

A Tourism Strategy for the Black Isle

Stay close,
feel connected...

THE BLACK ISLE



April 2019

.... Local Voices, Black Isle Choices

Our mission:

To develop a sustainable tourism sector that is aligned with the needs of the local communities of the Black Isle and to provide a year-round offer that increases visitor volume.

Introduction/Executive Summary

For the past two years we have tested our brand, 'savour the unexpected', and found the response to be positive. The time is now right to develop the concept and turn words into action. This strategy explores the detail of what 'slow tourism' and a sustainable approach means for the Black Isle and offers a guideline for practical projects which will help make it reality.

Not surprisingly the key objectives focus on:

1. Enhanced Communications
2. Greater accessibility with improved services and infrastructure
3. Extending the tourist 'season'

But we have also identified the need to measure current demand and forecast future demand to better determine where our energies and resources should be focused in the long term. Many of the short to medium-term actions are reactive, a response to immediate needs. Our long term goal is to avoid this default position. Investment in 'planned' tourism creates economic growth, attracts talent seeking a quality lifestyle, which in turn is a catalyst for more new businesses. That is the benefit from tourism we need to keep in our sights – to support the future prosperity of the area.

Who are the Target Market?

.... the Black Isle is Open to All but will appeal most to those who appreciate slow tourism, immersive tourism, local experience, nature

We understand that the Black Isle best suits a target market that is prepared to take their time; happy to **experience unique Highland Hospitality in an immersive way**, being part of the community for the duration of their stay; take in the natural beauty and appreciate nature, join in local events and activities; cherish a safe, friendly and stress free environment.

We recognise that the Black Isle is not for everyone; this is a fair comment and an important factor to be addressed in attracting the 'right' audience

Our Target Groups include:

1. Active couples and young families
2. Time-rich independents, 'all season' nature lovers, those interested in local history
3. Those in search of something genuine, authentic, unique
4. People who could see themselves relocating to the Black Isle either in retirement or as a life-style choice; where they can play an active part in maintaining a vibrant, living community.
5. People who understand, and have the time to accept, that the more time you take to explore, the richer the experience

Planning our Route

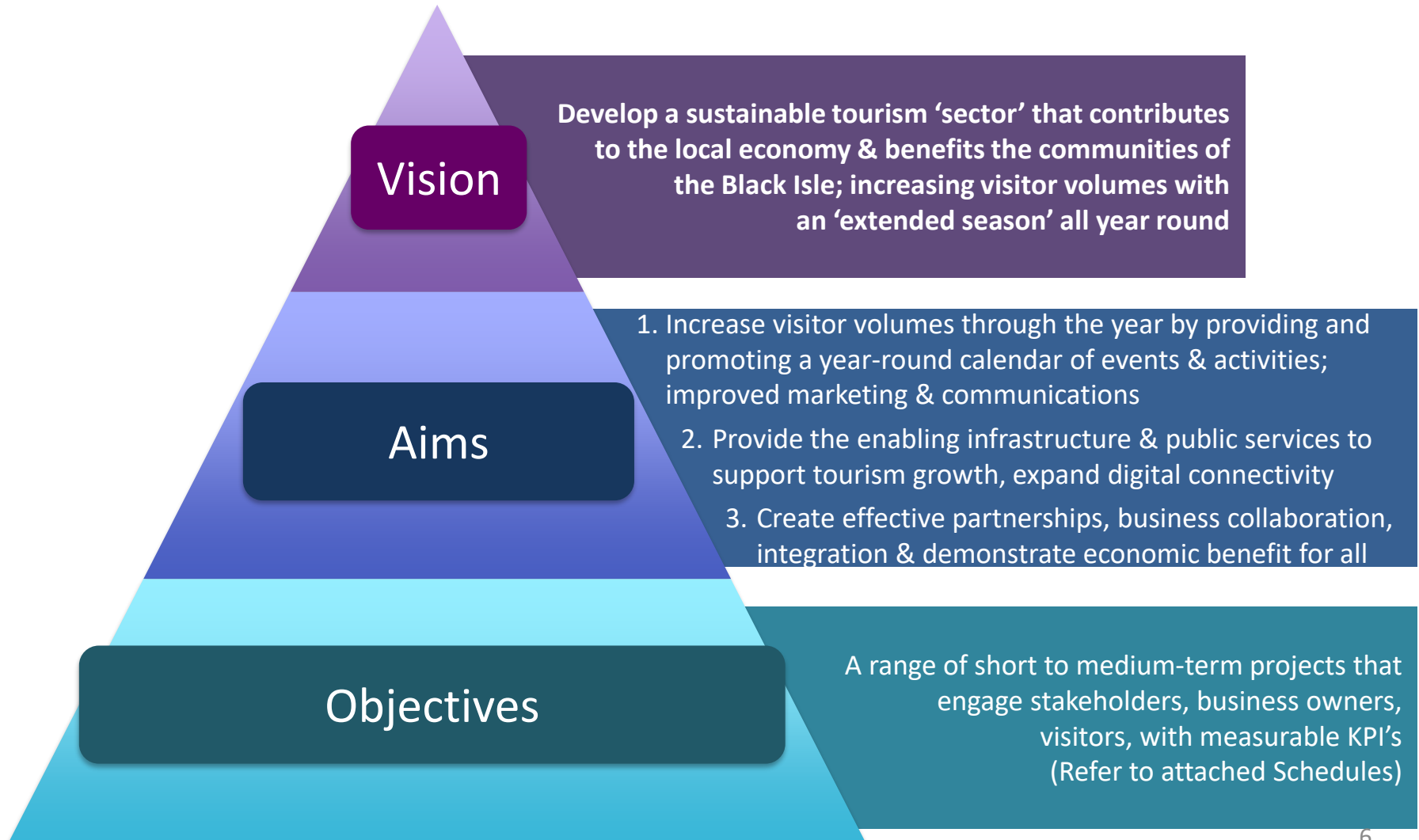
The aim of this strategy, initially, was to identify some short-term, achievable goals that can be quickly implemented. In order for these projects to 'make sense' it is important to know, ultimately, where they will lead and why they are important.

Clarity of Purpose & Statement of Intent

Creating a Sustainable Tourism Ecosystem Platform

Sustainable Development:

"... development that meets the needs of the present, without compromising the ability of future generations to meet their own needs."



The need to balance tourism visitor volumes, with capacity of infrastructure & services provided – what is the optimal volume?

Any Tourism Strategy is really only as good as the data and statistics that feed the strategy and planning. This does not currently exist. A priority for the long term must be to have this data to hand.

1. Funding is required to undertake reliable and accurate surveys of visitor numbers and flows.
2. Detailed assessments are required to forecast the future demand potential of visitors
3. Expert evaluation is then required to assess the impact on existing infrastructure and services, and forecast the need for improvement and additional infrastructure and services

Unless the above measures are undertaken, we can only 'guess' as to the implications resultant from increased tourism, and without it we could expose ourselves to negative experiences and a perception that is difficult to correct (see Appendix 4)

Optimised visitor numbers – meet sustainable goals, aligned with definition of 'slow tourism' experience, within capacity limits of infrastructure and services

How to attract & measure demand of the Target Market?

.... a critical and immediate milestone activity

This Tourism Strategy needs data and statistical inputs, and credible future forecasts of demand, visitors, affordability, accommodation needs, transport, etc.

Funding is required to produce a comprehensive professional assessment of demand volume for what the Black Isle offers (regionally, nationally, and internationally), and what the Black Isle wants to attract

Part 1 of this assessment will be a demand and volume forecast assessment. **Part 2** will incorporate a capacity evaluation of the existing infrastructure and public services; to establish the 'maximum comfortable' volume of combined visitors, residents, and workers, taking account of the current seasonal changes.

This will establish a 'Current Baseline' as determined by existing criteria and circumstances.

Part 3 of the assessment will then evaluate the future Vision, Objectives & Desired Outcomes of this Strategy Plan and develop a technical evaluation as to additional enabling infrastructure & services (upgrades and new components), to meet the basic needs of the additional visitors, residents, and workers - as well as provision to 'future proof' further growth.

This will establish a 'Future Baseline' assessment of the additional infrastructure and services requirements, as well as estimates of capital cost & operating cost

What about the Cost?

.... an element will be community programmes to generate revenue that is put back into operational and maintenance costs

.... an element will be required from Highland Council & Public Sector entities; investing in Highland Tourism for overall economic benefit

Before deciding 'who pays' and 'where the money comes from', we need to establish a credible and reliable forecast estimate of the costs.

There is never 'one right answer' to forecasting the needs, and therefore we would also expect the professional study to incorporate some element of 'Options Analysis' and recommendations as to a Phasing Plan, in order to 'spread the cost' in an appropriate manner.

An Extended Stay

The process of collecting and collating hard data is a long-term project – the longer the timescale the better the data and the more accurate the resultant forecasting will be. This is a discrete piece of work and will likely be a collaboration between ourselves, Highland Council, Visit Scotland and UHI. Discussions should start as soon as possible.

An Immediate Stay

In the meantime, we have identified a range of short to medium-term projects which we believe will make an immediate impact, and move us closer to our vision, without predicating what the outcomes of the research might be.

OBJECTIVE 1 – Enhanced Communications

Information & Marketing

Short Term [within 2 years]	Medium Term [2 to 3 years]	Long Term [3 to 5 years]
1. Encourage Community Councils & Local Development Trusts to adopt this strategy & support its implementation [£] 2. All communities to be represented on a Tourism Team Working Group and contribute to a central online annual calendar & point of information; with community access for posting events/activities [£] 3. Employ a Full-Time Destination Officer to facilitate networks and partnerships; help enact the Strategy; promote communications between Stakeholders [££££] 4. Increase availability of the Black Isle Tourist Map through local shops, eateries, accommodation providers [£] 5. Produce the Black Isle App; info on events, activities, accommodation bookings, tickets, traffic movements, year round calendar, etc [££]	1. Support Residents to be advocates, guides, owners of local knowledge; offer training where necessary [£] 2. Install/re-instate prominently located notice boards in key locations and keep them updated. [££] 3. Highway signage, support from VisitScotland & Highways Agency, at key access points [£££] 4. Provide an online 'one-stop shop' booking system for all accommodation on the Black Isle [£]	1. Encourage New Talent & Businesses to relocate to the Black Isle to contribute to the local economy [Revenue]

OBJECTIVE 2 – Improved accessibility

Public Services, Digital Connectivity, Physical Access

Short Term [within 2 years]	Medium Term [2 to 3 years]	Long Term [3 to 5 years]
1. Produce an audit of premises and sites in terms of ‘accessibility’, especially for those with mobility needs [£] 2. Assist local groups in keeping and maintaining public toilets open in Rosemarkie and Fortrose [££] 3. Work with public transport providers to provide additional services and routes [£] 4. Evaluate feasibility of a Black Isle Bus Pass system [££] 5. Create a ‘Black Isle Way’ or ‘Black Isle 50’ circular multi-modal route; car, foot, bike, public transport, boat, horse [£] 6. Pursue plans for dedicated cycle paths between Munlochy & Avoch, as well as Culbokie thoroughfare [£] 7. Install Black Isle logo on ‘data posts’ with QR codes, web links etc [££]	1. Further improvements to ‘accessibility’ – a condition of certification & promoted by the Black Isle Tourism initiatives [££] 2. Provide minor upgraded & new infrastructure as well as public services [££] 3. Work with public transport providers; provide additional services & routes, inverness City, Airport & Dingwall [££] 4. Provide digital ‘Smart’ signage, traffic management systems, Apps, early warning and automatic diversions [££] 5. Support greater use of Cromarty-Nigg Ferry; upgrade & marketing, with ‘real time’ information digital signs at A9 junctions [££] 6. Feasibility Study for water taxi services in the Cromarty & Moray Firths; link old Kessock Ferry [££]	1. Provide more significant upgrades & new infrastructure as well as public services [£££] 2. Work with public transport providers to develop an integrated transport network; connecting communities, locations, points of interest within the Black Isle, and beyond to establish regional transport links [££] 3. Build dedicated cycle paths between Munlochy & Avoch, as well as Culbokie area [££££] 4. Develop a circuit of Autonomous electric vehicles to cover key locations across the Black Isle [££££]

OBJECTIVE 3 – Extended Season

Business Partnerships to achieve All-Year-Round visitors and business

Short Term [within 2 years]	Medium Term [2 to 3 years]	Long Term [3 to 5 years]
1. Expand the annual calendar of events to cover 'year round' activities. 2. Provide an accurate and regularly updated calendar of events on Black-Isle.info - covering all activities and communities [£] 3. Highlight seasonal variations/attractions by promoting bike/walk/nature activities on maps. Websites, Sustrans [£] 4. Encourage shops, eateries, visitor attractions to collaborate on extended opening times, so that Black Isle is 'open for business' 12 months of the year [£] 5. Launch an annual 'Black Isle Week', to coincide with the February mid-term holidays - an identified 'gap period' in the annual offering [£]	1. Expand the scale, reach, and offering of The Black Isle Week – broader themes in more locations [££] 2. Encourage the allocation of small land plots for Community Farms; help to facilitate more regular farmers' markets, arts and crafts [££] 3. Explore the potential for a Black Isle BID – a self-supporting levy of local businesses to replace short-term funding and increase sustainability [£]	1. Develop a major annual event (possibly in November or February), e.g. The Black Isle Burning Man Festival – arts, music, concerts, events, fireworks, bonfires, torch-lit/lantern procession [££] 2. Produce a new 5-year development strategy based on the outcomes of this strategy [£]

A year-round calendar of attractions

An Indicative Schedule	Black – current Orange – potential gap fillers
January	Extended Hogmanay activities – through to Twelfth Night
February	Community markets Black Isle week, Fire Festival
March	Community markets, Tattie days – various locations
April	Easter – school holidays, Community markets, Cromarty-Nigg ferry service starts
May	Cromarty-Nigg Ferry starts, Crime & Thrillers weekend (Cromarty), Community markets
June	Open Studios (Cromarty), Open Gardens (Cromarty), Wildwoodz Music Festival (Munlochy), Community markets
July	Open Gardens (Rosemarkie), Galas in individual communities, Community markets
August	Black Isle Rowing Regatta, Black Isle Show (Muir of Ord), Belladrum ‘Tartan Heart’ Music Festival, St Boniface Fair (Fortrose), Community markets
September	Cromarty-Nigg ferry ends, Joktoberfest (Munlochy), Community markets, Food and Drink Festival
October	Gluren bij de Buren (Cromarty), Black Isle Gathering (Fortrose), Community markets, Cromarty-Nigg ferry service ends
November	Bonfire Night (Rosemarkie Beach), Christmas Fairs (Glen Ord, Cromarty et al), Community markets
December	Film Festival (Cromarty), Wildwoodz Winter Wonderland, Christmas concerts – various, Community markets

DESIRED OUTCOMES – By Stakeholder Group

Desired Outcomes – Community, Resident & Business Owner Related Stakeholders				
Ref	Stakeholder Group	Short Term [within 2 years]	Medium Term [3 to 5 years]	Long Term [5 to 10 years]
A	Black Isle Community Groups	- Improved communications and engagement - Consultation & inclusion at all stages of developing strategies and planning - Improved Signage	- Specific responses to community issues - Demand assessments to identify 'optimised' visitor volumes, aligned with existing infrastructure capacity	Additional funding for community programmes
B	Business Owners (Accommodation, F&D, Services, Activities)	- Develop strategy for BID application (for marketing or programme specific needs) - Improved marketing & promotions; - shared initiatives; - use of digital tech, Apps	- Secure BID funding - Digital marketing & communications, Shared Apps - regular event calendar; extended season; - Introduce the 'BI Loyalty Card', discounts, offers;	- New & Improved infrastructure; meet needs of residents and tourism growth - road upgrades - economic growth - Hospitality College
C	Residents	- Clear communications & shared strategy; explain how needs of residents will coexist with tourism growth; integrated planning, rental & property price equilibrium - Improved internet connectivity	- No disruption caused by additional visitors - Public services, housing & social provision to grow in parallel with tourism to support needs of increased residents	- Significant contributions to local economy - Balance provision of public spending on residents and direct tourism needs, maximise shared resources and funding
D	Local Employees	- Ability to understand the strategy, so that future employment opportunities can be identified - Catalyst for job creation (predominantly seasonal)	- More full time employment opportunities for locals - Job creation (full time, all year) - Expanded public transport options	Employment that provides training and career progression

DESIRED OUTCOMES – By Stakeholder Group

Desired Outcomes – Tourist & Visitor Related Stakeholders

Ref	Stakeholder Group	Short Term [within 2 years]	Medium Term [3 to 5 years]	Long Term [5 to 10 years]
A	Day Visitor	• Easy to understand range of attractions & events • Connectivity & accessibility • Reliable & frequent public transport	• Expanded schedule of vibrant events & attractions • Introduce the 'BI Loyalty Card', discounts, offers; • New & clear highway signs (A9 South of Inverness, City & North Kessock)	• All year round attractions • Expanded and more frequent public transport options • Improved ferry service from Cromarty to Nigg
B	Regular Repeat Visitor	• To be a 'registered' member of the BI community; linked to community App and regular event and news updates	• Priority bookings for events • Invited as source of valued feedback	• Nominated Member of BITT/Community Group • Upgraded infrastructure; roads, car parks, public transport
C	Family Group	• Enjoy a range of family events & activities	• Child friendly events & activities 'all year round', especially throughout all holiday periods	• New attractions for all the family; adventure parks, water park, etc • Affordable 'family suitable' range of accommodation options
D	Young & Active visitor	• Establish the Black Isle Routeway; include a range of 'active challenges' by variety of modes (walk, run, cycle, drive, horse, boat, etc)	• Vibrant activities & events • Super broadband connectivity across the BI • range of Apps to market, book and experience events	• New 'young & active' events & attractions; specific annual events that are on the international circuit • Affordable 'family suitable' range of accommodation options
E	Nature Lover	• Clearly defined and sign-posted walkways & other attractions	• Regular participatory events • Establish 'small plot' farms, with 'grow your own' experiences	• Establish a 'Learning Centre' for nature studies, animal protection, food studies and sustainability

A Permanent Stay

Impact assessment

Predict challenges early, plan for the future demand



The need to balance tourism visitor volumes, with capacity of infrastructure & services provision – what is the optimal volume?

.... we need to measure the problem

.... we need to manage the flow & timing of visitors

At peak times in the summer months it could be argued that the Black Isle is already close to capacity. At these times there are already pressures on roads (Fortrose High Street), camp sites permanently full (Rosemarkie and Fortrose), cafes and restaurants turning customers away, and at 'honey pot' sites that provide anything but a sense of solitude and tranquillity (Chanonry Point).

Our aim is to encourage visitors to stay for longer and give themselves the time to enjoy all that is on offer; and for more visitors to come at off-peak season times, when there is more infrastructure capacity. Ideally, the strategy seeks to attract more visitors to come more often – to enjoy the area in all its seasons and appreciate how nature, colours and culture change throughout the year.

By managing the tourism visitor strategy in this way, we can move towards a viable and accepted 'all year round' seasonality for the Black Isle

Provision of public infrastructure & services to balance the needs of residents, businesses, and tourist visitors

.... protect core attractions

It is important for any tourism strategy to protect the core reason that a particular location is attractive for tourism; to **avoid the 'negative' experience** (traffic jams, no car parking, lack of public conveniences, strain on emergency services, etc). In the case of the Black Isle its not 'mass tourism', however, a core objectives of the Tourism Strategy is to attract an increased volume of visitors, and all year round; **placing inevitable 'stress' and importance upon the provision of infrastructure and services.**

With the increased visitor numbers and economic growth, there will also be a growth of permanent residents and service workers; **strategy & planning must take account of the associated infrastructure and service provision needs** to cater for the cumulative requirements and impact of additional visitors, residents and service workers; with an **assessment of priority and needs to ensure that quality of life and visitor experience is protected.**

Provision of public infrastructure & services to balance the needs of residents, businesses, and tourist visitors

.... protect our quality of life

The opportunity for creating jobs in hospitality and services and **providing for the needs of those living and working here, has a related cost**. Addressing issues of housing, infrastructure and services that support the needs of residents in their day-to-day living, so that **tourism sits comfortably within the mix** rather than creating an either/or situation.

Lessons Learned:

- avoid situations found elsewhere, comparable case studies
- property prices become inflated by second-home owners
- rented housing market is squeezed by holiday rentals
- insufficient road networks and car parking
- public services, such as utilities, waste disposal become overstretched by increased number of visitors and residents
- existing public transport becomes insufficient
- public sector funding fails to meet the need for economic growth stimulus

SOLUTIONS, TECHNIQUES & ADVANTAGES

1. *Improved public transport; expansion of normal services, also this can be a tourist attraction in peak season (Hop-on-hop-off electric trams, with voiceover info on attractions, history, events etc etc)*
2. *Automatic 'vehicle readers' at main junctions, access roads, car parks, attractions*
3. *Digitally connected information signage; to control traffic flow volumes (with pre-determined alternative routes)*
4. *Data analysis can be published to inform the public of congestion times and locations in advance of their journey*
5. *Data can be used to 'smooth out' visitors, improve business planning, optimise opening hours – leading to 'all year round' seasonality*
6. *Enhanced communication between the community groups, residents, visitors*

Why is this good for Government?

.... the Black Isle Tourism Strategy would make a funding request (capital cost & services) that is fully aligned with Highland Council priorities and National objectives; sustainable economic growth and wellbeing for all



Catalyst to attract talent; Quality of Life; brings investment & commercial activity

In this way, funding of the Black Isle Tourism Strategy, will be a distinct catalyst for economic growth in the Highlands; this provides 'value for money' outcomes for Government with shared funding returns across both tourism and new businesses, as well as significant community benefits

Appendix - 1

The process of producing this document began with an open meeting held at Fortrose and Rosemarkie Golf Club in November 2018.

The event was widely publicised using BITT's database of over 200 contacts as well as various social media platforms. 47 people attended, representing a broad range of stakeholders – interested residents, local businesses, Community Councils, Development Trusts and statutory and voluntary bodies.

Through a series of round table discussions some key themes were highlighted (see following page). As a result of the meeting three new members joined the BITT Steering group and have helped collate the ideas into objectives and actions, which are detailed in this document.

This is intended as a consultative document. Its content is not set in stone. It is an attempt to consolidate and give shape to the ideas which came out of the meeting to provide a focus for further discussion and refinement.

A second 'gathering' is planned for April 2019 to publicise this document. It is intended that anyone should have access to it, and feel able to comment on it.

KEY ATTENDEE THEMES & THREADS

"Tourism / destination management"

"Seasonality"

"Infrastructure concerns"

"Sustainability"

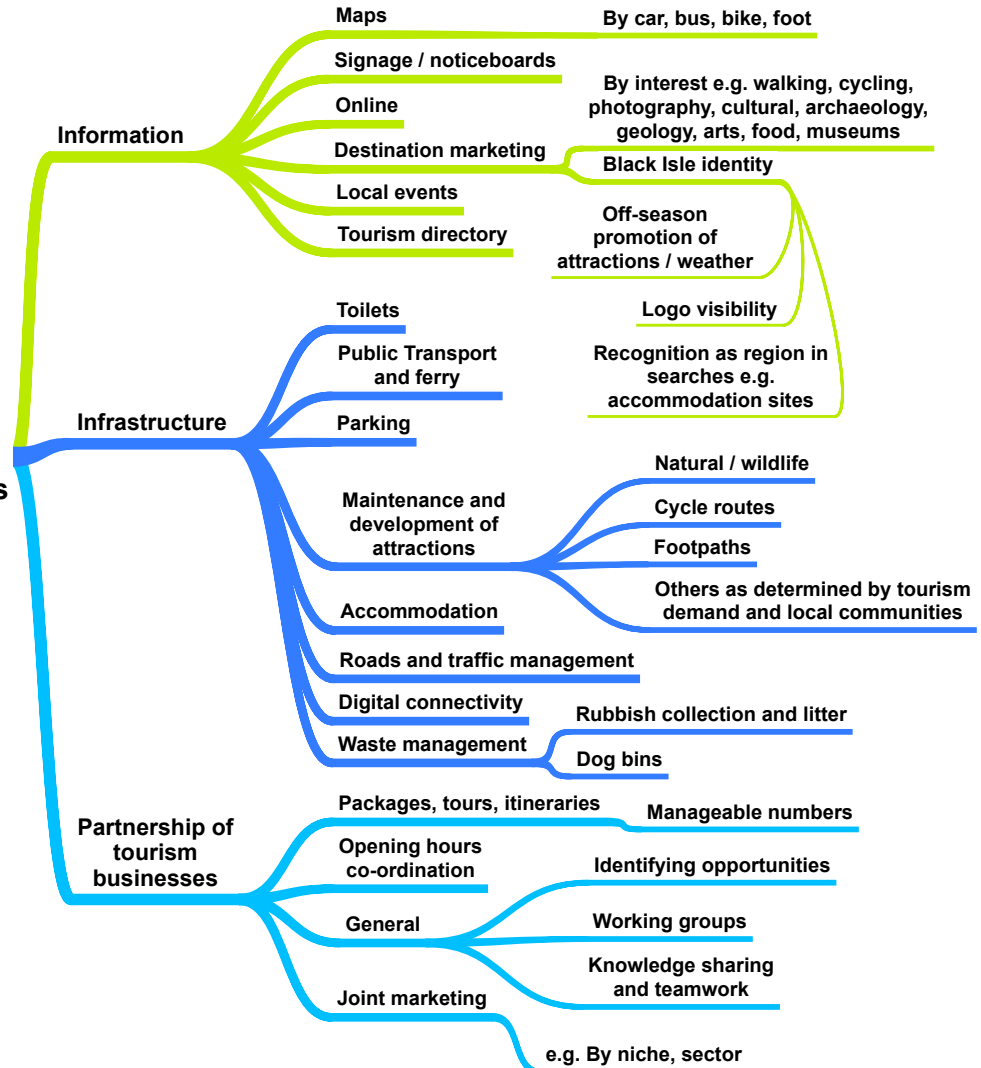
"Encouraging slow tourism"

"Better information communication"

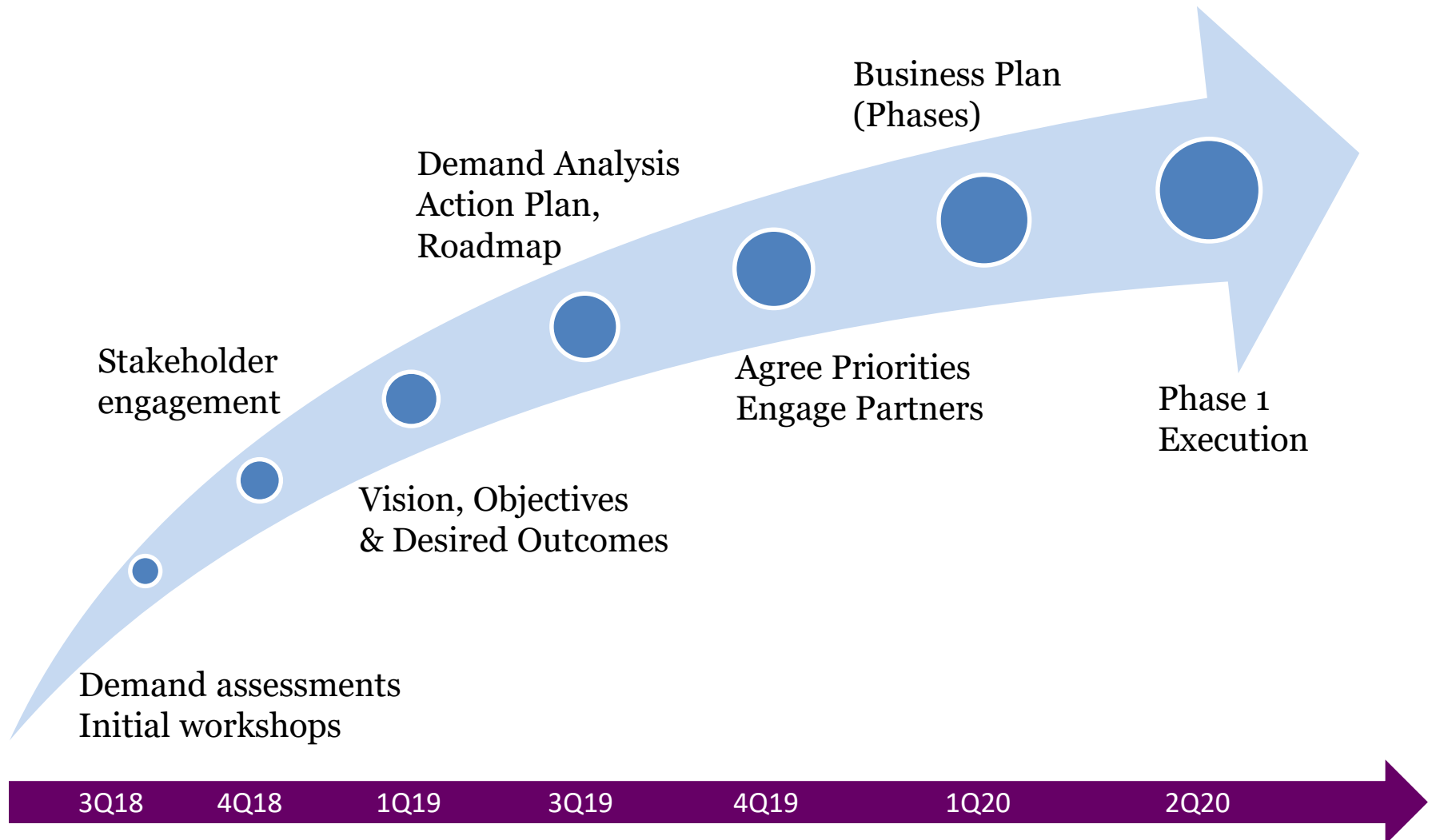
"Better partnership between tourism businesses"

BLACK ISLE TOURISM TEAM WORKSHOP Attendee key themes and focus areas (27th November 2018)

ATTENDEE SUGGESTIONS FOR IMPROVEMENT / DEVELOPMENT



Key Milestones & Indicative Timeline



Appendix - 2

Introduction to the Autumn Gathering 2019

Jon Palmer, Chair - Black Isle Tourism Team

‘Savour the Unexpected’

The Black Isle has always been a place to welcome visitors. As far back as the 13th century, it could be argued, with Fortrose Cathedral a visitor attraction of sorts. In the 18th and 19th centuries the harbours that surround the peninsular, although built for trade, were places that off-loaded people as well as goods – requiring temporary accommodation and places to replenish stock before continuing on their travels. Between the wars in the early 20th century the British Naval Fleet would be stationed in the Cromarty Firth for annual exercises, attracting sight-seers along with myriad small ‘pop-up’ businesses that saw an opportunity with the major influx of people. In recent years the popularity of the Highlands as a destination has witnessed a revival, due in part to the marketing of the North Coast route (NC500), which has seen many include the Black Isle in their itinerary.

In 2017 the Black Isle Tourism Team conducted a branding exercise and arrived at a strapline which encapsulated what was considered the appeal of this distinct land: 'savour the unexpected'.

Savour – slow tourism. What the Black Isle offers is not always immediately apparent. Time is required to get beneath the surface to fully appreciate it. History is everywhere - beneath the surface as well as on top. The landscape tells of centuries of farming and the coastal communities of fishing, and food and drink continues to play an important part of what the area has to offer.

Unexpected - Not necessarily dramatic – mountains, glens, white water rafting. More subtle. Again there is all that history to discover. Climatically it is softer, dryer and 'midge free' compared to West coast.

With the increase in visitor numbers in the last couple of years the Tourism Team is shifting its emphasis from a perceived need to 'market' the area, to one of 'managing'. Who, how and when does the Black Isle attract visitors? And what can be done to improve the experience for all – tourists and residents alike? Our strategy intends to map out what we feel are the changes that can be made to ensure that tourism becomes a sustainable and integrated element of the local economy.

Appendix - 3

Background to BITT

In 2013 Transition Black Isle applied for funding to the Coastal Communities Fund to develop cycle tourism on the Black Isle, and from Spring 2014 to Autumn 2016 were able to employ a half-time Destination Development Manager. She saw it premature to sell the area as a niche cycling destination in an area that lacked a cohesive identity and so formed the Black Isle Tourism Team (BITT) with a wider brief. After an inaugural meeting that attracted 60 people, BITT quickly gained a formal, funded agreement with Highland Council.

Four conspicuous achievements have been: the creation of a Black Isle Tourism Team logo with the strapline Savour the Unexpected; the design of the first Black Isle Visitor maps (with new editions each year); the upgrading of the website black-isle.info owned by Plexus Media of Cromarty to be more visitor-friendly; and to commission in November 2015 a site audit, feasibility and funding study by Duncan Bryden on a Black Isle Wildlife Trail. BITT is represented on the North Coast 500 steering group, the Highland Council Tourism Group and with Visit Scotland. Since Autumn 2016 all activity on the BITT Management Group has been initiated by volunteers. Well-attended networking events occur twice a year and a bi-monthly newsletter is sent to a database of over 200 local businesses and individuals.

BITT is legally constituted as a project of the Black Isle Partnership.

Appendix - 4

Has tourism killed Skye? We visited during the busiest month of the year to find out

The Telegraph, 19 August 2018

Skye islanders call for help with overcrowding after tourism surge

The Guardian, 9 August 2017

- Islanders complain that their narrow, single-track roads are being choked with camper vans, tour buses and cars, that litter is strewn around stopping places, and visitors are going to the toilet in the open.
- Locals routinely find it impossible to drive through the cars, coaches and camper vans clogging the single-track roads. There are also fears that the traffic jams could prevent or delay access for mountain rescue teams.
- Skye is buckling under the weight of increased tourism. It's not everywhere on the island: the reality is that there are a lots of places which aren't suffering too much but it's the key iconic destinations that are under strain.
- There is pressure on affordable housing for locals. The surge in visitors is economically vital, but has raised housing costs and squeezed out local families and workers. The number of Airbnb lettings on Skye has jumped, from 54 in 2015 to 360 this summer.
- Highland Council has been under fire for lack of car parking, and closing down public toilets which adds to the pressure on local hotels and bars, or leading visitors to relieve themselves outdoors.
- Its causing problems for parking and blocking the pathways for emergency vehicles and people who live in these areas.

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All responses and comments should be addressed to:
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