

The Highland Council
Planning, Development and Infrastructure Committee

2 November 2016

Agenda Item	12
Report No	PDI/ 65/16

Review of Highland Council's Tourism Services

Report by Director of Development & Infrastructure

Summary

This report presents the findings of a cross-service review of services that the Council provides that impact on tourism and makes a series of recommendations arising from this review. This report is the first step in delivering the Council's "Highland First" commitment to "improve our internal practices and policies to promote the positive impact they have on the significant tourism industry in the Highlands".

The report's recommendations support a number of other "Highland First" commitments:

- Empowering Communities – notably "reviewing ways of supporting communities to lead on the delivery of services locally";
- "We will explore how community works, including drainage, verges, grass cutting and road improvements could be delivered in the context of local decision making and local priorities";
- "The Council will work with community groups to improve the sustainability and use of small piers and harbours and, where appropriate, to help rationalise the Council's ownership";
- "The Council will strive to grow tourism by working with partners to retain and develop world class events and promote destination management"; and
- "developing a successful and thriving City in Inverness, which will contribute to a growing and sustainable Highland economy".

1. Background

1.1 Sustainable Tourism is one of Scotland's key growth sectors identified in the Scottish Government's Economic Strategy, and is the Highlands' most important industry, generating over £1billion for the local economy in 2015 – comprised of £900m of direct expenditure and a further £212m of indirect expenditure. This supports over 22,000 jobs in Highland.

1.2 Through a number of its Services the Council provides facilities and services that are of benefit to tourism. In addition, in recognition of the importance of tourism to the Highland economy, the Council allocates discretionary funding to develop Highland tourism from the Development and Infrastructure Service's budget. Working Together for the Highlands - The Programme for The Highland Council for 2012 to 2017, included a commitment to review this spending and this review was carried out in 2012/13 with a report and recommendations presented to this Committee on 13 March 2013. This element of the Council's support for tourism has therefore been excluded from this review.

2. Review of the Council's Tourism Services

2.1 During summer 2016, an internal review of a range of the Council's services that are aimed at, or impact on, tourism has been carried out. A series of recommendations are made based on the analysis undertaken and full details of these are included in a final report provided as background papers with this report. A summary of these recommendations is also given in 2.2 below.

2.2 Review of the Council's Tourism Services – summary of recommendations

Service	Recommendation
Council Services impacting on tourism businesses and the Highland tourism industry	
Business Support	The Council should work more closely with the Destination Organisations to deliver locally based tourism specific workshops.
Planning policy	The Council should consider taking a proactive approach to getting tourism industry input to development plans and other related plans.
Tourism Signposting	The Council should consider a system that would allow more of the process to be undertaken by approved contractors operating to an agreed set of standards.
Event support	The Council should consider greater use of the multi-agency approach to events. The Council should consider taking a consistent approach to areas such as charging for the use of public space for events that also reflects the wider benefits to the community.
Council Services impacting directly on visitors	
Maintaining the urban public realm	The Council should consider whether some "softer" elements could be undertaken by communities – perhaps with support and whether more commercial sponsorship opportunities exist. The Council should ensure that relevant services get suitable advance warning of cruise visits, events etc. to allow variations to service to be factored into service planning.
Maintaining the rural public realm	The Council should consider some rationalisation of sites to ensure the provision of high quality sites. Some prioritisation of capital investment on key tourism sites should be considered.
Roads & Parking	The Council should consider visitor passes as part of any parking charge changes. The Council should consider suitable allocations of space, improved signage and possible temporary use of other Council sites for motorhome parking. The Council should consider supporting community developments for motorhome overnighting where considered appropriate.

Public Toilets	The current Council review of public toilet provision should consider the needs of visitors by including expected tourism demand drivers, options for arrangements with community groups and / or private sector facility and the promotion alternatives when facilities are closed.
Marine Facilities	The Council should consider improved recognition of harbours as entry points to communities and whether communities might play a part in the operation of some facilities.
High Life Highland Facilities	The Council and High Life Highland should consider undertaking a similar analysis of High Life Highland delivered services when the contract defining these is next reviewed.

2.3 It is proposed that Members approve the recommendations in the review and that Council Services and the work on the redesign of The Highland Council take these recommendations into account in their future activity.

3. Implications

3.1 Resources: the delivery of this report does not create any requirement for additional resources as all resources for undertaking the review are already contained within the Development and Infrastructure Service budget. However, a number of the recommendations included in the review document would, if accepted, have an impact on how Council resources are distributed in future.

3.2 Rural, Legal, Equality, Gaelic, Climate Change/Carbon Clever and Risk: There are no direct rural, legal, equality, Gaelic, climate change/Carbon Clever or risk Implications arising from this report. A number of the recommendations included in the review document could, if accepted, have an impact in future and these impacts would require to be considered as part of the process of delivery of the particular change being undertaken.

Recommendation

The Committee is invited to note the findings of the review of the Highland Council's tourism services and approve the recommendations made and subsequent delivery of these as outlined in section 2.1 of this report.

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Date: 12 October 2016

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Background Papers: A Review of the Highland Council's Tourism Services 2016

A Review of the Highland Council's Tourism Services

12 October 2016

Development & Infrastructure Service

The Highland Council

A Review of the Highland Council's Tourism Services

Contents

Part 1: Current Situation

1. Introduction
2. Previous Review of the Council's tourism spend
3. Strategic Context

Part 2: Methodology

4. Methodology

Part 3: Analysis & Recommendations

5. Analysis of Council Services impacting on tourism businesses and the tourism industry
6. Analysis of Council Services impacting directly on visitors

Part 4: Summary of Recommendations

7. Summary of recommendations

Part 1: Current Situation

1. Introduction

- 1.1 Sustainable Tourism is one of Scotland's key growth sectors identified in the Scottish Government's Economic Strategy and is the Highlands' most important industry generating over £1billion for the local economy in 2015 – comprised of £900m of direct expenditure and a further £212m of indirect expenditure. This supports over 22,000 jobs in Highland.
- 1.2 The nature of Highland tourism is such that a wide range of organisations and businesses are involved in the industry both directly and indirectly and a successful industry is dependent on how these players deliver their services both individually and in partnership with others. As the provider of both significant elements of the area's infrastructure and of a range of local services, The Highland Council is one of the key players in Highland tourism.
- 1.3 Through a number of its Services the Council provides facilities and services that are of benefit to tourism. Significant areas of activity are:-
- Development Planning
 - Countryside access / Ranger service / Long Distance Walking routes
 - Road management & signposting
 - Maintenance of public spaces
 - Business support & advice
 - Marine facilities – harbours / piers / slipways
 - Event support

A number of other services, previously provided by the Council and now provided by Highlife Highland, are also important in helping to develop tourism including:-

- Leisure facilities
 - Archives and Genealogy
 - Museums, galleries and visitor centres
- 1.4 The Council Programme for 2015 to 2017 "Highland First" which details the political commitments and priorities for the Council includes two tourism specific actions:-

28. Tourism

We will improve our internal practices and policies to promote the positive impact they have on the significant tourism industry in the Highlands.

33. Building Tourism

The Council will strive to grow tourism by working with partners to retain and develop world class events and promote destination management.

The purpose of this this review is therefore to consider the Council's internal practices and policies and how they might be improved so as to benefit tourism with a particular

look at support for events and destination management.

- 1.5 This review can also complement and contribute to ongoing work on the redesign of The Highland Council, as tourism and many of the specific services that support it are of direct relevance to the ability of the Council to deliver against the following identified outcomes:

Outcome 1: Highland is an attractive place to do business, with key sectors supported making the most of our outstanding natural resources. Our economic growth is shared across the region with opportunities for all to contribute and benefit, making the most of the skills of our people and developing them.

Support for tourism supports economic growth, supports business (including key sectors being supported as tourism is the most significant sector) and supports inclusive economic growth and the sharing of economic growth across the region as tourism is arguably the only industry that reaches all areas of Highland.

Outcome 2: The world class environment of Highland is protected, enhanced and enjoyed by residents and visitors.

The importance of the Highland environment in attracting visitors provides a significant part of the rationale for the protection, enhancement of Highland's world class environment and a number of the services reviewed here and the recommendations made contribute to this while also helping to provide a high quality visitor experience.

Outcome 3: Highland is an attractive place to live, work and learn, where people and communities can achieve their potential, supported and connected by good infrastructure, amenities and services. In growing up and growing older we enjoy a good quality of life, living in safe communities, taking care of each other and looking out for those who need more support.

A number of the services being reviewed here form part of the area's infrastructure and are also used by the local population and many of the recommendations being made would enhance the areas attractiveness as a place to live, work and learn and would increase opportunities for businesses and communities.

Outcome 4: Highland communities are better supported to do things for themselves, with opportunities for wider participation in local decision-making and community led services.

This review makes a number of recommendations that both involve and could create opportunities for Highland Communities including taking a lead in delivery of some services.

2. Previous Review of the Council's tourism spend

- 2.1 In recognition of the importance of tourism to the Highland economy, the Council allocates discretionary funding to develop Highland tourism from the Development &

Infrastructure Service's budget. Working Together for the Highlands - The Programme for The Highland Council for 2012 to 2017 included a commitment to review this spending. This review was carried out in 2012/13 with a report and recommendations presented to and accepted by the Council's Planning, Environment & Development Committee on 13 March 2013. That element of the Council's tourism support has therefore been excluded from this review.

2.2 The main recommendations from the 2013 Tourism Review are as detailed below. A further column has been added detailing the current situation with the activity concerned with this all being delivered directly by the Council's Tourism & Film section.

Area of Spend	Recommendation	Current situation
Highlands & Islands Tourism Awards	Continue sponsorship at similar level to present but explore options for partnering with other local authorities.	Sponsorship continues but no other local authorities have come on board.
Cruise promotion and welcome	Ports to cover costs of promotion as they can recoup this from berthing fees. Continue Civic Welcome for maiden visits.	Promotion continues but has been undertaken jointly with ports. Civic Welcomes continue to be arranged.
Tourism Seminar	Explore options for how event could be improved or expanded. Continue to provide some funding at a similar level if required.	Seminar has now evolved into a larger Highland Tourism Conference held in partnership with VisitScotland and other partners.
Research	Continue research required for reporting purposes. Support other research when considered appropriate.	Annual Highland wide research continues to be gathered along with less frequent sub- area research
Business development workshops	Continue to offer programme of workshops with as wide a range offered as possible, subject to demand from tourism industry.	Some workshops supported through Service Level Agreements with Destination Organisations. Conference also includes workshops.
Destination Development Organisations	Continue to support destination development organisations to at least the current level. Where possible increase the level of funding. Enter into a service delivery agreement with each organisation, specifying activities to be delivered.	Annual Service Level Agreements in place for each year since 2013. Council officers work directly with Destination Groups on projects.
Set up of new groups	Continue funding where considered appropriate.	Set up of two new groups (Black Isle and a Highland Golf Group) supported. Preparatory work for Nairn also supported.
Feasibility studies	Continue funding where considered appropriate.	No studies supported since 2013 review.

Local marketing initiatives	VisitScotland Growth Fund is main source of funding marketing so only support in exceptional circumstances.	No marketing activity directly supported since 2013 review but Service level Agreements with Destination Organisations recognise that they will undertake marketing activity which is commonly VisitScotland funded.
Local tourism events	Support on a more strategic basis by incorporating these into Service Delivery Agreements with Destination Organisations.	Some events supported through Service Level Agreements with Destination Organisations
VisitScotland Regional Marketing activity	Maintain or where possible increase the level of spend.	Funding allocation for marketing activity has been maintained in absolute terms (proportionally increased) in 2013/14, 2014/15, 2015/16 and 2016/17 Service Level Agreements with VisitScotland.
Visitor Information Centre network	Continue to provide the level of support required to operate the category 2 VICs and, in conjunction with VisitScotland, embark on a process of finding alternative solutions to the provision of information elsewhere.	Levels of support have reduced since 2013 due to budget pressures. VisitScotland are now rolling out a new method of provision nationally that sees public sector support for strategic locations and wider private sector / community provision elsewhere.
Events	Continue approach of only providing event funding through the Education Culture and Sport Service but ensure that tourism impact is considered as scoring criteria.	Events budget was transferred to Tourism & Film Section and is now focussed on only key international events. In recognition of this change some elements of event support are included in this review.
Conference Support	Provide matching funding where there is no alternative source of match funding.	Support provided to four conferences – 1 each in Aviemore, Dornoch, Fort William & Inverness.

3. Strategic Context

- 3.1 In June 2012 a new Tourism Strategy *“Tourism Scotland 2020 - a strategy for leadership and growth”* was launched by the Scottish Tourism Alliance with an ambition to grow visitor spend by £1bn by 2020. Having been developed by the private sector it is described as *“a strategy for the industry, by the industry”* but it is also endorsed by the Scottish Government and its agencies. Indeed, since the launch of this strategy there has been greater alignment of tourism strategies across Scotland and with other key strategies such as Scottish Government Economic Strategy as well as significant improvements in collaboration between stakeholders.
- 3.2 In early 2016 the Scottish Tourism Alliance, who are responsible for coordinating delivery of the strategy on behalf of the industry, undertook a mid-term review, with the findings announced at Scottish Tourism Week in March 2016. While the review showed limited progress in some areas, the Tourism Leadership Group – the industry group responsible for delivery stated that *“together with public sector partners and Scottish Government (the Tourism Leadership Group) is confident that with firm foundations now in place and continued support, alignment and collaboration, the sector is in a strong position to collectively deliver the 2020 vision.”*
- 3.3 A consistent finding from the Review was however, that in order to accelerate growth to 2020 there was a need to prioritise. At a national level the four priorities were agreed as:
1. Strengthen Digital Capabilities
 2. Strengthen Industry Leadership
 3. Enhance the Quality of the Visitor Experience
 4. Influence Investment (specifically flight access & transport connectivity, built infrastructure, digital connectivity and business growth finance).

Whilst the Council may have some influence in the delivery of all of these priorities, a number of Council services are of particular importance in delivering priorities 3 and 4 from this list.

- 3.4 Through the Highland Tourism Partnership (the partnership which brings together tourism industry representatives and the main public sector organisations involved in tourism) a Highland Tourism Action Plan was produced to outline the main actions that are required to deliver the national strategy’s objectives in the Highlands. The Council’s Planning Environment & Development Committee on 12 February 2014 subsequently recognised the Highland Tourism Action Plan as the strategic document that outlines the priorities and activities that will be undertaken to grow tourism in the Highland area between 2014 and 2020. This plan saw a focus on three key areas of activity:-
1. Marketing
 2. Improving the tourism product
 3. Advocacy and collaboration

As with the national priorities described above, the Council may have some influence in

delivering activities under any of these themes. Of particular importance is the Council's role in delivering priority 2 bearing in mind the Council's responsibility for elements of the tourism product such as roads, related infrastructure such as parking and signposting, a number of Countryside sites and facilities, and activities such as protecting public access to the Countryside.

Part 2: Methodology

4. Methodology

- 4.1 The nature of Highland tourism is such that a wide range of Council services may have an impact on the industry. However, there will be many situations where a service is delivered primarily for the local population but has a spin off benefit for visitors e.g. a play park or where any impact on tourism or the tourism industry is particularly minor. For the purposes of this analysis the Council services that have been reviewed have been selected on the basis that they are considered to have a reasonably significant impact either on tourism businesses / the Highland tourism industry or on visitors themselves.
- 4.2 To minimise the degree of subjectivity in the selection of services to review their selection has been directly informed by previous comments that have been received by the Council from destination organisations, businesses in the tourism industry or directly from visitors. Visitor feedback gathered by VisitScotland has also been used to assist in selecting the services to review.
- 4.3 In undertaking the analysis 5 different elements have been considered and are described for each individual activity or service reviewed.
1. The current method of delivering the service
 2. What, if any, issues have been raised by the tourism industry or visitors
 3. Examples of good practice from elsewhere when / if any are known
 4. A recommendation on whether the service should be continued as at present or whether any changes could be made to offer an improved service
 5. Any implications that any changes suggested might have

Part 3: Analysis & Recommendations

5. Council Services impacting on tourism businesses and the Highland tourism industry

5.1 Business support

Current method of delivery

The Council provides support to businesses across all sectors, including tourism businesses through the Business Gateway Service - now being delivered directly by the Development and Infrastructure Service. This service is free and is provided through a local network of business advisers based across Highland, a national website and a national contact and enquiry centre. While the Business Gateway Service is offered and promoted as the “one door” into an important portfolio of business interventions and business support and can direct businesses to more specific support on certain matters, some businesses will on occasion also seek specific advice directly from specialists such as trading standards officers.

The Council has been successful in attracting additional funding from the European Regional Development Fund (ERDF) towards a programme of support for businesses known as the Local Growth Accelerator Programme. This programme gets under way and will deliver additional growth services to businesses in the Highlands from the final quarter of the financial year.

The Council also provides sector specific support to the tourism sector (primarily to business groups rather than individual businesses) through the work of the Tourism & Film section. A review of this work was undertaken in 2013 and the main recommendations from this review and current work related to these recommendations are summarised in section 2.2 above.

Issues

While the Business Gateway service is used by a number of tourism businesses the support normally offered is not sector specific and there are instances where more specific support is sought by the sector.

Most areas of the Highlands are covered by a Destination Organisation that undertakes a range of tourism activities ranging from promotion of their area to improving the tourism offering. As a part of this the destinations are often keen to offer some forms of support to their member businesses such as workshops on subjects relevant to the sector but these organisations do not always have the expertise, resources or contacts to be able to offer such a service.

Examples of good practice

In 2012/13 the Council partnered with Business Gateway and a number of Destination Organisations to run a series of workshops specifically for tourism businesses which was part funded by the LEADER programme. This capitalised on Business Gateway's expertise and access to presenters along with the destination organisations' ability to attract businesses to the events. While the initial series was successful and further tourism workshops have been rolled out to a limited degree since then the lack of match funding has proved to be a barrier to meeting industry expectations.

Recommendation

In recognition of the fact that the tourism sector is the Highlands largest sector yet one that is made up largely of small businesses who may have limited access to other forms of business support, it is proposed that the Council work more closely with the Destination Organisations to deliver locally based tourism specific workshops. At least some elements of this work could be undertaken as part of the ERDF funded Local Growth Accelerator Programme.

Implications

Council funds which are matched by ERDF funding have already been allocated to deliver the Local Growth Accelerator Programme until late 2018. However, recent uncertainty over European funding following the UK decision to leave the European Union mean that at the time of writing a degree of uncertainty still exists over how this may be extended beyond 2018. The loss of access to EU funding whenever that happens will have implications either on the level of funding that would be required from the Council's own resources or for the level of service that could be offered.

5.2 Planning policy

Current method of delivery

It is not within the remit of this review to make recommendations on planning policy but it is considered relevant that the tourism industry have an input into developing planning policy. While the Council does consult widely when producing development plans, input from the tourism industry is often limited. The normal consultation process includes making direct contact with statutory consultees and organisations such as community councils but consultation with others is largely done on the basis of inviting the public to engage or respond e.g. through attending events held locally or responding to draft documents.

Issues

Despite the tourism industry being the most significant industry in Highland there is some anecdotal evidence that the often fragmented nature of the industry, comprised

largely of numerous small businesses, mean the industry has a more limited degree of involvement in the development plan process than might be expected.

Examples of good practice

In a Highland context Inverness City Centre Business Improvement District (BID) and Visit Inverness Loch Ness - the local Tourism BID have both played a part in the consultation on the development of a new Inverness City Centre Development Brief. To some degree this is related to the fact that these groups were invited to a small, informal, collaborative workshop.

Recommendation

It is proposed that the Council considers taking a proactive approach to getting tourism industry input to development plans and where appropriate other related plans such as local or regional transport plans. In recognition of the number and nature of the businesses that comprise the tourism industry this is likely to be most easily achieved by specifically inviting the local destination organisations to participate on behalf of their members.

Implications

No particular implications for the Council that would arise from the recommendations made have been identified.

5.3 Tourism signposting

Current method of delivery

Brown tourist signs are designed to provide clear and consistent directions to enable visitors to reach tourist destinations safely by car and minimise the risk of dangerous manoeuvres. National traffic sign legislation defines what can be classed as a tourist destination and recognised destinations are responsible for any application for signs and the cost of any brown signs directing visitors to their premises. The normal process involves VisitScotland providing an accreditation letter confirming eligibility to apply for signs after which the applicant will approach the relevant roads authority to apply for signs.

Transport Scotland is responsible for dealing with applications to erect signs on trunk roads where a destination takes its access directly from the trunk road. If access is from a local road this is the responsibility of the local authority roads department who also take the lead on applications where a sequence of signs to a destination commences on a trunk road but the final access to the destination is from a local road.

Once an application is made to the Council, the Council co-ordinates the application process and can offer guidance with queries relating to sign location, number of signs, costs, timescales etc.

Issues

The application process and the style of content of brown signs is defined in national guidance and national traffic legislation respectively and as such the Council's ability to make changes to these is extremely limited. However, there has been feedback from the tourism industry that the time taken to go through the process is too lengthy. In some cases this will be due to the complexity of an application but there are instances where lack of capacity within the Council causes delays.

Examples of good practice

No particular example known.

Recommendation

The need to take into consideration aspects such as road safety will always require the roads authority's involvement but there are elements of the process that could be opened up to third parties to help speed up the process. A number of commercial operators already manufacture and erect road signs to the required specification on behalf of roads authorities and could be involved more, subject to appropriate safeguards. The Council should consider a system where approval for signs could be given by the Council but further elements of the process such as sign design, manufacture and erection could be undertaken by approved contractors who operate within an agreed set of standards.

Implications

As the Council already has to undertake the approval process described this element would not require any additional resources in relation to an individual application and indeed there may be fewer resources required if approved contractors undertake some elements of the work. There may however, be a one off resource implication in terms of setting up such a system. From a wider perspective positive implications would include a faster process for applicants and increased commercial opportunities for local businesses who became approved suppliers.

5.4 Event support

Current method of delivery

The Highland Council itself does not directly deliver any events although in Inverness a number of events are delivered by the City's Common Good Fund which the Council administers e.g. Inverness Hogmanay and Inverness Highland Games. The Council has also provided some grant aid to the major international events that are / have been held in the Highlands such as the annual Mountain Bike World Cup in Fort William, the Scottish Open Golf near Inverness and the World Orienteering Championships held in a number of Highland locations in 2015.

A large number of other events also take place across the Highlands and with many of these Council services can either be involved in supporting the event in some way or Council services can be impacted upon by these events. In some cases these services are engaged at an early stage e.g. an event organiser making an approach seeking a licence, advice or assistance with a traffic management plan or permission for a road closure. However, there are other instances where the Council's involvement may be following an event, such as litter collection or street cleaning. In most, but not all, cases this involvement will be planned in advance.

For some of the major events such as the Scottish Open Golf or Inverness Hogmanay the Council takes a proactive approach, convening a multi-agency group with the organisers and other partners such as the police, ambulance service or trunk roads authority to help plan for the event.

Issues

The additional preparations made for major events has tended to mean there have been few issues, and indeed some such as the 2015 World Orienteering Championships were described as the best ever by organisers. However, this is not always the case with all events and some of the feedback from the events industry has indicated areas where they believe the Council could be more supportive:-

- Considering the wider benefits that an event might bring to a community or area rather than simply considering the cost impacts on the Council.
- Taking a consistent approach to dealing with requests for road closures etc. with the current situation being that some local areas are more supportive than others.
- Being more open to having some events in High Street type locations which organisers feel could create a more positive "buzz" to the host town as well as increasing footfall for local businesses.
- Charging policies – these appear inconsistent with some events put on by charities being offered free use of public spaces whereas commercial operators had to pay. In some cases these charity events use a commercial event organiser and the charity benefitting may be a national or international one which gives limited evidence of local benefits that would justify such discounts.

Examples of good practice

Within Highland the multi agency approach used for major events in and around Inverness is considered best practice – indeed after the Scottish Open Golf was first held in Inverness and this approach was used, the European Tour looked at using this approach elsewhere.

Elsewhere in Scotland, Perth & Kinross is seen as an area that is particularly supportive of events, not just through those involved in attracting or funding events but by trying to embed a culture of being supportive to events across all its Services. A good example of this is demonstrated by a Highland based event organiser running an event in Perth &

Kinross who was seeking use of a public car park in a Perthshire town. On approaching Perth & Kinross Council to see if use could be made of a car park as an event centre, rather than the event organiser being asked to pay the equivalent to lost parking income the Council instead offered free use of the car park as the event would bring a significant number of people to the area. As a spin off from this the Council recognised that many of the additional visitors would use other paid car parks which could offset at least some lost income.

Recommendation

In view of the success of the multi agency approach it is proposed that consideration is given to rolling out this approach to a wider range of events where it is considered this could be beneficial. This could simply be coordinating some lower key stakeholder engagement and could help other areas draw on the existing expertise gained by the Inverness Common Good Fund funded events officer. It is recommended that the Council also consider taking a consistent approach to areas such as charging for the use of public space for events and that charging practice and decisions on usage of public spaces should reflect the wider benefits an event might bring to the community as well as considering the direct impact on the Council.

Implications

The increased use of a multi-agency / stakeholder type approach is likely to have some initial implications in terms of staff involvement although this would arguably be offset by better advance planning by organisers that limits last minute requests and leads to smoother running events. Charging practices that reflect the wider benefits an event might bring to the community could potentially mean offering use at a lower or zero cost to organisers which would impact on Council income. However, there could be opportunities to offset this by generating alternative income – for example, another public space could be used as official event parking with the participants / spectators charged for parking rather than the event organiser.

6. Council Services impacting directly on visitors

6.1 Maintaining the urban public realm

Current method of delivery

Most visitors to the Highlands will spend at least part of their trip in either the City of Inverness or in one or more of the towns or larger villages in the Highlands and as such the level of maintenance of what could be described collectively as the “urban public realm” can have an impact on the quality of their experience. This will include elements such as the condition of roads and footways, street cleaning, provision of and frequency of emptying of litter bins and the maintenance of parks, gardens and floral displays. The method of delivery of such services is not done in the same manner across the area – and deliberately so as different locations will have differing conditions e.g. weather

patterns, differing levels of use and different seasonal patterns as far as visitors are concerned. At a local level some particularly good examples of flexibility exist such as the timetabling of grass cutting to fit in with the Scottish Open Golf being held in Inverness.

Issues

While media coverage can often suggest that there are significant issues such as litter the reality is that these often come from residents rather than visitors. Such subjects are rarely mentioned in Visitor Feedback. An analysis of complaints concerning Highland received from visitors by VisitScotland over the 5 years to the end of August 2016 showed that of 2167 complaints only 9 related to either “General Scottish Experience” or “Standard of / access to public facilities”. As Highland prides itself as an area with a high quality environment including in its towns and villages, it will be important to ensure adequate resources and / or alternative methods of provision are in place to maintain standards.

Additionally there can still be issues that arise at certain times. While overall seasonal patterns of service are generally put in place these are not always able to cope with short term or unexpected peaks in demand. In some cases these situations may relate to a specific event that could be predicted while other instances the pressures may be unpredictable. As an example, Skye saw visitor numbers in summer 2016 that by some accounts haven't been seen for over 20 years yet there was no real indication prior to the season that this was likely to be the case and this can put a significant strain on services. Such unexpected situations can mean that plans such as those defining the frequency for the emptying of litter bins do not match the demand. Even where spikes in demand are predicted, many resources (including both staff and equipment) are already being used at capacity meaning the ability to respond to short term increases in demand is limited.

Examples of good practice

Some good examples exist across Scotland of communities taking on a role in ensuring a high quality public realm in their community. The most common examples are where a community has taken on some degree of responsibility for floral displays such as has happened in Alness whose floral displays throughout the community led to them being frequent winners in national floral competitions. Similar examples at a smaller scale are evident where a specific site is maintained by volunteers such as the Natal Gardens in Invergordon, a site often visited by cruise passengers.

Recommendation

It is proposed that further consideration be given to whether some “softer” elements such as maintaining floral displays could be undertaken by communities – perhaps with some level of ongoing support from the Council. Commercial sponsorship of some displays such as those on roundabouts is already offered in some locations and there may be the potential to widen this to allow for example a significant tourism business in an area to use this as a form of promotion.

Bearing in mind the impact that things like larger events and cruise ship visits can have on the numbers of visitors in a community at certain times it is also proposed that those in the Council involved with these events / visits ensure that relevant other services get suitable advance warning to allow variations to services at these times to be considered and factored into service planning.

Implications

This is an area that is very staff resource dependent so any improvements or even the ability to maintain current levels of service will be heavily dependent on adequate resources being allocated.

Where community involvement is considered as an alternative way of providing the service there may be a need to work with a community to ensure it has the capacity in terms of personnel, other resources and skills to be able to deliver the service – as poor service will have reputational risks for both the local / Highland tourism experience and industry and for the Council.

6.2 Maintaining the rural public realm

Current method of delivery

As described above for urban areas, most visitors to the Highlands will also spend a part of their trip in the Highland countryside. Indeed, visitor research undertaken by VisitScotland shows that this is what attracts most people to the Highlands. The most recent comprehensive visitor survey carried out in 2011 showed that the key motivator for visiting the region was scenery/landscape with 57% of visitors coming for this reason. Once in the area the most popular activity was taking a short walk (54%) with long walks (41%) and visiting a beach (35%) also scoring highly emphasising the importance of different parts of the countryside and the facilities that give access to it in providing a good quality visitor experience.

Most rural land is not the responsibility of the Council but instead is owned / managed by either private landowners or in some cases communities or other public or third sector organisations. However, the Council is responsible for a number of specific sites that are of importance to visitors while also having responsibility for some areas of activity even on land owned by others – for example, as the access authority. The main Council services provided in rural areas that are of relevance here are:

- Maintenance of around 200 countryside sites, parking and picnic areas. This includes some elements of minor maintenance and repairs carried out by Countryside Rangers (which can avoid the need to go through a contracting process that for minor works would often be longer and more costly.)
- Protecting the public right of responsible access under the Access legislation and guided by the Scottish Outdoor Access code.
- Management of formally designated Long Distance Routes such as the Great Glen Way.

In some cases the Council is already working with communities to try and develop new

ways of delivering some of these services, for example, the Projects and Facilities Team is working closely with the Staffin Community Trust in developing proposals for greater community involvement at Storr Woodlands.

Issues

There is no evidence from either visitors or the tourism industry of significant problems at the majority of Council managed sites but a small number of sites do experience a level of demand that the site struggles to cope with, particularly at peak times. Notable amongst these are Storr Woodlands and Neist Point on Skye and Chanonry Point on the Black Isle.

A number of sites that are not Council owned also experience similar issues, for example the Quiraing and the Fairy Pools on Skye, Rogie Falls and a number of hill walking trail heads. Capacity issues at such trail head sites can have a knock on effect on Council services as they often lead to issues such as inappropriate parking on the public road or littering. While it is too early to be certain of the impacts there are also indications that some sites on the increasingly popular North Coast 500 (both Council managed and others sites) are seeing increases in usage levels that may create similar problems in future.

The most significant issue for the Council is not one that is specific to current provision at any given site, but rather that the Council is responsible for too many sites for these to be suitably maintained with the current level of resources. Allied to this is the fact that there is a degree of expectation that the Council should also be involved in resolving issues even where these are not related to Council sites.

Examples of good practice

Within Highland there are some good examples of where the Council has allocated more significant resources to improve a site rather than simply maintaining it at the current level which has led to a vastly improved visitor experience. Path and access improvements at Smoo Cave, Durness a number of years ago and the work at Chanonry Point earlier in 2016 are good examples of this but while they address quality issues they do not always resolve capacity issues.

Good examples also exist of Council officers taking on a more proactive role in addressing issues that arise on land that is not Council managed. For example, access officers have taken on work beyond their statutory role to resolve practical issues such as the poor quality of the path to Skye's Fairy Pools which ultimately led to funding being sourced for the building of a new path. Another example of a more innovative approach has seen emerging issues over mountain bike access in Torridon partly resolved by the access officer engaging with both landowners and users leading to a system where the users contribute volunteer time to help maintain the trails they use.

There are numerous examples across Scotland of community led projects and / or community managed sites that are designed to support local tourism (as well as

delivering other community benefits). Good examples in Highland include Abriachan Forest Trust which includes facilities including community managed paths and mountain bike trails and the Isle of Eigg Heritage Trust whose subsidiary Eigg Trading Limited owns and manages the community building An Laimhrig which in turn offers a range of visitor services. Further afield examples such as Balkello Community Woodland near Dundee has seen a community owned facility attract significant events such as a national junior orienteering event in June 2016.

Recommendation

On the basis that the most significant issue limiting the Council's ability to provide a high quality service on its sites is one of trying to manage too many sites with limited resources, addressing this issue is fundamental. This in turn should lead to provision of a smaller number of high quality sites rather than a broad range of "average" sites. It is therefore proposed that consideration is given to the disposal of sites that have limited relevance to the Council, while sites that remain in Council ownership see priority given to capital investment on the key tourism sites.

Implications

The existing portfolio of sites already has significant resource implications for the Council. The proposed recommendation given would help reduce long term resource demands although in the short term there could be one off costs or staff resource implications related to disposal transfer of other sites. Where community involvement is considered as an alternative way of providing the service there may be a need to work with a community to ensure it has the capacity in terms of personnel, other resources and skills to be able to deliver the service.

6.3 Roads and Parking

Current method of delivery

In general terms the Council provides a network of roads and parking in selected locations for a range of users of which visitors are only one. Few services are offered specifically for visitors as in most cases visitors needs are the same as those of local users but an exception to this is catering for Motorhomes and Caravans where dedicated parking facilities are provided in a few locations. Parking charges are levied in a small number of locations, primarily in the larger settlements.

Issues

The National Caravan Council (NCC) reported that new motorhome registrations in the UK more than doubled between 2000 and 2007 to over 11,000 per annum. Despite the period of recession that followed, registrations have continued at a rate of over 7,000 new registrations per annum since then with similar patterns also reported from other European countries. Allied to the increasing numbers is an increase in size of many of these vehicles which can have an impact on roads and demand for parking.

Road issues are most likely to relate to single track roads where passing places can be quite small or manoeuvring more difficult – an issue that is often exacerbated with hired vehicles which the driver may be less familiar with.

Parking issues can be considered to fall into two very different sets of circumstances – daytime parking and overnight parking. With daytime parking there are clear seasonal patterns with more problems being evident in peak summer but also geographical variations with certain popular destinations such as Aviemore, Fort Augustus, Kyle of Lochalsh and Portree seeing greater levels of demand. As well as capacity issues in some locations that affect all types of vehicles, another common issue is a lack of suitably sized parking spaces to cater for the level of demand from motorhomes.

Overnight parking issues tend to relate to the use (and sometimes abuse) of areas used for parking by motorhomes where the visitor has chosen not to stay on a recognised caravan and camping site. While many modern motorhomes have on board facilities such as toilets and the vast majority of visitors do behave responsibly there are some instances of inappropriate behaviour such as littering or illegal emptying of waste outside recognised sites.

Examples of good practice

As far as providing suitable daytime parking for motorhomes is concerned there are some excellent examples in Highland such as the An Aird and West End car parks in Fort William where larger marked bays are provided and signposted.

Overnight parking, described by some motorhome owners as “wild camping”, can be a sensitive issue with differing views as to whether this is depriving recognised sites of business or whether the ability to do this actually attracts more people to the area who may not otherwise have visited. This debate is not unique to Highland, or indeed to Scotland and examples of how it has been addressed can be found in many countries. The continental system of “Aires” sees overnight parking areas provided along main routes or at the edge of communities (often those without caravan or campsites) to encourage motorhome visitors to stop overnight and use local businesses for eating out, shopping etc. Basic services such as electricity and water are sometimes provided at a small charge and stays are often limited to one or two nights so they are considered more as transit stops rather than holiday destinations. Examples are beginning to be seen in the UK with local authorities directly involved in encouraging similar facilities in Northern Ireland while closer to home community efforts have seen a similar initiative in Glenlivet. In this instance visitors can use part of the grounds behind the hall and get access to the hall toilets and showers for a small fee with the proceeds going to the maintenance of the hall. Locally this is seen as an important contribution to a fragile area as it keeps people in Glenlivet where they can spend in the local shop, eat out etc. rather than them moving on to better known tourism destinations nearby such as Braemar or Aviemore.

Recommendation

Consideration is already being given to introducing parking charges at further locations in Highland with some of those being considered likely to be locations popular with visitors. With such charges being common in many other popular destinations this is unlikely to be detrimental to tourism but it is proposed that consideration be given to whether some visitor passes might be made available that would offer parking at a number of sites in a given area or perhaps on a recognised route.

For any upgrades and new parking developments it is proposed that consideration be given to the likely demand for motorhome parking so suitable allocations of space can be made, ideally complemented by signage to direct users to the most appropriate locations. Where new developments or upgrades are not planned consideration should be given to whether other provision might be possible - for example, some communities that experience the above problems may have a local school with a tarred playground that is unused for most of July and August when demand is highest and consideration could be given to using these for motorhome parking with charges levied to offset costs.

As regards overnight parking it is unlikely that the Council would wish to pursue the idea of Council run facilities because of the potential competition with private sector caravan and campsite providers but where a community is interested in having such a facility consideration could be given to supporting such community developments.

Implications

With daytime parking provision there would be costs related to providing new motorhome parking bays in existing locations although including such provision in any new developments is unlikely to add to the development costs. In terms of income, there could potentially be a loss of income from having space for fewer vehicles - although this could be offset by higher charges for larger vehicles.

In view of the potential or perceived conflicts related to overnight parking described above there could be competition related implications in some locations, for example, in a community with an existing caravan and camping site although this may not be an issue in other locations with no such facilities nearby.

6.4 Public toilets

Current method of delivery

The Council currently operates 102 facilities across the Highland area with a further 27 Comfort schemes where others provide a service on the Council's behalf. These range from fairly dated basic facilities through to good quality modern facilities built or refurbished in recent years and including a number that have received recognition in the national "Loo of the Year" awards. The geographical spread of public toilets is to an extent the product of historic factors which can mean some locations have no public toilets where today's visitor numbers might suggest a need, while other locations may have underused facilities or have alternative suitable facilities provided by another

business or organisation nearby.

Issues

In some locations patterns of use are fairly steady making management simpler but there are other locations which see seasonal peaks or indeed even daily spikes in demand that make management more problematic. Notable instances of this are in areas with large numbers of coaches visiting or towns where a cruise ship's visit can put significant numbers of additional visitors in the town on a given day. This is less of an issue with ports such as Invergordon where ships come alongside making it easier for passengers to go aboard but greater difficulties arise in places such as Portree (and probably in future Fort William) where passengers are reliant on a tender running a shuttle between the ship and the shore. A good example of the pressures that can arise comes from Portree where a footfall counter recently installed at the entry to the female toilets showed that a daily average of 2000 people were using toilets designed for 300 during August 2016 with much of this related to Cruise visits.

Seasonality can also be an issue in some more rural areas where the level of demand means it is not economically viable to keep toilets open in winter (particularly where there are additional weather risks such as frost damage) but where there will still be some visitors. An emerging example of this would be in some of the smaller communities along the route of the recently created "North Coast 500" where businesses are reporting a gradual increase in off season visits but where numbers are unlikely to justify all year opening. In some cases visitors may expect a facility to be closed for the winter, for example at a beach, but alternatives are not always promoted and this element of the service could be improved.

Examples of good practice

One way of addressing issues that has been taken forward in South Ayrshire has been to rationalise the provision in settlements with multiple facilities in relatively close proximity so that instead of two facilities of an average standard, one higher quality facility is offered.

A number of community organisations across Scotland manage public toilets in their communities with good examples in the Highlands such as Kyle of Lochalsh where the community has managed the service for a number of years. In some lower usage locations good examples exist of facilities being provided with multiple uses in mind – for example, the village halls in Invermoriston and Invergarry include toilets that are also available to the public even when the hall is not being used.

A new form of waterless toilets have been used in Cornwall in locations where there are issues with aspects such as water supply or drainage and plans are in place to trial this approach in Highland.

Other examples exist of private businesses making their facilities available to the general public for example in Pitlochry where a number of premises are signposted as offering "publicly available toilets". As well as providing a public service this can provide business benefits by increasing the footfall in the businesses that provide the service.

Recommendation

Through Community Services the Council is currently undertaking a review of public toilet provision which will consider aspects such as alternative provision, charging options including contactless payment, use of newer types of low maintenance / waterless provision in suitable locations and rationalisation in settlements that have multiple sites.

While it is important that this review does not seek to prejudge the findings of the Community Services review it is proposed that that review should consider the following factors to ensure visitor needs and new opportunities are addressed:

- Expected tourism demand drivers such as cruise visits to certain locations or further development / promotion of routes such as the North Coast 500.
- Options for arrangements with community groups and / or private sector facility operators - particularly in lower usage locations.
- Whether this approach might be encouraged through enhanced signposting, one-off setup support and / or reducing revenue support.
- How an improved off-season service might be provided by promoting nearby alternatives when some facilities are closed.

Implications

Current costs of operation average over £11,000 per annum for each Council facility but with a further 35% reduction in the budget for such facilities proposed for 2017/18 there will likely be a need to close some facilities unless other sources of funding and / or other methods of provision are found. Potential negative implications include the likelihood of an increase in human waste issues particularly behind closed public toilet buildings. A more positive outcome of some of the likely changes could be increased footfall for businesses that make their facilities available which in turn could improve the viability of some rural businesses.

6.5 Marine facilities

Current method of delivery

The Council currently operates a large number of marine facilities including harbours, piers, slipways and moorings. In many cases these are predominantly used by local people for business purposes such as fishing, aquaculture or even ferry transport but there is use of some locations by visitors. Two main forms of visitor use can be identified – use by visiting yachts or similar craft and their crew and use by visiting cruise ship passengers. Charges are levied at a number of sites at published rates that vary depending on the scale of usage. In the case of visiting cruise passengers the Council also offers a wider service that recognises the immigration and security needs related to such visits.

Issues

No specific issues have been identified related to past provision of services for visiting

yachts. However, in view of the fact that the recently produced National Strategy for Marine Tourism identifies this as one of the areas with the greatest growth potential and the fact that the most significant benefits could be provided to some of the more fragile areas of Highland, it is appropriate that opportunities to develop this element of the Council's services are considered here.

In terms of visiting cruise ships only a small number of Council operated sites are affected, most notably Portree but also on a more occasional basis locations such as Gairloch, Raasay and Fort William where the community is keen to see this developed further. The size of most visiting cruise ships combined with the nature of the harbour facilities the Council manages means that anything other than the smallest cruise ships cannot berth alongside but instead anchor offshore with passengers taken ashore by tenders. Some congestion issues can be apparent (particularly in Portree related to the numbers of passengers coming ashore, the need for coach parking and marshalling before shore excursions depart) in part because other legitimate uses of the harbour and / or adjacent road may be taking place at the same time. There are also reports of a lack of toilet facilities at the pier with this being particularly evident with passengers returning to the pier after their visit but having to wait some time before being tendered back to the ship.

Although harbours can be an entry point to a community for cruise or small craft passengers (in the same way as rail or bus stations or car parks are for other visitors), there is rarely signage or information supplied at harbours in the way it often is at other entry points.

Examples of good practice

A number of areas of Scotland have seen harbours or other marine facilities taken over by community groups. Community involvement ranges from fairly large scale examples such as Portpatrick in Dumfries & Galloway where a charitable trust, the Portpatrick Harbour Community Benefit Society, operate as a harbour authority to smaller scale initiatives such as installing and managing pontoons or moorings – often undertaken by a local moorings association as has happened in places such as Lochaline or more recently Fort William.

Recommendation

It is proposed that certain key harbours are considered in a similar way to other entry points to communities and, as such, consideration is given to whether this in turn creates a demand for better facilities or signage. Consideration should be given as to whether communities might play a part in the operation of some facilities.

Implications

The operation of marine facilities can be a very complex area with significant legislative requirements which can mean a community organisation taking over certain types of facilities or responsibilities may have to comply with standards such as the Port Marine

Safety Code. This in turn can make it difficult for organisations to operate in a commercially viable way or could result in the Council having to retain some liabilities and the related costs which might outweigh any advantages gained.

6.6 High Life Highland Facilities

As described in section 1.3 a number of other services that are also important in helping to develop tourism are now provided by Highlife Highland. As a contract is already in place defining the services to be provided they are not directly considered in this review. However it is recommended that consideration is given to undertaking a similar analysis of these services when this contract is next reviewed.

Part 4: Summary of Recommendations

Ref.	Service	Recommendation
Council Services impacting on tourism businesses and the Highland tourism industry		
5.1	Business Support	The Council should work more closely with the Destination Organisations to deliver locally based tourism specific workshops.
5.2	Planning policy	The Council should consider taking a proactive approach to getting tourism industry input to development plans and other related plans.
5.3	Tourism Signposting	The Council should consider a system that would allow more of the process to be undertaken by approved contractors operating to an agreed set of standards.
5.4	Event support	The Council should consider greater use of the multi-agency approach to events. The Council should consider taking a consistent approach to areas such as charging for the use of public space for events that also reflects the wider benefits to the community.
Council Services impacting directly on visitors		
6.1	Maintaining the urban public realm	The Council should consider whether some “softer” elements could be undertaken by communities – perhaps with support and whether more commercial sponsorship opportunities exist. The Council should ensure that relevant services get suitable advance warning of cruise visits, events etc. to allow variations to service to be factored into service planning.
6.2	Maintaining the rural public realm	The Council should consider some rationalisation of sites to ensure the provision of high quality sites Some prioritisation of capital investment on key tourism sites should be considered.
6.3	Roads & Parking	The Council should consider visitor passes as part of any parking charge changes. The Council should consider suitable allocations of space, improved signage and possible temporary use of other Council sites for motorhome parking. The Council should consider supporting community developments for motorhome overnighting where considered appropriate.

6.4	Public Toilets	The current Council review of public toilet provision should consider the needs of visitors by including expected tourism demand drivers, options for arrangements with community groups and / or private sector facility and the promotion alternatives when facilities are closed.
6.5	Marine Facilities	The Council should consider improved recognition of harbours as entry points to communities and whether communities might play a part in the operation of some facilities.
6.6	High Life Highland Facilities	The Council and High Life Highland should consider undertaking a similar analysis of High Life Highland delivered services when the contract defining these is next reviewed.