Ayrshire & Arran Tourism Strategy Consultation

Background
The contents of the Strategy has been the result of extensive desk based research and extensive consultation with both public and private sector, to ensure industry ownership and 'buy-in'. The combined consultation methods used offered a flexible approach, which facilitated the involvement of the industry whenever possible, combined with the expertise/knowledge offered through the public sector.

This qualitative primary research was combined with a secondary review of related local and national statistics and relevant data, in the identification of the key priorities for the Ayrshire & Arran area.

The results of the consultations are summarised below, and take into account a request from specific community councils who wished to express their opinions and ideas, prior to the shaping of the Strategy.

Methodology

1.0 Baseline Research Study

"THE VISITOR ECONOMY OF AYRSHIRE: THE PRESENT PROFILE AND FUTURE OPPORTUNITIES" – Doyle (2011)

- Completed March 2011
- Key Objectives:
    - Identify the value of and employment provided by tourism;
    - report on market research into what visitors to Ayrshire & Arran are looking for;
    - look at the options for 'growing' tourism, including some assessment of the market size

- The study looked specifically at Tourists and Day trippers (together these two groups form *the Visitor Economy*)
- Sources used:
    - STEAM – Scottish Tourism Economic Activity Model (2009)
    - Deloitte & Oxford Economic Report – 'Visitor Economy' (2008)
    - Existing L.A. Tourism Strategies

2.0 Consultation

Two sets of meetings were organised to capture as broad an audience as possible, from all geographic regions and specific tourism groups.

Ayrshire & Arran Hoteliers Association and Ayrshire Consortium for Tourism Training due to the holiday period were encouraged to take part in the online survey. Members of both the Ayrshire & Arran Chamber Tourism Partnership and Scotland's West Coast

Golf Links provided generic feedback, many having previously taken part in a geographic consultation event.
In addition, Carrick Steering Group and Pinmore & Pinwherry Council contributed to the consultation process; however for consistency of approach the analysis does not include specific community feedback due to the nature of the localised information.

Table 1: Geographic Meetings

EVENT	Dates	Number of Attendees
Kilmarnock	13th July	12
Irvine	20th July	24
Ayr	27th July	50
Cumnock	3rd Aug	11
Seamill	10th Aug	18
Girvan	17th Aug	8
Brodick	24th Aug	28

Table 2: Tourism Groups

Groups consulted	Meeting Date	Number of Attendees
VisitArran Board	9th August	4
Ayrshire Food Network	11th August	
Ayrshire Visitor Attractions Assoc.	18th August	6
Culture & Heritage Group	19th August	
Youth Group (20-30 yr assembled from key tourism businesses)	22nd August	6
Ayrshire B&B Association	25th August	Circa 40

Round 1 Industry Workshops – key contributors to the Tourism sector attended a series of workshops which were delivered throughout Ayrshire & Arran between April and May 2011. These initial workshops sought the opinions and ideas on the three key areas that would assist in building the Strategy, and on which the Strategy would be based:

What are your ambitions for tourism in Ayrshire & Arran?
What challenges do you think the industry faces?

What investments would help achieve the area's tourism ambitions?

Round 2 – Roadshows – 7 Regional Roadshows, 10 Tourism Industry Groups, 2 Community Groupings. Based on results from the Round One consultation the draft Strategy was written and presented for further consultation to the original consultees from the Industry Workshops and included a broader audience including Tourism Groups to shape the Strategy:

Their opinions on the - Overall Strategic Direction
How would they priorities - Offers & Opportunities
How would they priorities - Enablers
How do we work together to grow the sector?

Online Survey Monkey – to ensure a broad audience coverage a survey was designed and made available online, throughout the Round 1 and 2 survey periods to 31st August 2011, seeking the same opinions, ideas and prioritisation required to Shape the Strategy. 43 responses were received.

3.0 Results of Consultations

Individual summaries for all the workshops are available online at www.south-ayrshire.gov.uk, and an accumulative summary of the Round 2 and Survey Monkey consultations are attached in Appendices 1 and 2 of this document.

Vision - analysis of responses from the consultation workshops presented an overall positive feeling about the vision of the Strategy.

Objectives - mixed views were expressed with regards to the objectives, with the main concern being that the increase in the number of jobs (10%) may not necessarily happen, even if spend and visitor numbers increase.

Offers & Opportunities – in terms of the prioritising of 'Offers and Opportunities', robust analysis is not possible due to the variation in recording. However, from a simple tabulation of responses from all 7 Geographic Groups and 5 of the Tourism Groups, the prioritisation of the top 6 offers & opportunities by the participants and respondents were:

Category	Score Geographic	Score Tourism Groups	Total	Ranking
Burns	29	11	40	6th
Ancestral	38	5	43	5th
Golf	28	34	62	3rd
Sailing	28	6	34	
Activities	54	28	82	1st
Day Trips	37	19	56	4th
Business Tourism	8		8	
Weddings	13	10	23	
Young Families	14	5	19	
Heritage	53	28	81	2nd
Islands	18	7	25	
Food and Drink	13	15	28	
Natural Environment	6		6	
Culture	1		1	

Coach parties		3	3	
Arts & crafts				
Mountain Biking & Biosphere				
Independent retail				

(Categories in red were added by consultees)

Enablers – prioritisation of the top 3 enablers by the participants and respondents:

In terms of the prioritising of enablers, the priorities assigned to the enablers display a consistency of response across all groups. There were a significant number of groups who assigned top rankings (1st and 2nd) to **Collaboration & networking** and **Signage, Public Realm & Cleanliness**. However, if **Product Knowledge** and **Skills** are linked together, then combined they display overall top ranking.

Signage, Public Realm & Cleanliness and **Product Knowledge** are the most frequently ranked as are **Transport, Gateways, Routes & Connectivity,** albeit the latter with lower rankings. Notably, **'Regulation'** received no ranking but in group discussion was perceived as a barrier.
In summary the key enablers may be ranked:

1st Collaboration & networking
2nd Signage Public Realm & Cleanliness
3rd Product Knowledge & Skills
4th Transport, Gateways, Routes & Connectivity

How do we work together to grow the sector – feedback from all consultation workshops highlighted the need for collaboration and networking with anecdotal feedback highlighting the importance of public and private sector collaboration.

Getting Involved and Taking Action – making a success of the Strategy will only happen if there is wide involvement from all parts of the sector in Ayrshire & Arran. As part of the consultation, participants were asked to indicate if they wished to get involved in the early developments of the actions and delivery of the Strategy, indicating which areas of interest they had. To-date 61 responses have been received from a broad range of backgrounds including private and the social enterprise sector.

4.0 Overall Summary – generally very positive feedback from consultees, especially the collaboration between public and private sector and favourable welcome regarding the ambitious targets that have been set. The positive response from those registering the desire to become involved, confirms the private sector's commitment to developing a proactive approach throughout Ayrshire & Arran in the delivery of the Strategy.

APPENDIX 1

Round 2 - Roadshow Consultation Analysis

Comments re Vision

- Figures in brackets – frequency of response

Geographic Groups	Tourism Groups
Culture missing (5) Natural environment to replace coast, countryside etc (3) Heritage should be included (2) Clumsy – too wordy, should be brief, should be catchier (4) Knowledgeable staff is not necessary – implied later Staff should be people Do not limit to destination of choice in Scotland – should be UK, Europe and beyond Realistic but should be influenced by major events such as 2014 Inclusion of gateways Too much in it and too much missing More a mission than vision Great vision is it realistic? Accessibility should be included Service include leads to training work Where are communities – need to include residents More of an objective Superb welcome is good should add 'fantastic experiences' Where's the USP – all Scotland can claim to have unique environment	Culture missing (2) Natural environment to replace coast, countryside etc (2) Heritage missing (4) Staff should be people If including fantastic experiences & superb welcome perhaps no need to have knowledgeable staff - implied Knowledgeable staff important Aspirational but bit too ambitious Needs to be pitched at achievable level – 2016 ? Too many run down towns & deprived places to make vision realistic Burns should be mentioned as a defining Scottish icon It's the 'whole' experience that defines repeat visitation Quality important but value needs to have its place Authentic would be good word to describe a A&A Arran could have completely different vision , targets etc to A& A Not ambitious enough Needs to be ambitious Positive re vision

Raw Data re objectives – frequency of comments noted in brackets

Geographic Groups	Tourism Groups
Visitor numbers should be more ambitious (3) Visitor expenditure seems about right – need to target more big spenders & high income groups & focus on quality (4) FTEs should be less ambitious in current economic climate looking to improve productivity (3) Visitor numbers are ambitious – worth aiming this high	Increase number of visitors to 20% 10% increase seems realistic Visitor numbers seem aggressive Visitor expenditure is ambitious (2) Need to do more overseas marketing as this market spend more FTEs 5% about right – people look for efficiencies rather than increase number of jobs Jobs realistic if targets and spend are met

Is baseline data robust to allow on-going monitoring? Make use of progression targets Aspirational but achievable – balance about right Seasonality and part time issues need recognised What is comparison with other areas of Scotland re visitor numbers Spend may be difficult to achieve – possibly 10% Not likely to make significant impact on employment Only way to affect employment would be to increase business numbers; or link with large employers to identify their ambitions Built and natural environment is crucial to success (2) Realistic Improve life for local community/residents as well as tourists Jobs & spend objective about right Investment target missing	Increase annual spend about right 10% increase would impact on smaller establishments more than large employers – 20% would impact on large employers Ambitious in time frame By time strategy in place and governance - will be 2013 Built and natural environment really important Generally OK Jobs a bit high Not joined up between objectives Public Realm important - underpins

Ranking of Offers & Opportunities

Category	Score Geographic	Score Tourism Groups	Total	Ranking
Burns	29	11	40	6th
Ancestral	38	5	43	5th
Golf	28	34	62	3rd
Sailing	28	6	34	
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Young Families	14	5	19	
Heritage	53	28	81	2nd
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Food and Drink	13	15	28	
Natural Environment	6		6	
Culture	1		1	
Coach parties		3	3	
Arts & crafts				
Mountain Biking & Biosphere				
Independent retail				

(Categories in red suggested as additional by groups)

Enablers – Rankings from Geographic & Tourism Groups

Enabler	Ranks given	Number of respondents selecting rankings	
		Frequency of ranking	Ranking Selected
Product Knowledge	**2, 3,3,2,1.3,2,1,3.4,2**	**2 4 4 1**	**1 2 3 4**
Skills	**3.1,1,3,1**	**3 2**	**1 3**
Collaboration & networking	**2,1,3,5,2,1,1,2,1,3**	**4 3 2 1**	**1 2 3 5**
Accommodation	**5,5,4**	**1 2**	**4 5**
ICT	**3,4,4,2**	**1 1 2**	**3 3 4**
Funding	**5,4,1,1**	**2 1 1**	**1 4 4**
Signage, Public Realm & Cleanliness	**1st, 2,1,3,1,3,2,3,3,2,1**	**4 3 4**	**1 2 3**
Transport, Gateways, Routes & Connectivity	**5,4,3,2,1,2,2,5,4,5,3**	**1 3 2 2 3**	**1 2 3 4 5**
Regulation			
Branding	**2**		**2**

(Enabler in red was added by consultees)

Appendix 2

Online Survey Monkey

Q1: Comments re Strategy Vision
No of respondents: 42

Survey Monkey
Overall 69% felt the document almost met their expectations; 26.2% said it did meet their expectations and 2 persons said no and commented: "Seems very disjointed, vague and too general.

Q2: Do you think the targets are achievable
No of respondents: 41

Survey Monkey
65.9% of respondents agreed that the targets were achievable, with 34.1% disagreeing making the following comments: "I don't think NAC will have sufficient resources to do everything required" "Although it would be good to see some quantitative targets for the built environment. For example there will be no boarded up buildings in Gateway villages by 2014." "I think most of the targets are achievable but will they be able to be retained especially in the current financial climate?" "Money - so many of the areas of focus for improvement depend upon substantial investment." "Need for great deal of investment and clear thinking about what we can offer in A&A" "The strategy is very wide spread and therefore may work better if focus is given to certain areas. There doesn't seem to be a clear strategy on how to achieve the targets - who will do the work and how will it be funded?" "20% growth in the world financial climate sounds too much" "So much depends on events outwith our control - e.g. world economic climate. We have limited resources to bring about the necessary changes. We don't have the willpower to tackle the "sacred cows" - development of the Low Green." "I think that there will be budgetary restrictions due to Government policy and current financial situation of country" "Economic climate" "The biggest problem related to this area especially on Arran is Visit Scotland." "I'm doubtful - lack of cash will limit what can be done and increasing costs will limit what people can and will spend."

Q3: Do you think the objectives are achievable?
No of respondents: 41

Survey Monkey
82.9% of respondents agreed with the objectives but 17.1% did not agree, and commented as follows: "not all" "I agree with most of those objectives outlined but feel that what is missing is the attracting the arts market. For those people interested in the arts, and indeed for those attracted initially by golf, Burns or whatever, there is a huge lack of cultural entertainment. Whatever

else I may want to do when on holiday, I will firstly be attracted by a lively arts community, something which this area could once boast, but which has virtually completely disappeared.” “The target to increase visitor spend by 20% may not be ambitious enough. Is that 20% in Real Terms?” “Yes, but one at a time.” “I agree with the objectives identified in the strategy, but would add a further objective. We should target events tourism by attracting conferences, sport competitions etc to the area, Eg the Karate championships due to take place in the North Ayrshire in the spring of 2012.” “Public Transport needs to be a priority. Poor Train Service (especially in winter)”

Q4: Ranking of Offers & Opportunities
No of respondents: 42

Category	Ranking
Burns	**1st**
Ancestral	8th
Golf	**2nd**
Sailing	10th
Activities	**3rd**
Day Trips	**4th**
Business Tourism	11th
Weddings	12th
Young Families	7th
Heritage	6th
Islands	9th
Food and Drink	**5th**

Q5: Rankings of Enablers
No of respondents: 42

Category	Ranking
Product Knowledge	6th
Skills	**5th**
Collaboration & networking	7th
Accommodation	**3rd**
ICT	8th
Funding	**4th**
Signage, Public Realm & Cleanliness	**2nd**
Transport, Gateways, Routes & Connectivity	**1st**
Regulation	9th

Q6: Do you think you will gain from the Strategy?
No of respondents: 42

Survey Monkey
83.3% of respondents felt they would gain from the strategy the remainder commenting as follows: “If it delivers, my local towns should see investment & improvement.” “If the strategy is successful”

“tourism doesn,t affect my job or lifestyle” “NAC have neglected tourism and activities for 15 years, why would they change their approach now?” “Usually only the council gain!!” “No emphasis on culture and the arts”

Q7: What changes would have to be made?
No of respondents: 12

Survey Monkey
• Significant work to improve appearance of towns • Improvement in attitudes of staff in retail and hospitality • Road surfaces would need to improve to allow more road cycling! • Investment • Implementation • better facilities ,cheaper pricing (golf etc) cleaner enviroment • Cleaner, open clean toilets, attractive town • Vast improvement in the High Street and surrounding area • Business priority wins over the NIMBY's • Prompt and significant action by all parties during 2011. • Connectivity to be improved • More emphasis on culture and the arts

Q8: Do you agree with the approach to alternative governance - single team delivery?
No of respondents: 39

Survey Monkey
82.1% of respondents agreed with the structure, with 17.9% disagreeing.

Q9: Further comments
No of respondents: 17

- Irvine's position as a former administrative centre would need to be acknowledged and explored formally by the council and government. Wallace, Bruce, John Balliol, the Stewarts, the High Constables and High Stewards probably all had their origins in Ayrshire, yet we are one of the few counties not celebrating them.
- Local bus fares are far too expensive -£2.75single from Prestwick to Troon is prohibitive
- The last question reads as two questions. I agree with a single team delivery but do not agree with all the proposals associated with the alernative governance. Let's think outside the boxes of Ayr, Irvine and Kilmarnock and do something radical and base the offices in Gateway villages. There are plenty of buildings in New Cumnock , one of the five original gateways to Ayrshire, that could be converted and used for meetings. We need to guard against developing a tourist strategy for Ayr, Irvine and Kilmarnock.
- I would love to be able to say, as I once did, that I was pround to be born in Ayr. Lately I've been ashamed to say so.

- VisitScotland have failed Ayrshire consistently and miserably. If we have a single team delivery it will need to be more dynamic, pro-active and sincere. The problem with tourism in Scotland as a aholw is that we want people to come and spend their money but we don't actually want to provide any services, welcome or invest anything into it. That attitude needs to change. How many times have I been to a cafe or pub to be told the kitchen closes at 2pm so you can't have lunch here (and generally it's the only place in the area). We need to change our mentatlity and actually provide for our visitors.
- The emphasis on public/private collaboration is welcome BUT the 3rd Strand i.e. "Community" is all but ignored in the strategy. Getting the third sector and community organisations on board will help in the implementation of the strategy. Also, the emphasis on the Ayrshire & Arran level is useful but should not stifle initiatives at a more local level. Smaller geographical areas and individual settlement should be encouraged to develop their initiatives within the overall strategy and branding.
- Definitely single team delivery. A lot can be learned from The Glasgow City Marketing Bureau. Improving our product is vital but once we do we need the right marketing and Visit Scotland simply do not provide enough regional focus to achieve this. Financial support needs to be given to develop further inbound routes at Prestwick Airport to provide higher yielding international visitors.
- One team to oversee Ayrshire with regular monitoring and feedback, enforcement of rules/law.
- There is presently a very poor library of literature and photographs to promote the area. This needs to be addressed in addition to the availability of a website through which all the main themes of the strategy can be promoted. Equally travel agents could use that promotional material to attract inward tourism from abroad, in particular Europe.
- Ayr is looking decidedly tired even after the recent improvements. Better promenade facilities for day trippers in any weather needs to be addressed eg very good indoor cafe on front- similar to Nardinis in Largs which will also be used by locals throughout the year.
- Important to raise the profile of Ayrshire, to compete with Edinburgh, Glasgow, and the Highlands
- Difficult to priorities Enablers - all important
- the beach frontage in ayr could be so much more appealing along with the general appearnace and quality of the town centre which has become a haven for yobs rather than people who will help ayr thrive,brilliant to see strategies being suggested and that people can see the degeneration of the town centre etc and the improvements required.
- Is there scope for Ayrshire to have a major rock music festival
- Arran Tourism would greatly benefit from a round island/cross island (delineated) route; our roads are too narrow yet hordes of tourists attempt to cycle here at great risk to themselves and other road users. ow for safe cycling yet hordes of tourists attempt to cycle here at great risk to themselves and other road users.
- What a total piece of crap!!
- Regret the absence of Culture as an important driver for the tourism strategy. This missing from Offers & Opportunities but included in the draft strategy alongside Heritage. An arts-led tourism strategy with modern, contemporary elements could put A&A on the tourism map.