

# EAST AYRSHIRE COUNCIL

CABINET- 4 JUNE 2008

## TOURISM: THE WAY AHEAD IN EAST AYRSHIRE

### Report by Depute Chief Executive/ Executive Director of Corporate Support

#### **1 PURPOSE OF REPORT**

- 1.1 To seek Cabinet approval for a strategic delivery report and draft Action Plan for Tourism in East Ayrshire.

#### **2 POLICY BACKGROUND**

- 2.1 In 2006, the Scottish Executive published its policy document for the development of the tourism industry in Scotland and set out its strategic ambition for growth in revenue from the industry of 50%, over a ten year period to 2015.

- 2.2 The importance and potential of tourism in East Ayrshire is identified in the East Ayrshire Community Plan, in both the Improving Opportunities Theme and the Improving the Environment Theme.

##### Improving Opportunities

Thematic Aim 5 is “to attract investment and increase opportunities in East Ayrshire by developing tourism, culture and leisure, housing and rural diversification”. The specified target is to increase tourism revenue by 5%, from the 2005/06 baseline position by 2011”.

##### Improving the Environment

Thematic Aim 1 is “to regenerate, protect and improve the natural and built environment through sustainable development”; and  
Thematic Aim 8 is “to develop visitor attractions and invest in leisure and cultural activities”.

#### **3 OVERVIEW OF CURRENT POSITION IN EAST AYRSHIRE**

- 3.1 The tourism industry is important to the economy of East Ayrshire, generating around £56 million per year in tourism revenue and there is considerable potential to grow this contribution further.

- 3.2 The tourism product in East Ayrshire includes a range of cultural and visitor attractions, and opportunities for outdoor activities and recreation. East Ayrshire has much more to offer in terms developing tourism as a significant generator of wealth and employment in the local economy. These attributes include :

- Close proximity to highly populated areas within Scotland;
- Close proximity to Glasgow Prestwick and Glasgow International Airports;
- Good transport links;
- Easily accessible from central Scotland and northern England;
- Scenic quality of rural areas;
- Strong associations with Robert Burns and other Scots of international renown;
- Strong cultural offer in arts and museums; and
- Emerging opportunities arising from Dumfries House and Estate being “saved for the nation” by a consortium led by HRH The Duke of Rothesay and the associated proposal for the development of a “sustainable eco-village” on a site within the Estate, currently referred to as “Knockroon”.

#### 4 THE VISION FOR TOURISM IN EAST AYRSHIRE

- 4.1 Aligning the policy background summarised in Section 2 and the positives shown in section 3.3, the following **vision** for tourism in East Ayrshire is proposed:

*“By 2015 East Ayrshire will be an immediately recognisable and even more attractive destination where our industry works together to provide a unique, authentic and accessible tourism experience which focuses on exceeding visitor expectations and delivers tangible benefits to the wealth and wellbeing of local communities.”*

- 4.2 The **strategic ambition** is to *grow tourism revenue by 10% in real terms growth, in East Ayrshire by 2015*. While this may seem a relatively modest target in comparison to the national target of 50% real terms growth in tourism revenue, it is considered that this is a realistic target for sustainable growth, taking into account the fragility of the current economic climate and the level of tourism development required to achieve this growth.

#### 5 THE WAY AHEAD : 2008 to 2015

- 5.1 The document sets out in considerable detail, the background to the tourism industry, the policy context and the challenges which the industry faces. It proposes a strategic framework for the achievement of East Ayrshire Council’s ambition for the development of the tourism industry in the area, based on the following aims :

- Aim 1 To establish and work towards a growth ambition and vision for tourism;
- Aim 2 To develop an active, connected tourism community;
- Aim 3 To develop a framework for research and information monitoring;
- Aim 4 To enhance and expand the tourism product;
- Aim 5 To improve tourism infrastructure to support the tourism product; and
- Aim 6 To proactively market the area as an attractive destination

**5.2** The full document which is attached to this report provides a detailed action plan for each aim, including projected outcomes, timescales and partner involvement.

**5.3** It is to be noted that in respect of Aim 6, The Way Ahead Report is not designed as a marketing tool but rather as the Council's own framework. However the importance of having such as marketing tool cannot be underestimated and so we will produce a “glossy” and concise brochure which will be easily read and available for distribution as required. Input from colleagues, particularly in Neighbourhood Services, will be critical in this.

## **6. PARTNERSHIP WORKING**

**6.1** The development of the tourism industry in East Ayrshire is not an objective which the Council can achieve solely by its own efforts and with its own resources of staffing and funding. Therefore, the implementation of the action plans will be on a collaborative basis, with both the tourism industry in East Ayrshire and the partner agencies which support the development of the industry at a local, regional and national level.

**6.2** Working in partnership is a guiding principle of the East Ayrshire Community Plan and in developing the tourism industry in East Ayrshire, the key working relationships will be with :

6.2.1 Operators in the private sector, providing accommodation, food and drink and visitor attractions;

6.2.2 Colleagues in other Council services, particularly the Department of Neighbourhood Services of the Council, who operate and manage the museums, parks etc;

6.2.3 Scottish Enterprise – the structural changes in the SE network which took place at the beginning of April 2008 will mean the demise of the local enterprise company in Ayrshire, as it has been absorbed into the new and larger Glasgow West Central region. However, the tourism industry will remain a priority sector for Scottish Enterprise at a national and regional level and therefore, there will be continued opportunity to work with SE, albeit noting concern about the potential for the level of priority afforded to Ayrshire in general to be diminished in competition with the focus on cities as primary economic generators.

6.2.4 VisitScotland – the national tourism marketing agency, which has the primary responsibility for the marketing of “Scotland the brand” in a structured hierarchy at international, national and local levels. VisitScotland undertakes “activity marketing” (e.g. walking, golf etc), but does not undertake localised “destination marketing”.

In parallel with the restructuring of the Scottish Enterprise network, the VisitScotland network of local offices is to be realigned in keeping with the new Scottish Enterprise structure. Currently, VisitScotland operates a local network office in Prestwick, servicing the Ayrshire and Arran area. The future operation of the office in Prestwick is under consideration by VisitScotland, but it is understood that there is a commitment to maintain a presence in Ayrshire, though not necessarily in Prestwick. The opportunity to seek an appropriate local co-location with VisitScotland and Scottish Enterprise is being pursued.

6.2.5 EventScotland is a national agency which promotes and supports the development of “events” which have an economic impact at a national level. EventScotland does not support events which have a purely local focus in terms of market and outputs which are largely community focussed.

6.2.6 East Ayrshire Council is an active member of the Ayrshire and Arran Tourism Partnership (on which the Council is represented by Councillor Buchanan) which brings representatives of both the private and public sector industry operators and tourism agencies together to promote the development of tourism in the area in a planned and co-ordinated way.

6.2.7 A good example of partnership working was achieved at the Southern Local Community Planning Forum on 27 May with Tourism as the chosen theme. A series of early actions were discussed which will now be incorporated into the Tourism Action Plan.

**6.3** Work to support the development of tourism businesses will continue to be undertaken in the context of the Council’s business development support programmes.

## **7 PERFORMANCE MEASUREMENT**

- 7.1** At a strategic level, performance will be measured directly against the ambition of 10% growth in tourism revenues within East Ayrshire, by 2015. This will be based on data provided by the Ayrshire and Arran STEAM Report, independently undertaken on an annual basis. Currently, the information provided by STEAM is on a VisitScotland area network basis (i.e. Ayrshire and Arran), however discussions have been held with VisitScotland to provide a more detailed analysis at local authority level, which will provide the baseline for indicators at Council level.
- 7.2** Support will also be provided to colleagues in the Department of Neighbourhood Services to further develop and record effective performance measurements systems to identify the economic impact of the visitor attractions operated directly by the Council.

## **8 FUTURE GRANT FUNDING CONTRIBUTION TO VISITSCOTLAND**

- 8.1** The funding provided by the Council directly to the Prestwick office of VisitScotland in the financial year 2007/08 is £70,000 and has been funded from the Grants to External Bodies Budget. The level of funding has largely been based on the amounts of “core funding” which were previously awarded to the former Ayrshire and Arran Tourist Board.
- 8.2** It is proposed that for the financial year 2008/09 onwards, that the amount of grant funding to be made available to VisitScotland be directly related to services provided by VisitScotland, which will be specified in a Service Level Agreement (SLA), which will itself be subject to approval by Cabinet.
- 8.3** The SLA will include such requirements as (inter alia):
- The VS publications in which East Ayrshire will require to have a presence, in terms of advertising or feature;
  - Promotion of the events and exhibitions which East Ayrshire Council is organising;
  - Targeted marketing campaigns which the Council would wish to have undertaken;
  - The provision and maintenance of supply of publicity and marketing material at such tourist venues, as required by the Council.
- 8.4** SLA's in the above format will be required by each of the 3 local authorities in Ayrshire and officers are currently in discussion with a view to developing a standardised package of requirements relative to Ayrshire, which can be supplemented by local requirements.
- 8.5** Once costed, it is hoped that such a package of requirements can be secured at a lesser cost than the current level of grant funding – perhaps a figure in the order of £30,000, which would be paid to VisitScotland in pre-determined tranches, aligned to outputs.

**8.6** It is proposed that a report on the draft SLA will be submitted shortly to Cabinet for approval.

## **9 FINANCIAL IMPLICATIONS**

**9.1** As the budgets are currently structured, there is no defined budget for “tourism”, with any expenditure being drawn from other budget sources.

**9.2** It is, therefore, proposed that a dedicated budget be established to aid the delivery of the objectives of this document (excluding the salary costs of the Tourism Promotion Adviser). It is proposed that the Depute Chief Executive/Executive Director of Corporate Support be remitted to seek to achieve this from within existing resources, where possible.

**9.3** Additional resources may also require to be identified for the production of the marketing brochure referred to at paragraph 5.3 above.

**9.4** Businesses operating in the tourism sector would continue to be eligible for loan funding assistance through the West of Scotland Loan Fund, subject to the normal criteria of the Fund.

## **10 LEGAL IMPLICATIONS**

**10.1** The Solicitor to the Council advises that in terms of the Environmental Assessment (Scotland) Act 2005, it will be necessary to carry out a Strategic Environmental Assessment on this policy framework. This requires to be carried out before it can be approved and published.

**10.2** A formal SLA for 2008/09 with VisitScotland will require to be concluded.

## **11 POLICY IMPLICATIONS**

**11.1** The Tourism policy framework as described in this report and in the fuller document will support the achievement of the objectives of the East Ayrshire Community Plan, as expressed in the Improving Opportunities Theme and the Improving the Environment Theme.

**11.2** As clearly demonstrated in the 6-point Action Plan, the delivery of the actions will be in accordance with the Guiding Principles of the Community Plan, particularly in respect of :

- Sustainability - which will be addressed through the Strategic Environmental Assessment;
- Joint Working and Involving People - in all aspects of the delivery of the action plan, there is a clear commitment to work with the “tourism industry” and other support agencies;
- Quality and Accessibility – there is clear recognition in the document that the future success of the tourism industry will be dependent on the provision of “quality” at all levels of product provision and customer

interface. Good accessibility to the tourism product by means of the transport infrastructure for visitors and residents is already a strong feature in East Ayrshire, but it is also important that accessibility in terms of physical access and service availability is continually developed and enhanced; and

- Continuous Improvement and Best Value – the Scottish Government has set an ambitious target for growth in tourism revenues and similarly, targets which reflect the situation in East Ayrshire are set within this policy framework. In accordance with the requirements of the Community Plan, there is a commitment to progress tracking, performance measurement and reporting, all aimed at driving up the positive impact which the tourism industry has on the economy and the communities of East Ayrshire.

## **12 PERSONNEL IMPLICATIONS**

**12.1** There are no immediate or additional personnel implications.

## **13. CORPORATE MANAGEMENT TEAM**

**13.1** This preparation and development of this tourism policy framework has been led by the Planning and Economic Development Division of the Department of Corporate Support, in consultation with the Leisure Services Division of the Department of Neighbourhood Services. It has been fully considered by the Corporate Management Team and has received endorsement for submission to Cabinet.

## **14. RECOMMENDATIONS**

**14.1** That the Cabinet :

- (1) Approves the document, "Tourism: The Way Ahead in East Ayrshire 2008-2015" and the Draft Action Plan, in principle, subject to the outcome of the statutorily required Strategic Environmental Assessment;
- (2) Authorises the creation of a new dedicated budget from within existing resources, where possible;
- (3) Requests the Depute Chief Executive/Executive Director of Corporate Support to bring forward a further report on the draft Service Level Agreement with Visit Scotland for 2008/09; and
- (4) Requests the Depute Chief Executive/Executive Director of Corporate Support to bring forward performance monitoring reports on an annual basis and on a cycle to be agreed.

**ELIZABETH MORTON**

**Depute Chief Executive / Executive Director of Corporate Support**

22 May 2008/jrs

**PAPER ATTACHED**

**Tourism: The Way Ahead in East Ayrshire, 2008 - 2015**

**For further information please contact JOHN SPOONER, Business Development and Tourism Manager at Council Headquarters on (57) 6143.**

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# **TOURISM: THE WAY AHEAD IN EAST AYRSHIRE**

**2008 - 2015**

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## **Executive Summary**

This document outlines our vision for the tourism industry in East Ayrshire over the next seven years to 2015, and describes how the area will contribute over this timescale to the national growth target set by the Scottish Government of 50% real terms growth in tourism revenues by 2015.

The key principle, which underpins the direction, is to create and develop links with and between public sector economic regeneration agencies, tourism businesses in the private sector and attractions and facilities operated by the public sector, and communities within East Ayrshire to work together towards a shared vision for tourism. This is vital to ensure that it is implemented and further developed over the next seven years.

East Ayrshire has an existing tourism product comprising of history and heritage, cultural venues and visitor attractions, and natural environment providing opportunities for a range of outdoor activities and recreation.

When viewed in context of economic impact, tourism contributed around £56 million to the economy of East Ayrshire in 2006, a decrease on the previous year.

The current economic climate in the UK, increasing competition from domestic and international destinations, and context of decreasing local tourism revenue provides a considerable challenge for the tourism industry within East Ayrshire to work in partnership to achieve economic growth which benefits local businesses and communities and contributes to the national ambition for growth.

Analysis of the tourism product and potential confirms that there is considerable potential to grow tourism revenues and this document outlines a way ahead, to make the most of the area's assets and deliver sustainable tourism growth by enhancing the tourism product through innovative and imaginative projects and encouraging collaboration both within the area and with neighbouring areas to package complimentary product offerings and promote the area as an attractive destination for visitors.

## VISION

The Vision for the area, outlined in the East Ayrshire Community Plan is that:

***“East Ayrshire will be a place with strong, vibrant communities where everyone has a good quality of life and access to opportunities, choices and high quality services which are sustainable, accessible and meet people’s needs.”***

Tourism will contribute towards achieving this vision, through the Improving Opportunities and Improving the Environment Themes of the East Ayrshire Community Plan.

Tourism is a key industry with great potential for economic growth, and East Ayrshire Council believes that in order to compete to our maximum potential in an increasingly competitive global marketplace for tourism, there is a need for a more clearly defined vision which everyone shares and strives to achieve.

### Our Vision

***“By 2015 East Ayrshire will be an immediately recognisable and even more attractive destination where our industry works together to provide a unique, authentic and accessible tourism experience which focuses on exceeding visitor expectations and delivers tangible benefits to the wealth and wellbeing of local communities.”***

This vision is ambitious given the current position and climate of increasing competition. It will only be achieved through the commitment of private sector tourism businesses and public sector operated facilities working together, with public sector agencies providing appropriate and justifiable business development and marketing support.

This document outlines the scope of this vision and sets out clear and achievable actions which are necessary to reach this vision and capitalise on the potential for tourism growth to contribute to the sustained regeneration and economic prosperity of East Ayrshire.

### Our Ambition

Our strategic ambition is to **achieve 10% real terms growth in tourism revenues by 2015**. While this may seem a relatively modest target in comparison to the national target of 50% real terms growth in tourism revenue it is considered that this is a realistic target for sustainable growth taking into account the fragility of the current economic climate and the level of tourism development required to achieve this growth.

This aligns with the target set out in the East Ayrshire Community Plan of a 5% increase in tourism revenue by 2011. Continued growth at this rate will allow the target of 10% growth in revenue to be met by 2015, contributing towards the national agenda for tourism. These targets will be reviewed at the halfway point in the planning review in 2011.

## **POLICY CONTEXT**

### **National**

In 2006, the Scottish Executive published 'A Tourism Framework for Change', as a result of collaboration with the private sector. The document outlines what needs to be done to achieve the strategic ambition of 50% growth in tourism revenue in Scotland by 2015.

The national tourism marketing agency, VisitScotland, followed this up with the publication of the 'Tourism Prospectus' in September 2007 which considers that the national 50% growth ambition outlined in the Tourism Framework for Change is still achievable and has highlighted that spend is a more important focus than trip volume. They do however acknowledge that achieving the ambition will require significant intervention by both the private and public sectors, sustained over several years.

The 'Tourism Prospectus' identifies five drivers for growth which work should be built around to achieve this ambition:-

- |                 |                                   |
|-----------------|-----------------------------------|
| • Invest        | Driver One: Capital Investment    |
| • Shout Louder  | Driver Two: Incremental Marketing |
| • Total Quality | Driver Three: Market Positioning  |
| • 24/7/52       | Driver Four: Capacity Utilisation |
| • Sell          | Driver Five: Cross-selling        |

It is anticipated that the 50% growth in revenue will be achieved, not solely through growth in visitor numbers, but through a 20% increase in visitor numbers who stay longer and spend more per person during their trip.

### **Regional**

The regional context of tourism in Ayrshire is undergoing a period of change at the time of writing this document. As of April 2008 both VisitScotland and Scottish Enterprise have restructured their organisations following Scottish Government reviews.

At a regional level, tourism promotion was structured around the boundaries of the former Area Tourist Boards (ATBs) which operated as membership organisations prior to the creation of VisitScotland. Since abolition of the ATBs VisitScotland operates as a tourism marketing agency, engaging with visitors, businesses, and strategic partners to market Scotland's tourism product within the UK and overseas.

The Ayrshire & Arran Tourism Partnership was established following the abolition of ATBs in 2005 to ensure continued industry participation and representation of local interests. The Partnership has no official status but it acts as a link between the public and private sectors and developed the Ayrshire & Arran Tourism Partnership Plan 2006-2009. This is a working plan, structured around the themes of the Tourism Framework for Change, which details a number of Ayrshire-wide actions to be taken forward during the period 2006-2009.

As of April 2008 VisitScotland re-organised its local activities around six larger regions aligned to the Scottish Enterprise regional structure. Therefore Ayrshire is now part of a wider West Central Scotland Region with Network Offices in Glasgow and Prestwick.

The network of Local Enterprise Companies, including Scottish Enterprise Ayrshire no longer exists although the local offices have been retained. Management of Business Gateway and responsibility for local regeneration projects has been transferred to Local Authorities, with Scottish Enterprise focussing on projects of regional and national significance.

Both VisitScotland and Scottish Enterprise are key strategic partners in delivering tourism growth so these organisational changes at regional level will certainly impact upon local tourism development and promotion. The full extent of this impact will be ascertained as the new structures are rolled out, and the future of structures such as the Area Tourism Partnership is discussed.

## **Local**

At a local level The East Ayrshire Community Plan is a blueprint for improving the lives of people living within East Ayrshire and builds on the main strengths of the area. Tourism is identified in the plan as an important sector with potential for development and economic growth which will directly contribute towards Improving Opportunities and Improving the Environment of the area.

Tourism will contribute towards achieving the aims of the Improving Opportunities Theme by attracting investment and increasing opportunities by developing tourism, culture and leisure and promoting East Ayrshire as a desirable place to live, work and visit.

It will also contribute towards achieving aims of the Improving the Environment Theme by enhancing natural and built amenities for residents and visitors through developing visitor attractions and investing in leisure, recreational and cultural activity in order to regenerate communities.

This document takes account of national and regional strategies and builds upon the work already being undertaken by various agencies and the industry to grow tourism. It provides a meaningful strategic framework which takes account of local issues to provide focus and galvanise local efforts to contribute towards the strategic ambition of 50% growth across Scotland.

Key Strategic Documents which have been considered in the writing of this document include:

### National

- Scottish Tourism: The Next Decade – a Tourism Framework for Change
- Smart, Successful Scotland
- Principles & Priorities – The Government's Programme for Scotland
- Framework for Economic Development in Scotland
- Concordat

### Regional

- Ayrshire & Arran Tourism Partnership Plan 2006-2009
- Ayrshire Regeneration Framework

### Local

- East Ayrshire Community Plan
- East Ayrshire Local Plan
- East Ayrshire Outdoor Access Strategy
- Single Outcome Agreement

## **MARKET CONTEXT**

There is little doubt that tourism is a growing and fiercely competitive global sector. The World Tourism Organisation (UNWTO) have forecast that international tourism will see continued growth at an annual average rate of 4% (World Tourism, 2004), and reported that international arrivals grew from 25 million in 1950 to 763 million by 1994. It is predicted that this will reach 1.6 billion by 2020 (Tourism Intelligence Scotland, 2007).

It is also predicted that by 2020, 99.6% of the countries in the world will have a tourism proposition (Tourism Intelligence Scotland, 2007) and that although Europe will remain the most popular destination, its share will drop from 60% in 1995 to 46%. At the same time the world economy is growing. People are becoming wealthier, and consumers have greater aspirations.

UK and international visitors will have a greater choice of destinations than ever before, so differentiation and strong marketing will be ever more important in order to gain a share of this increasingly crowded global marketplace. It will also be vitally important that once visitors arrive at their destination they receive excellent customer service and a high quality product, otherwise visitors will not return and investment in marketing and promotion will be inefficient at best.

### **National - Scotland**

Over 16 million tourists took overnight trips to Scotland in 2006, with an annual expenditure of £4.1 billion. It is estimated that tourism supports around 9% of all employment in Scotland (VisitScotland, 2006).

The vast majority (83%) of visitors to Scotland come from within the UK and account for around two thirds (65%) of total overnight tourism revenue. Of the remaining 17% (and 35% of expenditure) the largest market is the USA followed by Germany. Longer term increases in visitors are expected from 'emerging markets' such as Brazil, Russia, India and China (Tourism Intelligence Scotland, 2007).

Tourism is still highly seasonal, especially for overseas visitors, with 69% of overseas trips taken between April-September (VisitScotland, 2006).

Figures at a national level provide an important backdrop for generating priorities at a local level. The figures above clearly demonstrate both the importance of domestic visitors as our main market and the economic importance of high spending overseas visitors who generate over a third of tourism expenditure, despite only accounting for

17% of visitor numbers. It is important at a local level that efforts are made to grow numbers of UK and international visitors in an effort to achieve sustainable growth in volume and value.

### Regional – Ayrshire & Arran

The tourism industry in parts of Ayrshire & Arran is relatively well developed, comprising a bed stock of 21,781 beds in serviced (7,423 beds) and non-serviced (14,358 beds) accommodation.

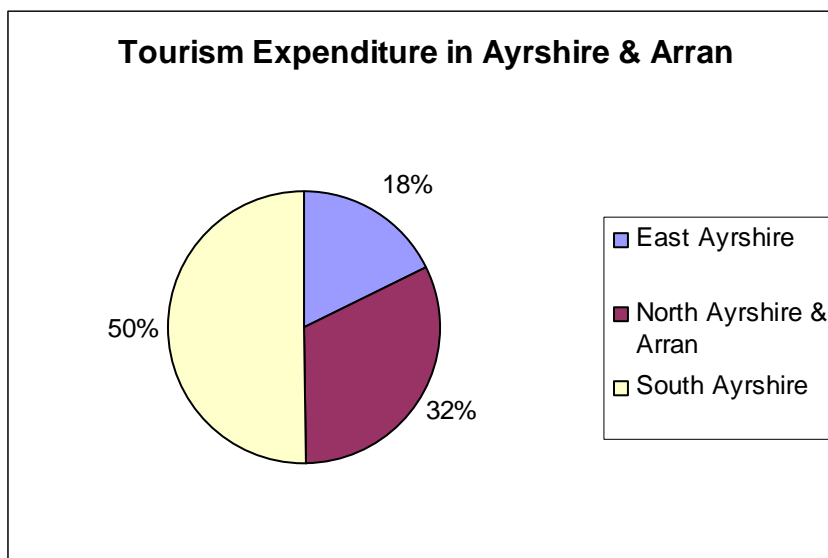
Tourism is vitally important to the Ayrshire economy, generating £314.87 million of expenditure for the local economy over 7.01 million tourist days, of which East Ayrshire accounts for £55.75 million (Ayrshire & Arran STEAM [Scarborough Tourism Economic Activity Monitor] Report, 2006).

Some 12,571 people are in tourism-related employment within Ayrshire & Arran, accounting for 10% of all jobs in the area. This is higher than the national average of 8.8% for tourism-related employment as a percentage of all employment within Scotland (VisitScotland, 2005).

### Local – East Ayrshire

Tourism is of undoubted value to the East Ayrshire economy, but it is important that this is viewed within the wider context of Ayrshire. Whilst tourism contributes £55.75 million (18% of total tourism expenditure in Ayrshire & Arran) to the local economy, this does not compare favourably with the figures for neighbouring council areas in South Ayrshire (£158.29 million) and North Ayrshire & Arran (£100.83 million), which have long established and internationally recognised tourism products comprising of golf, coastline and other visitor attractions.

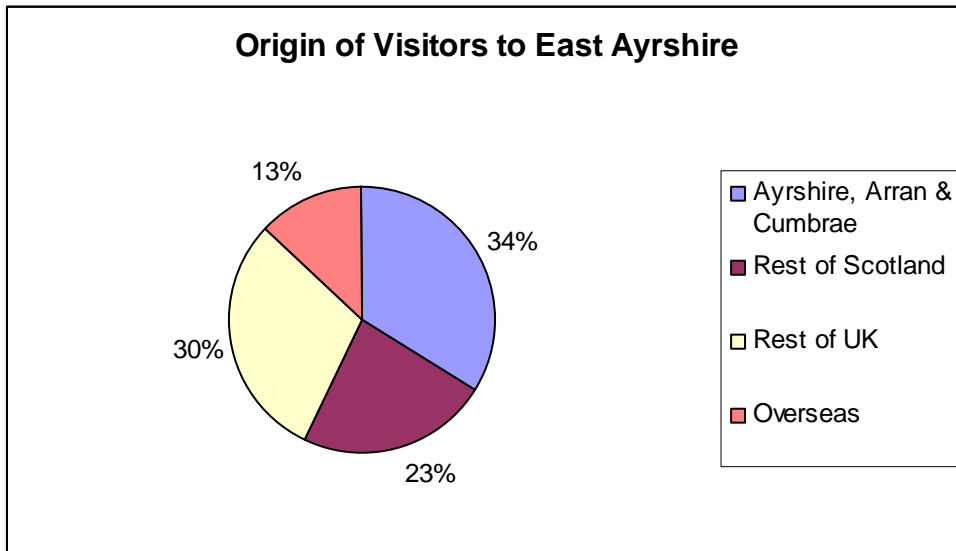
It must also be noted that tourism revenue fell by around 3% from £57.6 million in 2005 to £55.75 million in 2006. This drop was lower than that experienced across the whole of Ayrshire & Arran, which experienced an 8% decline overall.



Source: Ayrshire & Arran STEAM Report 2006

It is clear from these figures that there is considerable scope for development, and that there is much work to be done in order to grow the contribution of tourism to the East Ayrshire economy.

The vast majority of visitors to East Ayrshire are domestic tourists. Over a third of visitors are from within Ayrshire, Arran and Cumbrae, with a further 23% of visitors originating from the rest of Scotland and 30% from the rest of the UK. The key markets for overseas visitors are Europe and USA & Canada, each of which accounts for 5% of visitors (Ayrshire, Arran & Cumbrae Visitor Survey, 2001/02).



Source: Ayrshire, Arran & Cumbrae Visitor Survey 2001/02

Day visitors represent a significant proportion of the visitors to Ayrshire and Arran, accounting for 2.1 million tourist days, and 24% of the total tourism expenditure in the area (Ayrshire & Arran STEAM Report, 2006). This is particularly evident in East Ayrshire where day visitors account for 51% of trips to the area. This compares to 42% in North Ayrshire and 26% in South Ayrshire (Ayrshire, Arran & Cumbrae Visitor Survey, 2001/02).

Day visitors are of undoubted value and it is viewed as a strength that East Ayrshire attracts visitors on day trips due to the area's favourable geographic location close to the highly populated central belt. The area must continue to position itself to cater for day visitors and create greater linkages between industry sectors to create a more joined-up visitor experience which encourages higher spend-per-day. More work also needs to be done to increase the number of visitors staying within the area for holidays and short breaks, as staying visitors have a much greater economic impact in terms of spend-per-day.

It is of great importance that we understand and constantly monitor who our visitors are so that we can make sure that we meet their needs. In order to achieve this, tourism businesses must be proactive in collecting feedback from visitors and sharing that information across the industry so that everyone can benefit from a greater understanding of our customers. This will allow us to make informed decisions about future product development, addressing weaknesses in current provision, and marketing products to key audiences.

## Emerging Trends

In light of the contextual backdrop of increasing competition it is important that this document is informed and continually developed to respond to emerging trends and changes in consumer behaviour and market forces.

Some of the key emerging trends which have been considered in the development of the document, and which will impact upon East Ayrshire to varying degrees, include:

- People are looking for a taste of luxury, which perhaps could not be sustained in their everyday lifestyle.
- People are now seeking local produce and authentic food as part of overall visitor experience.
- People can access customised tourist information and source better deals due to increased access to technology.
- People are living longer, with more leisure time and disposable income they are travelling more than ever.
- People would rather spend money on experiences than goods.
- Increasing drive for authenticity and experiences which you can learn from and connect with emotionally.
- Time is precious – people want experiences in short, sharp bursts on regular short breaks.
- There is a growing concern for health and wellbeing and relief from stressful everyday lives.

Source: Tourism Intelligence Scotland, 2007

A number of key areas have been identified for future growth. In particular, the tourism product within East Ayrshire could position itself to benefit from growth in the following areas:

- Short Breaks
- Responsible/Green Tourism
- Experiential Tourism
- Cultural Tourism

## **TOURISM PRODUCT & POTENTIAL**

It is unlikely that the UK in general and Scotland in particular, will ever be a cheap destination due to exchange rates and the relatively high cost of petrol and labour. Therefore it is essential that the product is excellent – providing high quality experiences which represent value for money.

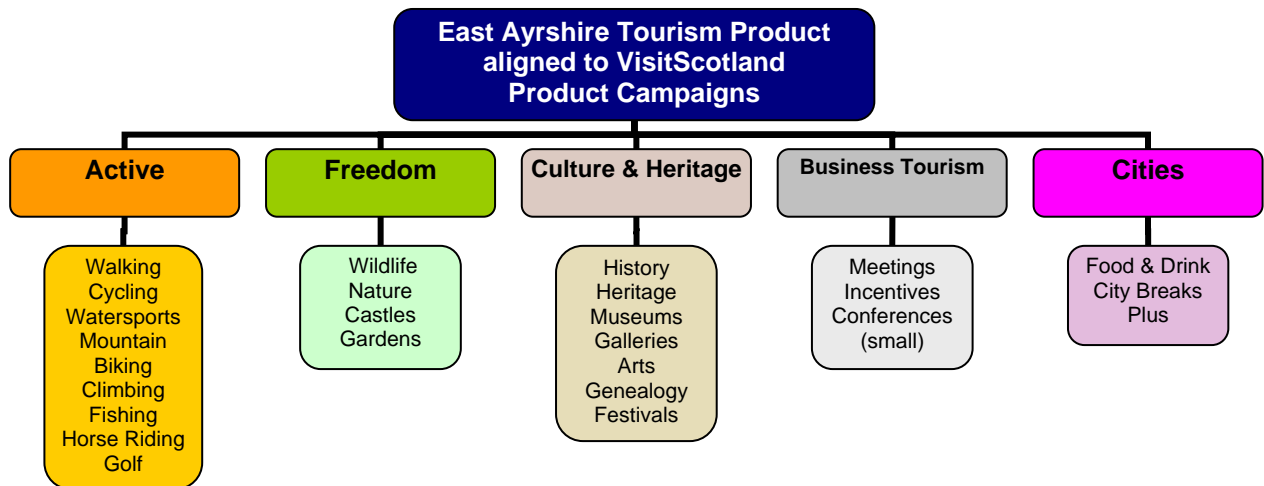
Given that Ayrshire as a whole was traditionally visited by people wishing to spend time at the coast, East Ayrshire has always been at a historical disadvantage in terms of its ability to attract visitors. The area does not benefit from a coastline, traditionally popular seaside towns or links golf courses as enjoyed by other areas of Ayrshire. The area has also suffered from the decline of traditional industries which impacted upon the perception of the area as an attractive destination for visitors.

The East Ayrshire Local Plan considers the tourism, leisure and recreational profile of East Ayrshire to be characterised by:

- The existence of a wide range of tourism resources which remain unexploited and under-developed.
- Deficiencies in the range, quality and variety of tourist accommodation and other related facilities.
- A lack of particular leisure facilities in certain areas.
- Areas of high scenic quality and nature conservation interest containing little tourism related infrastructure.
- Large tracts of countryside, especially attractive to hill walkers, cyclists and anglers.

It is clearly acknowledged within this overview that the area has huge potential for tourism development, but further development of tourism infrastructure is required in order to harness the economic potential of our natural environment and heritage.

Despite considerable challenges East Ayrshire has a tourism product which comprises of rich and fascinating history and heritage, connections to famous Scots, a range of visitor attractions, and areas of outstanding natural beauty which provide opportunities for a range of outdoor activities and recreation. The goal is to make the most of these assets and build upon what has already been achieved to further grow the industry. This will be achieved by further developing the tourism product through innovative and imaginative projects and encouraging collaboration both within the area and with neighbouring areas to package complimentary product offerings.



The tourism product within East Ayrshire has been matched against the tourism product areas defined by VisitScotland. As illustrated by the diagram above, East Ayrshire has a tourism product (or potential) offering within every national product campaign.

Some of the tourism product areas mentioned in the diagram, such as mountain biking, watersports and golf, are not currently considered to be part of the tourism product but great potential exists to develop new product offerings for these markets.

A full critique of the tourism product, infrastructure, marketing and potential is provided within this document. This provides a detailed consideration of the tourism product and potential and outlines areas for consideration and action.

In summary, tourism is already an important economic generator within the East Ayrshire economy. There is already an established tourism product and there is considerable potential to develop this further and increase tourism revenues by promoting the area's tourism assets in a strategic, planned and co-ordinated way.

This co-ordinated approach will require an enthusiastic and pro-active private sector supported by public sector support agencies, and relevant forums at an Ayrshire level. It is also important that research is carried out on an ongoing basis to ensure that decisions are based on robust, up-to-date market research allowing the industry to focus marketing efforts, monitor growth, and be responsive to changes in the market.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Research to increase understanding of consumer behaviour, inform decisions and provide a framework to monitor performance and identify evolving trends.	Produce agreed framework for ongoing research and monitoring of performance data and consumer behaviour.	2008-2009	East Ayrshire Council VisitScotland Private Sector
	Increase the number of tourism operators contributing data to the Visitor Attraction Monitor and Scottish	2008-2010	East Ayrshire Council Private Sector VisitScotland Moffat Centre

	Accommodation Occupancy Survey from X to X.  Comprehensive database of all tourism businesses and attractions in East Ayrshire compiled.	August 2008	East Ayrshire Council Private Sector VisitScotland Scottish Enterprise Ayrshire Chamber of Commerce & Industry
Create a sense of belonging amongst tourism operators within East Ayrshire and encourage joint working with and between private sector tourism businesses, voluntary groups, organisations, and public sector agencies.	Tourism Officer will hold 50 business meetings per year to discuss issues, provide advice and support, and refer businesses to relevant depts./agencies.  Create an online 'tourism community' website for East Ayrshire and encourage businesses to register and share information and ideas.	2008-2015  2009	East Ayrshire Council Private Sector VisitScotland Scottish Enterprise  East Ayrshire Council Private Sector
Encourage the creation and development of tourism businesses in East Ayrshire.	Provide business support, advice, and access to Grant and Loan Funding.	2008-2015	East Ayrshire Council Business Gateway Scottish Enterprise Private Sector
Ensure that East Ayrshire issues and successes are supported by relevant forums at an Ayrshire level.	Officers and private industry participation on relevant groups including: - Ayrshire Chamber Tourism Committee - Golf Tourism Ayrshire	2008-2015	East Ayrshire Council

## History, Heritage & Ancestry

East Ayrshire has a rich and fascinating past which includes heritage such as:-

- Castles and historic buildings
- Famous figures such as Robert Burns and William Wallace
- Historic sites such as Loudoun Hill and Dalmellington Mote
- Industrial heritage including coal and textiles
- Transport related heritage such as locomotives and road building

This is a major strength of the existing tourism product, and opportunities to utilise make greater use of this heritage, and to leverage further competitive advantage should also be explored. Opportunities to create new attractions, or develop existing attractions to maximise potential, will be explored to ascertain their feasibility and sustainability.

Potential exists to make even more of the existing heritage within East Ayrshire at the following sites:

- The Barony A-Frame: Potential to be promoted as an industrial heritage attraction.
- Dumfries House: Opening of house and estate as a visitor attraction.

- Mauchline: Potential to develop and link Robert Burns assets to create a formal tourist trail.
- Fenwick Weavers: Potential to develop a heritage attraction dedicated to the birth of the co-operative movement.

In addition to this there are currently a large number of sites around the area which are invisible to tourists due to a lack of recognition, interpretation, and promotion. This includes statues, battle sites, ruins, historic buildings and many other assets. Information on such sites should form part of a project to provide comprehensive online tourist information for the area. Work also needs to be undertaken to orientate tourists to these sites through appropriate road and interpretive signage.

There is a growing interest in family history and genealogy. The development of the Burns Monument Centre at Kay Park in Kilmarnock provides a fantastic opportunity for the area capitalise on this by providing a vibrant, modern space with expert staff catering for this niche market. As with all new attractions and initiatives, consideration is being given to maximising the economic potential. This will be through working with genealogy tour operators, provision of onsite retail and catering or through links to accommodation providers, restaurants, etc, within the local area.

## **Famous People**

East Ayrshire has produced many famous names who have gone on to gain international recognition, a selection of which are noted below:-

- William Wallace – Scottish Patriot, thought to have been born at Ellerslie near Kilmarnock.
- Robert Burns – Scotland's National Bard, had many associations with the area - he farmed at Mossgiel, lived in Mauchline and married Jean Armour. His 'First Edition' was printed in Kilmarnock. Many prominent East Ayrshire people were his friends, and several of his poems feature local people and settings.
- Alexander Fleming - born just outside Darvel, identified penicillin.
- Andrew Fisher – from Crosshouse, became Prime Minister of Australia.
- Johnnie Walker - marketed his 'Walker's Kilmarnock Whisky' which then became 'Johnnie Walker's'.
- Bill Shankly – from Glenbuck was a successful football manager.
- James Keir Hardie - founder of the Labour Party, lived in Cumnock for most of his life.
- James Boswell, Essayist, lived in Auchinleck.

Many of these people are celebrated through East Ayrshire Council's Arts & Museums collections at venues such as the Dick Institute, but only one (Burns) has a dedicated museum or visitor attraction within the area.

Three names in particular stand out from this list in terms of potential for tourism development. Robert Burns, William Wallace, and Johnnie Walker all have the potential for international appeal due to their prominence.

The economic benefit derived from East Ayrshire's claim to Robert Burns could be further maximised. The main attraction is our Burns House Museum in Mauchline which is free to visit and attracts around 5000 visitors per annum. There are a number of other Burns assets within Mauchline which tell the story of his time there. This includes the disused National Burns Memorial, Poosie Nansie's, Mossgiel Farm, Jean Armour Statue, Kirkyard, and numerous other sites. With estimated visitor numbers of over 300,000 at the Burns National Heritage Park at Alloway there is clearly a market for Burns tourism if it is packaged as a quality visitor experience. There is certainly potential to grow the tourist appeal of the offering within East Ayrshire. Given the focus of key sites and physical museum space within Mauchline this is the obvious location for such development. Consideration should be given to developing Mauchline as a 'Burns Heritage Town' by creating further interpretation, linking key sites and finding a renewed use for the National Burns Memorial.

There is great potential to develop tourism product celebrating East Ayrshire as the home of William Wallace and Johnnie Walker. The success of the Wallace Monument at Stirling and international interest in whisky and distilleries suggests that there may be marketable opportunities to develop and promote tourism experiences which focus on these two famous figures.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Exploit potential for sustainable tourism development linked to famous people from East Ayrshire.	Investigate market opportunities for developing new tourism product/attractions linked to famous people (2010/11)	2010-2011	East Ayrshire Council Scottish Enterprise
Develop Mauchline as an attractive destination by developing a co-ordinated visitor experience exploiting Burns assets.	Implement recommendations of Tourism Resources Company's 2006 Report to erect new road and interpretive signage in the town (2009)  Investigate opportunities for future potential use of the National Burns Monument (2009/10)	2009-2010	East Ayrshire Council Scottish Enterprise Private Sector

## Arts & Culture

East Ayrshire already has a significant cultural offer, which includes a wide range of attractions and collections that tell the story of the region and that of the south West of Scotland.

The principal venues operated by East Ayrshire Council includes:

Dean Castle & Country Park, Kilmarnock (4 Star Visitor Attraction)  
The Dick Institute, Kilmarnock (3 Star Museum)  
The Palace Theatre and Grand Hall Complex, Kilmarnock  
Burns House Museum, Mauchline (4 Star Museum)  
The Baird Institute, Cumnock

Doon Valley Museum, Dalmellington (3 Star Museum)  
Burns Monument Centre, Kilmarnock (due to open 2008)

The cultural offer in East Ayrshire is both distinctive and innovative and the Council owned and operated attractions have been the subject of considerable investment over the past four years. The modernisation programme will be complete by 2009 as the Grand Hall and Baird Institute complete their refurbishment.

'Marketing the Culture of East Ayrshire' is a project funded by the European Regional Development Fund (ERDF) that was designed to develop an events based marketing strategy to help increase visitor numbers to the Arts and Museums Venues of East Ayrshire and raise the profile of the region. It has been successful in promoting the cultural venues and developing an active events programme which runs alongside the venues and includes new event strands being programmed into each venue, designed to attract new audiences which target people from outside the region.

The collections owned by the Council are of national significance and help to define each venue. Increasingly, the programming strategies are linked to the collections and exhibitions and events are planned to capitalise on the distinctive offer. The vision for the future is to develop a series of large scale exhibitions that run for longer periods and are marketed widely.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Further enhance existing East Ayrshire Council attractions through increased quality and standards.	Improve/maintain current VisitScotland gradings: <ul style="list-style-type: none"> <li>- Burns House Museum (maintain 4 star)</li> <li>- Dean Castle (maintain 4 star)</li> <li>- Dick Institute (3 to 4 star)</li> <li>- Doon Valley Museum (2 to 4 star)</li> <li>- Baird Institute (not graded to 4 star)</li> </ul>	2008-2011	East Ayrshire Council VisitScotland

## Leisure & Visitor Attractions

East Ayrshire has a number of existing visitor attractions, the majority of which are arts and cultural venues owned and operated by East Ayrshire Council (as mentioned above) and allow free access.

Only Loudoun Castle Family Theme Park is a privately operated, fee-paying attraction. This attraction is of significant scale and is graded by VisitScotland as a 4-Star Visitor Attraction. It is widely marketed as a family visitor attraction and attracts a large number of visitors each year.

The planned opening of Dumfries House and Estate as a visitor attraction from summer 2008 will provide a much needed high-profile attraction for the southern area of East Ayrshire and stimulate renewed media and public interest in the area. In addition to the house and estate, The Prince's Foundation for the Built Environment

is planning to build a mixed-use, planned neighbourhood between Cumnock and Auchinleck. This will be built along similar principles to Poundbury, in Dorset, which attracts thousands of visitors every year so the neighbourhood may also become a tourist attraction in its own right. It is important that the development of the house and estate, and the neighbourhood, is linked to tourism operators in the wider area to realise its full potential as a catalyst for regeneration.

The culture and heritage attractions currently attract a significant number of visitors, particularly to Dean Castle and The Dick Institute in Kilmarnock. In order to grow the economic benefit of tourism it is essential that even greater links are forged between these Council owned attractions and tourism operators. Building connections between these attractions and local communities can help to draw people into the area and encourage them to have longer visits, spending more money.

Additional measures also need to be put in place across all Council owned attractions to understand who is visiting the attractions as currently only headline visitor numbers are collected. Moving forward it is essential to understand how many people visiting the attractions are tourists and how many are local people.

Even more could be done to utilise Council owned attractions as information points for tourists, orientating them to other attractions, sites, and tourism operators within the area through the provision of brochure racking, tourist maps, etc.

Leisure and recreational facilities, many provided by the Council, are located across the area including the (4-Star) Galleon Leisure Centre in Kilmarnock and Visions Leisure Centre in Cumnock. There are currently no swimming pools or spa facilities attached to hotels within the area, although future plans to develop Lochside House Hotel and Rowallan Castle may provide such facilities.

In addition to this the area has a dry ski slope at Newmilns which provides facilities for skiing and mountain boarding.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Increase the economic impact of visitors to existing attractions and facilities.	Investigate market opportunities for selling goods and services at and within existing Council operated attractions (2008/09)  Increase commercial turnover at East Ayrshire Council attractions by 10% in real terms (2008 - 2015)  Investigate feasibility of opening Council run attractions on public holidays (2009)	2008 - 2015	East Ayrshire Council Private Sector
Increase participation in VisitScotland Quality Assurance schemes to aid product development through increased quality and standards.	All Visitor Attractions within East Ayrshire to participate in VisitScotland Quality Assurance scheme.	2009	VisitScotland Private Sector

Develop new and sustainable visitor attractions within East Ayrshire to expand the tourism product.	Open new visitor attractions and facilities including: <ul style="list-style-type: none"> <li>- Burns Monument Centre at Kay Park</li> <li>- Dumfries House &amp; Estate</li> <li>- Rowallan Castle Golf Club</li> </ul> Support the creation of new and sustainable attractions within the area through provision of business support, and appropriate grant and loan funding.	2008-2015	East Ayrshire Council Scottish Enterprise Great Steward of Scotland's Dumfries House Trust Private Sector
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### Outdoor Activities & Nature Based Tourism

One of the biggest opportunities for East Ayrshire is the high quality of the area's natural environment, which has been partly shaped by the pattern of agriculture, land use and social heritage of the past. Adding value to these natural resources through careful development and marketing has high potential as an economic driver for the rural economy as has been shown in other parts of Scotland.

In the last decade, there has been significant development throughout East Ayrshire in the creation of path networks, community woodlands, nature reserves and sites designated for their biodiversity interest. More than 150 potential nature based tourism sites have been identified in East Ayrshire. These include:

- **Archaeology and historic sites which involve a natural heritage experience.** This includes areas such as Loch Doon with the remains of the Castle which is set within the Galloway Forest Park and on the edge of the Galloway Biosphere Reserve and the Muirkirk Local Path Network with its links to Covenanters, MacAdam and Tibbie Pagan. These historical sites are all linked by the River Ayr Way and are set in a Special Protection Area for the European importance of breeding birds.
- **Sites of Special Scientific Interest (SSSI), European designations such as Special Protection Area (SPA) and Special Area of Conservation (SAC).** East Ayrshire has numerous SSSIs including Glenbuck Loch designated for the fossilised fish in its bed, Loch Doon for the unique population of Arctic Charr and the entire riparian valley of the River Ayr, designated for the semi nature mature woodland. There are also 2 SPAs and an SAC all linked by well used paths.
- **Places for wildlife watching, bird hides, CCTV systems.** There are several hotspots for wildlife watching throughout East Ayrshire. The Dean Castle Country Park has been established to provide an area of countryside in an urban setting and to allow people to gain an appreciation of nature in a 'safe' environment. With the recent installation of a wildlife surveillance system, the Country Park has potential to become even more popular as a wildlife watching venue. Other sites include Knockshinnoch Lagoons (wildfowl), Loudoun Hill (peregrines) and Craigenkillan Estate (red squirrels).

- **Walks, trails and ways.** East Ayrshire has an excellent and extensive path network with a range of long distance routes, local circular paths and green corridor routes between settlements. With over 700km of footpaths, cycle routes and bridleways, there is no shortage of opportunities for passive recreation. The main tourism product in this category is the River Ayr Way, which is Scotland's first 'Source to Sea' path, opened in 2006. Many other routes are set in a high quality landscape which has the potential of attracting tourists, including Dalcairnie Falls, Auchenroy Hill and Mulwacker in the Doon Valley.
- **Outdoor activities including cycling, kayaking, fishing and shooting where the activity uses natural resources and involves a natural heritage experience and is available to tourists.** The National Cycle Network enters East Ayrshire at Kilmarnock. This route links Kilmarnock to a network of paths throughout the UK. It has been extended throughout East Ayrshire using cycling standard off road paths, farm tracks and minor roads, making it possible to cycle from one end of the local authority area to the other. The area also has a number of navigable rivers which are of interest to canoeists. The River Doon as it flows through Ness Glen has been given a grade 4 rating for the white water experience that it offers. Other pursuits such as fishing and shooting in a revenue generating context are often associated with estates.

Considerable progress has clearly been made to establish paths networks and promote outdoor access within East Ayrshire. This work is very important in terms of developing the tourism potential of the rural areas as a well established access network can form a key attraction in itself. It is important that work is continued to develop the network and increase interpretive signage linking networks to other tourism attractions, and to make it more widely recognised through appropriate promotion and marketing.

Despite the progress which has been made to date, the area does not yet have an outdoor and nature tourism product capable of competing with established destinations such as Perthshire. This presents an opportunity for further development in order to fully harness the huge potential of rural areas to become an attractive and established destination for outdoor activities such as walking, cycling, horse riding, fishing, kayaking, mountain-biking and other adventure tourism activities.

Opportunities will be fully explored to develop the areas of Whitelee Forest in the north and from New Cumnock and Glen Afton across to Dalmellington and Loch Doon in the south of the area as destinations for such activities.

Already, opportunities to work with the Forestry Commission are being explored to promote East Ayrshire as a gateway to the Galloway Forest Park, and for part of the area to become part of a designated Biosphere Reserve. Developing the areas around Glen Afton, Loch Doon, Craigengillan Estate, and Bogton Loch as areas with potential for tourism could stimulate tourism within this area and lead to greater investment in tourism infrastructure and facilities.

Acknowledging that public transport links to rural areas of East Ayrshire are not regular and convenient, it is important to provide infrastructure such as car parks, signage, and interpretation allowing people travelling by road to stop at key sites to go for a walk, stop off in a village for lunch, and visit nearby attractions.

Signposting and maps which show where routes are in relation to roads and public transport routes should also play a key role in the process, and even greater links should be made with tourism operators to promote use and linkages with the network.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Develop East Ayrshire as an established destination for outdoor activities and nature tourism.	<p>Establish a visitor centre within the Doon Valley as the northern gateway to the Galloway Forest Park. (2008-2011)</p> <p>Designation of a Biosphere Reserve incorporating the southern area of East Ayrshire. (2008-2011)</p> <p>Develop and implement strategy to combat the negative impact of illegal caravans using area around Loch Doon. (2008/09)</p> <p>Investigate potential to create an outdoor education and water sports centre at Bogton Loch. (2008/09)</p> <p>Develop opportunities for outdoor activities within Whitelee Forest (2009/10)</p> <p>Increase usage of Path Networks by tourists from x to x (2008-2015)</p>	2008-2015	<p>East Ayrshire Council</p> <p>Forestry Commission</p> <p>Private Sector</p> <p>Strathclyde Police</p> <p>Scottish Coal</p>

## Green Tourism

The issue of environmental responsibility has become a determining factor in consumer choice over recent years, as global debates on climate change, global warming and offsetting carbon emissions have become widely recognised by consumers. It has become more important for businesses to display their 'green credentials' and use this as leverage to market themselves as ethical, responsible businesses which consumers can trust with their patronage.

Businesses across every sector are also becoming increasingly aware of the potential benefits of implementing more efficient and sustainable practices which can significantly reduce business overheads and therefore improve their 'bottom line'.

The high quality of scenic areas, wind and hydro-electric energy, and the potential designation of a Biosphere Reserve encompassing part of the southern area of East Ayrshire allows huge potential for businesses to be innovative and position themselves as environmentally responsible to appeal to this growing market.

It is important that sustainability issues are acknowledged by the tourism industry within East Ayrshire and viewed as an opportunity to improve business performance and differentiate itself through product innovation.

Businesses should be encouraged to participate in the Green Tourism Business Scheme (GTBS) and efforts will be made to grow sustainable tourism through continuing work in developing path networks for walking and cycling which allow visitors to access the area in an enjoyable, healthy and sustainable way.

Kilmarnock could consider adopting the principles of Cittaslow (literally *Slow City* in Italian), which is an international movement founded by the Slow Food organisation. Cittaslow's goals include improving the quality of life in towns while resisting "the fast-lane, homogenised world so often seen in other cities throughout the world".

Celebrating and supporting diversity of culture and the specialties of a town and its hinterland are core Cittaslow values. There are a small number of towns throughout the UK, including Perth in Scotland, who have joined the movement in order to improve quality of life for local people and provide an attractive, enjoyable environment for visitors.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Adopt sustainable business practices to improve efficiency and open channels for promotion of the area as a Green Tourism destination.	All East Ayrshire Council attractions to achieve Green Tourism Business Scheme (GTBS) accreditation (2008-2011)  Increase number of East Ayrshire Businesses participating in GTBS from 0 to 10 (2008-2011)  Achieve Cittaslow (Slow City) status for Kilmarnock (2010-2012)	2008-2012	East Ayrshire Council VisitScotland Ayrshire Chamber of Commerce and Industry Private Sector

## Food & Drink

Food and drink is an essential part of the tourism product, accounting for £53.27 million (17%) of tourism expenditure in Ayrshire and Arran (Ayrshire & Arran STEAM Report, 2006). This is greater than expenditure on accommodation, shopping, or recreation.

Regardless of visitor profiles or behaviour, all visitors must eat, so revenue will always be generated from visitors. This does not mean that this expenditure can be taken for granted, as discretionary spending on food and drink can make a significant impact on tourism revenue. Without the provision of convenient, quality food and drink visitors may choose to bring picnics or eat outwith the area.

East Ayrshire has many well known establishments such as The Sorn Inn, The Jefferson Restaurant, and The Cochrane Inn which all provide a culinary experience which would be of interest to visitors.

The challenge in terms of tourism is to position food and drink within the tourism product and use it as a key motivation for visiting the area, rather than it simply being viewed as a basic physiological requirement which must be fulfilled during a trip. This can be achieved by creating greater linkages between tourism operators and promoting quality food as part of the wider tourism offer. Further, consideration should be given to creating commercial opportunities for eating and drinking at key tourist attractions as quality food and drink conveniently on-site at an attraction can generate considerable revenue.

The 'Appetite for Ayrshire' promotional campaign was run by VisitScotland during April 2008 as a pilot. The campaign featured eating establishments across Ayrshire offering special deals throughout the month and was promoted via newspaper inserts, mail drops, and online promotion and media releases. This type of promotional activity has been successful in other areas and should be used regularly to attract tourists to enjoy fine Ayrshire cuisine.

In addition to establishments such as restaurants, cafés, and hotels which serve food and drink, East Ayrshire produces a range of quality food and drink which could be linked directly to the tourism product. Consumers increasing concern for authenticity and sustainability has led to a growing market for local produce.

The Ayrshire Food Network and Ayrshire Farmers' Market are already well established within the area and there is certainly potential for growth in this area, bringing producers and eating establishments together to provide and deliver quality local food which appeals to tourists. In addition to this there is great potential to continue to grow on the success of the farmers markets and food trails as attractions.

East Ayrshire is the historic home of Johnnie Walker Whisky. This is a global brand of national and international appeal. Further opportunities should be explored to ascertain how this brand appeal can be leveraged to develop tourism product to the mutual benefit of the area and Diageo.

### **Day Visits & Short Breaks**

The potential for attracting day visitors to East Ayrshire must continue to be recognised. Whilst day visitors spend comparatively less than other tourists as there is no economic impact for the accommodation sector, they nonetheless make a valuable contribution to the economy through spending on attractions, retail and hospitality.

East Ayrshire is well placed geographically to position itself for day visits given its accessibility from the central belt and in particular Glasgow, which attracted 2.8 million trips with expenditure of £700 million in 2005 (Glasgow Tourism Strategy, 2007). The M77 motorway link provides an opportunity for East Ayrshire to attract day visits from tourists visiting the city who would also like to experience rural

Scotland within their stay. In addition to this there is an opportunity to attract domestic tourism visits for day trips and short breaks from the city's 580 thousand resident population.

Day visits and leisure tourism are currently the key markets for the East Ayrshire tourism product. Short break tourism is a growth area as consumers are tending to take more short breaks throughout the year rather than one or two long holidays.

It is, therefore, essential that tourism development and promotion focuses efforts on attracting visitors for day trips and short breaks by creating itineraries and product packages which provide an attractive proposition for such trips.

## **Festivals & Events**

Events and experiential tourism have continued to grow in appeal at local, national and international level over recent years. Fuelled by hectic lifestyles and consumer culture, people are willing to pay for short 'bursts' of experience which can be delivered through events. Major sporting, music and cultural events require large levels of investment but have in many cases proved to be commercially successful delivering social and economic impacts for host areas. Additionally, local events and festivals can act as catalysts for increased visitation, especially out with peak months.

There are currently a number of established events within East Ayrshire which appeal to local people and visitors, and deliver a degree of economic impact. Events such as Darvel Music Festival, Cumnock Highland Games and East Ayrshire Council's Amplify Festival and Imprint Book Festival have all operated in recent years. There is potential to further develop these events to become sustainable annual events which attract people into the area to support the tourism industry and deliver measurable economic impact.

Perhaps the most high profile event in Ayrshire is the Burns an' a' That Festival, incorporating The Robert Burns Humanitarian Awards, which celebrates the life and works of Robert Burns. The festival is largely attended by Ayrshire residents but is still estimated to have generated around £1.1 million of direct expenditure into the area in 2006 (Moffat Centre for Travel & Tourism Business Development, 2007).

The festival has been held largely within South Ayrshire focussing its activities in Ayr. The only real exception to this is the Holy Fair which is held annually in Mauchline and live music events which have been held at Dean Castle. There is perhaps scope for the Burns Festival to grow into East Ayrshire in the future, but this will require significant public sector investment.

Consideration should be given to developing new events and festivals within East Ayrshire which can demonstrate sustainability and positive social and economic impacts, and linking all events more closely with the wider tourism product.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Develop an Events Strategy for East Ayrshire which enhances the	Undertake audit of current events activity and ascertain economic	2008-2015	East Ayrshire Council Event Scotland VisitScotland

tourism product and supports economic growth.	impact (2008/09)  Investigate market opportunities and produce strategy (2009/10)  Implement strategy (2010-2015)		Scottish Enterprise Private Sector
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## Business Tourism

The majority of meetings, conventions and exhibitions within East Ayrshire take place at The Park Hotel in Kilmarnock which has well equipped meeting spaces and rooms. Lochside House Hotel near New Cumnock also hosts a number of meetings and events.

Despite the success of The Park Hotel and Lochside House, business tourism does not currently represent a huge market for East Ayrshire. This is in part due to the fact that much of the accommodation stock is self catering cottages and B&Bs which do not have meeting space. Without a large-scale purpose built convention centre it is unlikely that business tourism will be a significant area for growth.

Nonetheless, potential development of Lochside House Hotel, Rowallan Castle, Dumfries House and Allseasons at The Meadows may present opportunities to attract more business tourism in the form of meetings and small conferences in the future. There is potential to make greater use of facilities at The Dower House, and to use the new Burns Monument Centre as a commercially viable, quality meeting space.

Development of appropriate and quality facilities would allow potential to target business tourism, linked to adventure and activity tourism, in the rural areas of East Ayrshire such as around Whitelee Forest, Loch Doon, Craigengillan Estate and Glen Afton. There may also be potential for working in collaboration with tourism operators within Glasgow to position East Ayrshire as an ancillary tourism product for business travellers visiting the city.

## Golf

East Ayrshire currently has a range of municipal and privately-run golf courses of varying quality across the area. Much more work is required to have our golf courses recognised by golf tourists, many of whom are attracted to Ayrshire by high profile courses of international renown such as Turnberry, Royal Troon, and Prestwick.

There is an opportunity for future growth in golf tourism within East Ayrshire through the potential development of quality inland courses which will complement the existing world-class links courses elsewhere in Ayrshire. In particular the proposed development of quality golf courses at Rowallan Castle and Lochside House Hotel will provide a new impetus to develop golf tourism within the area and catalyse other tourism businesses to capitalise on increased expenditure from golf tourists.

It is important that golf tourism is not viewed in isolation within East Ayrshire. In order to derive maximum benefit it will be important to work in collaboration across the whole of Ayrshire to market the area as a golf destination, capitalising on the huge

international of the Championship courses and packaging products where possible to ensure that East Ayrshire benefits from this niche market.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Develop potential for golf tourism within East Ayrshire linked to the wider Ayrshire golf tourism product.	Development and opening of privately run golf courses at: - Rowallan Castle - Lochside House Hotel  Participate in development and promotion activities of Golf Tourism Ayrshire	2008-2015	East Ayrshire Council Private Sector Golf Tourism Ayrshire

## Retail

The main retail offering within East Ayrshire is in the principal urban settlement of Kilmarnock, which has a pedestrianised town centre containing a variety of high street chains and independent retail outlets. In addition to this the town offers retail parks incorporating large supermarket chains and other large retailers.

The proximity of Kilmarnock to Glasgow provides a particular challenge to retailers as investment can not possibly match the scale of projects such as Silverburn. In tourism terms the proximity of the shopping experience in Glasgow can be a positive for the area as it can allow visitors to enjoy the benefits of a 'city shopping' alongside a holiday in rural Scotland. In order to benefit from this, more needs to be done to package and promote the area on this basis, as a 'City Plus' product.

Retail alone will not bring huge numbers of tourists to Kilmarnock and Cumnock. However careful consideration should be given to linking retail areas with other attractions to ensure that visitors dwell longer within towns and retailers benefit from tourism expenditure. It should be considered within the town centre strategies how these areas can play a greater part in the tourist experience by utilising built heritage as sustainable and commercial assets, and considering the development of new and innovative attractions.

As consumers become more focused on unique and fulfilling experiences it may be possible to consider urban retail as part of a wider package alongside activities, attractions, culture, arts, food and drink. By creating 'experience areas' rather than traditional shopping areas it may be possible to reposition shopping as part of something wider, allowing people to undertake a range of experiences within multi-purpose areas with a menu of experiential offers, such as heritage, leisure, retail, hospitality and accommodation. In this respect it may be possible to compete not directly as a retail destination but as a vibrant and innovative destination which offers much more than retail and appeals to wider families and mixed interest groups.

Consumers are becoming more demanding of authenticity both in terms of experience and products. This will provide opportunities for retailers to differentiate themselves from the ubiquitous city-centre shopping experience by marketing themselves as purveyors of sustainable locally crafted or produced goods.

Development of tourism linked to the scenic quality of rural areas such as walking, cycling and adventure tourism, along with further exploitation of our heritage, may also lead to new opportunities for niche retail outlets to meet demand for outdoor equipment and local giftware.

## TOURISM INFRASTRUCTURE

### Accommodation

A basic requirement in establishing a successful tourist industry is the availability of a range of tourist accommodation. Limited or poor quality accommodation restricts the potential market to day visitors. Staying visitors make a significant contribution to the local economy and are an essential part of a prosperous tourism industry, both in terms of the job creation and related expenditure.

It is estimated that visitors staying in serviced accommodation spend approximately 1.07 million tourist days within Ayrshire & Arran, generating in the region of £95.66 million of expenditure into the local economy. In addition, visitors staying in non-serviced accommodation spend approximately £85.41 million over 1.97 million tourist days in the area (Ayrshire & Arran STEAM Report, 2006). Therefore, it is important to provide a range of appropriate accommodation within East Ayrshire to ensure that the area grows the volume and value of staying visitors.

The range of accommodation currently available within the East Ayrshire comprise hotels, guest houses, bed and breakfasts, self-catering accommodation, and caravan and camping sites. In general terms the area is characterised by a high number of small non-serviced accommodation providers, with a small number of quality serviced accommodation providers. It is also notable that East Ayrshire currently has no resort or spa hotels, which are evident and successful in neighbouring areas of South Ayrshire, North Ayrshire, and the Isle of Arran. There is also a notable lack of caravan and camping sites within the area.

The development of additional serviced accommodation and spa facilities within the area should be encouraged in order that a comprehensive range of accommodation can be provided to meet the needs for sustainable tourism growth. Development of caravan and camping sites within the area may also be appropriate in order to cater for a growing market for outdoor activities and nature tourism.

East Ayrshire Council has recently undertaken a comprehensive audit of accommodation providers within the area for the first time. It is estimated from this data that approximately 39% of accommodation providers have a quality assurance grading from VisitScotland. This represents an opportunity to support and encourage existing accommodation providers to place a greater emphasis on quality and customer service, and encourage to participation in appropriate VisitScotland Quality Assurance schemes.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Improve existing accommodation within East Ayrshire through increased quality and	Increase the number of accommodation providers participating in VisitScotland Quality	2008-2011	East Ayrshire Council VisitScotland Private Sector

standards.	Assurance scheme from 26 members to 50 members.		
Support businesses in accommodation sector to develop appropriate new and existing accommodation supply within East Ayrshire to expand the potential number of bed nights and increase economic impact of overnight visitors.	Increase available bed stock within East Ayrshire by at least 10%.  Support the creation of new and sustainable accommodation businesses within the area through provision of business support, and appropriate grant and loan funding.	2008-2015	East Ayrshire Council Scottish Enterprise Private Sector

## Accessibility & Transport

In order to ensure that it competes in domestic and international markets, East Ayrshire must ensure that it is easily accessible to travellers by air, rail, sea and road.

As tourist numbers grow, an extensive and efficient transport network will be required to provide tourists with the quickest and most convenient routes into and around the area.

East Ayrshire is geographically well situated to attract domestic and international tourists, with the area benefiting from a well-developed transport network linking it to key markets. This network includes:

- Glasgow Prestwick Airport
- Glasgow International Airport
- M77/M8/A71 road connections to Glasgow and Edinburgh
- M74/A70 road connection to Carlisle
- A713 tourist route through the Galloway Forest Park
- Rail network connecting the area to other UK destinations

Transport links to rural parts of the area are less well served, and the south of the area in particular is not easily accessible to tourists other than by car.

East Ayrshire also has an extensive network of cycling and walking routes, including the 66km River Ayr Way which links East Ayrshire to the urban centre of Ayr town. Further development and promotion of such networks will allow tourists to access much of the area, and its attractions, in a sustainable way.

Although East Ayrshire is conveniently situated for access from the transport networks mentioned, there is a challenge to capitalise on this location to ensure that tourists stop and spend money in the area rather than passing through en route to neighbouring areas and major gateways such as ferry ports and airports. Key to addressing this challenge is to increase the profile of the area as a destination in its own right by developing both product and promotion.

This will include a co-ordinated presence at key gateways and tourist information centres in order to influence visitors' discretionary travel plans.

Tourist road signage throughout the area is a major issue which has been highlighted as inadequate through discussions with private sector tourism operators around the area. Current signage lacks a co-ordinated approach and does little to orientate visitors around the area and its attractions. Given that much of the area requires visitors to use road networks for access, this is a major disadvantage. This is particularly evident in rural areas, as many of the 'attractions' are natural areas of scenic beauty such as waterfalls, lochs, forests and path networks. Because there is no explicit ownership of these assets there is little signage to alert visitors to their existence. In order to develop the area as a destination for outdoor access and activities it is essential that this is addressed.

The area does not currently benefit greatly from coach tourism and has a lack of roadside facilities to allow for such visits. Development of Dumfries House could potentially open the area to more coach trips and consideration should be given to developing services in conjunction with local tourism operators which would allow coaches to incorporate stops within the area into their itineraries.

In addition to this, consideration could be given to developing an iconic presence on the main A77 route which could also act as a functional visitor orientation hub.

Consideration should also be given to developing innovative transport options which can act as attractions in their own right. In particular the development of the Bio Bus service could be linked into sustainable tourism development; tram services within Kilmarnock town centre could link to a visitor experience in the town, long distance walking and cycling routes could be linked via the Galloway Forest Park.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Improve tourist road signage to orientate visitors into and around the area to key attractions, and tourism businesses.	Undertake audit of current tourist signage and identify errors and gaps in provision (2008/09)  Undertake works to rectify all errors in road signage where necessary (2009/10)	2008-2010	East Ayrshire Council Scottish Transport Private Sector

## People & Skills

Regardless of the tourism product and built infrastructure, sustained growth of tourism in East Ayrshire will only be possible if the people working in tourism and related sectors provide a friendly, helpful and welcoming service which becomes part of an authentic visitor experience.

A competitive marketplace, increasing visitor expectations and a culture of immediacy means that anything less than exceptional service can ruin the visitor experience. With growing use of consumer review websites for the travel and leisure markets this means that feedback can be instantly published to the world, impacting

upon a destination's image, so it is essential to recognise that people and skills can affect the bottom line more than ever. The challenge is to make sure that this impact is positive.

The national ambition is to have “the best regarded tourism workforce in the world, with highly-skilled managers and leaders who nurture and value their staff” which in turn, will improve the employee experience, provide a better customer experience - and visitors will be more likely to spend more, and to return.

Taking this into account it is essential that everyone working in tourism related sectors has the necessary skills and attitude to ensure visitors have an enjoyable and interesting experience within the area. Managers and business owners need to have adequate management and leadership skills, and they must also ensure that their staff have the skills they need to provide a high quality service. This is crucial to growing their businesses and to the wider growth of the industry within East Ayrshire.

In addition to the importance of management training and staff development, there is a need to address the perception of the industry as a career choice. Tourism has long suffered from an image of poor pay, long hours, seasonality and lack of structure for career development. It is important to improve this image and make sure tourism is viewed as a first-choice career for talented and motivated people, by conveying the message that tourism is an attractive industry to work in from school level onwards. Unless this is addressed, recruitment and retention problems will continue to have considerable negative impacts upon the bottom line of many tourism businesses.

The ambition to grow tourism within East Ayrshire has the potential to create new employment opportunities within the area, and to make a considerable contribution to the social and economic wellbeing of local communities. Job creation is particularly important in areas of high unemployment, but it is important that skills issues are taken into account and that people are supported through relevant training to ensure that they have the skills and confidence needed to work within the industry.

Greater links must be encouraged between training and education providers and private sector tourism operators to ensure a mutually beneficial system which ensures that education and training is relevant for businesses and that businesses make use of these opportunities for staff development.

Through ‘Determined to Succeed’, the Scottish Government's strategy for developing enterprise in education and ‘More Choices, More Chances’, the strategy to reduce the number of young people not in education, employment or training, businesses and organisations can get involved with young people through initiatives such as work experience, placements, mentoring and apprenticeships. Tourism operators and education providers should be encouraged to participate in these initiatives which can give young people skills and drive to create a smarter, wealthier and fairer Scotland as outlined by the Scottish Government.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Improve the perception of	Participate in annual	2008-2015	East Ayrshire Council

tourism as a career choice amongst young people.	Tourism Challenge event for local schools.		Ayrshire Chamber of Commerce and Industry Private Sector
Provide a range of training and development opportunities for tourism businesses.	Increase number of businesses in East Ayrshire participating in training and development leading to recognised qualifications.	2009-2011	East Ayrshire Council Private Sector Further and Higher Education Providers

## Information Communications Technology

Use of Information Communications Technology (ICT) has grown exponentially over the past decade and now provides the platform for much of modern life.

Internet booking systems, search engines, and e-marketing have revolutionised people's lifestyles and the tourism industry worldwide. As an absolute minimum, destinations and businesses must have a basic online presence in order to compete in this crowded and ever more sophisticated marketplace.

Ayrshire, as a destination, has fallen behind in this respect with very little online presence which is comparable with competing areas. VisitScotland host an Ayrshire & Arran 'gateway site' which allows visitors to access information on attractions, accommodation, local events, etc. It also allows accommodation booking through the VisitScotland.com online booking system. However as with all VisitScotland marketing, inclusion on these websites and booking systems is paid for and is only open to accommodation providers who participate in the appropriate quality assurance scheme.

This currently excludes a large number of the tourism operators within East Ayrshire who are not actively engaged with VisitScotland. There are a number of operators who have their own websites and online booking facilities though this is not the case for the majority of accommodation providers. Attractions such as Loudoun Castle Theme Park and Dumfries House have websites, as do the Council operated arts and museums venues which are served by a marketing website (<http://www.visiteastayrshire.com>) and through an interactive, online cultural portal (<http://www.futuremuseum.com>) which allows people from around the world access to the museum collections and stories about the South West of Scotland.

Information technology must be embraced, joined-up and harnessed to its full potential as an efficient and targeted marketing tool to gain competitive advantage and increase awareness of the destination.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Improve use of information and communication technologies by tourism businesses in East Ayrshire.	Provide business listings and contact details for all quality assured (where possible) tourism businesses on consumer-focused tourism website marketing the area.	2008-2010	East Ayrshire Council VisitScotland Private Sector

## MARKETING & PROMOTION

### Image & Brand

East Ayrshire currently has no single destination brand or tourism identity. This is true not only of East Ayrshire, but more widely for Ayrshire as a whole. The development of a strong and instantly identifiable brand which conveys a positive image of the area is key to ensuring that East Ayrshire is visible to tourists when making decisions to select one destination above another.

Our Arts & Museum service has developed an effective brand identity which they utilise extensively across our venues and in all marketing materials. Other recognisable brands within the area include the brand developed for the River Ayr Way and the Loudoun Castle Family Theme Park branding. All of these brands have proved to be successful to some extent in marketing individual attractions, however it is not considered appropriate to impose such branding on the wider tourism sector by utilising it to market the whole area as a destination.

Developing a consumer focused destination brand identity to differentiate the area and position it within a competitive marketplace is of great importance and must be viewed as a priority.

Any destination brand should consider branding the area as Ayrshire, even if marketing focuses only upon the tourism product within the East Ayrshire Council boundary, as Local Authority boundaries are irrelevant to visitors and it is considered more likely that consumers will identify with 'Ayrshire' than 'East Ayrshire'. This would also allow the opportunity to extend the brand in the future to work in collaboration across the whole of Ayrshire.

It is also important that the destination brand is created to be flexible enough for use in marketing the area to diverse audiences and niche markets.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Develop a distinctive brand identity for the area is required to provide a consistent marketing message across related marketing activities.	Develop branding for the area and utilise this on all marketing materials	2008-2009	East Ayrshire Council VisitScotland Private Sector

### Marketing

Marketing of East Ayrshire, and more widely of Ayrshire, should be more co-ordinated and refined. The national tourism marketing agency, VisitScotland, undertake a range of online and offline marketing campaigns aimed at international and domestic markets. Their marketing is generally segmented into product campaigns as follows:

**Active** - Golf, Outdoor, Adventure Sports

**Freedom** - Historical Sites, Gardens, Walks, Wildlife

**Business Tourism** - Meetings, Incentives, and Conferences

**Culture & Heritage - Arts, Museums, Festivals, Heritage**  
**Cities - Shopping, Nightlife, Food & Drink**

VisitScotland has a network office in Prestwick which maintains and promotes a visitor 'gateway website' for Ayrshire and Arran, containing information on attractions, accommodation, itineraries, etc. The marketing message for Ayrshire focuses largely upon the links golf courses, sailing, Burns heritage in Alloway, and the Isle of Arran which is in many respects a separate tourism destination from mainland Ayrshire.

In addition to the gateway site, the network office communicates with tourism operators within Ayrshire and Arran, and offers a range of marketing opportunities for businesses to promote their products and services through a huge range of websites, leaflets, brochures, PR and press trips, trade shows and exhibitions.

The marketing efforts of VisitScotland are of considerable value; however there is an issue that East Ayrshire is under-represented within the marketing collateral due to the low number of key attractions, golf courses and large accommodation providers. Engagement of East Ayrshire tourism operators with VisitScotland is not high at present.

In addition to the VisitScotland marketing activity, there is a range of online and printed marketing materials which are produced by Council operated attractions and private tourism operators. The quality and effectiveness of this activity varies greatly but in general terms there is a lack of consistency and co-ordinated approach in the marketing messages about the area.

The Council maintains some generic tourist information on the corporate website which is of limited value as the website is not designed for consumer interaction, it is not aesthetically appealing, and it does not allow online booking.

A co-ordinated approach is required to ascertain the key market segments for the East Ayrshire tourism product and provide a comprehensive marketing plan for East Ayrshire to position itself as a tourism destination. Such marketing should reinforce an agreed brand identity and target key markets through online and offline media. As a starting point, a consumer focused tourism marketing website should be created to act as the 'call to action' for all marketing activities.

As outlined earlier, East Ayrshire has tourism product or potential for development under each of these product campaigns. It would be prudent to align future co-ordinated marketing efforts with the national product campaigns to derive maximum benefit from VisitScotland marketing opportunities.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Develop a marketing plan to promote the area as an attractive destination.	Use findings of Visitor Survey to identify key market segments and develop a marketing plan for the area aligned to VisitScotland product campaigns (2009/10)	2009-2015	East Ayrshire Council VisitScotland Private Sector

	Agree marketing activity required from VisitScotland and monitor return on investment (2009-2015)		
Develop a comprehensive online marketing and tourist information portal as a call-to-action for all marketing activity.	Create a consumer-focused website as a focus and call-to-action for all marketing activity and as an information resource for the tourism trade.	2009	East Ayrshire Council Private Sector

## Tourist Information

Tourist information is an important part of the visitor journey as it orientates visitors once they arrive in the area, and influences discretionary plans during their trip.

Current information provision is very limited within East Ayrshire due to the fact that VisitScotland do not operate any official Tourist Information Centres (TICs) within the Council area. Currently TICs are operated in Ayr, Brodick and Largs providing tourists with information and booking facilities once they have arrived in the area. VisitScotland sells brochure racking within these information centres as a marketing opportunity. In addition to this VisitScotland provide 'bedroom packs' to all graded accommodation providers in Ayrshire & Arran. These contain leaflets and tourist information.

Other main information points include Glasgow Prestwick Airport and the Ferry Terminals in Troon and Ardrossan.

A range of leaflets, maps, and brochures is displayed, usually through an intermediary marketing agency, at venues such as museums, shopping centres and hotels. This provides visitors with some printed tourist information within East Ayrshire although there is no interactive or human presence.

Provision of a comprehensive online tourist information website for East Ayrshire, with downloadable resources such as maps and leaflets, would allow information to be accessed anytime, anywhere by visitors. This could provide a co-ordinated presence for tourism information which could also be utilised by tourism operators to field enquiries from visitors.

Greater use could also be made of the Council owned attractions as tourist information points. This could include limited brochure racking, access to an online tourist information website, and training for staff to be able to field enquiries and give basic advice to orientate visitors.

<b>Actions</b> (What needs to be done?)	<b>Projected Outputs</b> (What do we propose to do?)	<b>Timescale</b> (When will the action be completed?)	<b>Partners</b> (Which organisations are involved?)
Develop a deeper understanding of East Ayrshire and its attractions, environment, heritage and facilities amongst public and private sector tourism partners.	Create a consumer-focused website to market East Ayrshire's tourism product and encourage public and private sector partners to utilise this as an information resource.	2008/09	East Ayrshire Council VisitScotland Private Sector

## THE WAY AHEAD

In the Policy Context chapter of this document reference is made to the national tourism ambition of 50% growth in revenue by 2015. Potential growth rate of world tourism is predicted at 4% and there is ever increasing competition from domestic and overseas destinations to attract visitors.

It is estimated that tourism is currently worth around £55.75 million per annum to the East Ayrshire economy. Analysis of the current tourism proposition confirms that there is potential to generate increased tourism revenues through developing the tourism product and infrastructure and marketing the area's tourism proposition in a co-ordinated way. It also considers a plethora of opportunities which should be explored and considered in order to contribute towards the ambition of 10% growth in tourism revenue.

The actions suggested within this document are not exhaustive as East Ayrshire Council cannot, and would not wish to, explore these opportunities in isolation. Instead it provides a strategic framework for tourism and forms the basis to work in collaboration with other public sector agencies and private sector tourism operators to explore these opportunities and find other opportunities for investment and development in the future.

### The Way Ahead

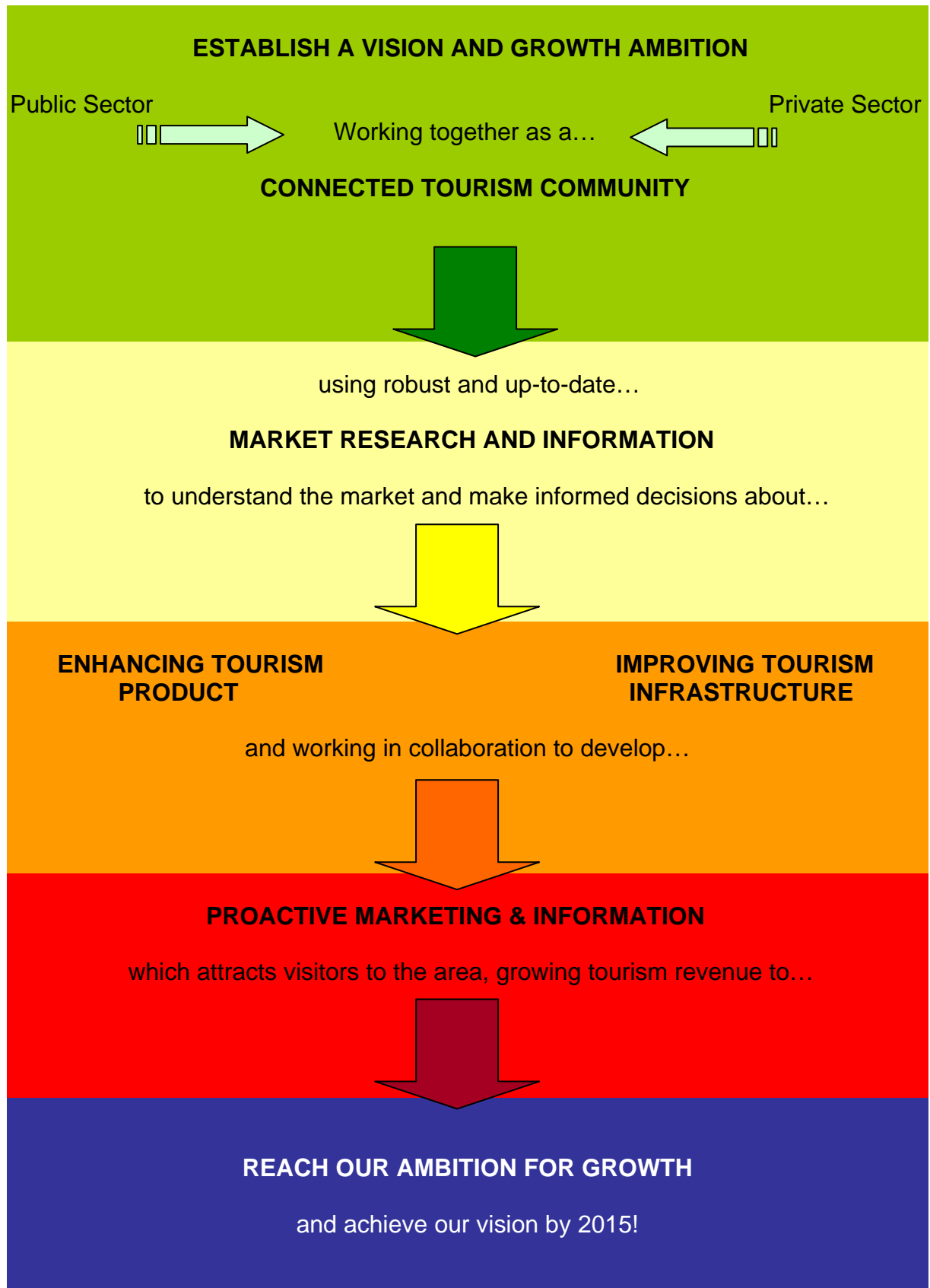
Taking into account the context and analysis which was considered in the development of this document, the following aims form the strategy recommended to grow tourism revenue in East Ayrshire:

- 1) To establish and work towards a growth ambition and vision for tourism.
- 2) To develop an active, connected tourism community.
- 3) To develop a framework for research and information monitoring.
- 4) To enhance and expand the tourism product.
- 5) To improve tourism infrastructure to support the tourism product.
- 6) To proactively market the area as an attractive destination.

The way ahead for tourism in East Ayrshire will focus on these aims, and work to deliver this will be built around the five drivers for growth as outlined in VisitScotland's Tourism Prospectus:-

- |                 |                                   |
|-----------------|-----------------------------------|
| • Invest        | Driver One: Capital Investment    |
| • Shout Louder  | Driver Two: Incremental Marketing |
| • Total Quality | Driver Three: Market Positioning  |
| • 24/7/52       | Driver Four: Capacity Utilisation |
| • Sell          | Driver Five: Cross-selling        |

## Diagram: Achieving the Vision



## Performance Measurement

At a strategic level, performance will be measured directly against the **ambition of 10% growth (in real terms)** in tourism revenues by 2015. This will be based on economic activity data provided by the STEAM Report which is undertaken on an annual basis.

Growth “in real terms” refers to the real economic growth rate which takes into account the effect of inflation. The real economic growth rate is a more accurate look at the rate of economic growth because the real rate is not distorted by the effects of extreme inflation or deflation. Measuring growth in real terms will ensure that growth has a real benefit for the local economy as it will measure additional tourism revenue as opposed to higher or lower tourism expenditure due to fluctuation in the price of goods and services.

A summary of outcome indicators is presented in the table below. These indicators will be the high level method of measuring growth and performance of the tourism sector in East Ayrshire, and will be reported on an annual basis. The STEAM Report has historically only provided a breakdown of visitor expenditure at Local Authority level. Therefore baseline data is not available for all indicators at present. Attaining baseline data and ongoing research will form part of the work in developing a research and monitoring framework.

<b>Outcome Indicator</b> <small>(How will we measure whether the aim has been met?)</small>	<b>Description</b>	<b>Baseline</b> <small>(including source)</small>	<b>Target</b> <small>(Anticipated change in baseline position by 2015)</small>
Tourism Revenue	Total expenditure generated by visitors to East Ayrshire	£55.75m (STEAM 2006)	10% (in real terms)
Visitor Numbers	Number of visitors to East Ayrshire	TBC (STEAM 2006)	TBC
Occupancy	Occupancy rates for accommodation businesses	TBC (VisitScotland)	TBC
Seasonality	Visitor expenditure by calendar quarter	Q1 £6.29m Q2 £21.84m Q3 £17.75m Q4 £9.87m (STEAM 2006)	10% growth in Q1 and Q4
Employment	Total number of employees in tourism sector	TBC (STEAM 2006)	TBC
Quality Assurance Membership	No. of accommodation providers in VisitScotland Quality Assurance scheme.	24 (VisitScotland 2008)	100% increase to 48
	No. of eating establishments in EatScotland scheme.	3 (VisitScotland 2008)	200% increase to 9
	No. of businesses achieving Green Tourism Business Scheme (GTBS) accreditation.	0 (VisitScotland 2008)	increase to 10

## Delivery

The vision outlined in this document is one which it is hoped will be shared by the tourism industry and public sector support agencies across the area, but the ambition of 10% real terms growth in tourism revenues is a target for East Ayrshire Council and against which we will measure our success in committing resources to developing tourism in the area to contribute towards Improving Opportunities as outlined in the East Ayrshire Community Plan.

It would not be possible, or desirable, for East Ayrshire Council to achieve this ambition without the commitment of private sector tourism businesses and other public sector support agencies. East Ayrshire Council will therefore support the process of tourism development and work in partnership with others to achieve the set objectives.

It is anticipated that East Ayrshire Council will continue to engage in existing strategic partnerships with other public bodies to further the growth of tourism, and will develop stronger relationships with the tourism industry to work in partnership in planning and delivering against this ambitious vision.

There are a number of funding options for the tourism action plan which will require to be explored and developed to deliver activity in East Ayrshire.

This includes:

- Private Sector – Investment by businesses individually or by pooling resources
- East Ayrshire Council – Business grants scheme, West of Scotland Loan Fund, grant to VisitScotland to deliver marketing activity
- Public/Private Partnership – Funding from Scottish Enterprise and other Public Sector Bodies which can leverage private sector funding.
- VisitScotland – Funding for some marketing projects
- EventScotland – Funding for regional events and festivals
- European Funding – Programmes such as LEADER and INTERREG