

ORKNEY TOURISM PARTNERSHIP PLAN

THE STRATEGY

1. INTRODUCTION

The Orkney Tourism Partnership¹ (OTP) has agreed this Strategy and Action Plan (the Plan) for the period from 2006 to 2015, which describes some of the key issues that need to be addressed in order to grow tourism in Orkney. The Plan is based on the outputs from the industry conference and workshops, held on 15th February 2006 at the Pickaquoy Centre in Kirkwall, involving representatives from local businesses and agencies involved in developing and promoting tourism - and on the consultant's report of the process. It will link with the Plans that are being developed by other Area Tourism Partnerships (ATPs), such as Highlands and Aberdeen/Grampian, in order to co-ordinate activity that draws visitors through those areas and into Orkney.

The Strategy maps out the key objectives and priorities for the OTP over the next 10 years and explains the market context, strengths, weaknesses and opportunities for the tourism sector in Orkney. The Action Plan outlines the actions that will be taken by all partners for the first three years and focuses on four themes for action, based on the national tourism strategy:

- Knowing Your Market
- Exceeding Visitors' Expectations
- Marketing Your Product
- Being Sustainable

Many of the action areas outlined in the Plan will be delivered by specific projects or initiatives, which will be developed in detail by the identified lead organisations. A full annual review of the Strategy and Action Plan will be co-ordinated by the OTP and this will form the basis of reports to the Scottish Executive on the activity and progress being made in Orkney to grow tourism on a sustainable basis.

Although public sector agencies acknowledge that they have a key role to play in developing Orkney tourism, the responsibility for delivering innovation and excellence at the front line rests with individual tourism providers and industry groups. The Plan is not intended to be prescriptive and it is recognised that the industry might develop in other directions should appropriate opportunities present themselves.

2.1 MISSION STATEMENT

To continue to develop Orkney as a high quality tourism destination by building on its history, culture, environment and the hospitality of its people.

2.2 WHAT WE AIM TO ACHIEVE

We will:

Continue to deliver a world-class product that exceeds visitor expectations and delivers a consistently high-quality visitor experience, with high standards of facilities, customer service, career opportunities and income levels.

Continue to develop a growing and sustainable tourism sector in Orkney, renowned for its value for money, as well as its respect for the communities and the natural environment that are the centre of its attraction.

Improve collaboration and joint working, both within the tourism industry and with other key sectors in Orkney, e.g. craft, food and drink and transport, in order to facilitate information exchange, sharing of best practice and the promotion of training and skills development.

Ensure that everyone living and working in Orkney understands the value of tourism to the local economy and actively gets involved in growing tourism.

¹The Orkney Tourism Partnership (OTP) comprises representatives from the tourist industry and key public bodies involved in delivering tourism in the Orkney Islands, including VisitScotland, Orkney Islands Council, Orkney Enterprise and Orkney Tourism Group. The group was established in 2005, in order to work together to develop and deliver plans and programmes to grow tourism in Orkney.

Overall, we aim to grow value by about 2% annually, which will be achieved mainly through increases in visitor spend and improved value for money. Visitors will be encouraged to disperse across the outer islands - and the more peripheral parts of the mainland - in increasing numbers, bringing the benefits of tourism to remoter parts of the county.

3. SETTING THE SCENE – WHAT ARE OUR MARKETS?

3.1. Global Context

Tourism is now growing worldwide, despite various adverse factors such as terrorism, pandemics and economic downturns. With this growth comes increasing competition between existing holiday destinations and from emerging and comparatively lower-cost destinations, such as some of the new EU countries.

Trends that are likely to affect the development of tourism include: an ageing population; a 'cash-rich, time-poor society', with more disposable income but less time, and hence an increased propensity towards short breaks; an increased importance on leisure, health and wellbeing, and continuing education; greater and more frequent opportunities to take holidays than in the past; increasing use of the internet to source and book holidays, with a linked rise in late booking; and sustained growth in domestic and intra-regional travel.

Tourism is on track to fulfil the World Tourism Organisation's forecast of 4-5% annual growth until 2020. There is huge competition with over 200 countries now offering a tourism product and many are chasing the same markets. VisitScotland's research on some of the world's leading tourism destinations shows that they:

- Offer a wide product base and good variety of holiday experiences, which offer discovery and experience as key themes;
- Target growing consumer interest in outdoor activities, cities, culture, well-being and business tourism;
- Use native/traditional culture and heritage to differentiate themselves and use special events to boost profile;
- Make heavy use of the internet for promotion;
- Use private/public partnerships to deliver key roles;
- Depend on domestic tourism as well as the international market and campaign to encourage tourist friendly attitudes.

If we want to compete in the global marketplace and become world leaders in tourism provision, then we must learn from this and consider how Orkney compares with this profile.

3.2. Orkney context

Orkney is often marketed together with Scotland, but it competes with destinations in other parts of Scotland for its market share. Tourism is a major employer in Orkney and makes a significant contribution to Orkney's economy. The sector is dominated by small businesses, with a higher rate of self employment and slightly higher rates of new business start-up compared to the rest of the Highlands and Islands.

The following information on existing markets in Orkney is drawn from:

- Survey of Visitors to Orkney 2004/2005: TNS Travel & Tourism, November 2005;
- Tourism factsheet: volume and value figures for 2003, VisitScotland;
- Review of Tourism Accommodation in Orkney 2004, Brian Burns Associates.

Volume and Value:

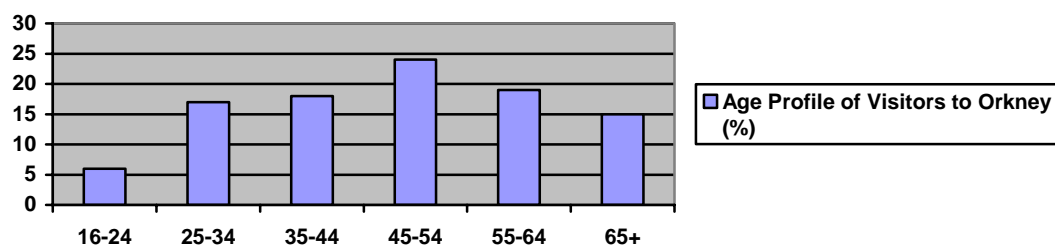
Some 127,200 people are estimated to have visited Orkney in 2004 (this excludes cruise liner passengers). This is close to the target of 128,000 per annum outlined in the 2000-2005 Orkney Tourism Strategy and is a 15.6% increase on the 110,000 numbers that visited Orkney in 2000.

Tourism Value and Volume Figures				
	Orkney 2000 figs	Orkney 2004 figs	HIE 2001-03 figs (3 yr averages)	Scotland 2001-03 figs (3 yr averages)
Trips (million)	0.110	0.127	4.3	19.1
Expenditure (£million)	18	26.6	950	4484
Av spend/trip		£209 £311 incl. travel to Orkney	£215	£208
Av spend/night	£36	£42	£49	£58

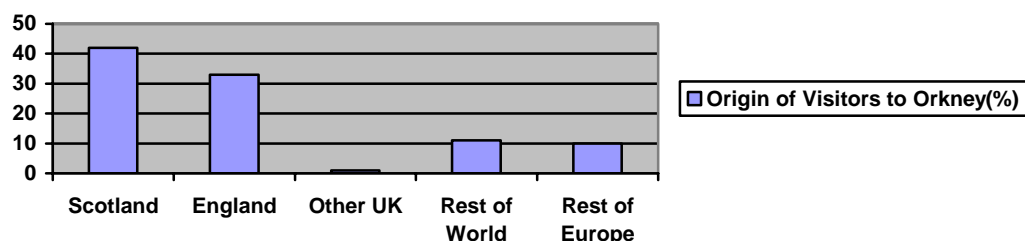
The estimated spend during the period May-Oct 04/05 was £18.9m, a significant increase compared to the £16.5m expenditure estimated for the same period in 2000. Total annual visitor spend in 2004/05 was estimated as £26.6m, an improvement on the target spend of £24m per annum outlined in the last Tourism Strategy. This has been achieved through maintaining the average length of stay and increasing the average daily spend, which has increased from £36 to £42 per person.

Visitor Profile:

The visitor profile for Orkney is very similar to that for the Highlands. Orkney visitors have a relatively old age profile and it has aged over the last 9-10 years. Only 23% of visitors in 2004 were under 35, whereas 42% were in the 35-54 year age group and 34% were 55+.



Visitors tend to be in the higher social classes (67% were ABC1s); the majority (76%) came from the UK, most of those (38%) coming from elsewhere in Scotland. However, Orkney does attract a higher proportion of overseas visitors (21%) compared to the rest of Scotland (9%). Most people were on a holiday or short break (64%) and 21% were visiting friends and relatives (mainly for holidays).



The average party size was 2.2; most people travelled with their partners and only 8% came with children. Visitors stayed for an average of 5.3 bed nights – slightly less than the 5.5 nights spent in the county in 2000, but higher than the target (outlined in the last Orkney Tourism Plan) of holding up to an average of 4.5 nights. Information on the changes in the proportion of visitors to the outer islands is sparse but the visitor survey indicated that of those people spending at least one night in Orkney overall, only 14% stayed on the islands – 86% stayed on the mainland only.

Visitor Behaviour:

The majority of visitors (up to 77%) arrived by ferry, most travelling in cars, with increasing numbers of people bringing their own cars. The highest proportion (27%) of visitors stayed in Hotels, 23% stayed with friends/relatives, and 21% in B&B accommodation.

Approximately three quarters of all visitors surveyed had been engaged in general sightseeing and most visitors had visited at least one of the many sites or buildings of local historic or cultural interest, with over 50% visiting either, or both, St Magnus Cathedral and/or Skara Brae.

Of those surveyed, visiting friends and family was the most frequently cited reason for visiting Orkney (24%), followed by work/business (14%).

The feature that visitors liked most about Orkney was the friendly people (34%); scenery and landscape were also key strengths (mentioned by 30% of all respondents). Visitors to Orkney were largely satisfied by their trip – 60% stated that their visit had met their expectations and 33% said their visitor experience had exceeded their expectations

4. FUTURE TOURISM IN ORKNEY

Research and scenario planning suggests that increasing numbers of visitors will access information and/or book their trip using ICT, through a variety of modes including internet, podcasts etc. and increasingly, they will come prepared with an idea of what they want to see and do during their stay. Ease of booking and getting here will be crucial. Compared to many parts of Scotland, many visitors to Orkney will be older, relatively well-off, better travelled and more sophisticated. Visitors will want self-discovery and chances to try new things. They will be looking for rich opportunities to experience an authentic Orkney and will have interests in outdoor activities, natural heritage and the environment, genealogy, heritage and archaeology, culture and the arts.

The main opportunities for growth could come from the UK market, along with Europe and North America, although Australia and New Zealand may also be important. Long-stay or long-haul markets will still be important and compared with Scotland, a relatively higher proportion of overseas visitors are likely to continue to visit Orkney.

5. STRATEGIC CONTEXT

This (Orkney) Area Tourism Partnership Plan is set in the national context of the national strategy, the 'Tourism Framework for Change'; 'A Smart, Successful Scotland' the Framework for Economic Development in Scotland; and the Sustainable Development Strategy for Scotland, to ensure that there is a sound basis for the priorities and actions outlined within it.

At an area level, the Plan takes account of the priorities outlined in partner strategies, including for example HIE's 'A Smart, Successful Highlands and Islands'; Orkney 2020: the Community Plan; the Orkney Economic Forum's Development Strategy; the Structure and Local Development Plans and Orkney Enterprise's Business Plan 2005/6. The Orkney Arts Strategy, Public Arts Strategy, Heritage Strategy and Orkney Genealogy Tourism Development Strategy were also taken into account.

Other current, or future, points of reference include the strategic regional transport priorities being developed by Hi-Trans, and the Orkney Islands Council Sustainable Energy and Access Strategies. Emerging programmes that build on what is achieved during Highland 2007 and the Orkney Year of Homecomings, will also lend some context to the priorities for culture, events and sport.

Many other national strategies have been considered in the development of this Plan. Among these are the priorities set out by VisitScotland, EventScotland, sportscotland, the Sustainable Tourism Unit (formerly the Tourism & Environment Forum), Scottish Natural Heritage, Historic Scotland, the National Trust for Scotland and the Scottish Museums Council.

A high quality visitor experience, a high standard of facilities, excellent customer service and value for money will increasingly influence choice of holiday destination and the Orkney tourism product will have to stand comparison, and stand out, against all others on the market. Simply delivering a product that is just "good enough" is no basis for competing in today's market.

6. KEY THEMES AND ISSUES

6.1 Issues, Threats and Weaknesses

Ease of access to the islands is crucial for tourism but we also need to accommodate the needs of residents and safeguards for the environment. More direct air links from the central belt and beyond and continued improvements to ferry infrastructure and services, particularly harbours and ferry terminals, and external road and rail links, would help to offset the limiting effects of seasonality and remoteness from key markets. However, travel may contribute to climate change and it impacts on the environment in many ways. This is particularly significant in Orkney, where getting there and getting around involves long travel distances. We can start to address these impacts through the promotion of public and other modes of transport; the integration of services and timetables and the adoption of sound environmental practices consistently throughout the industry. Sensitive visitor management can help to eliminate pressure on key site capacity and improve dispersal of visitors across the islands.

The majority of participants at the consultation workshop agreed that Orkney has a dynamic tourist industry, offers good service, facilities and value for money, and provides a warm Orkney welcome. Real improvements for the visitor have been achieved in eating places, accommodation, shops and visitor attractions. However, the feedback gathered during the workshop suggested that there are still issues about the status of the industry and appreciation of its importance and this is reflected in the concerns over the stability of employment and terms and conditions. Staff recruitment and retention is a major issue for Orkney, particularly in areas faced with shortages of affordable housing. Posts may be filled on a short-term basis only, reducing the incentive for employers to invest in staff training. Workers may have a poor knowledge of the area, and immigrant workers may have poor language skills.

Much has already been done through courses offered at Orkney College and by distance learning. However, challenges remain in how to ensure that training programmes reach the people that need them most, including overcoming obstacles such as lack of awareness, lack of time, and in some cases general lack of interest with regard to staff training. Improved terms and conditions of employment, better compensation for services performed, a wider recognition of the importance of the service industry and a wider range of educational opportunities in local schools are all required to boost the profile of the industry.

The industry is very diverse, and it can be difficult to achieve consensus and a focus of vision, or a wholesale adoption of policies and delivery of plans. On the other hand, this small scale diversity leads to grass roots changes that may be more sustainable and much can be done to get everyone to pull together in the same direction, through improved networking, joint working and sharing of information and best practice. A key challenge will be to develop tourism without damaging the features that draw visitors to Orkney in the first place and placing greater emphasis in growing value and increasing visitor spend will be increasingly important, rather than trying to achieve huge increases in visitor numbers.

6.2. Strengths and Opportunities

The quality of the landscapes, sea and skies, the unique built and natural heritage, its people and communities and the sense of remoteness of the islands are the main reasons that visitors come here. The islands boast a huge range of archaeological and heritage sites that are second to none, including a World Heritage Site, and offer a wealth of accessible wildlife in a pristine environment. The quality, of both the cultural and natural heritage resources, is critically important for tourism in Orkney and they consistently exceed our visitors' expectations. The first class environment supports a range of outdoor activities, including wildlife watching, walking, cycling, sea angling, loch fishing, diving, sailing and golf and much can be done to develop these markets further.

A key challenge will be to grow tourism sustainably, working in partnership to protect the natural environment and the rich archaeological heritage, while using them to attract and retain visitors on the islands. We must grasp the opportunity to promote Orkney as a Green Destination, focusing on the quality of the environment and its wildlife. We need to raise awareness, in both residents and visitors, about the importance of our natural and built heritage and developing the existing ranger services will be an important factor in achieving this.

The islands also support a rich arts, crafts and creative environment. Arts events, including all types of music, attract visitors to the islands through events programmes and offer a variety of attractions to enhance visitors' experience when they are here. Many festivals, such as the St Magnus festival and the Orkney Folk Festival, enjoy an international following and other events, such as the Orkney Dance Festival and the Jazz Festival weekend are growing in prominence. There are many opportunities to build on the programmes being developed during 2007 (the Highland Year of Culture and the Orkney Year of Homecomings).

The profile of Orkney's craft and food industries also continues to grow, and this not only helps to attract visitors to the islands through targeted promotion of the craft trail; sales of locally produced goods elsewhere in the UK and abroad serve to promote Orkney in the global market place. Many opportunities exist to increase spend on retail products and to develop retail quality generally, including shops offering basic goods as well as visitor-orientated "gift" shops. The growing interest in genealogy (particularly from North America and the Antipodes) has activated an ancestral tourism industry, which is growing in significance in Orkney and links well to the archaeological and cultural heritage provision. This is a rapidly growing market, which could be developed to a greater extent on Orkney, particularly as part of a package with other activities, such as arts activities, festivals and events, and outdoor activities.

We must build on these strengths: continue to develop and market these products and improve the quality of accommodation across all types and grades; give good value for money in all aspects of the visitors' trip, not just attractions, activities and accommodation, but also the retail sector, transport etc. We need to find more innovative approaches, in order to maintain and improve Orkney's position in an increasingly competitive global market.

Although the landscapes, the diversity of wildlife that they support and the excellent opportunities for a range of outdoor activities are a strong draw for visitors, similarly impressive opportunities exist elsewhere; in the Highlands and Argyll, for example. We must present and promote Orkney's special identity and its unique sense of place, drawing on its geographical location and position as an island archipelago; its history and Nordic influences; and its established reputation for its produce. There is scope yet to broaden the range and number of visitor attractions; develop wet weather facilities and more evening activities. The activity markets can be developed further, to include more taster sessions, catering for the growing number of visitors that want to try new experiences for the first time. A broader number and range of events and festivals associated with Orkney's culture - and held at different times of the year - would help to lengthen the season, as would supporting restaurants, facilities and attractions to stay open for longer. The cruise market needs further development and a more strategic and co-ordinated approach to scheduling, in order to bring well-spaced visits from liners over a longer seasons and improved management of visiting groups to control pressure on key site capacity.

Primarily, we need to market the diversity of experiences and activities that make up the Orkney product, in ways that allow visitors to book easily their own package of varied experiences, making the linkages between different types of opportunities. This will require a joined-up approach, with a high degree of collaboration and partnership working, within the industry and between businesses, their representative bodies and public sector organisations.

Orkney Tourism – S.W.O.T. Analysis

<p>STRENGTHS</p> <ul style="list-style-type: none"> • Quality, number and density of its archaeological, cultural and heritage attractions • World Heritage Site status – “The Heart of Neolithic Orkney” • Breadth and depth of its craft industries • The opportunity to promote “destinations within the destination” afforded through the outer isles • A broad range of industries and products using the Orkney name as a hallmark of quality • High quality environment • Strong and focused support from public agencies and high levels of industry participation through the OTP • Island destination 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> • The vagaries of the weather • The shortness of the season • Perceived and real costs of travel • Lack of integrated transport and booking opportunities • Poor levels of marketing investment by the industry relative to returns • Varying public attitudes to tourism • Poor service quality in some businesses, in all sectors • Limited accommodation
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • Low cost, direct to customer marketing through ICT and e-business, broadening access to potential markets • Integrated booking, packaging and distribution opportunities • Work with British Airways to package Orkney with ‘extra leg’ sales to Orkney through Edinburgh/Glasgow/Inverness. • Orkney the Brand – increasing profile of Orkney products helping promote islands as a holiday destination • Increasing interest in heritage and ancestral tourism • Events Calendar – drawing visitors throughout the year • Crafts, Food and Drink 	<p>THREATS</p> <ul style="list-style-type: none"> • Inadequate transport links and lack of integrated services • Impacts of currency markets • Under-investment in marketing and promotion • Failure to meet customers expectations on quality, service and Value for Money, leading to lack of repeat visits • Global or national events discouraging travel (avian flu, terrorism etc) • Competition from global markets • Increasing visitor numbers leading to damage and negative impacts on visitor experience

The Way Forward

This Plan will build on the previous Orkney Tourism Strategy (2000-2005). Good progress was made in delivering the targets of that Strategy and in developing the foundations of a sustainable tourism industry on Orkney in the longer term. High-level targets for growth in volume and value were largely met, although the increase in the number of visits to the outer islands has not been as significant as planned. Similarly, there has not been a significant improvement in the status of the industry and the numbers of young people attracted to working in it.

There have been transport improvements, with bus routes/schedules developed to meet external and internal ferries; improved interchange facilities completed in Stromness and Burwick and a new travel centre scheduled to open in Kirkwall in 2007. New toilets, parking areas close to viewpoints and improved signage and leafleting to promote cycle routes have also been achieved, although there is still much work to be done on this. A sustainable management strategy has been produced; work is progressing on the Local Biodiversity Action Plan and there are ongoing environmental improvements throughout the islands. Increasing numbers of businesses participate in the Green Tourism Business Scheme and there was good uptake of the Business WINS waste campaign project. Information provision has also improved, with Neighbourhood Information Points being available in various locations as remote Tourist Information Centres.

However, there is scope yet for significant tourism growth and the OTP recognises that future planning should aim to engage the industry to a greater extent, and add as much value as possible to what partners are doing

independently. A recurring theme throughout the consultation and discussions on this Strategy is the need for greater networking and joint working within the public sector and with industry partners - and developing clear mechanisms for co-ordinating and focusing effort should be key priorities for everyone. Collaboration with neighbouring ATPs will be important, in order to co-ordinate activities to draw visitors into their areas and on to Orkney. It is also crucially important that we give our visitors good quality and Value for Money at all times - we should all be thinking about the whole experience, not just the individual elements that we are responsible for. We must also develop contingencies for any future scenarios that are outwith our immediate control, such as global terrorism threats, pandemics, etc.

All those involved in tourism must draw up plans for their own businesses and for their local area. But "tourism is everyone's business", and responsibility lies not only with those directly involved in tourism but all those encountering visitors to all the islands – for example in shops and banks, in taxis, on ferries and buses, and in pubs and restaurants – all of whom can strive to be friendly and helpful ambassadors for the area and contribute towards making Orkney a key 'must-visit/must-return' destination.

7. THE FRAMEWORK – OUR OBJECTIVES, PRIORITIES AND TARGETS FOR THE NEXT DECADE

How we can contribute to the national strategy targets

The OTP's key objectives and priorities for the next 10 years are outlined below, together with key targets for their delivery. Only one or two overarching targets have been included in each section here - more detailed actions and targets are presented later in the Action Plan.

7.1. Knowing Your Market

We must constantly update our knowledge of the market in order to adapt to its trends, so we need to collect targeted and meaningful information and we need networks to disseminate it. A Tourism Research Network is going to be co-ordinated at the national level and there is an opportunity to input to and influence the Network's activities, to ensure that any local information gathered by it is relevant to Orkney's needs, and that we can use it effectively to plan our activities and to measure the results of our efforts to grow tourism in Orkney. We need to identify new research requirements, promote information sharing and networking between partners and gather feedback and monitor performance on a regular basis.

Our priority

a) Promote co-ordination and partnership working on collecting and sharing information for planning and delivery of marketing, services and projects.

Key target

Review local research requirements and develop regular dialogue with the National Tourism Research Network to agree any Orkney specific needs/inputs by December 2006.

7.2. Exceeding Visitor's Expectations

Only a proportion of our target for growing tourism is based on increasing the number of visitor trips as a result of our marketing and the quality and range of products. The majority of the growth potential lies in providing the things to see and do that will make visitors want to stay longer and spend more money.

7.2.1. Quality of Visitor Experience

Value for Money is a priority and all businesses and service providers need to consistently deliver the highest quality product possible, based on local market needs, and this should include attention to basic facilities such as public toilets, car and coach parking etc. No two customers are the same or have the same needs, and flexibility must therefore be built into service delivery wherever possible. We need to improve co-ordination of services such as public transport, particularly buses and ferries, and ensure that visitors are able to access up-to-date information about them. Restaurants and cafes must be encouraged to use local produce, and to pay more attention to the source of their products and the quality and presentation of food. Increasing the flexibility of opening hours to cater for visitors' needs is also important.

We need the involvement of local people, as individuals and communities, to be ambassadors for tourism in Orkney and to care about all aspects of their living and working environments, if we are to fulfil all our visitors'

expectations. Tourism businesses need to work more collaboratively, with each other and with other sectors, supported by the activities of the public agencies.

This Plan is wide ranging and requires a significant input from the Orkney Tourism Group, if it is to be delivered successfully. As OTG resources are limited, the establishment of a Project Officer post will be required in order to deliver OTG's responsibilities, to develop priorities and to help promote co-ordination and joint working between partners. The Plan will only be delivered successfully through good partnership working between industry, agencies and communities to deliver the agreed actions and to spread the message that Tourism is Everyone's Business.

Our priorities

- a) Promote the use of local products, particularly crafts and food and drink, as an integral part of the visitor experience
- b) Promote best practice in customer service.
- c) Encourage industry forums to focus on improving quality standards in products and service delivery.
- d) Increase participation by local communities in growing tourism and raising general environmental standards.
- e) Co-ordinate and focus activity on the delivery of this Strategy and Action Plan.
- f) Ensure that appropriate staff and Board members, in all relevant public sector organisations, have a good knowledge of tourism in their area

Key targets

Deliver mechanisms for promoting the use of, and showcasing, local products by local accommodation, facility and service providers, by March 2007.

Establish quality networks for co-ordinating activity on products and service quality by July 2007.

Establish a Project Officer post, to help deliver the Tourism Plan, develop priorities and promote co-ordination and joint working.

7.2.2. People and Skills

The majority of issues and priorities that have been raised during consultations relate to customer service delivery and that some businesses have limited relevant local knowledge. Also, some concerns exist with regard to the first impression that visitors get when booking a trip to Orkney and a key factor in ensuring a positive experience is the service that they receive from the Visitscotland.com call centre. The Orkney Tourism Group will build dialogue with Visitscotland.com in order to ensure that these concerns are addressed.

A great deal of good work has already been done by Orkney College, in providing training and raising the profile of career opportunities in Tourism and Hospitality. Many of the students that undertake the apprenticeship chef's courses through the college and the area's Hotels go on to work on a full time basis in Orkney. The range of tourism and hospitality related courses have expanded through the college and through distance learning. The HIE network also has a leading role in helping the industry to develop leadership and workforce skills. However, some negative perceptions of working in tourism and the service industry persist and there are still concerns about the status of the tourism industry and in particular, of the negative impact that this has on attracting young people into tourism as a career choice. These problems are exacerbated by the fact that people can enter the industry with little or no qualifications or experience. We need to encourage greater uptake of available training programmes - the high number of small businesses, often with single operators, makes it difficult for owners to access training at appropriate times.

Also, much can be done to develop further the diverse range of activity skills that are required, in order to deliver the tourism product in Orkney, for example, tour guides, wildlife watching, archaeology and heritage interpretation. The existing ranger services at Sanday, Eday and the World Heritage Site are important resources to build on, not just for interpretation and awareness raising activities, but also for developing the

range of activity skills that are increasingly required. Greater knowledge and use of foreign languages by staff and in welcome literature, menus etc, are also required, to help improve the experience of international visitors.

Workplace training and development must be provided at times and places to suit the businesses, in order to encourage uptake and this is more likely to happen with a more stable workforce. Enhanced networking opportunities would also be effective mechanisms for developing and promoting customer service through sharing of best practice, linking networking events to training opportunities and creating industry forums that can focus on standards.

Our priorities

- a) Improve access to and uptake of existing training programmes, including Hospitality, E-business and Product Knowledge.
- b) Improve level of vocational training in tourism, including a mentoring programme for young workers.
- c) Attract more people to work in the industry and improve the retention of staff.
- d) Improve skills/knowledge networking and sharing of best practice within the industry and with others (as per the earlier networking action).
- e) Establish and promote training courses to maintain the high standard of tour guides.

Key targets

By 2009, increase uptake of available training with identified providers by 30%.

Significantly improve the proportion of businesses undertaking staff development.

Provide induction training programmes for all new workers, by December 2008.

Encourage industry participation in work place mentoring programmes and study tours for key workers/operators.

Hold at least one large networking event every year, starting in 2007.

7.2.3. Innovation and Product Development

Although a high level of visitor satisfaction with quality standards was recorded in the 2004/5 visitor survey, the industry needs to be aware of the dangers of complacency and the need to maintain and develop standards in line with changing customer expectations. All partners in the OTP have a key role to play, as both advocates and exemplars of the industry.

There is a great deal of potential to consolidate the high reputation that Orkney already enjoys for its outstanding scenery and wildlife, archaeology, quality local produce, outdoor activities and cultural and creative heritage; for example developing existing niche markets such as diving, angling and ornithology. Many opportunities exist to develop the touring (caravan/motorhome/tent/sailing) markets, linking to all the activity opportunities mentioned above. There is also potential to raise Orkney's profile in the business tourism market, taking advantage of the wealth of activities and attractions available for corporate entertaining. Orkney can provide a good range of tourism products, many of which are unique to Orkney, and visitors' enjoyment of the islands will be enhanced by presenting a coherent package of products that focuses on the whole holiday experience.

Visitors increasingly want new experiences and we need to cater for both the committed enthusiasts and the people wanting taster sessions; these choices can be offered across all sectors – wildlife/eco-tourism, sports and outdoor activities, arts and culture and so on. Our efforts must be concentrated on improving information on, and access to, a broad range of facilities, services and attractions, providing the necessary infrastructure to support this improved access and ensuring that our visitor management activities are properly targeted to disperse visitors throughout the islands and to protect sensitive locations. Increasing visitor numbers, partly related to improvements in transport infrastructure and services, may lead to increased pressure on the accommodation sector during peak season and during prime events, such as the St. Magnus Festival. A clear strategy must be developed to address these "pinch" periods.

Orkney already has a good reputation for its produce but more can be done to develop the range, availability and profile even further. A local to Orkney badging scheme could be used to identify and highlight local products and this could include wildlife, heritage and landscapes – promoting Orkney as a unique destination. There is huge scope to develop the profile of the Orkney craft industry and to strengthen links between crafts and tourism on Orkney.

Our priorities

- a) Improve product and service quality across all facilities.
- b) Improve the standard and quality of accommodation across all accommodation types, at all grades, in all areas.
- c) Support developments to meet increasing demands for new bed spaces, as they arise.
- d) Promote a co-ordinated approach to product development.

Key targets

Increase uptake of existing QA schemes by 20%, by October 2008 and consider the case for making membership of relevant QA schemes a condition of any funding support.

Review current strategies for developing the accommodation sector, by March 2008.

Identify opportunities for collaborative product development and implement them.

7.2.4. Culture, Events and Sport/Outdoor Activities

Orkneyarts (together with Hi-Arts, who cover the wider Highlands & Islands) support and promote a comprehensive programme of arts facilities and events, which are a key part of the range of activities for visitors when they arrive. Events that are rooted in the culture and tradition of the islands will offer a level of authenticity that visitors will appreciate and that will also attract local audiences who may help to sustain them in their early years. Traditional music has a particularly strong role to play in this, including both the large scale events and the more informal performances held in local venues – but contemporary arts also provide a strong draw. Much can be done to build on the success of previous events, such as the “Rolling in the Isles” programme.

However, we need to improve information and access to these activities. Arts and cultural programmes could be presented better to visitors through VisitScotland marketing activities but many local events may be organised with a short lead-in time, making it difficult to maximise their economic benefit through advance promotion. Much can be done to build on the success of the existing festivals and to roll out the programmes being developed for Highland 2007 (Scotland’s Year of Highland Culture) and Orkney Homecoming 2007. There is scope to explore more innovative approaches and collaborative projects: operators can work more closely together to deliver a more holistic holiday experience, with a package of activities and experiences – and these can be linked to events and attractions in other parts of the country. A good example is the Minehowe Know How project, which delivered a combined arts and archaeological festival.

The broad range of outdoor activities, particularly walking, cycling, diving, fishing and sailing that are available across Orkney can be marketed more strongly. The further development and promotion of cycle ways and core path networks will support cycling/walking but improved access provision in key locations is also important if other activities, such as canoeing, sailing and fishing are to grow. Access improvements must also be linked to the promotion of the Scottish Outdoor Access Code – guides and leaflets on access have already been produced.

Historic Scotland and Orkney Archaeological Trust will have a key role to play in developing facilities linked to Orkney’s cultural heritages and in promoting education and awareness raising activities. Orkney’s archaeological resource is second to none but the historic buildings and burgh, notably the Conservation Areas of Kirkwall and Stromness, may also be of interest to visitors and there may be scope to incorporate local architecture in visitor interpretation and heritage trails. Sensitive visitor management should aim to reduce pressure on key sites by encouraging the spread of visitors to different sites across the county; managing access at major sites and co-ordinating the itineraries of visiting groups. Historic Scotland have already taken steps in this respect, by introducing timed ticketing at Maes Howe and by changing the visitor route at Skara Brae and this approach may need to be rolled out elsewhere. Outdoor activities may have

specific impacts on heritage features, for example increased diving visits may have an impact upon protected wrecks, and plans for the promotion of these activities will need to include provisions for reducing any impacts. Promotional activities should link Orkney's heritage with similar attractions in Scotland to produce a co-ordinated package that promotes the journey to Orkney as part of the experience.

Our priorities

- a) Link the interpretation and promotion of Orkney's archaeological and built heritage with arts/cultural attractions.
- b) Improve joint working and communication between local arts/cultural promoters and tourism accommodation and activity providers.
- c) Improve the promotion of arts, music and other cultural events to visitors to Orkney
- d) Continue to develop a comprehensive and inspiring event calendar - based upon the rich resources of Orkney.
- e) Develop genealogy and ancestral tourism as an important theme of the Orkney tourism product.
- f) Further develop and promote outdoor/sport niches and improve local services and facilities which support them.
- g) Ensure co-ordination of activity to improve integrated programmes across the region and with the rest of Scotland.

Key targets

Improve joint working between arts/cultural promoters and accommodation/activity providers, by 2007.

Develop mechanisms for gathering feedback from tourism businesses and arts/heritage providers and use this to develop joint projects and combined packages for visitors.

Produce an enhanced and comprehensive events calendar by 2010.

Identify opportunities for developing new programmes of outdoor/sport activities or events.

Establish cultural/heritage development partnerships with other ATP areas.

7.2.5. E Business

Orkney businesses are increasingly conducting their business electronically and the industry is keen to make the best use of new technologies and the most appropriate media to access new markets and project an image of a modern and vibrant destination. The provision of ICT and e-business training are key requirements for future growth of the industry in Orkney and there are many opportunities to develop further training and support mechanisms for this. Existing gaps in the required infrastructure are being addressed but we must ensure that this is done comprehensively. Consideration should also be given to providing funding support to local businesses who seek to invest in enhanced e-business capabilities.

Our priorities

- a) Ensure that all tourism operators in Orkney use appropriate technology for information exchange and marketing.
- b) Ensure that a range of training and incentive programmes are accessible to all tourism businesses, to increase uptake and capabilities with IT.

Key targets

By 2010, all tourism businesses in Orkney to be using e-technology to maximise sales and improve the visitor experience (from internet booking to e-marketing to hand-held e-guides).

7.2.6. Access and Transport

We need to improve access to the islands, improve the experience on all types of journey, and promote the journey as part of the holiday experience, positioning the off-shore location of the islands as a key attraction. We must continue to improve local signage and provide en-route interpretation and work to make the destination services and experiences worth the travelling. Improvements to the ferry terminals at Gills Bay and Burwick harbours are required and improvements to the A96 and A9 are long overdue, as these routes can severely limit the onward movement of visitors into Orkney.

All this is best done through joint working between the relevant public sector bodies and the air and ferry operators that offer access to the islands. The establishment of a Transport and Tourism Forum could be an effective mechanism for joint working, particularly on marketing and increased timetabling integration of public transport services. The forum should comprise representatives of all the main transport operators, both on and off the islands, as well as representatives of the OTP, who can bring wider tourism issues to the agenda. The forum should identify specific opportunities to develop new routes into Orkney. The new Orkney Travel Centre, which will incorporate coach and bus transport as well as the Tourist Information Centre, will also play a key role in helping to integrate public transport services and information and to align them to visitors', as well as locals', needs.

The new subsidised airfares for local residents may eventually create knock-on benefits for visitors to the islands, with the increasing local demand for air services potentially leading to increased capacity on air routes and reductions in the full cost of unsubsidised fares, as planes operate with greater passenger loads. Should local demand grow to a level that leads to increased route capacities or reductions in overall fare levels, and if there are tangible knock-on benefits for visitors, then it would be appropriate for the OTP to consider how these benefits could best be promoted to visitor markets.

An objective should be to increase visitors' use of public transport and alternative methods of travel wherever possible, while they are on the islands. We therefore need to improve the islands' public transport infrastructure, promote integrated services and ticketing and ensure that there is comprehensive, accurate and up-to-date information available at all points of travel.

Cycling and walking are also very important in Orkney and this will require further development of infrastructure and provision of appropriate information and signage. The development of core path networks and linked cycle routes should be a priority, together with associated amenity features such as heritage walks, landscaping etc, in order to provide multiple benefits for communities and visitors and best use of resources. Any access improvements will need to incorporate measures to promote sensitive visitor management, to help reduce pressure on key areas.

Our priorities

- a) Ensure that tourism is a key factor in delivering integrated public transport services.
- b) Improve the integration of services and information provision on local facilities.
- c) Campaign to improve routes and services into and within Orkney.
- d) Promote and support access networks for walkers and cyclists and promote the Scottish Outdoor Access Code.

Key targets

Establish a tourism providers/transport operator's forum by 2007.

Produce plans for improving information provision and integration of services by March 2008.

Identify specific opportunities to develop new routes and services into Orkney.

Lobby for improvements to the A9 and A96 as key elements of the journey to Orkney.

7.2.7. Natural Environment

The environment and natural heritage are hugely important to the visitor experience on Orkney. The challenge will be to develop tourism on the islands that is based on their natural and cultural heritage, whilst at the same time safeguarding and enhancing these assets.

There is scope to develop a co-ordinated programme of events, facilities and interpretation focusing on the natural heritage across the islands, linking and complementing the existing and planned heritage networks and local walks. Every opportunity should be taken to protect and enhance the high quality of the natural heritage, through integrated planning and management of natural resources, sensitive siting and design of new developments and through ensuring that the value of the natural heritage to the local economy along with its intrinsic value, are fully recognised by everyone living and working in the area. Opportunities exist to promote Orkney as a green destination, developing improved partnerships to emphasise and enhance the high quality of the natural environment.

Our priorities

- a) Raise awareness in residents of the natural environment as a key part of the Orkney “product” and its importance in underpinning the visitor experience.
- b) Promote the quality and diversity of the natural heritage in Orkney.
- c) Ensure that the high quality of the natural heritage, landscapes and environment of the Orkney Islands are maintained as a priority.
- d) Improve the accessibility of information on the natural heritage and communities of the islands.

Key targets

Develop a programme of activities for raising awareness, delivering environmental improvements and developing heritage trails by 2009.

Develop closer communication between agencies to agree priorities on key issues and to consider major developments that may impact on the environment.

7.3. Marketing Our Product

Our aim should be to build local confidence, promote Orkney as a quality place to live and work, and raise awareness of its unique features and products in a global market place. There is huge scope to develop our strongest market – the UK – and emphasis should be given to this, using up-to-date information on our key markets to communicate with customers, raise their awareness and desire to visit, and convince them to commit to making the trip. There are many opportunities to build the Orkney Brand, including the environment and communities of the islands, linked to their rich cultural heritage and archaeology.

Further opportunities exist for VisitScotland to undertake targeted local marketing activity of Orkney’s key strengths, including for example, wildlife tourism; outdoor and specialist activities; heritage attractions; ancestral tourism; cultural heritage; local crafts and food; events and festivals etc. There is scope to make more use of the arts sector as a marketing tool, also to market Orkney as a clean, green destination. More can be made of educational tourism on Orkney (summer schools, student visits and so on) making the most of Orkney’s connection to the University of the Highlands & Islands Millennium Institute. Orkney’s tourism product is a unique package of experiences and the various elements need to be packaged and promoted as “Destination Orkney”. There is also scope to collaborate with other ATPs in Shetland and the Outer Hebrides to promote visits to all these island destinations as activity breaks in their own right, within the activity sections of VisitScotland’s product portfolio.

Maximising the lifetime value from existing customers is also important, encouraging visitors to stay longer and return more frequently, by offering them a “whole”, quality experience. Adding value through collaborative working between accommodation and activity providers and joint marketing initiatives, are an essential part of this product development and placement. Making best use of Information Technology will be key to our success in this but there is a role for local post offices and other service centres to improve the delivery of tourist information. We also need to make contingencies in case of significant and worst case scenario events that might impact on tourism in Orkney, such as avian flu, climate change etc.

Our priorities

- a) Continue to promote Orkney the Brand to attract new visitors and maintain a high level of repeat visitors.
- b) Ensure that Orkney products are well represented within VisitScotland's product portfolio of marketing activity.
- c) Preserve Orkney as a destination.
- d) Encourage more effective joint marketing initiatives by the industry and relevant partners.
- e) Enhance the development of niche marketing.
- f) Improve the linkages between different promotional media, with particular emphasis on improving print production linked to web production and content.
- g) Improve access to information on local products

Key targets

Develop a collaborative Marketing Plan to deliver all agreed actions identified in the OTP Plan by 2007.

Investigate the feasibility of joint marketing Orkney with other island regions, for example, as locations for activity breaks, by September 2007.

7.4. Being Sustainable

The increasing number of visitors who take account of environmental factors in consumer decisions, presents real opportunities to strengthen the promotion of Orkney as a Green Destination. Safeguarding the environment and communities of the Orkney Islands, whilst growing a successful tourism industry, is central to this. The principle and practice of sustainability should underpin all the priorities and actions being delivered by this Tourism Plan, and while this can largely be delivered by the actions in the attached Action Plan, there is also a need to maintain sustainability as a specific and intrinsic goal, which has its own action plan and monitoring framework.

There are further opportunities to raise awareness and understanding, in both visitors and residents, of sustainable tourism and of the economic and social benefits of greener working practices (energy conservation, recycling etc) in order to attract new customers and increase business profitability through increased awareness of costs. Encouraging the use of public transport where possible, promoting greater involvement of communities in tourism issues and taking account of tourism in the determination of development applications, are also important. Activities should link to the Orkney Community Planning and Local Agenda 21 processes: Orkney has already signed up to Zero Waste and the CREST European programme.

Extending the season

As a first step, a list of year-round, local visitor facilities could be produced and circulated to tourism operators for use in promotional materials and onward dissemination to visitors, in order to enhance the off-season promotion and appeal of Orkney.

Events are likely to create additional motivations for off season visits to Orkney. The development of packages around these events will greatly enhance their appeal to visitor markets and enhanced packaging could be developed through networking events that incorporate a training element.

Spreading Visitors Across Orkney

Transport acts as a major brake on visitor dispersal across Orkney and the development of more flexible transport systems that are technology driven should form a significant part of the activities of the Transport Forum. For example, visitors could use the internet to identify and contact other visitors travelling on the same transport services and link up with them to co-ordinate travel arrangements and organise joint onward travel connections with non timetabled operators.

We need to maintain a high level of core local services for visitors throughout the islands all year round; for example, island shops and hotels need to be encouraged to be open for ferry arrivals, and to make available a

range of local products etc. Improved core services may help stimulate further social and economic activity and make the isles more attractive to tourists.

Joint working is essential to encouraging visitors to island destinations: the existing island Tourism Associations could be encouraged to affiliate to the Orkney Tourism Group (OTG), who could also encourage and facilitate the establishment of new associations on islands where they currently do not exist. This would enable OTG to co-ordinate activities and facilitate best practice and information sharing across the whole island group.

Our priorities

- a) Work towards Green Destination status.
- b) Work towards extending the season.
- c) Develop a long term Action Plan for dispersing visitors across the islands, using gateway hubs to signpost visitors to the outer islands and remoter areas.
- d) Develop and promote year-round visitor services and facilities throughout the Orkney mainland and the outer islands.
- e) Raise awareness in locals and visitors of sustainability issues and develop opportunities to demonstrate our environmental awareness to visitors.
- f) Use sound environmental, economic and socially sustainable principles to underpin the planning, development and delivery of all tourism activities.

Key targets

Develop a long term plan to extend the season, by October 2007, and implement it.

Develop an action plan for dispersing visitors to the outer islands by October 2007, and implement it.

Significantly increase membership of the Green Tourism Business Scheme by 2009.

8. MONITORING, EVALUATION AND REVIEW

Monitoring the implementation of this Plan is a further task for the Orkney Tourism Partnership: key activities and outputs will be monitored regularly by each lead body; the methodology and frequency of information collection and collation will be determined separately for each agreed action. The ATP will also conduct a full annual review of both the delivery and impact of the Plan. It will focus on key outcomes, and this information will form the basis of any reporting to the Scottish Executive and to key stakeholders. The Strategy and Action Plan will also be reviewed for their continuing relevance, although the broad aims and objectives are not expected to change significantly over the period of the Plan. Trade Associations and public sector partners will also be invited to provide more detailed presentations to the OTP on occasion, on specific projects. Progress on the delivery of any more localised projects/plans will be monitored separately and local partners will be encouraged to report back to the OTP on a regular basis. The Strategy will be updated in 2015 and the Action Plan in 2009.