



ARGYLL & THE ISLES STRATEGIC TOURISM PARTNERSHIP VISITOR ECONOMY RECOVERY AND GROWTH STRATEGY 2022 – 2025



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Introduction

This document is intended as strategic guidance for the first of three annual tourism development Action Plans and has been devised to respond to changes in strategic or operational priorities. The Year 1 Action Plan (Appendix 1) outcomes have been agreed to complement projects supported by the Argyll & Bute Council Rural Growth Deal, Shared Prosperity and Levelling Up funds; but are not dependent on significant infrastructure investment. Accordingly, emphasis on regional marketing and industry development activity will support the partnership's ambitions for a competitive and sustainable visitor economy.

An approximate marketing budget of £75,000 has been agreed for Year 1. It should be noted that specific actions and associated financial allocations may be subject to change to meet partnership objectives in a challenging and volatile tourism environment.

Pandemic Effects and Context

The Covid19 pandemic had a devastating impact on the global tourism industry and an immediate impact across Argyll and the Isles from lockdown in March 2020.

Recovery has faced obstacles and delays with changing restrictions and regulations over 2020 and 2021. There have been inevitable business casualties, but the tourism industry is resilient and there is an appetite to build back better in terms of both economics and quality of visitor offering; and to focus on an improved tourism product increasingly responsive to communities and sensitive to the outstanding environment. Targeted and sustained marketing efforts will be necessary to raise the profile of the destination's offers effectively; and attract visitors who will respect as well as enjoy Argyll & the Isles.

The Argyll & Isles Strategic Tourism Partnership (AISTP) that includes Argyll & Bute Council (ABC), Visit Scotland (VS), Argyll & Isles Tourism Cooperative (AITC) and Highlands & Islands Enterprise (HIE) as the core members, have developed a three-year strategy to align activities around recovery priorities and to ensure the most appropriate use of partner resources. This strategy is aligned to national strategic imperatives: Scotland Outlook 2030 National Tourism Strategy, and the Scottish Tourism Emergency Response Group (STERG) National Action Plan; and will be adapted to take account of the Outdoors Scotland Tourism Strategy, led by project partners Wild Scotland and Sail Scotland.

Markets have changed and continue to change. Some changes are likely to be temporary – such as short booking periods - but others will be permanent in nature and could bring new opportunities to meet the needs of new visitors. For example, the “staycation” phenomenon has brought much needed business and spend into the region; but has also placed new stresses on existing infrastructure, communities and resources and introduced a minority of irresponsible visitors. Recovery planning addresses these pressures; and the need to inform visitors on what to expect, and to encourage socially and environmentally responsible behaviour. Recovery planning will also influence and be ready to respond to changes in market requirements, particularly at short notice.

Partnership Background and Record of Achievement

The AISTP was set up in 2009 to provide industry direction immediately after the dissolution of the Argyll, the Isles, Loch Lomond, Stirling & Trossachs Tourist Board. Following a summit event in Oban in 2011, AITC was established as the delivery vehicle for regional strategic marketing campaign activity, product development and industry communications. AITC was established as a cooperative with membership drawn from 12 local marketing groups operating across Argyll & Isles, plus sectoral associates Food from Argyll (FFA) and, latterly, Culture, Heritage & Arts Argyll (CHArts). The Destination Organisation was entirely industry based and represented approximately 1200 business interests at regional and national forums.

Since 2012, three strategic programmes have been agreed by the partnership and funded principally by ABC and HIE with additional support for marketing campaign and development project activity provided by VS, Caledonian MacBrayne, Scotrail, Scottish Natural Heritage/NatureScot, Forestry Commission Scotland/Forestry & Land Scotland, Sustrans and others:

- 2012-2014 Stronger Together - £275,000 HIE, ABC Leader and VS Growth Fund
- 2014-2017 AITC Development & Capacity Building Programme - £360,000 ABC, HIE and Caledonian MacBrayne
- 2017-2020 Industry Leadership and Product Development - £330,000 ABC and HIE

Each of these initiatives has delivered demonstrable growth and outcomes creating a strong foundation on which to build recovery of the visitor economy across Argyll & the Isles. Industry standard Scarborough Tourism Economic Activity Monitor (STEAM) data models from 2009 to 2019 show a clear pattern of growth, notably well above the Scottish average. This growth is attributed to the combined work and investment of the partnership.

https://www.wildaboutargyll.co.uk/media/5177/waa_wildabouttourism_2020.pdf

The partnership has worked to create a three-year strategy to support the return of visitors and enable our tourism businesses to understand the opportunities and requirements to increase economic and sustainable growth across Argyll & the Isles. This document sets out that strategy and will be reviewed and refined over the three-year period as the new visitor patterns and requirements emerge.

Tourism Growth and Economic Impact

Between 2011 and 2019 Argyll & the Isles experienced:

- 23% increase in visitor days
- 32.3% increase in visitor numbers
- 25.8% increase in direct expenditure.

The economic impact of tourism had been steadily growing and was at an all-time high in 2019 at £208.34m. Argyll & Isles also had the highest proportion of tourism businesses in Scotland and the industry's importance to the local economy and community life cannot be overstated. This was crystallised in 2020 when the pandemic closed the industry down. Many micro business interests failed to meet national criteria for support and then subsequent tiered restrictions cut off existing markets once some level of travel was permitted again.

Over 2020 the overall economic impact of tourism dropped by 79.9% to £41.95m. This has clearly been a devastating period for the industry but notably STEAM data for the first half of 2021 suggests significant build-back with economic impact more than doubling from £41.95m in 2020 to £94.83m in 2021 - a remarkable recovery rate of 126.1%. Predictions at the time of strategy development suggest a 3-6 year worldwide full tourism recovery period. Sustained marketing and product development is necessary to underpin confidence in travel and position Argyll & the Isles as a safe, sustainable and enjoyable destination.

This strategy supports the delivery of a sustained visitor return to 2019 levels over the next three years.

Sector & Market Focus

In 2021 and 2022 AITC received Scottish Government business support grants administered by ABC and VS. AISTP believes the industry has utilised this support to good effect. Even in

the face of significant losses there have been clear signs of innovation and entrepreneurialism by existing and new businesses, and investments in new infrastructure and improved products.

Major changes to the marketplace and consumer trends necessitate significant action at individual business and destination levels. Multifaceted staycation activity and delayed return of volume international travel will require effective future marketing to aid a sustained recovery and promote growth. Accordingly, there is an immediate and significant opportunity to invest in new and meaningful marketing activity to build on the success of time-limited partnership-funded campaigns delivered over the last five years:

- 2016-17** **Wild about Argyll** – outdoor adventures in stunning settings
- 2018-19** **Heart & Soul of Scotland** – proximity to the central belt
- 2019-21** **West Coast Waters** – a multi-agency campaign showcasing the whole of the West Coast
- 2020-21** **Taste of Place Trails** – celebrating the food and drink producers, their products, and experiences across Argyll & Isles
- 2021-22** **The Pantry and The Drinks Cabinet** – promoting product development collaborations uniting Argyll & Isles’ food and drink providers and venue operators
- 2021-22** **Peddalling** – Inspiration for people-powered adventures and active travel around Scotland’s Adventure Coast
- 2021-22** **GCN Destination Partnership** – showcasing Argyll & Isles’ outstanding gravel biking credentials
- 2021-22** **Above and Below** – showcasing the exceptional marine and celestial experiences

Each of these campaigns has had associated product development funded by HIE and delivered by AITC. ABC has secured a Rural Growth Deal which includes a portfolio of investment in marine and coastal tourism infrastructure and product development.

Argyll & Isles’ credentials as an outdoor adventure and food-lovers’ destination have been substantially enhanced through campaign activity to date. New assets have been created, including trails that appeal to consumers and encourage new business collaborations. Examples include the Kintyre 66 holiday route; and a collaboration across Cowal to launch a local produce hamper, bookable in advance by guests’ intent on authentic self-catering options.

AISTP will devote significant effort in 2022-23 to promote regional adventure and food and drink products and use trails and itinerary ideas as the principal method of business engagement and consumer activity. Inter-connected active travel experiences should be integral and the partnership will aspire to have options available to book online via business operators’ own digital channels and www.wildaboutargyll.co.uk and www.visitscotland.com.

Strategic Priorities

Argyll & the Isles must compete as a destination to recover its loyal customer base and attract new visitors. AISTP, through its delivery partners AITC and VS, has developed a tactical and agile marketing plan aimed at positioning Argyll & Isles as Scotland’s Adventure Coast. Combined industry and consumer research, undertaken in 2021 suggests:

- the primary motivation for taking a trip was to go somewhere to get away from it all although connecting with friends/relatives, enjoying the outdoors, going back to a previous favourite place, and wanting to stay close to home were all important motivations for a Scottish break
- a home holiday will also deliver benefits – three-quarters of potential visitors felt it would aid mental health and wellbeing and two-thirds would visit places not visited for a long time.

<https://www.visitscotland.org/research-insights/coronavirus-insights/uk-market>

The partnership anticipates emphasis on the destination's hero products:

- the natural environment and iconic wildlife
- water-based activities
- unique cycling territory
- dark skies
- excellence in food and drink (especially seafood, local whisky and gin, craft beer)
- authentic cultural experiences
- health and wellbeing opportunities
- our range of accommodation and options for motorhomes & wild camping.

The region's additional advantages of proximity to Scotland's Central Belt and improving, accessible inbound transport options render it ideally placed to appeal to domestic holidaymakers with reduced budgets as fuel costs rise.

To make practical contributions to the recovery and growth of the regional visitor economy, AISTP has established four strategic priorities.

STRATEGIC PRIORITY: Extending the season and spreading visitors across the destination

Visitor pressure was becoming evident at some locations even before the pandemic, but lockdown and post-restriction activity placed significant stress on some destinations with limited capacity to welcome visitors at peak periods. The Rural Tourism Infrastructure Fund has supported – and continues to support – projects across the region to address particular issues.

Extending the season will only be possible for communities that can, or have the potential to, offer appropriate visitor facilities and experiences that are available from January-March and September-November (in addition to the traditional holiday periods in the Spring, Summer, Autumn, and Christmas/New Year). The partnership will focus on those destinations which present those opportunities and can demonstrate viable levels of commitment from local businesses.

Improving visitor circulation around the region will also have a positive, long-term impact on pressure points; and introduce business opportunities for "alternative" destination choices. Moving off the beaten track has enormous consumer appeal and AITC will lead on creating and sustaining compelling local products for existing and emerging markets.

These measures are in response to the immediate shift to a primarily Scottish, then wider UK, domestic staycation market in Years 1 and 2. International travel is not likely to return in any meaningful way until Year 3. As international markets tend to be higher yield, recovery in Years 1 and 2 needs to focus on developing value in Argyll's staycation proposition and preparing in advance for the return of international markets through closer working with the travel trade. AITC will work with VisitScotland on readiness to fulfil travel trade requirements from Year 1.

Areas for Action:

- Accommodate evident consumer desire for active time in the great outdoors, build on the success of Wild About Argyll campaign activity and product development: and position Argyll & Isles as Scotland's Adventure Coast on Glasgow's doorstep. This will maximise appeal to a younger, more adventurous, and experience-driven demographic.
- Encourage new tailored experiences for individuals and small groups that celebrate Argyll & the Isles' key points of differentiation, and that can be booked online. Large group, coach and cruise audiences are not being ignored, but rather managed within appropriate destination and resource clusters.
- Respond to and accelerate the objectives of Scotland Outlook 2030, with a clear focus on sustainable and responsible tourism practices. Communities must be better integrated into local tourism decision-making and delivery of area-specific tourism offers.
- Demonstrate an environmentally friendly approach to tourism business development, including industry-wide carbon footprint reduction and the promotion of active travel and "buy local" consumer behaviour.

STRATEGIC PRIORITY: Reaching new audiences

Marine & Coastal Tourism

The West of Scotland, with Argyll & Isles at its heart, has long been established as one of the world's best sailing and boating locations. ABC and HIE have recognised maritime infrastructure and access improvements as investment priorities; including the UK and Scottish Government-backed Rural Growth Deal and the UK Government Levelling Up projects which are set to build and focus on the region's enviable marine and coastal assets.

Scotland's Adventure Coast perfectly encapsulates the wealth and diversity of the region's marine and coastal tourism products and experiences; and opportunities exist to cement the region's reputation as the most vibrant and customer-focused marine tourism destination in Europe.

Maintaining industry and public sector partner focus on immediate and future visitor requirements will deliver visitors to Argyll & Isles who are enthusiastic about being on or near the water, and responsible about how they interact with maritime, terrestrial and community environments.

All campaign activity to date has been strategically linked to the Argyll & the Isles Tourism 2020 strategy, and each campaign themed around key products that Argyll & Isles excels at delivering, and which are relevant across the destination – adventure and wildlife, and food and drink. The partnership's recent investment in online booking and e-commerce enables tracking and economic return of marketing activity.

The emphasis on maritime and coastal tourism development has been informed by years of research commissioned by Scottish Enterprise, HIE, British Marine Scotland and VS Insights.

<https://scottishtourismalliance.co.uk/wp-content/uploads/2019/03/Awakening-the-Giant-final.pdf>

<https://scottishtourismalliance.co.uk/wp-content/uploads/2020/08/FINAL-Strategy-Documents-Giant-Strides-2020-2025.pdf>

<https://www.visitscotland.org/research-insights/about-our-visitors/interests-activities/coastal-tourism>

Events and Festivals

In addition, prior to Covid19, the partnership had been investing substantial time and energy in supporting the events and festivals sector. Over 200 sporting and cultural events have been

staged per annum and profiled on the AITC and VS websites. This calendar was suspended in 2020 and only a few events were staged in 2021. To address the mix of casualties and potential new events arising out of post-lockdown innovation and entrepreneurialism, AITC has utilised market readiness grants to invest in a relationship with The LIST and have developed the technology to enable all events listed on AITC, VS and The LIST programmes link to ticket booking.

Hero products and consumer-facing campaigns will entice and educate visitors to consume experiences without creating social or environmental problems by emphasising the links between travel, accommodation, activities, food and drink and the triple bottom-line sustainability of the communities that deliver them. The visitor-facing strategic marketing focus will be delivered around the following key propositions:

- **Argyll & Isles as Scotland's Adventure Coast;** people-powered adventures (cycling, walking, sailing and other water activities). Responsible tourism-focused activities to be discovered across the destination's varied locations. A range of activities for first time triers to specialists and everything in between.
- **Argyll & Isles excels in local provenance;** from foraging to food production, to Michelin star restaurants, and an abundance of high-quality hand made goods. Argyll & Isles excels in the provision of local provenance and its characterful makers and producers are a key element of the visitor experience.
- **Argyll & Isles is an ideal destination for responsible tourism;** the destination offers many ways in which to enjoy the beautiful landscape responsibly. Businesses can demonstrate ideas for reducing their environmental impact and increase opportunities for visitors to create lasting memories without leaving a trace. This message will have resonance with informal and wild campers, camper van and motorhome users.

Travel Trade Business Development

Argyll & Isles is an attractive destination to the Travel Trade market, particularly as operators move away from large coach tours to small groups with tailored itineraries. Of particular interest is the region's ability to deliver experiences focusing on:

- Activity and adventure; on water and land, people-powered adventures
- Local food and drink; trails and UK's first Vegan Trail
- Luxury breaks; wellness, spa and off the beaten track
- Wildlife, nature, and sustainable tourism

The Travel Trade is interested in ready-made itineraries and ideas for immersive experiences. The region presents many options for travel, accommodation, attraction, and activity packages based on the above experiences and combinations of local destinations. AITC and VS will work closely together to develop relationships with the travel trade and encourage industry to build appropriate products across the destination. The primary driver will be quality of experience, rather than discounted rates.

STRATEGIC PRIORITY: Improving the Offer

For Argyll & the Isles to compete with other destinations, the partnership should continue to build on the improvements achieved in the last ten years. ABC have made significant investment in our places, and essential visitor infrastructure at numerous sites, creating benefits for both visitors and residents.

The customer journey can be a long chain with potential weak links that need to be addressed by individual businesses and collectively.

- The journey starts with destination marketing activity that presents clear and compelling reasons to visit (and/or move around) Argyll & Isles. AITC has an established history of producing first-class content for web and social media platforms; and understands the efficacy of multiple edits for use in different formats across a variety of campaigns. The global reach of VS will be a particularly useful partnership asset and AITC will work on compatibility of content for sharing on VS platforms and imagery to share on the Digital Media Library.
- Direct booking capability is expected by customers because it saves time and money. The regional tourism offer will be improved in terms of economic returns and destination reputation if most businesses can conclude a transaction online. AITC will work with industry on affordable and manageable system adoption to deliver that objective.
- Private car travel remains the default position for many visitors. The trunk road network is subject to permanent disruption on the A83, and delays are common. Disruptions to the ferry network continue to frustrate passengers and the partnership is committed to ensuring accurate and up-to-date travel information is available across all channels.
- Most visitors interpret the offer as the direct encounters and experiences associated with their valuable leisure time. Customer service and value for money rank very highly in traditional satisfaction surveys, as do authenticity, choice, quality, cleanliness, and personal safety.

What makes these activities extra special is being made to feel welcome. AITC will work with partners across the region to emphasise the fundamental necessity of first-class customer service across all sectors and locations.

Research has shown that employee wellbeing plays a key role in creating a productive and efficient workforce and reduces workplace attrition. To achieve the first-class customer service aspirations across the sector it will be key to embed fair work practices. Fair work is defined as work that offers an effective voice, opportunity, security, fulfilment, and respect and these need not involve a cost, and indeed may themselves realise a financial benefit to employers.

Skills Development

Another key driver of improving the offer for visitors is the continuing education and inspiration of tourism operators to support their understanding of the advantages of continued investment in their own businesses to sustain visitor growth and commercial rewards. This includes improving the skills of existing staff and attracting new entrants into the industry.

The AISTP partnership will offer a programme of events, focusing on practical ways in which businesses can develop. The following topics have been determined as a priority for 2022/23:

- Turning Food & Drink offering into a business asset and adding value
- Marketing your green credentials & promoting responsible tourism
- Developing trails / itineraries & engaging visitor experiences
- Innovative ways to retain staff
- Visitor insights & how to apply them to your business
- Creating a memorable visitor experience (for accommodation providers)

Highlands and Islands Enterprise have developed a support programme for businesses to understand how to implement fair work practices into their business. The partnership will promote the programme and support businesses in its implementation.

STRATEGIC PRIORITY: The journey towards net zero

VS leads the national tourism industry initiative. The Scottish tourism sector is being asked to prioritise responsible, low carbon growth and join the journey to Destination Net Zero. By acting, operators will reduce costs, build resilience, and meet increasing consumer demand for sustainable businesses focused on delivering responsible tourism. AITC will utilise and share the resources for region-wide destination and sector development projects; and emphasise Argyll & Isles' environmental credentials and consumer responsibilities in marketing and promotional material.

<https://www.visitscotland.org/supporting-your-business/responsible-tourism/sustainability/climate-change#advice>

The journey to net zero will be achieved through changed business practices and exploiting Argyll & the Isles' enviable location on the doorstep of the central belt. This has given the area a competitive edge: initially through the Heart & Soul campaign prior to Covid19 and enhanced by the surge in staycation activity. The Scotrail investment in the Highland Explorer carriage operating twice daily on the Glasgow-Oban line in 2021 – the first in the UK – is a measure of confidence in this market.

Lockdown and staycation responses have demonstrated that the market is becoming much more aware of sustainability and responsible travel choices and the more environmentally conscious consumer is keen to spend locally to support local businesses. Accordingly, it is imperative that local producers maintain realistic pricing structures.

Investment in AITC's digital capacity and capability in the last 2 years has ensured the destination is visible and bookable online through www.wildaboutargyll.co.uk and its digital footprint continues to grow. Focused marketing activity to profile these credentials is proposed.

By adhering to these principles, the strategy will also deliver against the National Strategic Priorities on behalf of the partnership:

- Our thriving places
- Our passionate people
- Our memorable experiences
- Our diverse businesses.

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May 2022

Appendix 1 - Year 1 Action Plan

The year 1 action plan builds on the momentum achieved throughout the last year as the tourism industry opens again for Argyll & the Isles. The plan has been built to be agile and respond to

the emerging needs of the visitor and make the most of Argyll's natural assets and new product offers.

Marketing Target Audience

The target visitor audience for 22/23 is based on an already engaged social media following. Males & females from 25-54, predominantly central belt, northern England, and Greater London.

Marketing Campaigns

The following marketing campaigns are planned for delivery. We will work closely with relevant partners to ensure cohesive and effective delivery. The partners will be Argyll and Bute Council, Visit Scotland, NatureScot, CalMac, Scotrail, Sustrans, Sail Scotland, Wild Scotland, Logan Air and others.

Strategic Priority	Campaign Key Focus
Extending the season and spreading visitors across the destination	1. Experience Scotland's Adventure Coast your way: <ul style="list-style-type: none"> ▪ Walk ▪ Cycle in the home of UCI ▪ Paddle / swim ▪ Sail ▪ Retreat
	2. Argyll's Wildlife Wonders: come and enjoy our rich and diverse terrestrial and marine wildlife and leave nothing but footprints
	3. Cosy Treats & Retreats: indulge your senses and while away the winter hours in our spas, cabins, and hotels
Reaching new audiences	4. Above & Below: enjoy five themed trails pin-pointing different locations where locals and visitors can explore more by getting in the water or lifting their eyes above the horizon
	5. Peddadling 2: Introduction to new cycling routes across Argyll (influencer campaign)
	6. Argyll's Makers & Culture: Be introduced to our local creators and immerse yourself in our culture events (VS Year of Stories)
The Journey to Net Zero	7. Sustainable travel options

Organic Marketing Development

Whilst the campaigns are being delivered, we will continue developing our organic marketing activity, growing our audiences, and understanding what type of content they respond to. These activities will include:

- Continued development of Food & Drink Trails and promotion
- Ensuring that active travel options are included in every campaign and creating a new Active Travel section on Wild About Argyll website
- Promotion of Argyll's events through our partnership with The List (reach of 9m across the UK)
- Upweighting and cleansing of destination information to ensure the visitor can plan their trips effectively
- Development of content around sustainability linked to partner information as appropriate

Budget

The budget to support the overall delivery of the marketing activities for 22/23 comes from several different sources and will be delivered by the AITC team and specialist partners as required. Funds will be drawn from; membership fees paid to AITC, £75,000 fund from Argyll & Bute Council and may include grants from Visit Scotland if they become available. It is anticipated that the £75,000 Argyll & Bute Council Grant will be apportioned as follows.

It should be noted that some tactical changes may be necessary as the world tourism market recovers. Adjustments to activities and budgets will be approved by the partnership.

ACTIVITY	BUDGET	OUTCOMES
PR & media – Destination positioning	15,000	<ul style="list-style-type: none">Reach new audiences
Bloggers, Influencers	5,000	<ul style="list-style-type: none">Reach new audiences; food trails, wellness and extend the season; winter retreats
Paid social promotion	5,000	<ul style="list-style-type: none">Boost marketing reach across all campaigns
New format, license free photography	15,000	<ul style="list-style-type: none">Assets which can be shared with Visit Scotland, A&BC & AITC Members
SEO Copywriting & new content development	10,000	<ul style="list-style-type: none">Insight based new content across all areas of Wild About Argyll
Campaign delivery	25,000	<ul style="list-style-type: none">Positioning Argyll as perfect get away from it all & wellness experiencesFamily friendlyGreat place for wildlife & nature
TOTAL	75,000	

Supporting evidence for marketing approach

In terms of domestic holidays, there may be deep-rooted beliefs around accommodation choice and travel options. However, there is some willingness to change around some areas of responsible tourism, notably around food and drink choices, energy consumption and car free days.

<https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers/about-our-visitors/external-vs.org-slides-summary-rt-scots-study-2021.pdf>

Other innovation insights. Visit Scotland continues to develop its data on current visitor trends and wants. The current insights fit well with Argyll & the Isles and have formed the basis of this marketing plan.

- Localism and authentic experiences
- Adaptable adventure

- Workcations
- Artisanal retail and food and drink
- Voluntourism
- Wellness

<https://www.visitscotland.org/research-insights/trends/trends-for-tomorrow>

<https://foodanddrink.scot/the-knowledge-bank/trends-foresighting/>

Appendix 2 SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Natural assets Scenery Coasts & Waters Islands Wildlife & Environment • History • Culture & Heritage • Proximity to population centres • Diversity of offer • Events & festivals calendar • Recreational amenity networks • Travel integral to holiday experience • Mature industry • High quality regional produce • Reputation for customer service • Inbound transport options 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Travel disruption • Seasonality • Inflexible business practices Lifestyle operators Hospitality dead zones • Inconsistent accommodation offer • Parking pressure • Insufficient camper/motorhome infrastructure • Online booking capability • Internal transport options • Town centre decline
<p>Opportunities</p> <ul style="list-style-type: none"> • Public infrastructure investment • Private investment Distilleries Accommodation Golf Marine • Holiday route development • Cruise tourism • Adventure tourism • Outdoor/marine tourism • Food & Drink • Cultural tourism • Eco/green/responsible tourism • Post-COVID domestic market demand • Town centre regeneration 	<p>Threats</p> <ul style="list-style-type: none"> • Rising costs Fuel Energy Wholesale supplies Retail prices Commercial rent • Reduced consumer spending power • Reduced hotel capacity • Low/no deposit overseas holiday bookings • Staff shortages