

**HIGHLANDS AND ISLANDS ENTERPRISE**

**A FRAMEWORK FOR DESTINATION DEVELOPMENT**

**AMBITIOUS FOR TOURISM CAITHNESS AND NORTH SUTHERLAND**



**Full Report – Volume II  
(Research Document)**

**(April 2011)**

**TOURISM RESOURCES COMPANY**  
*Management Consultancy and Research Services*

*In Association with EKOS*

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# TOURISM RESOURCES C O M P A N Y

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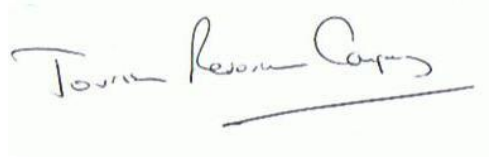
18<sup>th</sup> April 2011

Dear Ms Skene

## **AMBITIOUS FOR TOURISM CAITHNESS AND NORTH SUTHERLAND**

We have pleasure in presenting Volume II of our report into the opportunities for tourism in Caithness and North Sutherland. This report is in response to our proposals (Ref: P1557) submitted to you in October 2010.

Regards  
Yours sincerely  
(For and on behalf of Tourism Resources Company)



Sandy Steven  
Director

Ref: AJS/IM/0828-FR1 Vol II



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**AMBITIOUS FOR TOURISM CAITHNESS AND NORTH SUTHERLAND –  
VOLUME II**

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*(Front Cover Picture Courtesy of David Bullough of TRC – Dunnet Head Lighthouse)*

## **APPENDIX I**

### **AUDIT OF TOURISM INFRASTRUCTURE PRODUCTS / SERVICES AND FACILITIES BY TYPE**

## **Services / Product Overview – Visual Presentation of Data**

The tables and maps overleaf present a summary profile of the facilities and services available in each part of the study area. (The serviced accommodation sector is presented separately from the non-serviced).

The audit of infrastructure and services provides a detailed breakdown and backdrop to the offering in each of the four settlement foci in the study area.



<b>TOURISM ACCOMMODATION – BUSINESSES BY ZONE</b>					
<b>Category</b>	<b>Total No of Units</b>	<b>Helmsdale / Latheron</b>	<b>John O’Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>
<b>Serviced Accommodation</b>					
Hotel	26	4	9	11	2
Small Hotel	8		4	1	3
Inn	3			1	2
B&B	106	21	49	25	11
Guest House	12	1	5	3	3
<b>Serviced Accommodation Sub-Total</b>	<b>155</b>	<b>26</b>	<b>67</b>	<b>41</b>	<b>21</b>
<b>Non-Serviced Accommodation</b>					
Exclusive Use	6	4	1		1
Self-Catering	96	18	48	18	12
Hostel	5	1	1	1	2
<b>Non-Serviced Accommodation Sub-Total</b>	<b>107</b>	<b>23</b>	<b>50</b>	<b>19</b>	<b>15</b>
Caravan	13	1	7	2	3
<b>Overall Total of Tourism Accommodation Businesses</b>	<b>275</b>	<b>50</b>	<b>124</b>	<b>62</b>	<b>39</b>

**Note:** The above categories are those adopted by VisitScotland – for full descriptions see [www.visitscotland.com/quality-assurance/accommodation-types](http://www.visitscotland.com/quality-assurance/accommodation-types).

The above table provides detail of the number of tourist accommodation businesses across the four settlement foci. As can be seen the John O’Groats / Wick focus provides the greatest concentration of both serviced and non-serviced operators.

<b>TOURISM ACCOMMODATION – ROOMS CAPACITY BY ZONE</b>					
<b>Category</b>	<b>Total No of Rooms</b>	<b>Helmsdale / Latheron</b>	<b>John O’Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>
<b>Serviced Accommodation</b>					
Hotel	534	43	161	308	22
Small Hotel	100		37	21	42
Inn	14			7	7
B&B	271	46	128	67	30
Guest House	63	3	22	27	11
<b>Serviced Accommodation Sub-Total</b>	<b>982</b>	<b>92</b>	<b>348</b>	<b>430</b>	<b>112</b>
<b>Non-Serviced Accommodation</b>					
Exclusive Use	55	18	25		12
Self-Catering	221	36	116	43	26
Hostel	N/A	N/A	N/A	N/A	N/A
<b>Non-Serviced Accommodation Sub-Total</b>	<b>276</b>	<b>54</b>	<b>141</b>	<b>43</b>	<b>38</b>
Caravan (Pitches)	123	24	20	30	49
<b>Overall Total of Tourism Accommodation Rooms</b>	<b>1,381</b>	<b>170</b>	<b>509</b>	<b>503</b>	<b>199</b>

The previous table provides detail of the number of tourist accommodation rooms across the four settlement foci. The table highlights that the Thurso focus with a smaller number of accommodation businesses offer almost the same number of serviced rooms as John O’Groats / Wick focus suggesting that in the Thurso focus properties / businesses are larger.

The table below provides information on the number of available tourist bed spaces (sleeper capacity) across the four settlement foci. The table again highlights that the Thurso focus has more serviced bed spaces than the John O’Groats / Wick focus and John O’Groats a much higher level of bed spaces within the non-serviced sector.

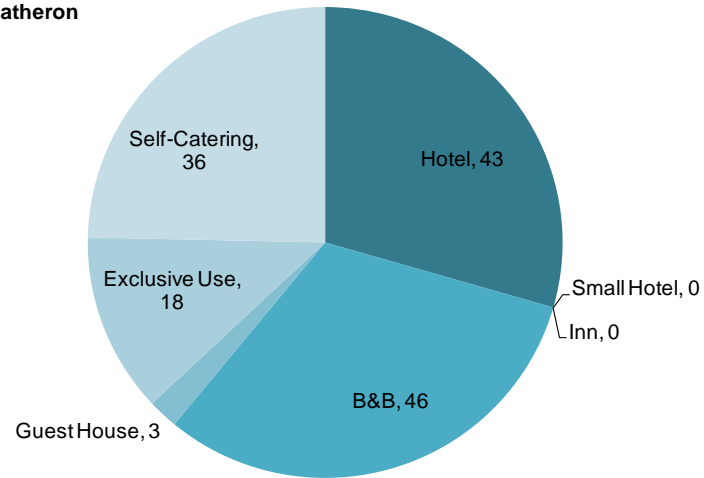
<b>TOURISM ACCOMMODATION – BED SPACE (SLEEPER) CAPACITY BY ZONE</b>					
<b>Category</b>	<b>Total No of Bed Spaces</b>	<b>Helmsdale / Latheron</b>	<b>John O’Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>
<b>Serviced Accommodation</b>					
Hotel	1047	90	318	599	40
Small Hotel	223		91	45	87
Inn	29			13	16
B&B	584	101	280	140	63
Guest House	145	7	48	65	25
<b>Serviced Accommodation Sub-Total</b>	<b>2,028</b>	<b>198</b>	<b>737</b>	<b>862</b>	<b>231</b>
<b>Non-Serviced Accommodation</b>					
Exclusive Use	106	34	48		24
Self-Catering	437	71	232	87	47
Hostel	123	24	20	30	49
<b>Non-Serviced Accommodation Sub-Total</b>	<b>666</b>	<b>129</b>	<b>300</b>	<b>117</b>	<b>120</b>
Caravan (2.5 Sleepers per pitch)	1,295	37.5	627.5	355	275
<b>Overall Total of Tourism Accommodation Bed Spaces</b>	<b>3,989</b>	<b>364.5</b>	<b>1,664.5</b>	<b>1,334</b>	<b>626</b>

The pie charts overleaf provide visual representation of the room mix in each of the settlement foci.

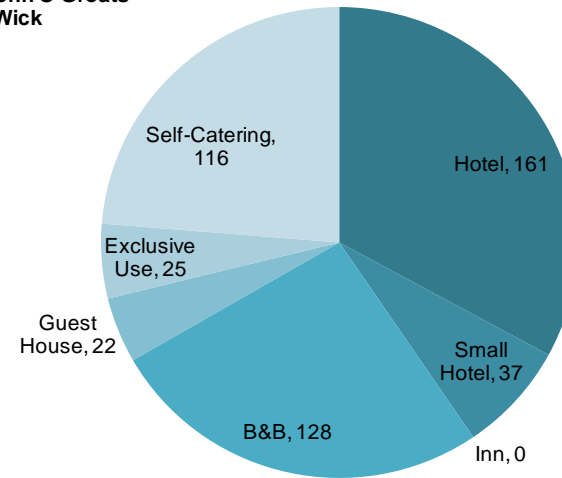
In the remainder of this section we present maps that provide visual representation of the dispersal of the various tourism products across the CNS area.

**ROOM MIX IN EACH LOCATION**

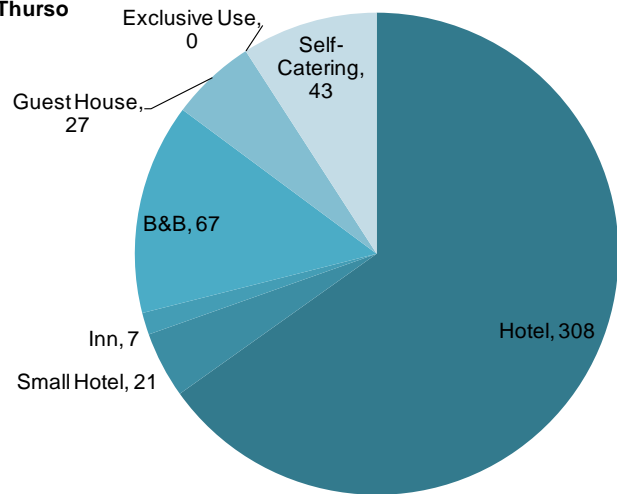
**Helmsdale /Latheron**



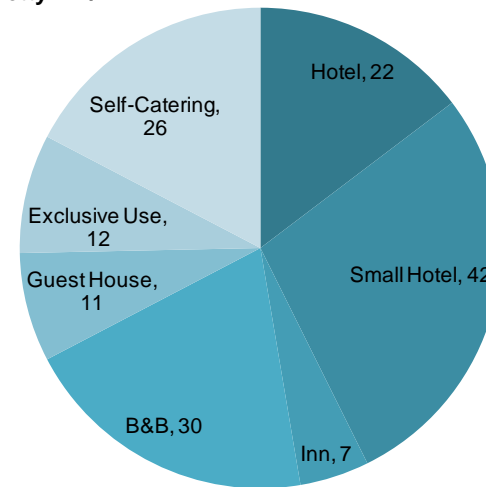
**John O'Groats /Wick**



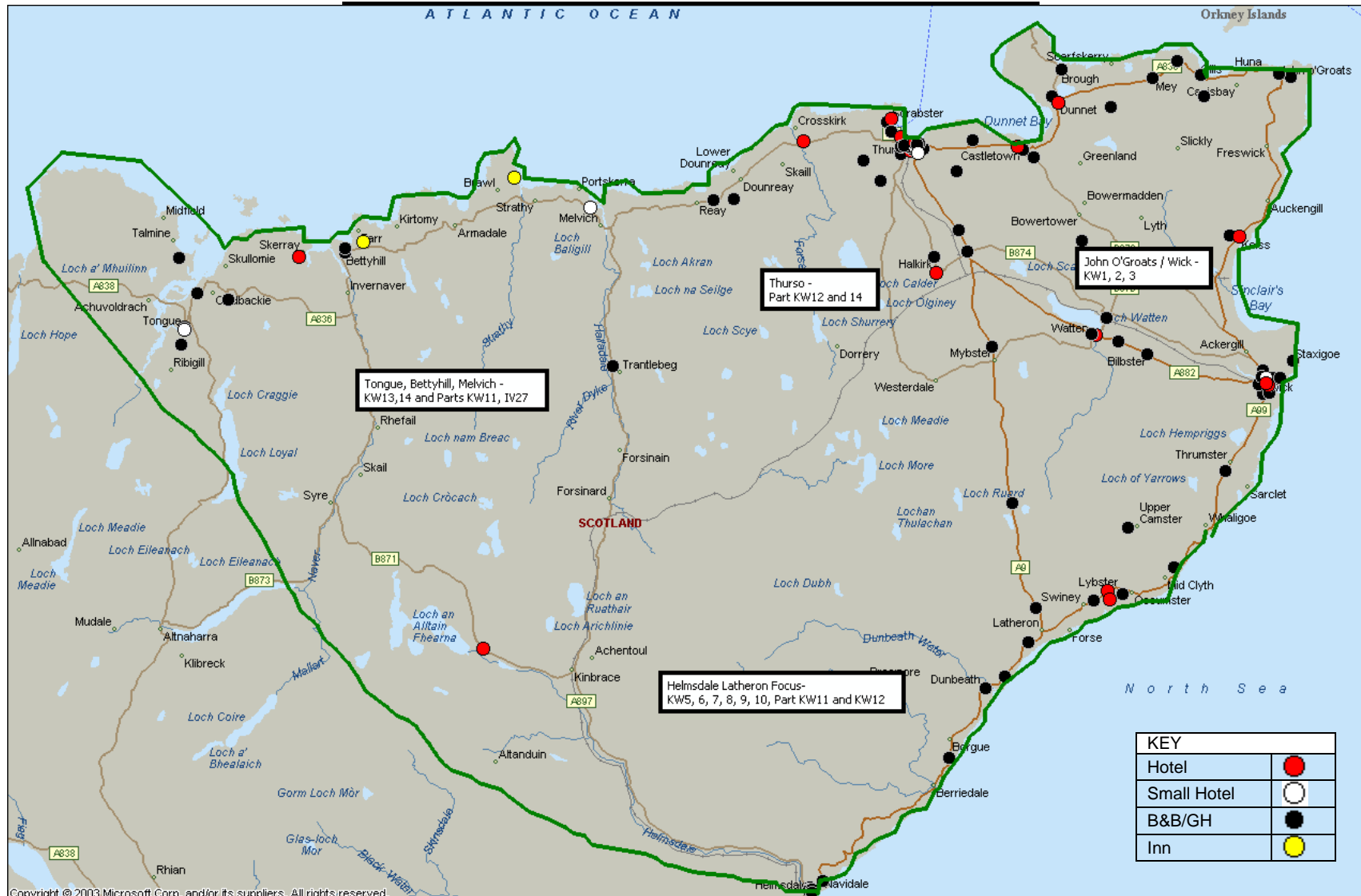
**Thurso**



**Tongue / Bettyhill / Melvich**



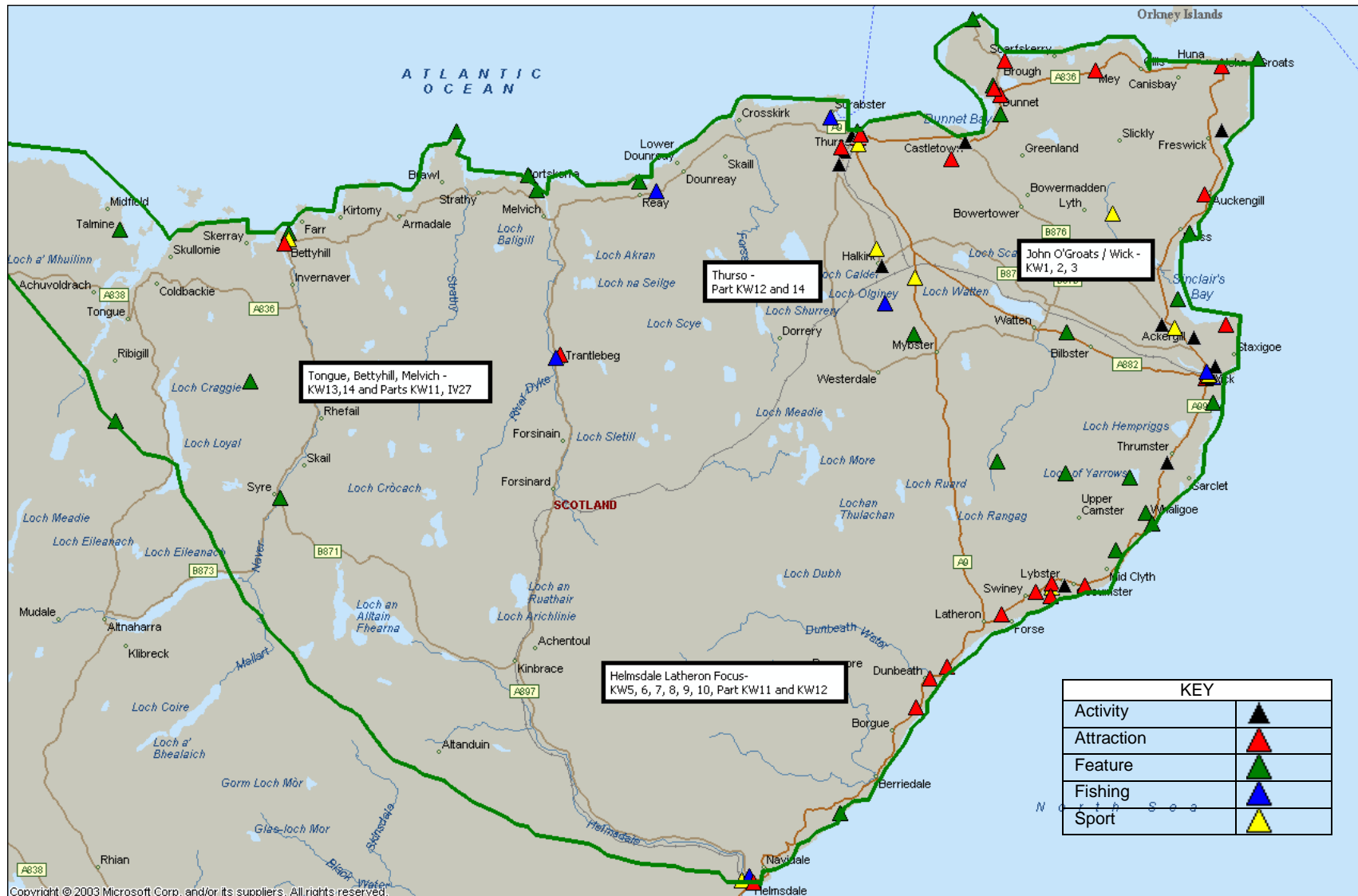
**DISTRIBUTION OF SERVICED ACCOMMODATION TYPES**



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**DISTRIBUTION OF ATTRACTORS / ACTIVITIES IN THE AREA**



<b>KEY TOURISM ATTRACTORS BY ZONE</b>					
<b>Category</b>	<b>Total</b>	<b>Helmsdale / Latheron</b>	<b>John O'Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>
Activity	21	1	13	7	
Attraction <sup>(1)</sup>	53	9	33	8	3
Feature <sup>(2)</sup>	24	4	8	1	11
Fishing	8	1	2	4	1
Sport & Recreation <sup>(3)</sup>	12	1	5	5	1
<b>Total Attractors</b>	<b>118</b>	<b>16</b>	<b>61</b>	<b>25</b>	<b>16</b>

**Notes:** Classifications are those assumed by TRC for the purpose of this audit. The actual content of each locale are highlighted in Appendix I and are in outline:

<sup>(1)</sup> Mainly built visitor facilities, attractions and museums, etc.

<sup>(2)</sup> Natural features, etc including viewpoints, etc.

<sup>(3)</sup> Sports including Recreation centres, swimming pools, tennis, football, etc.

ACCOMMODATION LISTING FROM AUDIT DATABASE								
Zone	Designator Category	Property Name	Settlement	Post Code	No of Units	Total Rooms	Total Sleepers	Grade 2010
1	Hotel	Navidale Hotel	Helmsdale	KW8 6JS	1	10	20	
1	Hotel	Belgrave Arms Hotel	Helmsdale	KW8 6JX	1	7	17	
1	Hotel	Bridge Hotel	Helmsdale	KW8 6JA	1	18	38	
1	Hotel	Garvault Hotel	Kinbrace	KW11 6UE	1	8	15	
1	B&B	Mulberry Croft	Berriedale	KW7 6HA	1	2	4	
1	B&B	Tormore Farm	Dunbeath	KW6 6EH	1	3	8	2 Star
1	B&B	Braemore Bed Breakfast	Dunbeath	KW6 6EB	1	2	4	
1	B&B	Inver Caravan Park B&B (Inver Park House)	Dunbeath	KW6 6EH	1	3	8	
1	B&B	Torbuie B&B	Helmsdale	KW8 6JS	1	2	6	
1	B&B	La Mirage B&B	Helmsdale	KW8 6JA	1	2	4	
1	B&B	Kintyre B&B	Helmsdale	KW8 6JD	1	3	6	
1	B&B	Kindale House B&B	Helmsdale	KW8 6JF	1	3	8	4 Star
1	B&B	Broomhill House B&B	Helmsdale	KW8 6JS	1	2	4	3 Star
1	B&B	Kerloch B&B	Helmsdale	KW8 6JX	1	3	5	
1	B&B	Heathcote B&B	Helmsdale	KW8 6JW	1	2	4	
1	B&B	Customs House B&B	Helmsdale	KW8 6JZ	1	3	6	
1	B&B	Burnside B&B	Helmsdale	KW8 6JS	1	2	4	
1	B&B	Bayview B&B	Helmsdale	KW8 6HL	2	2	4	
1	B&B	Old Manse, The	Latheron	KW5 6DJ	1	2	4	
1	B&B	Tacher B&B	Latheron	KW5 6DX	1	3	8	
1	B&B	Cnoc Shee B&B	Latheronwheel	KW5 6DW	1	1	2	
1	B&B	Crossburn, The	Latheronwheel	KW5 6DW	1	2	4	
1	B&B	Tigh Chailan B&B	Latheronwheel	KW5 6DW	1	2	4	
1	B&B	Auld Post Office B&B	Wick	KW1 5XR	1	2	4	4 Star
1	Guest House	Ruard Guest House	Helmsdale	KW8 6JR	1	3	7	
1	Exclusive Use	Strathmore Lodge	By Halkirk	KW12 6UP	1	8	14	
1	Exclusive Use	Craiglea	Latheronwheel	KW5 6DW	3	10	20	4 Star
1	Caravan	Inver Caravan Park	Dunbeath	KW6 6EH	15	0		3 Star
1	Hostel	Helmsdale Hostel	Helmsdale	KW8 6JR	1	4	24	4 Star
1	Self-Catering	Tigh a Mhuilinn	Dunbeath	KW6 6EG	1	2	4	
1	Self-Catering	Dunbeath Estate	Dunbeath	KW6 6EY	12	23	46	
1	Self-Catering	Rockhead	Dunbeath	KW6 6EY	1	2	4	
1	Self-Catering	Glendaroch House	Helmsdale	KW8 6JS	1	4	7	4 Star
1	Self-Catering	Old Manse Studio Apartment	Latheron	KW5 6DJ	1	2	4	3 Star
1	Self-Catering	Old Manse - Latheron	Latheron	KW5 6DJ	1	1	2	
1	Self-Catering	Balvalloch	Nr Helmsdale	KW8 6HY	1	2	4	3 Star
2	Hotel	Sinclair Bay Hotel	Keiss	KW1 4UY	1	6	12	
2	Hotel	Portland Arms Hotel	Lybster	KW3 6BS	1	23	42	(4 Star)
2	Hotel	Commercial Hotel (Lybster)	Lybster	KW3 6AE	1	3	7	
2	Hotel	Castletown Hotel (formerly the St Claire Arms)	Thurso	KW14 8TP	1	24	49	2 Star
2	Hotel	Northern Sands Hotel	Thurso	KW14 8XD	1	9	18	
2	Hotel	Brown Trout Hotel	Watten	KW1 5YN	1	8	16	
2	Hotel	Norseman Hotel	Wick	KW1 4NL	1	48	99	
2	Hotel	Breadalbane House Hotel	Wick	KW1 5AQ	1	10	20	
2	Hotel	MacKay's Hotel	Wick	KW1 5ED	1	30	55	3 Star
2	Small Hotel	Seaview Hotel & Caberfeidh	John O'Groats	KW1 4YR	1	15	37	2 Star
2	Small Hotel	Castle Arms Hotel	Thurso	KW14 8XH	1	8	22	2 Star
2	Small Hotel	Nethercliffe Hotel	Wick	KW1 4NS	1	6	14	3 Star
2	Small Hotel	Queen's Hotel	Wick	KW1 5PZ	1	8	18	2 Star
2	B&B	Lau-ren House B&B	Barrock	KW14 8SY	1	3	7	3 Star
2	B&B	Alamar B&B	Dunnet	KW14 8YD	1	3	6	
2	B&B	Dunnet Head B&B	Dunnet	KW14 8YE	1	2	4	
2	B&B	Windy Braes B&B	John O'Groats	KW1 4YB	1	2	5	
2	B&B	Swona View	John O'Groats	KW1 4YS	1	3	6	
2	B&B	Mill House	John O'Groats	KW1 4YD	1	2	4	3 Star
2	B&B	Hamnavoe B&B	John O'Groats	KW1 4YR	1	3	6	
2	B&B	Burnside B&B	John O'Groats	KW1 4YB	1	2	4	
2	B&B	Blackfield Holding B&B	John O'Groats	KW1 4YD	1	2	4	
2	B&B	Bencorragh House	John O'Groats	KW1 4YD	1	3	8	3 Star
2	B&B	Broo, The	John O'Groats	KW1 4YR	1	5	12	
2	B&B	Links View B&B	Keiss	KW1 4XG	1	2	4	
2	B&B	Acarsaid	Lybster	KW3 6AS	1	3	8	
2	B&B	Croft House, The	Lybster	KW3 6BT	1	2	4	3 Star
2	B&B	Station House B&B	Lybster	KW3 6BA	1	2	4	
2	B&B	Kyleburn House	Lybster	KW3 6BA	1	2	4	
2	B&B	Canisp House	Lybster	KW3 6BD	1	1	2	
2	B&B	Bolton House	Lybster	KW3 6AE	1	3	6	

ACCOMMODATION LISTING FROM AUDIT DATABASE								
Zone	Designator Category	Property Name	Settlement	Post Code	No of Units	Total Rooms	Total Sleepers	Grade 2010
2	B&B	Thrumster House (Estate Fieldsports)	Thrumster	KW1 5TX	1	2	4	
2	B&B	Lea View	Thurso	KW14 8XL	1	1	2	
2	B&B	Valleyview B&B (Antoinettes)	Thurso	KW14 8YT	1	3	6	
2	B&B	Greenland House (formerly Clydesdale Bank House B&B)	Thurso	KW14 8TU	1	3	7	
2	B&B	Hawthorns, The	Thurso	KW14 8XH	1	4	11	
2	B&B	Glennearn	Thurso	KW14 8XL	1	2	4	
2	B&B	Creag-na-mara	Thurso	KW14 8XL	1	4	10	
2	B&B	Garth House	Thurso	KW14 8SL	1	3	6	
2	B&B	Watten Mains	Watten	KW1 5UH	1	4	6	
2	B&B	Corrigall B&B	Watten	KW1 5XG	1	2	6	
2	B&B	Quayside B&B	Wick	KW1 5EP	1	7	18	
2	B&B	Dunroamin B&B (South Keiss)	Wick	KW1 4XG	1	2	4	
2	B&B	Hebron	Wick	KW1 5QG	1	2	4	
2	B&B	Clachan B&B	Wick	KW1 5NJ	1	3	6	4 Star Gold
2	B&B	Loch Watten House	Wick	KW1 5UG	1	3	10	
2	B&B	MacMillar House	Wick	KW1 4ND	1	3	6	
2	B&B	Mount Pleasant House B&B	Wick	KW1 4DN	1	4	7	
2	B&B	Mrs R Miller B&B	Wick	KW1 5BQ	1	2	4	
2	B&B	Eileen Ryrie	Wick	KW1 4PG	1	2	4	
2	B&B	Papigoe Cottage	Wick	KW1 4QU	1	2	4	
2	B&B	Hazelrigg B&B	Wick	KW1 5LS	1	3	6	
2	B&B	Riversdale B&B	Wick	KW1 4DE	1	2	4	
2	B&B	Seaview Guest House	Wick	KW1 4JH	1	3	8	3 Star
2	B&B	Wickers World	Wick	KW1 5EP	1	4	9	
2	B&B	White Gables B&B	Wick	KW1 5NH	1	1	2	
2	B&B	Bower Old Free Church Manse	Wick	KW1 4TT	1	1	2	Listed
2	B&B	Bayview B&B	Wick	KW1 4JJ	1	2	4	3 Star
2	B&B	Blackstairs House	Wick	KW1 5AW	1	2	4	
2	B&B	Bilbster House	Wick	KW1 5TB	1	3	6	
2	B&B	Bellhaven	Wick	KW1 4JJ	1	2	4	3 Star
2	B&B	Netherby	Wick	KW1 5QP	1	2	4	
2	Guest House	Caberfeidh Guesthouse	John O'Groats	KW1 4YR	1	2	4	
2	Guest House	Wellington Guest House	Wick	KW1 4BS	1	6	12	
2	Guest House	Harbour Guest House	Wick	KW1 5EX	1	5	9	
2	Guest House	Bramhill Guest House (formerly Carey's)	Wick	KW1 5PZ	1	4	14	
2	Guest House	Bank House Guest House	Wick	KW1 4NG	1	5	9	
2	Exclusive Use	Ackergill Tower	By Wick	KW1 4RG	1	25	48	5 Star
2	Caravan	Upper Bowertower	Bower	KW1 4TT	5	0		
2	Caravan	Dunnet Bay Caravan Club Site	Dunnet	KW14 8XD	57	0		5 Star
2	Caravan	John O'Groats Caravan Park	John O'Groats	KW1 4YR	90	0		3 Star
2	Caravan	Central Caravans	Loch Watten	KW1 5XL	7	0		
2	Caravan	Celtic Firs 'The Hideaway'	Thurso	KW14 8XW	1	0		Pass
2	Caravan	Wick Caravan and Camping Site	Wick	KW1 5SP	90	0		
2	Caravan	Neil MacKay & Sons	Wick	KW1 4UD	1	0		
2	Hostel	John O'Groats Youth Hostel	John O'Groats	KW1 4YH	1	0	20	3 Star
2	Self-Catering	Holiday Cottage - Bower	Bower	KW1 4	1	3	6	
2	Self-Catering	Lower Thura Farm	Bower	KW1 4TP	1	2	4	
2	Self-Catering	Croft, The / Ness Point House	Dunnet	KW14 8YE	1	3	6	4 Star
2	Self-Catering	Ocean View	Dunnet	KW14 8YE	1	2	4	
2	Self-Catering	Mey Hall Holiday Cottage	East Mey	KW14 8XL	1	1	2	
2	Self-Catering	Mersing Cottage	Freswick	KW1 4XX	1	2	4	
2	Self-Catering	Firthview Cottage	John O'Groats	KW1 4YB	1	2	4	
2	Self-Catering	Tofts House	John O'Groats	KW1 4X	1	4	8	
2	Self-Catering	Lookout, The	John O'Groats	KW1 4Y	1	5	10	
2	Self-Catering	Briar Rose Cottage	John O'Groats	KW1 4YB	1	3	6	
2	Self-Catering	Keiss Harbour House	Keiss	KW1 4DX	1	5	12	
2	Self-Catering	Fernlea Cottage	Lybster	KW3 6BJ	1	3	6	
2	Self-Catering	Milton House (PJ Prop	Lybster	KW3 6AQ	1	3	6	

ACCOMMODATION LISTING FROM AUDIT DATABASE								
Zone	Designator Category	Property Name	Settlement	Post Code	No of Units	Total Rooms	Total Sleepers	Grade 2010
		Mgt)						
2	Self-Catering	Taigh an Clachair	Lybster	KW3 6AS	1	2	3	3 Star
2	Self-Catering	Church Apartment	Lybster	KW3 6	1	3	7	
2	Self-Catering	Midskerry Cottage	Scarfskerry	KW14 8XW	1	2	5	2 Star
2	Self-Catering	Shormary Cottage	Scarfskerry	KW14 8XW	1	2	4	3 Star
2	Self-Catering	Starbank	Scarfskerry	KW14 8XN	1	3	6	3 Star
2	Self-Catering	Ash Cottage	Thurso	KW14 8SX	1	4	7	3 Star
2	Self-Catering	Mey Cliff Cottage	Thurso	KW14 8XN	1	3	6	
2	Self-Catering	Rowan Cottage	Thurso	KW14 8TB	1	1	2	
2	Self-Catering	Maurinsey House	Thurso	KW14 8XF	1	5	8	Awaiting Grading
2	Self-Catering	Headwark Cottage	Thurso	KW14 8YE	1	3	6	
2	Self-Catering	Gladstone Cottage Flat	Thurso	KW14 8TP	1	2	3	
2	Self-Catering	Dairy Cottage	Thurso	KW14 8SX	1	1	2	
2	Self-Catering	Smithy Cottage	Ulbster	KW2 6AA	1	2	4	
2	Self-Catering	Croft Holiday Flats	Watten	KW1 5	1	2	4	
2	Self-Catering	Strathallan Self Catering Holiday Home	Watten	KW1 5XG	1	4	6	4 Star
2	Self-Catering	Town House	Wick	KW1 5PZ	1	2	4	
2	Self-Catering	Widelands Holiday Cottage	Wick	KW1 4RH	1	3	6	
2	Self-Catering	Old Salt House Holiday Apartment	Wick	KW1 5EH	1	1	2	
2	Self-Catering	Corner House	Wick	KW1 5QQ	1	4	5	4 Star
2	Self-Catering	Thistle Dhu	Wick	KW1 5AT	1	1	2	
2	Self-Catering	Round House	Wick	KW1 5EZ	1	3	6	
2	Self-Catering	Dempster Holiday Let	Wick	KW1 5SB	1	3	6	
2	Self-Catering	Coopers Cottage	Wick	KW1 4RF	1	2	4	
2	Self-Catering	North Fork Cottage	Wick		1	2	4	
2	Self-Catering	Gardeners Cottage / North Bilbster Cott	Wick	KW1 4TA	2	4	8	4 Star
2	Self-Catering	Quayside Holiday Flats	Wick	KW1 5EP	3	6	12	
2	Self-Catering	Duncorann House / Lorne Apartment	Wick	KW1 5EY	5	6	18	4 Star
2	Self-Catering	The Coastguards	Wick	KW1 5TN	1	2	4	
3	Hotel	Ulbster Arms Hotel (Angus Estates)	Halkirk	KW12 6XY	1	13	24	3 Star
3	Hotel	Commercial Hotel (Halkirk) (Angus Estates)	Halkirk	KW12 6XY	1	5	10	
3	Hotel	Bayview Hotel	Lybster	KW14 8BL	1	6	12	
3	Hotel	Ferry Inn Hotel	Scrabster, Thurso	KW14 7UJ	1	9	19	
3	Hotel	Station Hotel	Thurso	KW14 7DH	1	18	38	3 Star
3	Hotel	Central Hotel	Thurso	KW14 8EJ	1	7	13	
3	Hotel	Weigh Inn	Thurso	KW14 7UG	1	58	116	
3	Hotel	Pentland Hotel	Thurso	KW14 7AA	1	41	80	
3	Hotel	St Clair Hotel	Thurso	KW14 7AJ	1	34	68	3 Star
3	Hotel	Forss House Hotel	Thurso	KW14 7XY	1	14	28	4 Star
3	Hotel	Royal Hotel	Thurso	KW14 8EH	1	103	191	AI
3	Small Hotel	Park Hotel	Thurso	KW14 8RE	1	21	45	3 Star
3	Inn	Holborn Hotel	Thurso	KW14 7BQ	1	7	13	2 Star
3	B&B	Glenlivet	Halkirk	KW12 6XF	1	2	4	
3	B&B	Varrich	Halkirk	KW12 6UU	1	2	4	
3	B&B	Sordale House	Halkirk	KW12 6XB	1	3	6	
3	B&B	Old Inn, The	Reay	KW14 7RE	1	2	4	3 Star
3	B&B	Linkside B&B	Reay	KW14 7RE	1	2	4	
3	B&B	Harbour View B&B	Scrabster	KW14 7UH	1	2	4	
3	B&B	Brae House	Shebster	KW14 7RR	1	3	8	
3	B&B	Carlingwark	Thurso	KW14 7EW	1	2	4	
3	B&B	Straven (Haimer) B&B	Thurso	KW14 8YN	1	2	4	
3	B&B	Old Exchange B&B, The	Thurso	KW14 7AA	1	2	4	
3	B&B	Tigh Na Abhainn	Thurso	KW14 8AX	1	8	16	
3	B&B	Murray House	Thurso	KW14 7HD	1	5	12	3 Star
3	B&B	Skara B&B	Thurso	KW14 8YN	1	3	6	3 Star
3	B&B	Shinval B&B	Thurso	KW14 7NX	1	4	8	
3	B&B	Sheigra	Thurso	KW14 7EL	1	2	4	3 Star
3	B&B	Seaview Farm B&B	Thurso	KW14 7XQ	1	3	6	
3	B&B	Beach View	Thurso	KW14 8BL	1	2	4	
3	B&B	Navidale B&B	Thurso	KW14 7JB	1	4	10	
3	B&B	Kerrera	Thurso	KW14 7HH	1	2	4	
3	B&B	1 Janet Street B&B	Thurso	KW14 7AR	1	2	4	
3	B&B	Mrs Oag B&B	Thurso	KW14 8AR	1	2	4	3 Star
3	B&B	Mrs Murray B&B	Thurso	KW14 7NP	1	2	4	4 Star
3	B&B	Mrs Milne B&B	Thurso	KW14 7PX	1	2	4	
3	B&B	Mrs D Bremner B&B	Thurso	KW14 7UR	1	2	4	

ACCOMMODATION LISTING FROM AUDIT DATABASE								
Zone	Designator Category	Property Name	Settlement	Post Code	No of Units	Total Rooms	Total Sleepers	Grade 2010
3	B&B	Brownhill Cottage B&B	Thurso	KW14 8HU	1	2	4	
3	Guest House	Pentland Lodge House	Thurso	KW14 7JN	1	8	20	4 Star
3	Guest House	Waterside Guest House	Thurso	KW14 7AR	1	15	37	
3	Guest House	Ivordene Guest House	Thurso	KW14 7XF	1	4	8	
3	Caravan	Thurso Bay Holidays	Thurso	KW14 7JY	7	0		
3	Caravan	Thurso Bay Caravan and Camping Park (Blue Door 52N)	Thurso	KW14 7JY	135	0		2 Star
3	Hostel	Sandra's Hostel	Thurso	KW14 7BQ	1	0	30	4 Star
3	Self-Catering	25 Airdneiskich	Bettyhill	KW12 6UU	1	2	4	4 Star
3	Self-Catering	Halkirk Holiday Let (Kinross)	Halkirk	KW12 6XN	1	2	6	
3	Self-Catering	Briar Cottage	Reay	KW14 7RG	1	4	8	
3	Self-Catering	Coasters Cottage	Scarfskerry	KW14 8	1	1	2	
3	Self-Catering	Northern Lights Holiday Home	Scrabster		1	4	8	
3	Self-Catering	Birdsong Cottage	Thurso	KW14 8YH	1	3	6	
3	Self-Catering	Dixonfield Farmhouse	Thurso	KW14 8YN	1	3	6	
3	Self-Catering	Weydale Farm Cottage (Anderson Cottage)	Thurso	KW14 8YS	1	2	4	3 Star
3	Self-Catering	Bairlinnean	Thurso	KW14 8BN	1	2	4	3 Star
3	Self-Catering	7 Clarence Street	Thurso	KW14 7HE	1	2	4	
3	Self-Catering	Mayfield Holiday Cottages	Thurso	KW14 8YN	1	2	4	
3	Self-Catering	Knowes, The	Thurso	KW14 7RQ	1	1	2	
3	Self-Catering	Millbank Mews	Thurso	KW14 8PS	1	4	8	
3	Self-Catering	Upper Clayock Cottage	Thurso	KW12 6UZ	1	2	4	3 Star
3	Self-Catering	Hilltop Holiday Homes	Thurso		1	3	5	
3	Self-Catering	Pentland Firth Cottages	Thurso	KW14 8BN	2	4	8	
3	Self-Catering	Town House	Thurso	KW14 8BN	1	2	4	
4	Hotel	Forsinard Hotel	Forsinard	KW13 6YT	1	14	24	
4	Hotel	Borgie Lodge Hotel	Thurso	KW14 7TH	1	8	16	
4	Small Hotel	Melvich Hotel	Thurso	KW14 7YJ	1	12	24	3 Star
4	Small Hotel	Tongue Hotel	Tongue	IV27 4XD	1	19	42	4 Star
4	Small Hotel	Ben Loyal Hotel	Tongue	IV27 4XE	1	11	21	3 Star
4	Inn	Farr Bay Inn	Bettyhill	KW14 7SZ	1	4	8	
4	Inn	Strathy Inn	Strathy	KW14 7RY	1	3	8	AI
4	B&B	Shenley	Bettyhill	KW14 7SS	1	2	4	
4	B&B	Dunveaden House	Bettyhill	KW14 7SP	1	6	11	
4	B&B	Station Cottage	Forsinard	KW13 6YT	1	2	4	
4	B&B	Craggan Hotel	Melness	IV27 4YP	1	4	8	
4	B&B	Catalina	Strathy Point	KW14 7RY	1	1	2	
4	B&B	Cloisters	Talmine	IV27 4YP	1	3	6	4 Star
4	B&B	Sharvedda	Thurso	KW14 7RY	1	3	6	4 Star
4	B&B	Shelling, The	Thurso	KW14 7YJ	1	3	6	AI
4	B&B	Dalcharn (77)	Tongue	IV27 4XU	1	2	6	
4	B&B	Bothy, The	Tongue	IV27 4XG	1	2	4	
4	B&B	Weavers B&B	Tongue	IV27 4XW	1	2	6	
4	Guest House	Tigh-na-Clash Guest House	Thurso	KW14 7YJ	1	5	10	
4	Guest House	Rhian Guest House	Tongue	IV27 4XJ	1	3	7	3 Star
4	Guest House	Tigh-nan-ubhal Guest House	Tongue	IV27 4XF	1	3	8	
4	Exclusive Use	Bighouse Lodge	Thurso	KW14 7YJ	1	12	24	Listed
4	Caravan	Poulouriscaig	Armadale	KW14 7SA	1	0		Pass
4	Caravan	Craigdhu Caravan / Camping Site	Bettyhill	KW14 7SP	90	0		
4	Caravan	Halladale Inn Caravan Park	Thurso	KW14 7YJ	19	0		4 Star
4	Hostel	Corn Mill Bunkhouse	Forsinard	KW13 6YT	1	0	14	4 Star
4	Hostel	Tongue Youth Hostel	Tongue	IV27 4XH	1	0	35	3 Star
4	Self-Catering	Hughag's House	Armadale	KW14 7SA	1	2	5	3 Star
4	Self-Catering	Armadale Farm Cottage	Armadale	KW14 7SA	1	1	2	3 Star
4	Self-Catering	Rhivale	Bettyhill	KW14 7TA	1	2	4	3 Star
4	Self-Catering	Dhualton Cottage	Bettyhill	KW12	1	2	4	2 Star
4	Self-Catering	Fishery Cottage	Forsinard	KW14 7YL	1	2	4	3 Star
4	Self-Catering	Netstore Cottage	Forsinard	KW13 6YT	1	3	6	4 Star
4	Self-Catering	Talmine Post Office Flat	Talmine	IV27 4YT	1	3	5	2 Star
4	Self-Catering	Tuinne-na-mara	Talmine	IV27 4YS	1	3	5	3 Star
4	Self-Catering	Halladale Inn Chalet Park	Thurso	KW14 7YJ	4	8	12	2 Star

ATTRACTORS IN THE CAITHNESS AND NORTH SUTHERLAND AREA					
Zone	Property Name	Settlement	Post Code	Designator Category	Grade 2010
1	Borgie Forest		NC665587	Feature	
1	Badbea (Highland Clearance Village)	Badbea	ND084204	Attraction	
1	Dunbeath Heritage Centre	Dunbeath	KW6 6ED	Attraction	4 Star
1	Dunbeath Preservation Trust (Organisation)	Dunbeath	KW6 6ED	Attraction	
1	Laidhay Croft Museum	Dunbeath	KW6 6EH	Attraction	
1	Dunbeath Estate (Gardens)	Dunbeath	KW6 6EY	Attraction	
1	Timespan Heritage Centre	Helmsdale	KW8 6JX	Attraction	4 Star
1	Highland Pursuits (Not located)	Helmsdale	KW8 6JL	Fishing	
1	Bunillidh Thistle Sports Club	Helmsdale	KW8 6HH	Sport	
1	Hee-Haw Donkeys	Latheron	KW5 6DG	Activity	
1	Patricia Niemann Jewellery	Latheron	KW5 6DG	Attraction	
1	Clan Gunn Museum / Heritage Centre	Latheron	KW5 6DG	Attraction	3 Star
1	North Shore Pottery	Latheron	KW5 6DG	Attraction	2 Star
1	Ousdale Broch	Ousdale	ND072188	Feature	
2	Camster Forest (FCS) (Toftgunn Forest)		ND243370	Feature	
2	Caithness Broch Centre	Auckengill	KW1 4XP	Attraction	
2	Ackergill Links Beach (Brown Sign)	By Wick		Feature	
2	Caithness Archaeological Trust (Organisation)	Dunbeath	KW1 6EN	Attraction	
2	Duncansby Head Lighthouse & Stacks (Brown Sign)	Duncansby Head		Feature	
2	Britannia Hall	Dunnet	KW14 8YD	Attraction	
2	St Johns Pool and Artsmith Studio	Dunnet	KW14 8YD	Attraction	
2	Dunnet Head (RSPB)	Dunnet	KW14	Attraction	
2	Mary Ann's Cottage	Dunnet	KW14	Attraction	
2	Dunnet Bay Countryside Ranger Base (Seadrift Visitor Centre)	Dunnet	KW14 8XD	Attraction	
2	Burifa Hill	Dunnet Head	KW14 8YE	Attraction	
2	John O'Groats Ferries - Wildlife Cruises	John O'Groats	KW1 4YR	Activity	
2	Fripperies	John O'Groats	KW1 4YR	Attraction	
2	Last House Museum	John O'Groats	KW1 4YR	Attraction	
2	Caithness Candles	John O'Groats	KW1 4YR	Attraction	
2	Keiss Castle	Keiss	ND357616	Attraction	
2	Keiss Beach	Keiss		Feature	
2	Shelligoe Archery	Lybster	KW3 6AS	Activity	
2	Clan Gunn Heritage Trust (Gathering)	Lybster	KW3 6BT	Attraction	
2	Munsary Peatlands Reserve	Lybster	KW3	Attraction	
2	North Lands Creative Glass	Lybster	KW3 6BN	Attraction	
2	Caithness Heritage Trust (Waterlines)	Lybster	KW3 6BT	Attraction	
2	Waterlines Visitor Centre	Lybster	KW3 6AH	Attraction	4 Star
2	Katrina Sutherland Country Spa	Lybster	KW3 6AX	Attraction	
2	Caithness Cheeses	Lybster	KW3 6AX	Attraction	
2	Hill O'Many Stanes	Lybster	ND295384	Attraction	
2	Lybster Golf Club	Lybster	KW3 6BJ	Sport	
2	Yarrows Broch	South Yarrow	ND306433	Feature	
2	Thrumster Estate	Thrumster	KW1 5TX	Activity	
2	Ardmore Wildlife (not located closed?)	Thurso	KW14 8TU	Activity	
2	Dunnet Forest Walks	Thurso	ND220698	Activity	
2	Queen Elizabeth Castle Of Mey Trust	Thurso	KW14 8XH	Attraction	5 Star
2	Castlehill Heritage Centre and Trail	Thurso	KW14 8SN	Attraction	
2	Castle & Gardens of Mey	Thurso	KW14 8XH	Attraction	5 Star
2	Cairn O'Get	Ulbster	ND313411	Feature	
2	Fishing at Bilbster (not located)	Watten	KW1 5	Activity	
2	Whaligoe Steps	Whaligoe	ND318408	Feature	
2	Lyth Stables	Wick	KW1 4UD	Activity	
2	WICK-ed Paintball (not located)	Wick	KW1 4HZ	Activity	
2	Coastline Tours (Geo Explorer)	Wick	KW1 5ET	Activity	
2	Nordwall Livery Stables (not located)	Wick	KW1 4RR	Activity	
2	Patchwork Pleasures (not located)	Wick	KW1 4XX	Activity	
2	Lower Gillock Farm (not located)	Wick	KW1 4RG	Activity	
2	Caithness Seacoast Ltd, Sea Tours	Wick	KW1 5HA	Activity	

ATTRACTORS IN THE CAITHNESS AND NORTH SUTHERLAND AREA					
Zone	Property Name	Settlement	Post Code	Designator Category	Grade 2010
2	Old Castle of Wick (Historic Scotland)	Wick	ND 368 87	Attraction	
2	Camster Cairns (Caithness Archeo Trust)	Wick	KW1	Attraction	
2	North Highland Archive	Wick	KW1 5AB	Attraction	
2	Clan Sinclair Study Centre	Wick	KW1 4QT	Attraction	
2	St Fergus Gallery	Wick	KW1 5AB	Attraction	
2	Old Pulteney Distillery Visitor Centre	Wick	KW1 5EH	Attraction	4 Star
2	Castle Sinclair	Wick	KW1 4QT	Attraction	
2	The Spot (Bike Shop)	Wick	KW1 5PZ	Attraction	
2	Wick Heritage Centre	Wick	KW1 5EY	Attraction	
2	Lyth Arts Centre	Wick	KW1 4UD	Attraction	
2	Freedom Charters (Suspect)	Wick	KW1 5HB	Fishing	
2	Hugo Ross Fishing Tackle Specialists	Wick	KW1 4BP	Fishing	
2	Horsin' Around (Not located)	Wick	KW1 4UQ	Sport	
2	Caithness Kayak Club	Wick	KW1 5EH	Sport	
2	Wick Golf Club	Wick	KW1 4RW	Sport	
2	Wick Swimming Pool	Wick	KW1 5EH	Sport	
3	Cnoc Chambered Cairn			Feature	
3	Thurso Golf Club	Halkirk	KW14 7XD	Activity	
3	Caithness Clays (not located)	Halkirk	KW12 6YA	Activity	
3	Achanarras Fossil Quarry	Halkirk	KW12 6	Attraction	
3	Harpsdale Fishery Park	Halkirk	KW12 6UL	Fishing	
3	Achalone Activities (Horse Riding)	Halkirk	KW12 6XA	Sport	
3	Northfield Livery Stables	Halkirk	KW12 6XF	Sport	
3	Caithness and Sutherland Angling Services	Reay	KW14 7RE	Fishing	
3	Reay Golf Club	Reay	KW14 7RE	Sport	
3	MV Stormdrift II	Scrabster	KW14 7UN	Fishing	
3	Silverline Sea Angling	Scrabster	KW14 7UN	Fishing	
3	Great Escape Tours (Kenny)	Thurso	KW14 8BN	Activity	
3	North Experience (not located)	Thurso	KW14 8AP	Activity	
3	Pentland Tours (not located)	Thurso	KW14 7JN	Activity	
3	Viking Bowls (Thor Leisure Ltd) (Closed)	Thurso	KW14 7QU	Activity	
3	Surfing Lessons Andy Bain Thurso Beach	Thurso		Activity	
3	Caithness Horizons	Thurso	KW14 8AJ	Attraction	5 Star
3	Mill Theatre	Thurso	KW14 8PS	Attraction	
3	UKAEA (not located)	Thurso	KW14 7UZ	Attraction	
3	The Bike Shop	Thurso	KW14 8AZ	Attraction	
3	Harper / Jeans Fishing Shop	Thurso	KW14 8AZ	Attraction	
3	Library Gallery Swanson	Thurso	KW14 7AS	Attraction	
3	Dounreay.com (Corner Shop)	Thurso	KW14 7BJ	Attraction	
3	Thurso Swimming Pool	Thurso	KW14 8PS	Sport	
3	Caithness Rugby Football Club	Thurso	KW14 7RE	Sport	
4	Naver Forest			Feature	
4	Ben Loyal (Walk)			Feature	
4	Strathnaver Museum	Bettyhill	KW14 7SS	Attraction	2 Star
4	Bettyhill Pier and R. Naver (Brown Sign)	Bettyhill		Feature	
4	Bettyhill View Point (Brown Sign)	Bettyhill		Feature	
4	North Coast Leisure Centre	Bettyhill	KW14 7SS	Sport	
4	Flows National Nature Reserve (RSPB)	Forsinard	KW13	Attraction	
4	RSPB Forsinard Flows Peatland Reserve	Forsinard	KW13 6YT	Attraction	3 Star
4	Strath Halladale	Forsinard	KW13 6YT	Fishing	
4	Melvich Beach (Brown Sign)	Melvich		Feature	
4	Portskerra Pier (Brown Sign)	Portskerra		Feature	
4	Sandside Bay (Brown Sign)	Reay		Feature	
4	Rosal Clearance Village / Forest	Rosal	NC696439	Feature	
4	River Halladale (Brown Sign)	Strathhalladale		Feature	
4	Strathy Point & Lighthouse (Brown Sign)	Strathy		Feature	
4	Talmine Pier & Bay (Brown Sign)	Talmine		Feature	

## **APPENDIX II**

### **OTHER MATERIAL REFERENCED / BIBLIOGRAPHY**

<b>DOCUMENTARY REVIEW / BIBLIOGRAPHY (KEY DOCUMENTS)</b>
Ambitious For Tourism Summary
Tourism Development Forum Actions Captured 29.10.09
Tourism Development Forum Meeting Minutes
Collated Forum Responses
Caithness & Sutherland Area Plan 2010
Event Scotland O'Neill Coldwater Classic
Mobile Sutherland Art Works
Mackay Country: Reclaiming The Province of Strathnaver
Musical Map of Caithness
O'Neill Cold Water Classic Discussion Paper
Proposed Harbour Centre, Thurso, Feasibility Study
The History Brief
Highland Council Vision for Caithness
Sutherland Local Plan
Caithness: A River of Stone
NDA Caithness & North Sutherland Priority Area
Sutherland Summit 2009
Gaelic and Norse in the Landscape
Highland Area Tourism Partnership Plan (Strategy)
HIE Operating Plan 2010-2013
The Flow Country Project
The Business of Creativity 2010
Tourism Framework for Change Targets
John O'Groats Masterplan
Caithness & North Sutherland Regeneration Programme Action Plan
Sutherland Partnership Development Action Plan
CNSRP Vision for Caithness
Caithness Local Plan
Scrabster Harbour Development Information Pack
Highland and Moray ATP Agenda
Highland and Moray ATP Minutes
Highland and Moray ATP Action Plan
Highland Tourism Research Report (fact sheet)
Highland and Moray ATP Report December 2010
Barriers to Growth
Wild North Festival
Wild North Draft Letter Key Partners
Wild North Draft Community Groups
North Highland Festival Steering Group
International Flower Festival (Slovenia)
True North Highlands
O'Neil Surfing Competition
SE / HIE / VS Tourism Destination Development Guide
Steam Economic Report for The Highlands 2009 (The Highland Council)

## **APPENDIX III**

### **OVERVIEW OF ACCOMMODATION DEMAND**

<b>ANALYSIS OF HOTEL DEMAND ACROSS THE FOUR ZONES</b>					
	<b>Helmsdale / Latheron</b>	<b>John O'Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>	
<b>Type</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Overall Totals</b>
<b>Hotel</b>					
Total Available Bedroom	15,695	72,270	122,640	25,915	<b>236,520</b>
Total Available Bed Spaces	32,850	149,285	239,805	52,195	<b>474,135</b>
<b>Total Bed Nights Sold</b>	<b>7,738</b>	<b>61,105</b>	<b>133,291</b>	<b>19,774</b>	<b>221,908</b>
of Which:					
Total Corporate	5,804	27,940	42,375	2,193	<b>78,312</b>
Total Leisure	1,935	33,155	90,915	17,582	<b>143,586</b>

<b>ANALYSIS OF GUEST HOUSE / B&amp;B DEMAND ACROSS THE FOUR ZONES</b>					
	<b>Helmsdale / Latheron</b>	<b>John O'Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>	
<b>Type</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Overall Totals</b>
<b>Guest House / B&amp;B</b>					
Total Available Bedroom	18,074	53,633	28,533	14,965	<b>115,205</b>
Total Available Bed Spaces	39,559	117,486	60,716	32,120	<b>249,881</b>
<b>Total Bed Nights Sold</b>	<b>10,114</b>	<b>54,445</b>	<b>29,773</b>	<b>14,250</b>	<b>108,582</b>
of Which:					
Total Corporate	2,584	10,076	7,832	1,361	<b>21,853</b>
Total Leisure	7,530	44,369	21,941	12,889	<b>86,728</b>

<b>ANALYSIS OF SELF-CATERING DEMAND ACROSS THE FOUR ZONES</b>					
	<b>Helmsdale / Latheron</b>	<b>John O'Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>	
<b>Type</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Overall Totals</b>
<b>Self-Catering</b>					
Total Available Bedroom	19,710	51,465	16,425	13,870	<b>101,470</b>
Total Available Bed Spaces	38,325	102,200	33,215	25,915	<b>199,655</b>
<b>Total Bed Nights Sold</b>	<b>10,635</b>	<b>28,361</b>	<b>9,217</b>	<b>7,191</b>	<b>55,404</b>
of Which:					
Total Corporate	532	1,418	461	360	<b>2,770</b>
Total Leisure	6,832	26,942	8,756	6,832	<b>49,362</b>

<b>ANALYSIS OF CARAVAN DEMAND ACROSS THE FOUR ZONES</b>					
	<b>Helmsdale / Latheron</b>	<b>John O'Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>	
<b>Type</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Overall Totals</b>
<b>Caravan</b>					
Total Available Bed Spaces per night (Pitches x 2.5 sleepers)	37.5	627.5	355	275	<b>1,295</b>
TNS Occupancy	24%	24%	24%	24%	<b>24%</b>
<b>Total Bed Nights Sold</b>	<b>1,926</b>	<b>32,228</b>	<b>18,233</b>	<b>14,124</b>	<b>66,511</b>
of Which:					
Total Corporate	-	-	-	-	-
Total Leisure	<b>1,926</b>	<b>32,228</b>	<b>18,233</b>	<b>14,124</b>	<b>66,511</b>

<b>ANALYSIS OF HOSTEL DEMAND ACROSS THE FOUR ZONES</b>					
	<b>Helmsdale / Latheron</b>	<b>John O'Groats / Wick</b>	<b>Thurso Focus</b>	<b>Tongue / Bettyhill / Melvich</b>	
<b>Type</b>	<b>Zone 1</b>	<b>Zone 2</b>	<b>Zone 3</b>	<b>Zone 4</b>	<b>Overall Totals</b>
<b>Hostel</b>					
Total Available Bed Spaces (assume all seasonal)	5,136	4,280	6,420	10,486	<b>26322</b>
TNS Occupancy Highlands	38%	38%	38%	38%	38%
<b>Total Bed Nights Sold</b>	<b>1,936</b>	<b>1,614</b>	<b>2,420</b>	<b>3,953</b>	<b>9,923</b>
of Which:					
Total Corporate					
Total Leisure	1,936	1,614	2,420	3,953	<b>9,923</b>

## **APPENDIX IV**

### **POPULATION DATA ZONES**

<b>CAITHNESS AND NORTH SUTHERLAND POPULATION DATA ZONES</b>		
S01003968	S01003984	S01003998
S01003969	S01003985	S01003999
S01003971	S01003986	S01004000
S01003972	S01003987	S01004001
S01003974	S01003988	S01004002
S01003975	S01003989	S01004003
S01003976	S01003990	S01004004
S01003977	S01003991	S01004005
S01003978	S01003992	S01004006
S01003979	S01003993	S01004007
S01003980	S01003994	S01004008
S01003981	S01003995	S01004009
S01003982	S01003996	S01004010
S01003983	S01003997	

## **APPENDIX V**

### **VISITSCOTLAND MARKET SEGMENTATION**

## **VISITSCOTLAND MARKET SEGMENTATION**

### **I Mature Devotees**

Mature Devotees are mid and lower affluence, older couples from the North of England and Scotland, who are particularly committed to holidaying in Scotland, spending the most nights here of all the segments. They are a little below average for spend on holidays in general, but Scotland takes a disproportionate share of their spend. When they go away, they tend to take longer breaks, often touring in their own car, sometimes with a caravan, or arranging accommodation directly in a B&B or small hotel, quite possibly somewhere they already know, as they like to revisit special places. They think of Scotland as an affordable destination, and are no doubt good at seeking out offers. The internet has passed them by.

#### Profile

- 1.9 million households in UK;
- Northern based – 80% Yorkshire and above;
- Low affluence;
- Oldest segment (average age 50);
- High percentage retired;
- Traditional in outlook;
- Church goers;
- Likely to buy British;
- Not users of technology / internet.

#### Holiday Behaviour

- Scotland high share of spend;
- 81% visited Scotland in last year;
- Guest houses / B&Bs / small hotels (3\*);
- Will seek out offers;
- Like to explore local area;
- Like to tour and watch wildlife (by car).

## II Affluent Active Devotees

Affluent Active Devotees enjoy living life to the full, taking plenty of short breaks and occasional longer holidays. They are well-travelled experience-seekers. They will revisit special places, but also try new destinations, and they make sure they mark special occasions. Whilst they like to plan where they go, they are also quite spontaneous, and will often book accommodation close to time of travel, reflecting their confidence and knowledge. Some of them use the internet actively, for convenience, booking accommodation online, whilst others are less internet-savvy. Scotland is a close destination for them, and one they love. They are the highest spenders of all on Scottish holidays. This is because they participate in activities, including golf and other sports, but also because they treat themselves to the finer things in life: preferring to stay in hotels, and enjoying good food and drink.

### Profile

- 1.4 million households in UK;
- Northern based – 80%; 48% Scottish;
- High affluence;
- Second oldest segment (average age 50);
- Upmarket and traditional;
- Financially savvy;
- Enjoy finer things in life;
- Eat in good restaurants;
- Medium internet use.

### Holiday Behaviour

- Second highest total holiday spend;
- UK neutral, Scotland loyal;
- Scotland high share of spend;
- 85% visited Scotland in last year;
- Stay in hotels (quality – boutique);
- Enjoy good food and drink;
- Enjoy active pursuits on holiday;
- Like to plan where to go but will also book last minute.

### III Younger Domestic Explorers

Younger Domestic Explorers are very strong advocates of holidays in their own country. They believe that breaks in England and Scotland enable them to get away at short notice, offer good value for money, and offer plenty to see and do. They also believe there is always more of the UK to discover and explore.

There are two sub-segments in this group – couples / singles and families. The families group, which make up 36%, will have school age children and will have limited disposable income. They love breaks in their own country and will prefer to stay in self-catering accommodation due to the freedom that it provides them. They love to tour, watch wildlife but also enjoy cultural and educational activities such as visiting museums. For the singles / couples segment, as they are just starting out on their career and enjoying life to the full, they also have limited disposable income to spend on holidays. Breaks in the UK are therefore well suited to this group – they will also stay in self-catering, hotels and bed & breakfasts whilst on a break to Scotland. This group are more likely to research their roots, as well as touring, visiting museums and watching wildlife.

#### Profile

- 2 million households in UK;
- Northern based – 70% Yorkshire and above;
- Low affluence;
- Second youngest segment (25-45);
- 36% have children (school age);
- Families or young professionals;
- Convenience important (busy lives);
- High internet users (online purchasing and booking).

#### Holiday Behaviour

- Strong advocates of holidaying in own country;
- 81% visited Scotland in last two years;
- Like to plan where to go on holidays (but can be spontaneous!);
- Like to be active on holiday;
- Like to go somewhere different every holiday and broaden minds.

#### IV Affluent Southern Explorers

Affluent Southern Explorers spend the most nights away on holiday. Whilst they are affluent high achievers, they are not overly materialistic, and prefer simpler, local accommodation such as B&Bs and self-catering. They tend to take longer breaks, both in the UK and abroad, and are particularly seeking to broaden their mind and to mix with the locals – they like to engage with, and understand, the culture of places they visit. They enjoy discovering new places as well as returning to familiar places, and are always open to suggestions from articles in newspapers and from reading guide books.

##### Profile

- 2.3 million households in UK;
- Southern based (39% London);
- Most affluent segment;
- Fourth oldest segment (average age 49);
- Professionals;
- Financially savvy;
- Enjoy finer things in life;
- Have a relationship with Scotland (through university, friends / family).

##### Holiday Behaviour

- High usage of B&Bs and self-catering;
- 84% visited Scotland in last two years;
- Take long breaks;
- Like to broaden mind on holiday;
- Holidays off the beaten track;
- Like outdoor activities / golf.

## V Northern Sometimers

Northern Sometimers are mid affluence, mid-aged couples from Northern England, Scotland and Northern Ireland (some (32%) have older children aged 12-17). They prefer to travel abroad for holidays whenever they can afford to, as they believe the UK does not offer good value for money. They also believe that it is easier to plan a holiday abroad than stay in the UK. They are slightly warmer towards Scotland than the rest of the UK and are the warmest of the cold segments. They may consider Scotland for a city break (the type of break they prefer in the UK) so they can go shopping, stay in a good value hotel and perhaps take in a show or theatre performance. They like to have fun on their short city break, so eating and drinking will play a large part of this. As well as visiting cities, they will also take breaks in the UK to see friends and family.

### Profile

- 1.7 m households in UK
- Northern based – 80% Yorkshire & above;
- Mid affluence
- Average age 45 (but 49% under 45)
- 32% have older children (12-17)
- Prudent with finances
- Image conscious group – keep fit/gyms important
- Also early adopters of new technology
- High internet usage

### Holiday Behaviour

- 2nd highest segment for going abroad
- Like to eat/drink/lie in the sun (highest segment)
- UK negative but Scotland warmer
- Like visiting cities in UK
- Stay in hotels (not families)
- Like shopping, eating & drinking
- Like having fun on holidays/short breaks
- Like to visit friends/relatives in the UK

## VI Southern Travel Junkies

Southern Travel Junkies are affluent professionals across all ages. Their holidays are an important part of their lifestyle, in fact you could say they help to define them as people. They like to take a main holiday plus several short breaks a year, mainly abroad. Whilst some have children, this is not obviously reflected in their travel behaviour. They are adventurous, and like to go to new and different destinations, including fashionable places and vibrant cities. No doubt they tick places off a list. They tend to hop on a plane, and living in the South they have a wide choice of destinations on their doorstep. They will be influenced by good deals – and probably react quite spontaneously to offers. They use the internet actively to plan and research their trips. If they do take a break in the UK, it is likely to be to a city, to enjoy some shopping and good food and drink, or to visit friends and relatives, when they tend to find their own accommodation rather than stay. They have little relationship with Scotland, yet recognise there is much to discover and explore here – at some point in the future. They believe Scotland is difficult to get to, and, like the rest of the UK, is not particularly good value for money compared with destinations abroad.

### Profile

- 2.2 million households in UK;
- Southern based (37% London);
- 2nd most affluent segment;
- 3rd youngest segment (average age 45);
- Professionals;
- Financially savvy;
- Status brands;
- Technology adopters.

### Holiday Behaviour

- Highest total holiday spend;
- 2/3 of holidays abroad;
- UK & Scotland negative (but will visit friends & family);
- Like city breaks (shopping);
- Enjoy good food & drink;
- Stay in hotels (also hostels – to be different);
- Like to go somewhere different every holiday;
- Like fashionable places;
- Fly anywhere if good deal.

## **APPENDIX VI**

### **SUMMARY CONCLUSIONS FROM ROADSHOW WORKSHOPS OF NEXT STEPS**

# PRODUCT / SERVICES DEVELOPMENT

- 
- Draw 'Together' Festivals & Events into a Cohesive Annual Calendar at Regional Level
  - New Out of Season Events / to Raise Profile – Extend Season
  - Opportunities to Expand Events / Cultural / Performance & Visual Arts Sector re New Facilities
  - Build on Local Food / Provenance – Encouraging Wider Use of 'Local' Produce
  - See Business Development – Encourage Reinvestment in Quality & Service Standards
  - At Local / Regional Level, Car & Coach Hire is an Issue / Business Development Opportunity (See Diversification of Community Assets / Not for Profit)
  - Public Toilets?
  - See Technological Opportunities re Marketing & Promotion & Product (audio / apps / blogs / social networking etc)
  - North Highland Way & Other Similar Products
  - Capitalise Further on Lifelong Learning Opportunities (glass, pottery, archaeology, photography, wildlife, painting, gold panning, etc). Help Develop & Promote New Business Models – Opportunity for New Residential Centre
  - Retail / Attractions Opening Times to Service Cruise Market – Activity Communication by Delivery Vehicle (Internal Marketing)
  - Create Visit itineraries for Cruise Market with Improved Transport
  - Lobby for Creation of Better / More Frequent Air Links
  - Local Action Plans Must be Evolved to Ensure New / Existing Product Meets Target Market Needs
  - Confirm Sustainable Accommodation development Models eg Static Caravans Where Appropriate – See Licensing
  - Confirm Evolving Support Infrastructure Meets Needs of Business Tourism Visitors (Renewables, etc) – See Overnight Accommodation Offerings, Meeting Facilities, Office Space, etc
  - Icons – Develop John O'Groats
  - Packaging & Discounting
  - Mobile / Web Reception
  - Monitor Competition & Learn (Learning Journeys / Benchmarking)
  - Lobby Transport Providers, etc for Improved Services & Integration
  - Link / Package with Orkney (Archaeology, Norse etc)
  - Identify & Confirm Main Gaps in Activity Provision (Boat Trips, etc)
  - See Links to Identity (Marketing) Relevance & Contribution of 'New' Facilities to be Appraised eg River of Stone; Harbour Centre, Thurso; Geotrail, etc

# MARKETING & PROMOTION



- Confirm Identity
- Establish Core Icons
- Create Marketing Strategy & Promotional Action Plan
- Create Marketing Plan (Internal)
- Vehicle to Undertake Collective Destination Promotion
- Tourist Information Provision (Audit / Review)
- Create New Tourist Information Strategy (inc Signage & Interpretation Strategy)
- Create Packages & Itineraries
- See Visual Library
- Marketing Messages to Turn Remoteness, Wilderness to Advantage

# BUSINESS & SKILLS DEVELOPMENT



- Identify Training & Skills Needs vs Provision Locally
- Identify Quality Needs vs Provision (Limited Provision of Certain Accommodation Categories)
- Vocational Skills (Service etc)
- Business Skills (Management, Control, Understanding Investment Opportunities, etc)
- Inward Investment Strategy
- Business Information & Record Keeping
- Specialist Accreditation of Activity Operators, etc
- Encourage Understanding of Investment Opportunities Locally – Conference / Learning Journey
- Promotion of Business Opportunities to Encourage Extended Opening Hours – Conference / Learning Journey
- Raise Awareness of FFE Replacement
- Raise Awareness of how to Unlock Niche Opportunities utilising Existing Assets (see Account Managed Companies / Communities)

## DESTINATION MANAGEMENT AND DEVELOPMENT LEADERSHIP



- Remit / Roles & Responsibilities (Development? Business Support? Promotion?)
- Existing Public, Private & 3<sup>rd</sup> Sector Involvement remains as is?
- New Regional Body Formed / or one Evolved from Existing Organisation – its Remit
- Local Bodies – Local Delivery & Champions / Linked to Regional?
- Marketing / Promotion - Delivery & Co-ordination Separate?
- Promotion / Communication – External / Internal (helping the sector understand the ‘why’ of actions)
- Funding / Revenue Generation to Support Work?
- Collate & Provide Market Intelligence – Monitor Change

## **APPENDIX VII**

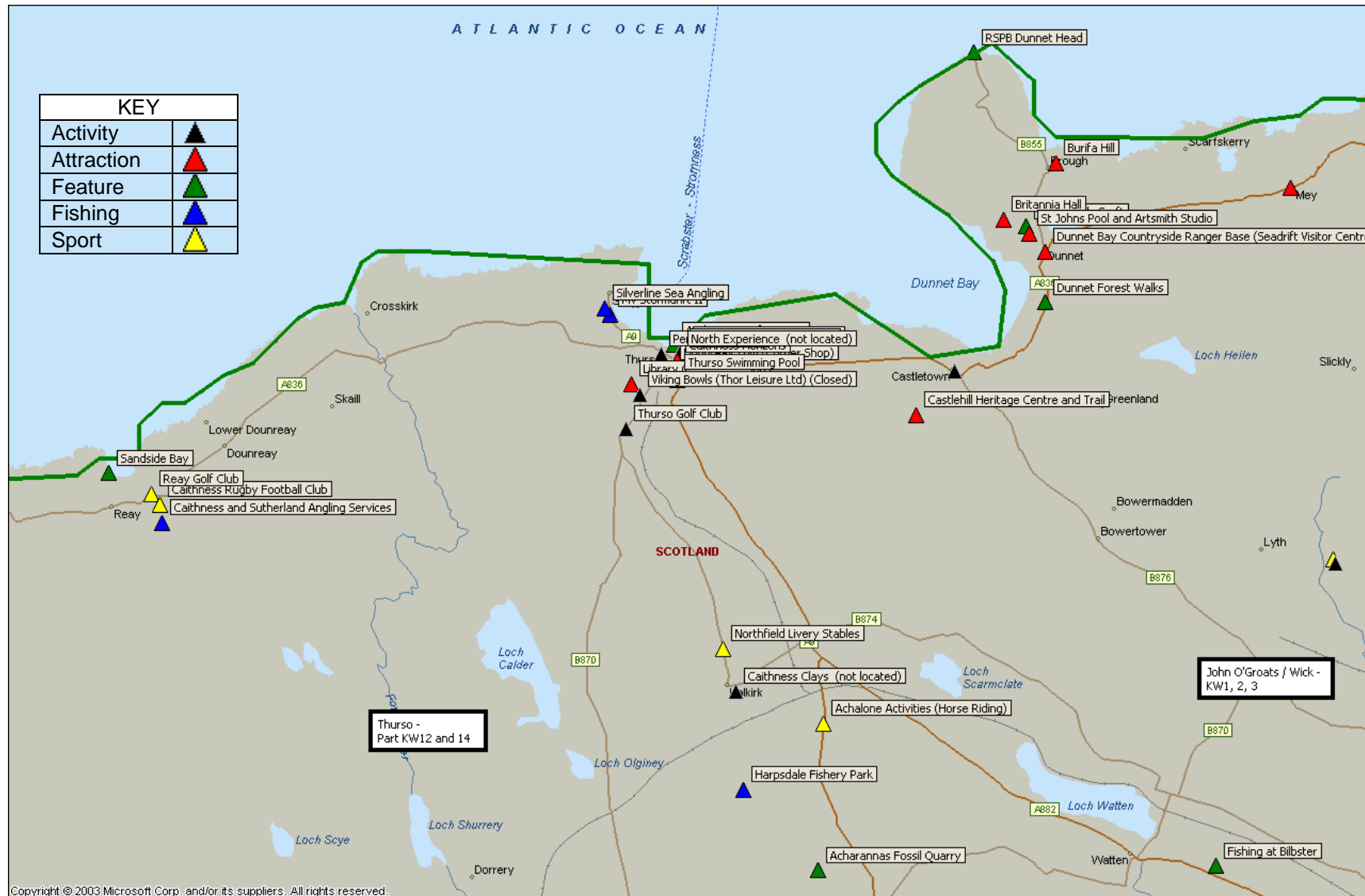
### **AREA MAPS OF TOURISM ATTRACTORS**

**ATTRACTORS IN HELMSDALE AREA**

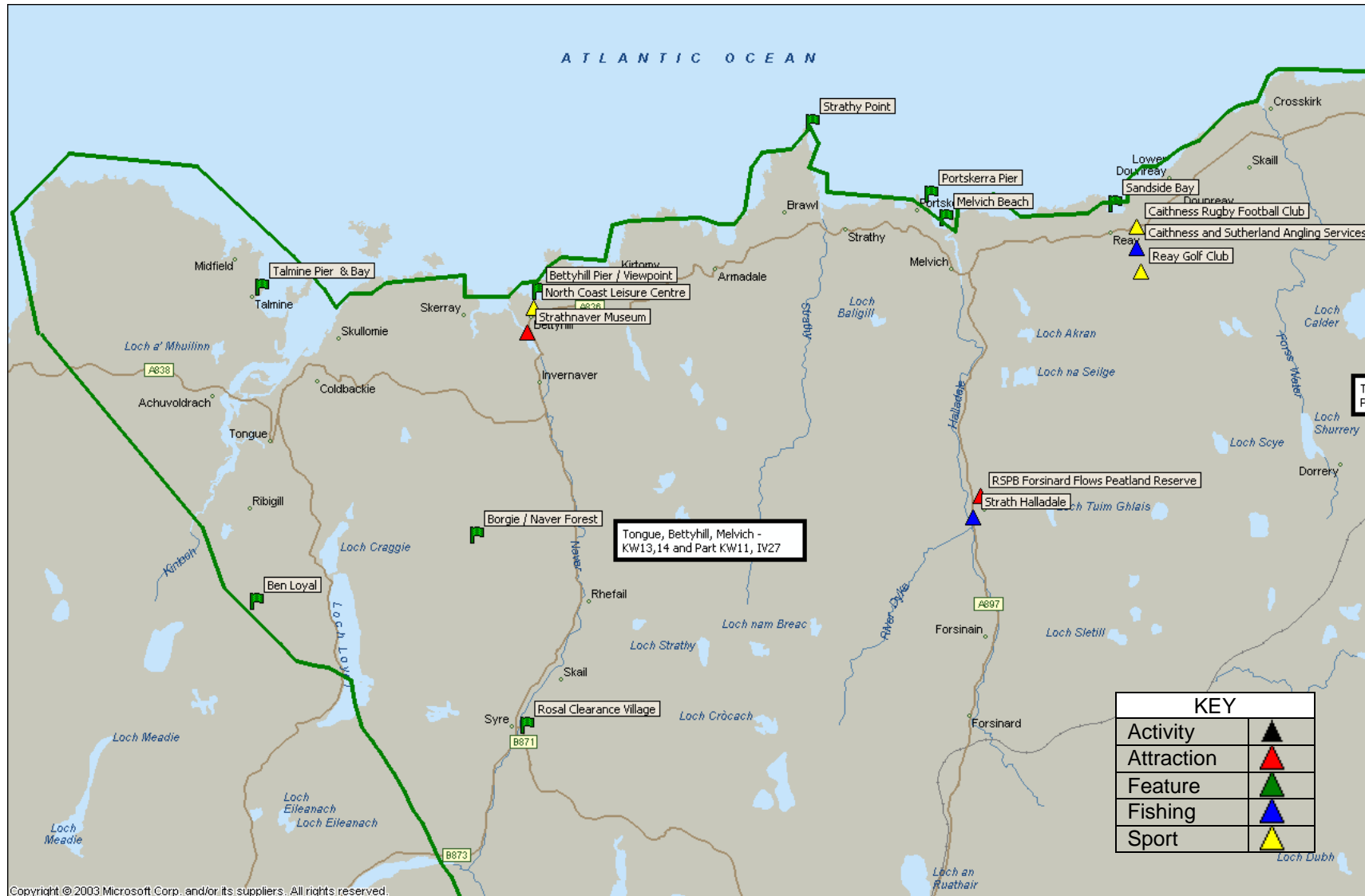




### ATTRACTORS IN THE THURSO AREA



**ATTRACTORS IN THE TONGUE AREA**



KEY	
Activity	▲
Attraction	▲
Feature	▲
Fishing	▲
Sport	▲

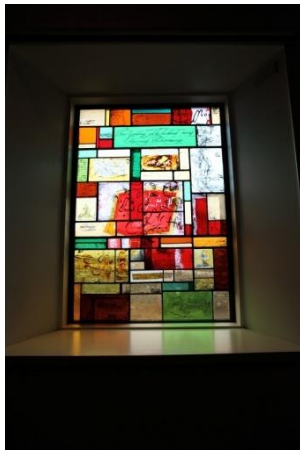
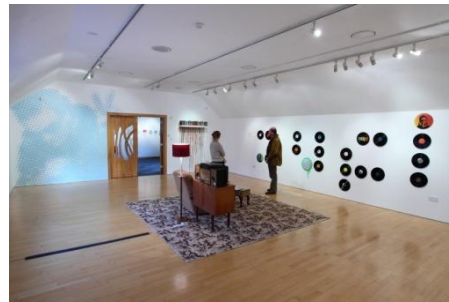
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## **APPENDIX VIII**

**EXAMPLES OF PHOTO LIBRARY FROM FIELD TRIP**  
**[Electronic file provided separately]**

**PHOTO LIBRARY EXAMPLES FROM FIELD TRIP**





## **APPENDIX IX**

### **SETTLEMENT OVERVIEWS**

## **I INTRODUCTION**

Profiled briefly in the Appendix I is an overview of each of the four 'sub-destinations' that make up the study area. These include:

- Helmsdale / Latheron
- John O'Groats / Wick
- Thurso
- Tongue / Bettyhill / Melvich

## **2 PRODUCT OVERVIEW**

Each of the above settlement foci at its product / destination experience and offering are highlighted within the body of the report and earlier Appendices. These outline the availability of accommodation, attractions and tourism facilities and infrastructure.

## **3 MARKET OVERVIEW**

TRC concluded a review of the current trading levels and sources of tourism demand for each of the four sub-areas and these are included within the report and appendices. In essence each has differing sources and types of demand. These have been referenced at different points in the report but indications are clearly that:

### Helmsdale / Latheron

The majority of overnight demand for this area is that which is emanating from the leisure sector; and to an extent the day visitor market comes from that passing through en route elsewhere. However given the area is 'close to other generating sources and is a key entry point into CNS study area it potentially benefits from more and broader visitor markets.

### John O'Groats / Wick

This settlement focus is one of the better performing destinations in that it benefits from demand from a broad mix of markets ie leisure and business tourism sectors. The John O'Groats icon is also a significant attractor for day visit / passing through markets and others.

### Thurso

The area benefits from a non-discretionary business tourism sector that is larger than that experienced by any of the other locations in the study area. This market is in evidence year round and is instrumental in seeing the Thurso focus performing the strongest overall. Day visit / market en route elsewhere a good sector too.

### Tongue / Bettyhill / Melvich

This is perhaps the most fragile of the areas relying almost solely on the leisure tourism sector. With limited accommodation it however cannot accommodate volume markets which sees its capacity curtailed in the overnight tourism sector. The natural environment of the area and the opportunities for outdoor activities are good and offer opportunities for the future however issues of seasonality and availability of accommodation / attractors are key in a fragile marketplace probably worse so than the other areas.

\* \* \* \* \*

In each location in addition to the findings and discussion at the workshops on markets and opportunities the consultancy team also had discussions with certain operators and local community representatives and organisation to explore key issues affecting their locales. These findings and discussions have informed TRC's work and the outputs of this study. In the following Appendix are the minutes / notes from each of the various development events and roadshow workshops.

**APPENDIX X**

**EVENT AND ROADSHOWS (INVITEES AND PARTICIPANTS)**

**AND**

**DEVELOPMENT EVENT AND ROADSHOW NOTES**

Below we provide details on the programme of events staged as part of this study.

<b>AMBITIOUS FOR TOURISM CAITHNESS AND NORTH SUTHERLAND – KEY EVENTS *</b>		
<b>Event</b>		<b>Content – Discussion Surrounding:</b>
1	Key Stakeholders (Representatives of Tourism Forum / Public Sector Agencies and Tourism 'Groups')	<ul style="list-style-type: none"> <li>• Strengths &amp; weaknesses to area's tourism sector;</li> <li>• Market opportunities / future target markets;</li> <li>• Constraints to success / factors affecting future growth;</li> <li>• Development opportunities and proposals;</li> <li>• Delivery vehicle and models;</li> <li>• Development agendas of each organisation.</li> </ul>
2	Open Event for All Involved in CNS Tourism Sector	<ul style="list-style-type: none"> <li>• Set backdrop / national picture of tourism sector (inc VisitScotland initiatives eg Homecoming);</li> <li>• Emphasise importance of 'destination' / working together;</li> <li>• Discuss key issues affecting sector in CNS;</li> <li>• Secure commitment from attendees to participate in ongoing programme of ATCNS work for the growth of the sector.</li> </ul>
3 - 6	Four Separate Roadshow / Workshop Events Across the Area – Open to All Involved in Tourism Sector	<ul style="list-style-type: none"> <li>• Strengths &amp; weaknesses to each area's tourism sector;</li> <li>• Market opportunities / future target markets;</li> <li>• Constraints to success / factors affecting future growth;</li> <li>• Current / future projects in development;</li> <li>• Product development opportunities (both physical development and virtual packaging of existing assets);</li> <li>• Secure commitment from attendees to participate in ongoing programme of ATCNS work for the growth of the sector.</li> </ul>
7	Key Stakeholders (Representatives of Tourism Forum / Public Sector Agencies and Tourism 'Groups')	<u>Session I</u> <ul style="list-style-type: none"> <li>• Update on the global findings from the project to date and key issues affecting success;</li> <li>• Short discussion to gain feedback from stakeholder group on findings presented;</li> </ul>
	All Attendees of Previous Events	<u>Session II</u> <ul style="list-style-type: none"> <li>• Update on the global findings from the project to date and key issues affecting success;</li> <li>• Break out into four sub-groups / workshops to discuss and priorities the key activities going forward;</li> <li>• Product Development, Business &amp; Skills Development, Delivery Vehicle, Marketing).</li> </ul>
8	Final Event	<ul style="list-style-type: none"> <li>• Presentation of recommendations &amp; 'Next Steps'</li> </ul>

## WORKSHOP 1: STAKEHOLDERS (Wednesday 19<sup>th</sup> January)

Invites were distributed to members of the 'Tourism Forum' and other key stakeholders in the region's tourism sector.

<b>ATTENDEES</b>	
<b>Name</b>	<b>Organisation</b>
Andy Mackay	HC Ward Manager
Becki Pope	Caithness Horizons
Chris Cariss	Caithness and Sutherland Visitor Attraction Group
Dr Graham Elliot	North Highland Connections
Frances Gunn	CVS North
Gordon Ireland	Highland Council Tourism
Jill McNicol	North Highland Tourism
Koreen Macdougall	Caithness Partnership
Lindsay Dunbar	HISEZ
Murray Lamont	North Highland Tourism
Pat Buchanan	Wild North
Paul Cariss	North Highland Tourism
Robbie Mackintosh	HC
Robert Livingston	Hi-Arts
Scott Armstrong	Visit Scotland
Trudy Morris	Caithness Chamber of Commerce

<b>APOLOGIES</b>	
<b>Name</b>	<b>Organisation</b>
Anna MacConnell	NDA Socioeconmoic Manager
Becky Shaw	SNH
Brian Weaver	HISEZ
Colin Simpson	Highland Council Tourism
David Sutherland	HC Ward manager
Eann Sinclair	Programme Manager, CNSRP
Elaine Lewis	Chair North of Scotland Hospitality Group
Ian Mitchell	SNH
Jennifer Irvine	Business Gateway
Joan Campbell	Federation of Small businesses
Joanna Johnston	Pentland Community Association
John Henderson	Leader Implementation Panel
Phil Tomalin	HC Ward manager
Stephen Fraser	Forestry Commission
Tina Wrighton	Caithness and Sutherland Visitor Attraction Group
William Sutherland	Sutherland Partnership

## **WORKSHOP 2: TOURISM SECTOR OPEN SESSION (Thursday 20<sup>th</sup> January)**

Invites were distributed to all members of North Highland Tourism and of the Chamber of Commerce. Additionally, a public notice was placed in The John O'Groats Journal, Caithness Courier and Northern Times for the week preceding the workshop.

<b>ATTENDEES</b>	
<b>Name</b>	<b>Organisation</b>
Muriel Murray	Castlehill Heritage Centre
Joanna Johnston	Pentland Community Enterprise Ltd
Patrick Gray	North Coast Leisure Centre
Shirley Farquhar	The Castle of Mey
Meg Sinclair	Dunbeath Preservation Trust
Louise Smith	Caithness Renewables Ltd
Sandra Thain	Luxury Highland (The Townhouse / The Church Apartment)
Artemis Thain	Luxury Highland (The Townhouse / The Church Apartment)
Simon Lee	Melness and Tongue Trust
Jo Hendry	Melvich Hotel
Joan Lawrie	Caithness Horizons
Michael Barnett	Yew Turn (Woodturner)
Patricia Neiman	Custom Made Jewellery and Body Adornment
Rob Wyke	Melvich Hotel
Christine Russell	Caithness Horizons
Andrew Mackay	Norseman Hotel / Castletown Hotel
Vicky Mackay	Norseman Hotel / Castletown Hotel
Pete Carson	Helmsdale & District Development Group
Mike Browne	Pentland Firth Cottages
Jennifer Bruce	Wick Paths Project
Murray Lamont	NHT Chair
Tina Irving	Dunnet Head / NOSH
Nicola Henderson	Timespan

**WORKSHOPS 3-6: DEVELOPMENT ROADSHOW (Monday 7<sup>th</sup>– Thursday 10<sup>th</sup> February)**

Posters advertising the events were provided to all members of the stakeholder group and to all attendees of the previous ‘open’ session for distribution around their local area. Email flyers were sent to all businesses on the consultants’ sector audit database (270 businesses).

<b>ATTENDANCE COUNT</b>	
<b>Location</b>	<b>Number of Attendees</b>
Helmsdale	9
Wick	11
Thurso	15
Tongue	17

**WORKSHOP 7: DEVELOPMENT EVENT (Tuesday 8<sup>th</sup> March)**

All previous participants in any of the events were invited to this workshop, approximately 40 of whom made it on the day.

## **WORKSHOP NOTES**

### **Stakeholder Workshop**

**Wednesday 19th January 2011**

**Park Hotel**

#### **General Notes**

- How does the whole area take tourism forward?
- The area's organisations and businesses do not have joined up thinking;
- We need better channels of communications;
- Not sure about the sub area geographies, this will create further confusion and may not be helpful. The tourists do not buy / see things in this geography. The geography for tourists should perhaps be wider;
- The tourist geography is about routes in;
- NHC are not sure that the geographical split is helpful – the area is too small to be representative of a cohesive tourist area. The breakdown could be: Ross-shire, Caithness, Sutherland more on the basis of NHI;
- How do the customers see the area? How do they buy the area?
- We need to look outside the immediate area. The Highlands are seen as the North West, Caithness needs to pull visitors north – this is slowly happening;
- It was explained that the subdivisions of the area were about business and community development at a local level as a way for the consultants to engage with the grass roots;
- There needs to be reasons for people to stay in the area. we need to encourage people to stay as long as possible;
- John O'Groats is on the visitors check list of places to visit – a must see;
- We need to encourage visitors to travel beyond Inverness;
- NHC is not just about culture, it has a much wider remit: local culture, buildings, tourism, community, heritage, events, performance, etc;
- It was agreed that there needs to be a grass roots support for action;
- The airport is vital to the future of the region. The passenger numbers were up in 2010. Need to promote the value of the airport, lobby for an increase in routes, particularly to Europe – see Amsterdam;
- The future of the transport infrastructure is key to the future fortunes of the tourism economy;
- People need to understand the value of business tourism to the area, both discretionary and non-discretionary. It is not all about leisure tourism which has a relatively short season in the area;
- We are looking for cohesion, critical mass and a clear delivery mechanism, why subdivide what is already a small area. We need clear and joined -up thinking about the way forward;
- There is a significant amount of frustration amongst operators – only talk nothing actually gets delivered, too many reports;
- There is not enough communication. Too many people doing their own thing need to channel and focus energy;
- Need to focus on key markets, and what they want. Need to identify key product development;
- Not sure about the grassroots approach, start at a higher level. This was discussed and its was agreed that the grassroots approach was correct. There needs to be local level informing and educating to achieve sustainable development growth and delivery. This bottom up approach should underpin top level strategies.

### Strengths

- 3rd sector is very active and well represented in the area;
- John O'Groats as well known must see visit destination;
- Visitors to and from Orkney;
- Few people, get away from it all, away from the hubbub of modern life;
- Highlands;
- Landscape/Seascape/Beaches;
- Diaspora;
- Caithness Stone;
- Royal Connections;
- Surfing and the O'Neil event
- Fishing;
- Game sports.

### Weaknesses

- Support services in certain markets;
- Lack of ambition (opening times, standards, etc) business awareness and understanding;
- Lack of cohesive working / frustration/impatience;
- Not west coast scenery, a bit like the western isles, bleakness
- Not quintessentially Highland Landscape;
- What is the identity?

### Issues

- Perception;
- Distractions;
- Locals do not embrace culture;
- Experiences;
- Internal markets;
- Identification of business and investment opportunities;
- Capital investment funding, difficulty in attracting inward investment – see (John O'Groats), invest Caithness;
- Cohesion and working together and thinking;
- Not enough things to do re cruise ships – see volume and peaks in demand, understanding of tourism, not packaged;
- Packaging working together and creating opportunity and virtual products.

### Markets

- Need to make step change – what are the markets we can attract?
- Build on the markets we already have;
- Need to develop the passion;
- Ullapool was in crisis but the communities came together. This is a model to perhaps emulate;
- Caithness' big market is the non-discretionary business tourism market
- Must take recognition of the renewables and the economic sector growth. Wick and Thurso benefit from business tourism;
- Need to build the leisure tourism sector;
- See Shetland need large level of ambition we need an ambition it must be high;
- The business tourist needs this to do in the evening – food, entertainment, good accommodation;
- We cannot influence the business sector, only the leisure;

- Should we concentrate on the young and the extreme and then capture them in later life;
- High level of repeat visits, self-catering sense of ownership;
- Facebook community keep in touch until their next visit, continual communication;
- Gives out local itineraries places to stay collaboration;
- Self catering is only part of the mix, it takes out housing stock and destroys community;
- Leisure markets – what are the intrinsically different markets for the area;
  - active extreme visitors;
  - Older generations;
  - Surfers;
  - John O’Groats tick list visitors;
  - Grand Tour Tourists;
  - Orkney related;
  - Events; Life long learning markets see Sabhal mòr Ostaig summer schools;
  - Low carbon tourism cruise-line Market;
- Need to have a good fit with the VisitScotland markets as the top line strategic ambition;
  - Southern Affluent Explorers;
  - Northern Sometimers;
  - Active Devotees;
- Map the niche markets against the Visit Scotland markets;
  - Loyal repeat customers v one off (easier and more cost effect to attract repeat)
  - Curiosity;
  - Who is not here, we need to understand the potential market;
  - Cross selling of micro destination for second and repeat visits.

#### Perceptions

- Extreme;
- Wild.

#### NHC

- The NHC vision – must be ambitious (all this is confidential can be sent to Rachel but must be edited for general circulation);
- Need more attractions;
- Three cultural hubs of international quality (only mention the cultural hubs the rest is confidential);
- Harbour front at Wick, visual arts, galleries and bookshop, making and showing film;
- Ham Gurnell study centre, this will become a residential 20 study centre this will start this year;
- Options appraisal (being done completed by April) derelict Snap Maltings, iconic purpose-built concert venue 300 seat Castletown (Confidential), quality will bring in customers see Shetland;
- The needs to be community consultation at an early opportunity, needs to go into the public domain cohesiveness and moving forward;
- Hubs will be the spokes on which to grow;
- All funding to date has come from foundations;
- The big problem is sustainability;
- £18 million how do we run these properly after 10 years;
- NHC can help in partnership the timescale 5 years;
- Vocational training course, building redevelopment of derelict buildings in Caithness;
- Tidal power - Concert hall link to Renewables Centre of Excellence.

### Development Vehicle

- DMOs – do we need one?
- What is the role of the vehicle?
- Need to channel the energy, needs to involve a number of people, and be done together;
- Need to overcome the negativity, attitude is the issue, working together as a team;
- About product development;
- Must not create new organisation, just someone to blame, (see Ullapool and the development vehicle) – working on the priorities;
- Agencies needs to look at how they engage to go forward, engage communities, public sector, businesses;
- if things go wrong there is a blame culture;
- Do people / businesses know they belong?
- Should we use NHT as the vehicle? We need to change it as an organisation to involve others, but also use the resources that we already have, be more joined up;
- Co-efficient drag factor with membership organisation, need to consider the structure and the funding model, difficult to get small fragile businesses involved;
- Questions of geography;
- NHT, NHC, NHP??
- Focus and leadership for the tourism sector, forum for discussion and for mutual agreement, other agencies can come in, need to pull in the correct direction and this will create a head of stream and channel energy, to move together in a cohesive and focussed way;
- NHC needs to be a partnership of equals, although players will be of a different scale two strands, how can local players come together to help themselves, everyone must come to the table and be active contributors;
- Very fortunate that we have Prince Charles as an active patron.

### Conclusion

Now we have two strands:

- formalise the network structure - Tourism Development / Management Partnership, business and sectoral issues; and
- Businesses working with HIE, business growth programmes, what we want going forward.

## OPEN SESSION

**Thursday 20th January 2011**

**Park Hotel**

### Strengths

- The coastline, wild beaches;
- Diversity of Wildlife;
- The geological features and unique landscape, adjacent and links to geopark, fossils
- Caithness history, clearances, Norse, Vikings;
- Diaspora and connections with the history;
- Archaeology, specific sites, high concentration untapped, burgeoning - opportunity for projects?
- Fishing, sea, loch and river;
- Adventure sports, sea, surfing and sailing;
- John O'Groats, must see, tick list, pilgrimage site;
- Dunnet Head, RSPB;
- Castle of Mey, Royal connections, castle baggers;
- unique engineering prowess - Telford;
- Single track roads, wilderness, natural and ecotourism;
- Food and drink;
- Geopark;
- Renewables;
- Astronomy and dark skies;
- Sanctuary of peace and quiet;
- Culture, music;
- Gateway to Orkney.

### Weaknesses

- Remoteness / accessibility;
- Self-imposed short season;
- Transport infrastructure – time and cost, timetabling and links;
- Awareness of the destination;
- Identity and brand is unknown, lumped in under highlands;
- Opening hours / short trading hours;
- Lack of festivals and events – do not get the word out;
- Communication / lack of information;
- VisitScotland – dreadful, out of date information, not marketing area;
- Local food no local provenance;
- Lack of cohesion and collaboration between private and the public sector;
- Over exploitation is a threat;
- No holistic overview;
- Lack of hire cars and other facilities;
- Lack of investment;
- Public toilets;
- Lack of tourist information and rest stops.

### Issues

- Distance from source markets for short breaks;
- Link to other tourist Highland destinations to attract repeat visitors;

- Aberdeen could be a good market, good flight but need a car, need car hire;
- We need to package, make it easy for the visitor to link things together, itinerary
- Niche Market willing to pay for good quality experiences;
- The issue is viability, marginal businesses;
- Communications between public and partnerships, need to work together;
- Changing technologies;
- Websites – integrated information and up to date, need better destination website, no web portal;
- Fuel costs;
- Caithness.org a good web site for local people.

### Markets

- Activity: walking, surfing, wildlife, fishing, equestrian;
- Wildlife life watching;
- Ecotourism low carbon footprint;
- Diaspora;
- Visiting friends and relatives.

### Product Development Innovations

- Good broadband and mobile phone coverage;
- Limited activity equipment hire, and guides, no training for accreditation;
- Communication and links;
- Business development training needed;
- Industry knowledge and awareness, Fam trips, cross selling;
- Fear of competition and people stealing ideas, limited cross fertilisation of ideas or sharing of information.

### Next Steps

- Identify the common good and how we can all work together to achieve a common aim.

### Delivery Models

- Area Tourism Partnership – for the Highlands not at local community level;
- Identify good practice – we need to grow the pie and work together create a vision and pull and work together;
- We need a financial pot. HIE have money moving forward;
- We need a public and private sector body, need to develop a holistic view, need to channel efforts, a lot of resources which could be collective;
- Trying to get together, NHT / CASVAG – do not want to reinvent the wheel;
- Like the idea of formal partnership;
- Do we agree on the destination geography and what can we all contribute? We must be sensitive to the visitor needs. Thought needs to be given to how we sell the destination.

### Other

- Explorer magazines;
- Do you want to meet other groups and find the best fit?

## **DEVELOPMENT SESSION (ROADSHOW) I: HELMSDALE**

**Monday 7<sup>th</sup> February 2011**

**Bridge Hotel**

### General Notes

- What are the issues and what are the potential projects?
- Is there model for moving forward?
- A lot of people not singing from the same hymn sheet;
- NHT is a bit sluggish, lack of coordination, lack of communication;
- A feeling of remoteness from Visit Scotland – used to have our own tourism associations VS is now a bit remote;
- Emphasis is put on the bed nights but less emphasis on the attractions;
- NHT should be the umbrella organisation, need to represent attractions;
- Marketing is all very ‘bitty’ – Caithness and North Sutherland Visitor Attractions;
- Profile and availability – perceptions that there is not a lot to do;
- Ferry to Orkney at night and Gill in afternoon. Things are not always open, depends on the months of the year, seasonality;
- Need to give people a marketed weekend – suggested itineraries – need an overall pot of offerings;
- Need to give alternative things for people to do ;
- Need to get more people to package - Puffin tours, small mini buses;
- There is the issue of advertising cost;
- There are very few tour operators, packaging tours;
- One of the issues is the cost of the tour – minibus tours;
- Need to entice people further north from Dunrobin, need to get them to stop;
- Need to get them to stay in Caithness – perception, communications, lack of familiarisation;

### Strengths

- Unusual landscape;
- Skies;
- Clearances, and history - Kildonan and Helmsdale;
- Honey pot to the south - Golspie, Dunrobin icon;
- What are the Aspirations for the area???
- Key Markets??
- Cyclists
- On route to Orkney, on way up and back;
- End to Enders;
- Geology on way to geopark - students from Aberdeen University;
- Archaeology;
- Genealogy;
- RSPB;
- Hunting, Fishing, shooting;
- Castle tours;
- Heritage;
- Golf to the south some golfers come up;
- Fish and chips - La Mirage;
- Sailors;
- Hebridean Princess, niche cruise market;

### Organisation Going Forward

- Do you need an organisation to physically help with packaging and marketing? – We need a forum. What is the correct vehicle? Do we need a hub? What is the level? – We need to come together in small groups to Market the area, local collective and a regional collective;
- Web sites are extremely important, availability of facilities. Smaller centres are not viable,
- Subsidy for extended seasons. Possibly of sharing and networking of resources, working together - see Caithness Horizons, it is the hub for the area;
- Where do visitors find the information?, Inverness is no good;
- Dunbeath, marketing in B&Bs, hotels, in Helmsdale, good connections and critical mass. Local hub Helmsdale, centric;
- NHT is the regional vehicle, subarea marketing vehicle and the local group should also have a role in product development and management, not just a regional level ;
- Local hub, organise and identify resources. Someone needs to be paid to do this organisation - needs to be funded, there are local resources not being used or not being used efficiently. Need to get people to work together;
- Not using NHT as we should, we should tell them what we want. NHT should have representation from public sector agencies. NHT is a marketing organisation only;
- Need to be flexible in the offer, times etc, phone ahead. Need to explain the tradition of the rural meal times, locals do not socialise in the summer;
- What is the sense of identity of this area that differentiates the Helmsdale area??

### Sense of Place

- The scenery, history, of here makes us different, but everyone has history and scenery;
- Highland feel, a highland part, Caithness is a Norse part;
- There is a different identity that should be maximised for this area - this has been agreed;
- Helmsdale is an entry point a gateway, but you need to stop;
- Take away the brand strap line pleasure in the extreme;
- HIE working at a community level is often more viable from grassroots and sustainable. The social enterprise approach. Work at a local and regional level;
- Connections with other areas, Mackay country, Geopark and other partners will be sought;
- There are potentially two tourist routes West and up the East coast;
- A weeks stay tends to be H,F,S, learning, conference, a business travellers needs tend to stay longer;
- We need follow through, it needs to work and be sustainable. We need personnel and funding, people are willing. It does not work just with volunteers. Not asking enough of NHT;
- Is NHT the correct organisation?
- North Highland makes sense, but not current geography of the study. Need to subdivide the umbrella;
- Local officer needs to be paid communication channels, promote need a coordinator.

## DEVELOPMENT SESSION (ROADSHOW) II: WICK

**Tuesday 8<sup>th</sup> February 2011**

**Mackays Hotel**

### Issues

- Don't think that there is anything online that is selling Caithness. Would like an online presence from our point of view that they can sell a central web based source that. Really sells the place on what there is to do when you get here;
- Everyone agrees that that would be good idea and the idea of a website would be a good idea.
- A mention of changing the name to North Highlands rather than Caithness. Caithness docent. Exits in the central belt, no one has an idea where Caithness is. Pushing the name of Caithness and the attractions within the area and the history surrounding it;
- Wick master mention about a sail north Scotland that was organised. 90% of people who came found the activity through the sailnorthscotland.com not the harbour website. Difficult to find things for the visitors to do when they came and found it a huge problem that the town came to a close around 6pm at night;
- Maybe a lack of information rather than a lack of things, not promoted;
- They agree that there should be one website and come on top of a search engine;
- Transport also came up as a major issue with the area. Trains are not a very pleasant journey, an issue with Scotrail, very poor running in the winter. The distance that it takes to get here frightens the tourists;
- Bad perception that we are so far away from Inverness. The journey itself in the train is beautiful and enjoyable scenery but. It's the length of time;
- Others think that people travel through here to get to Orkney so that may not be an issue as Orkney is popular. It's getting people to stop over on their way to Orkney;
- "Passport to Caithness" sell that yes it is far but. It has a complete different atmosphere from Sutherland and is much more than just the highlands. Caithness is serenity and relaxation, you come here to do nothing and complete relax and enjoy the scenery;
- what are the markets? Who are the markets? What are they doing when they are here?
- Germans were staying at a local b and as it was very historical building and the local area around such as damaged cairns. They're coming to part of the culture and be part of the community, his traffic is coming through visit Scotland;
- Do we need a visitor attraction? You can't get away from the history as there are many places to visit that hold history;
- Others were interested in the mystery of the place, exploring the land, relationship to people of the sea and taking people to the coastline and having boat trips. Geology and history of the sea draws people's attention to the area and the beaches;
- More viewpoints would be beneficial to the area as there are beautiful points along the journey of getting here that you could stop and take pictures. More signage for Whaligoe Steps and things like that;
- What other markets are we attracting?
- Other Scotland people, from Aberdeen, people going to the must see John O'Groats;
- John O'Groats is bit of a disappointment when you get there, it is not the view point, Duncansby Head is the view point. It has got to become a better destination, improve the quality and the experience, you feel the next stop is getting in the boat and seeing more. The activities are there but it's the feeling of emptiness and being unsure of what to do when you get there;
- The walks of Caithness need to be drawn together; the costal walks could have more promotion.

- Castles within the area are important to promote and hold a mystery and legends surrounding them;
- Norseman hotel get a lot of bus tour coming up overnight on way to Orkney but don't do much in the area of Caithness. Tour companies should promote and plan activities within the area.
- It was mentioned that the quality of the literature and picture promoting the activity or area can be very poor;
- Land owner liability issues were mentioned regarding walkers and manmade trails;
- A Facebook page where people that have visited the area could leave there comments on their experiences of Caithness. Some sort of web based media would be a good idea. Sometimes though harsh comments are more inclined as you are complaining faceless. It's a great way of building up a database of contacts to build up and promote events that are going on within the community;
- What do people think of technology and visitors usage of it?
- One guest uses twitter and trip advisor, GPS would be no use for his guests as the come from overseas and tend to buy a cheap mobile when they are here. All his bookings are done through an iPhone already. He thought it would be good to find somewhere and good to build on for the future but there is more important things to concentrate on at the moment;
- Authentic face to face contact is a better experience for the tourist and very strong selling point.
- It was mentioned that the season lasts longer near the end of the year: niche Market, relatives company back to trace ancestors;
- Business tourism, learners and leisure come to north shore pottery. A lot of people find that if someone is here on business they enjoy it and have repeat visits with their families;
- A mention of joining together events would bring a larger wider audience to make it a bigger event for people. It would have to be spread throughout Caithness rather than in one area. It was mentioned that the mod would have been better if it had been based in one place so that may not be a good idea. Each town has its own little events but need help in promoting them more throughout the county and help with finding accommodation for the event. The John Lennon Duress festival was an example of a 3 day festival that has been organised and coordinated very well;
- Caithness.org was mentioned again that it is not for tourists and searching for events. Caithness horizons couldn't provide with much information on events when asked either;
- How do we pull this all together now? Do we need something moving forward?
- Make sure that all information is sent to north highland tourism so that correct information can be passed in the correct way. No pictures of Caithness on the NHT website and the website is too wide and needs more of Caithness featured on it;
- They thought that the name John O'Groats was a more recognised name and maybe rename the local airport;
- They think NHT tourism is a good idea and a good "umbrella". People are missing the tourist information centres in the local areas. NHT have met the needs but is having to constantly to change to meet the needs of the people and the way that the economy is constantly changing. NHT fee was mentioned and are putting some people off joining. People need more support at a local level, the want the tourist office back and have someone with local knowledge that can give tourists better interaction face to face rather than on the Internet.;
- What are you looking for in a service that you would pay for?
- Flyers around Edinburgh or Special projects. They can't see the direct benefit of becoming a member and paying a fee;
- Many people seen a decline in visitors when the tourist information centre closed. They need a prominent place for people to visit and gather the correct information for them;
- Was agreed that they all need something at a local level, as the name Caithness is not recognized;
- The importance of the airport was stressed again and that it could be key in getting more tourism up here.

## DEVELOPMENT SESSION (ROADSHOW) III: THURSO

Wednesday 9<sup>th</sup> February 2011

Park Hotel

### General Notes

- Introduction-build on good visitor experience, aim/objective of the project;
- Tourism overview-identify key markets, very different types of tourism, business tourism;
- Selling Caithness and north east Sutherland to tourists;
- Building events to bring people in, different events target different markets;
- Scotland tourism is an 11bn industry, highlands overseas business tourists, overnight stays, but what about Caithness?! This is what we need to work on/figure out;
- What affects tourism? Recession, weather, new emerging destinations, ageing population, product evolution, we must think about the future to stay competitive;
- How do we build on our assets?

### Issues affecting future success and how to approach them:

- Petrol prices, encourage people to use public transport, problems with cyclists on trains. Discouraging people, contact friends of the far north scheme if there is enough people to bring it up, we can lobby them to help us. These people have a high spend;
- Opening hours, shops are closed, once people arrive in the afternoon there is nothing to do, then they leave in the morning. These people may want to spend but find it difficult;
- Bus/train standards. The times of these, the time it takes to arrive here, business tourists often arrive by air, there is no Tuesday or Saturday flights, international tourists come by air/folk that don't have much time to spend here. Some leisure tourists fly to Inverness then hire a car to see all of the north, is there enough communication between us and Inverness travel reps to encourage tourists to go further north than Inverness rather than telling them "there is nothing to see up there" take these people to see our attractions on a regular basis so that we can promote our area to people who we should be working with, not against;
- Is there still a bike bus?!
- Could Scotrail go back to the old service of splitting the train at georgemass, this would save people travelling to Wick going to Thurso first thus, taking an hour off their travel time!
- Lots of Children's facilities in Inverness, do have the facilities to compete with that?
- Spectacular coastline, similar to Cornwall, they have the benefit of a better package of lands end than we do of John O'Groats. Benefitted greatly from the Eden Project;
- Provide a real "chill out" destination. With fantastic scenery;
- Tesco?! It's affect on our community and visitor experience, turns us into "just another town" we were unique before?
- Large scale social enterprise, any money taken in put back into the business, will get bigger and better, if we lobby it correctly, we will have a kick-start budget. There is an end result if we all pull together, benefits groups as they all work together, everyone knows what is going on, more chance of achieving funding if you are seen as a united front;
- Crowd sourcing, if you get enough interest in a project, you will be granted x amount of money, as it has been proven that that particular event has enough interest to potentially make it a success;
- How big is our community?! 'north highlands' depend how many people are interested in promotion? We need an identifiable image to Market, should be jog;
- Shops staying open till 8pm on Thursday's, tourists were arriving, having their meal then only heading down town around 7.45pm, therefore defeating the shops being open. Cruise ships timetables, communication between shops and facilities, therefore the facilities can be open when it is required;

- Local paper advertising?! Collective advertising? Some companies advertise more than others, therefore get better rates. Sharing makes it more affordable for everyone;
- Orkney?! Could we learn from our competitors? Signage etc?
- Landmark press, very few Caithness related. Could Caithness do their own version of this?! Back to money issue, only companies who can afford, will get advertised by landmark press;
- Thurso TIC focuses on Orkney, should be open more often than just seasonal?! need to pay to be a member, therefore Thurso tourist office would promote Orkney over Thurso attractions, seems strange, not based on promoting each individual town more who can afford to be advertised, vicious circle of money!!
- Target people who are 'passing through' – convince these people to stay that extra few days;
- Selling ourselves nationally;
- Visit Scotland and north highland tourism websites need to be updated/ made relevant;
- Can better promote fishing and golf?! Scottish golf open in Inverness? Could we encourage people to come try our golf courses? Affordable and accessible past times;
- Archaeology very much undernourished, it needs publicity and signage. Make sure that paths are up kept and that grass is cut etc;
- Education and training, target specific target markets, increasing awareness of people in the industry of how to reach people. Use of north highland college to train?
- Imagery of our area compared to our competitors? When you think of our county, what imagery do you think of? Orkney is well recognised. Develop our icons, market them with signage;
- North highland way being developed? Not much known about it, just being developed;
- Local craft some very good craft locally, craft fairs seem to be no more?
- Develop festivals? Communicate and build a calendar of events, work on it together;
- Competitive events. Grow on what we have, O'Neil, Nashville, Bfest etc. Market these together so that people know what goes on. Encourage folk to come back;
- It seems to be difficult to find out what's on? Better use of a community website?
- Student trips? Sports students, geology;
- Traditional skills workshops, attracts a good audience, people want to do these things. Advertise on a wide scale community 'what's on' website, Caithness.org perhaps too big?
- Art and culture Change people perception of the arts, perhaps run taster events, familiarisation events, run transport, promote car school, get local taxi/bus services involved. People need to communicate and network more. Does it draw in tourists?
- Solve the identity crisis! Brand ourselves within an extremely competitive international Market.
- Businesses can market the county with professional photography etc to other business very well. It's very difficult for smaller organisations to do so. Brings back to looking at funding issues;
- Gather groups who are interested in the same thing. eg, information boards between Dunnet and jog, if everyone who was interested in putting information these did, it would be over run, there could be a group who put the right amount of relevant information in place;
- It can prove very difficult to get everyone signing from the same hymn sheet, need one voice, however we need to agree, which can prove difficult. Visible end results for investors.
- Build in an early measurement system, so that we can monitor progress. Set ourselves realistic targets, ensure everyone is looking at the bigger picture and not just their own business. 'make the pie bigger';
- Visit Scotland very expensive, less and less membership. Particularly with the web and independent booking, less need for the visit Scotland service;
- National themes at a local level? This year is active Scotland, tap into 'EventsScotland' national budget?
- Key issues: an identity is critical. Social enterprise idea, skills, marketing, small steps, quick wins.

## **DEVELOPMENT SESSION (ROADSHOW) IV: TONGUE**

**Thursday 10<sup>th</sup> February 2011**

**Ben Loyal Hotel**

### Issues

- Bigger range of accommodation bunkhouses, interesting accommodation;
- Need better roads but some like the single tracks the little roads;
- Fuel prices;
- Marketing;
- Discouraged in Inverness to come north, actively, visit Scotland asking about aces to stay and being told nowhere in tongue despite the hotel being a member;
- Inverness is brand jog is brand but what else?
- Needs a brand north;
- Brand identity currently weak;
- Representation in Inverness;
- Lack of public transport connections;
- Solve this by better integration on public transport links;
- Lack of connections;
- Anomaly with ticket prices Lairg Thurso Inverness;
- Are people who want an air strip, sea planes;
- Trains- services promoted like ferries etc and integrate better connections north;
- Better communications;
- Boost infrastructure in summer then reduce in the winter;
- Minimal taxi service;
- No car hire?
- Bike transportation/ support services for activity;
- Fuel;
- Marketing and publicity - need to find a way to make more of the area through journalists and travel features - need better images;
- Need to get away from piece meal approach and work together for marketing;
- Internet versus press;
- Needs representation- need effective better portal for the area coordinated and maintained by a skilled person;
- Accessing all the things - real need to reveal as ' things to do' can take operators time to find this, and may not be best placed to know all that there is;
- Community websites will not be maintained and then this is damaging as out of date/ poor content which then is to the detriment to the overall area;
- Caithness.org as an example;
- NHT – good umbrella website?
- Identity: what is Sutherland?
- Wilderness, true, rugged, positives, beaches scenery cycling etc fishing;
- Untapped archaeology genealogy;
- Secret beaches - dichotomy between quiet selling that and encouraging people;
- Colourful characters;
- Mountains;

- Orkney - better cottage industries, crafts trails etc , joined up makers etc;
- Centres of excellence ' creative arts' in the area - studio spaces etc we have nothing but aspirations – if it happened would open up gates etc extend seasonality;
- *Money*;
- Season needs to be extended – ways to achieve this: events on shoulder months, activity outwith the season is the key to extending and improving to make a year round season – definitely;
- Surfers – more to make of this niche. Market the different spots across the north coast – facilities – need things to give them opportunities to spend money;
- Surfers using the pool- but working on raising the visibility – there is money as they travel;
- Surfers - recreational and then the hard core - create the brand then you get the followers – reference made to the examples of the mountain bike product evolution;
- Start at base level - need to create the future surfers-local tourism opp. Enthuse people to try. Uni clubs. Bunkhouse budgets - gap. Food an issue- filling wholesome food at good price;
- Wildlife - eagles, highland cows, birdlife - cliffs , local ranger service cut and is missed, puffins, need for better signposting;
- Boat trips product actually not as good as offer on n coast but we have no boat business, Eilean Donan, rabbit islands;
- Need support for people to become professionally accredited etc - support to get the licences etc. Seasonal licences. John Frances used to do the boat trips- but weather has caused issues;
- Rainy days - outdoor space activities;
- Sea watching., sheltered benches;
- Story telling boat trips-mystique – intangible heritage;
- Ghost stories - guided tours;
- Roots, diaspora, Genealogy, Scottish life magazine- get articles into this;
- Strathnaver museums and Tigh Hughag;
- Need to make more of what we have - base it around existing facilities – need more training and development;
- Tours from museum - people and technology virtual and real;
- Bothy trails - linked wilderness trail- long trail with the infrastructure;
- North highland way definitely a good idea;
- Tongue is at the end of trail, rough camping – access;
- Paths are tricky - need to be clearly defined. Easy, interim, high levels of ability;
- Innovative ideas - exciting walks;
- Borgie log cabin - not used yet – needs to be taken ownership of – opportunity;
- Spiral walk example of good community project - ecological- sensory accessibility;
- Orienteering - specialist niches- link to events and promote to clubs elsewhere;
- Need a local ranger for the area, need local expertise to be available;
- Guides - paid and might be volunteers to then generate income for a community pot;
- Evidence of demand a hotels of customers willing to pay for guides and tours;
- Geocaching? Tours for younger generation- can it be interesting in the future?
- Trails - main artery then lots of other routes - specialists can take more specialist routes but others can have general experience through the more well trodden routes;
- Benchmarking competitors go see learn from best practice elsewhere;
- Need a hub points to get info - gateway points- need a cohesive approach across the area with consistent information - catch at all the entry points;
- Road signs - after Thurso before Melvich signposted to Ullapool - telling people to leave and get to Ullapool;
- Need ambassadors in Inverness;

- The north - Ullapool coast trail is important;
- Identity and marketing and promotion - how do we tackle all these things;
- Identify the customer , duration of the stay, limited time of the stay and channel the visitor to then stay - who are they and how are you going them to stay;
- Campsite - big loss;
- What is average stay in the area – Europeans are big market for Tongue hotel average 2 night stays;
- Hooks to get them to stay - segmentation - markets to then profile;
- Accommodation providers are recording;
- Incentivise visits - package - so would like partners to work with so it is more attractive to come and stay - hotels offering the good deals but the need for more to do;
- Tailored package holidays - want to sell all the products - so there is a menu for people to choose from;
- How to achieve this : what is destination capacity, managing expectations, be realistic about activity/ carrying capacity in higher season;
- Programmer in the area- croft living- Mackay Country as the broker- make more of the TV coverage that we get and actively pursue more;
- Need to get the joined up - need to make more of the coast as identity;
- Don't create another body- work with NHT - trying to represent the area;
- Should it be remit of NHT - doesn't include the things which add value to the experience;
- Look at the National Trust model? Needs to have a community level;
- Need a coordinated agency/ public sector and industry and community approach;
- How to make it relevant- paid jobs at the level of community development to create the connections;
- Not enough people locally to take on additional stuff- everyone is just keeping nose above the water;
- Need to keep the local identity- the mature destination overshadowing the premature destinations;
- Need to be seen and not subsumed into the bigger beast - need a voice;
- Prioritise the impacts - short mid and long;
- Strategy – CVS North – Springboard – Irene Homecoming;
- Too small on own to have an impact- need to have joint efforts to collaborate to then increase the capacity - passport to the area- incentivise the experience;
- Gaelic - cultural heritage needs to be included.

## **DEVELOPMENT EVENT**

**Tuesday 8<sup>th</sup> March**  
**Royal Hotel, Thurso**

### **Stakeholder Session (Morning)**

#### Projects

- North Highland Way;
- Familiarisation (external / internal);
- Visitor information / entry points etc;
- Web presence;
- JOG airport / expand airport links;
- Help identify and promote business development / marketing opportunities.

#### Champion / Delivery

- It was agreed that an umbrella organisation is required to effectively represent the tourist industry;
- If at all possible existing organisations should be utilised and morphed into a new organisation;
- Partnership is needed, between public stakeholders, business and the community;
- NHT is not representative of the whole industry, it is poorly funded and membership representative is geographically poor;
- The geography represented by NHT is the north of Scotland and is perhaps not correct, there are very few members from Wester Ross;
- It is important that geography adopted is informed by how the tourist view the area, but this depends on the market attracted;
- Discussion was held around CNSRP and Eann Sinclair suggested that perhaps an interim solution to take things could be done through the partnership. This may help to get partners on side so that a solution can be worked on;
- It was agreed that local identities need to be maintained and local enthusiasm must be channelled. The only way to achieve this was through local engagement;
- A champion is needed to help deliver things, advocacy is also extremely important;
- Information on recreational forest by FCS. Thus stressed the importance of a forum to share information;
- Discussion of Social Enterprise as a possible structure;
- Funding was seen as a key issue.

### **Industry Session (Afternoon)**

The afternoon session focussed on prioritising the key actions which came out of the previous sessions. The outcomes of this prioritisation are reflected in the Development Destination Plan in the main report.