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Scottish Tourism Forum

AGM 5th October 2006

Report to Members

2005/2006

Profitable Growth for Scottish Tourism

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Foreword: Peter Taylor



2005/06 was a good year for the Scottish Tourism forum. During this period we have further enhanced the Forum's position as the 'honest broker' between the industry and the public sector. The Scottish Tourism Forum is an independent body which does not receive public funding; it relies on support from you, the industry.

The highlight of the year was the first ever Scottish Tourism Week which took place in March 2006. The Forum did what it was set up to do; it brought businesses from all sectors of our industry together as a co-ordinated voice and engaged in high level debate with the elected and public sectors.

In March we also jointly launched the Tourism Framework for Action with Patricia Ferguson the Minister for Tourism, Culture and Sport. The TFFC lays out growth ambitions held for our industry. It is vital that all concerned in the industry get behind this strategy and we at the Forum look forward to playing our part in keeping the TFFC 'live and relevant' for the future. STF is determined to follow an agenda for '*Profitable Growth*' in our industry, growth that will allow for further investment in our product and people.

Membership continues to grow which is vital to the success of your industry organisation. I would urge you to support STF whenever possible, and make other businesses aware of the work that is carried out on your behalf. This report serves to underline the breadth of issues and activities STF has undertaken over the past year.

I would like to thank the staff for their commitment over the past year and the board and management committee for their ongoing support.

A handwritten signature in black ink, appearing to read 'Peter Taylor'. The signature is fluid and cursive, written on a white background.

Peter Taylor OBE
Chair
Scottish Tourism Forum

Profitable Growth for Scottish Tourism and Hospitality

Introduction: Alan Rankin



The past year has been a challenging year for the staff and board at STF, as we've been involved in a broad range of activities on behalf of our wide range of member businesses in many sectors. The wide range of members is our strength and it is one we must now move to capitalise on.

Sustainability of STF is of paramount importance. To achieve this we require a broader width and depth of members from across all sectors - this is a key strategic priority for the board and staff of the Forum.

We have been working hard to improve the standing of STF in the industry, in the private, the public and the elected sectors. Scottish Tourism Week in 2006 was a defining moment for STF as for the first time we took hold of the agenda on behalf of the industry and brought all parties together to debate tourism and its importance to

the Scottish economy. We are planning Scottish Tourism Week 2007, 12th – 16th March, which will focus on *profitable growth* for our industry.

2006 saw the joint launch by the Executive and STF of the Tourism Framework for Change. The TFFC sets out a growth ambition of 50% by the year 2015. STF support this joint ambition and look forward to making a continuing contribution to this debate. STF are determined that the growth ambitions are exceeded but on a profitable and sustainable basis. STF will be developing an agenda that will look for *profitable growth* in our industry, a growth that will allow for re-investment in businesses and people. STF are keen to see long-term commitment by the Executive to tourism growth and so establish our industry as the most important and most sustainable industry in Scotland.

As an organisation we have over the past two years maintained a contract to manage and support two publicly funded projects: Pride and Passion and the Tourism Innovation Group. TIG is now operating a clear agenda under the Project Director Sue Crossman. I have been acting project director of P&P since December with the staff team and industry supporters working hard to deliver a focussed business plan. A range of imaginative initiatives aimed at improving collaboration between businesses and heightening business focus on improving the customer experience will be delivered between now and March 2007. Both organisations were born out of the Forum and both are now making a significant contribution to our industry.

I would like to note our appreciation towards the British Hospitality Association with whom we have worked closely with over the past year.

Profitable Growth for Scottish Tourism

To be the true voice of the industry we require a broader membership base and it remains our main objective to bring together an effective, focussed and well advised industry voice representing your interests to the public sector.

As we head into 2007 STF is increasingly aware of the pressures that our industry is under. Costs are increasing, skilled and talented staff is at a premium and infrastructure and bureaucratic barriers to growth are not helping us compete in the world market.

During the coming year we will be introducing new and exciting member benefit schemes and enhancing our industry facing website. Above all we will focus on issues that can contribute to *profitable growth* and continue to represent your interests

On behalf of the staff I would like to thank our Chair, Peter Taylor, the members of the Board and the management committee for their support and look forward to working with you in the year to come.

A handwritten signature in black ink, appearing to read 'Alan Rankin', with a stylized flourish at the end.

Alan Rankin
Chief Executive
Scottish Tourism Forum

2005-2006 Activities

The following is an outline of the activities undertaken on behalf of members for the period October 2005- October 2006.

Scottish Tourism Week

- First ever national week long focus on tourism and its importance to the Scottish Economy.
- 1,000 delegates from over 400 businesses attend 13 events across Scotland.
- Scotland International: high profile event with speakers debating how Scotland is promoted overseas.
- First STF Parliamentary reception at Holyrood, attended by over 100 industry representatives, two ministers and over thirty MSPs.
- Industry Dinner: Tourism Minister attends gala dinner aboard Britannia.
- MSPs Challenge: STF challenges MSPs to visit tourism businesses in their constituency to better understand tourism issues. 39 MSPs participate across Scotland.

Tourism Framework for Change

- Extensive work carried out in pulling together industry comment and views so contributing to the TFFC.
- Launch: Minister and chair of STF jointly launch the TFFC.
- Implementation Group: STF play core role in bring industry views to the table in the drawing up of the TFFC.
- Monitoring Group: STF sit on TFFC monitoring group and assist towards the architecture of the delivery and monitoring of the framework.
- Ongoing communications of TFFC objectives to members and wider industry.

Skills

- STF calls for a Skills Summit which led to identification of key themes for skills development for tourism: Management & leadership, Workforce development, Recruitment & retention.
- STF sit on the Employers and Enablers board of the Sector Skills Council tourism skills body People 1st.
- STF assist in the development and endorsement of the new '100k Welcomes' training programme.

Transport

- National Transport Strategy. STF made a full submission on the national Transport Strategy consultation.
- Scottish Executive: STF and TIG hold a joint meeting with the transport department.
- Passengers Transport Users Committee: STF responded to the PTUC consultation seeking tourism representation on the PTUC.
- TransportScotland: STF open discussions with national agency to ensure tourism issues are included in future planning.

E-Commerce

- STF develop and deliver a series of e-commerce workshops with HIE, VS and VS.com.
- STF work to bring parties together to enhance the level of debate around the development of a successful e-sales strategy for Scotland.

Business

- HMRC Conferences; STF attended two conferences representing tourism businesses networking feedback to HMRC regarding business needs.
- Christmas and New Year Trading Bill: STF gives evidence to the Justice 2 Committee at Holyrood.
- Smoking ban Implementation Group, STF contributed industry input to the legislation implementation plan for the public place smoking legislation.
- Business rates: campaigned alongside other business representative bodies to bring Scottish business rates in line with the rest of the UK.
- UK Visa increase; STF, in partnership with VisitBritain, campaigned to make the government aware of the potential damage to tourism by their unilateral application of increased entry visa costs to the UK.
- Private Drinking Water Supplies: STF, in partnership with the Association of Scottish Self Caterers, responded to consultation seeking better terms for businesses affected by new European legislation on the use of private water supplies.
- Bed tax; STF consult with members as to industry views on possible imposition of a bed tax.
- First Sale of Fish: STF respond to the Scottish Executive on the application of excessive bureaucratic regulations on small hotels and restaurants wishing to buy local seafood produce.

Smoking Ban

- STF consultation with full membership.
- STF place on consultative group appointed to develop implementation and communication of the ban.
- STF continue to feed industry views to Scottish Executive via monitoring group.

Public Agencies

VistScotland

- Challenge Fund: STF sit on awards panel as industry representative.
- Eat Scotland: STF took part in initial assessments and consultation for the new food grading scheme and continue to feed industry views to the quality assessment group.
- Information and Sales Review: STF sit on industry advisory panel.
- Scenario Planning Group: STF are members of the group that looks at long term trends and 'futures' in tourism and world trends for the future.
- Regular briefing meetings between VS board and STF.
- Avian Flu: STF attend briefing meetings and issue industry briefings.

Scottish Enterprise

- Regular contact with senior managers on a wide range of tourism issues.

Highlands and Islands Enterprise

- Regular contact with senior managers on a wide range of tourism issues.

Events

- E-Commerce Roadshows; STF devise and run ecommerce road shows aimed at supporting better e-commerce skills and capacity in tourism businesses.
- STF Open Meeting, Huntington Tower, Perth, Oct 2005.
- Scotland United: STF and BHA jointly run the national conference at St Andrews Bay Resort, Nov 2005.
- Eastern Europe Trade Surgery, Menzies Belford Hotel, Edinburgh, Feb 2006.
- STF Open Meeting, Radisson SAS, Edinburgh, March 2006.
- Scottish Tourism Week, March 2006.

Political

- Regular contact with Minister's office throughout the year.
- Political part Briefings with main parties.
- BHA parliamentary reception at Holyrood.
- Preparation of STF Industry Manifesto for Profitable Tourism.

Industry Groups/Advisory Panels

- BHA Scotland Committee
- CBI Trade Association Committee
- British Tourism Development Committee
- National Smoke Free Areas Implementation Group
- Tourism Environment Forum
- Sector Skills Council People, 1st Enablers Board and Employers Board
- Visitscotland. Information and sales Review Industry Panel
- Sustainability Tourism Partnership
- Challenge Fund Judging Panel
- Tourism Innovation Group
- Scenario Panning Group

Project Management

Pride and Passion

- STF continue as project managers on behalf of VS, SE and HIE.
- STF CEO takes on part-time project director role.
- STF charged with delivery of 2006-07 Business Plan.

Tourism Innovation Group

- STF provide administrative support to TIG.
- CEO assists TIG project director with project development.
- STF attend TIG meetings and management group meetings.

Press

STF regularly contacted by the media for background comment and response to topical tourism issues. We have commented on numerous topics, including the following:

- Skills: STF comment on need to have better skilled Scots in tourism and not rely on cheap overseas workers.
- Green Taxes: STF comment on need to take caution on adding costs to visitors.
- Bed Tax: STF seek open debate on merits of tourism taxation and need to maintain investment rather than taxation based investment.

Profitable Growth for Scottish Tourism

- World Cup: STF comment on First Minister's comments having potential harm for tourism with our biggest market.
- Scottish Tourism Week; Extensive TV, Radio, Press and trade press coverage of the first Scottish Tourism week.
- Midge: STF respond to BBC claims that Scottish tourism is blighted with midge problems.
- Swallow Hotel Group going into administration.

In house

- New Sage accounting system bedded in.
- Fiona McLaughlin leaves after six years with STF.
- Sharon McCord joins STF as Membership and Policy Communications Manager.
- Newsletter continues to be recognised as the leading source of industry information offering a wide cross section of issues and information.
- Membership: STF membership at 149.
- Website: STF website changes to new content management system now offering a more flexible ability to update pages and content. STF develop a secure members' area to better offer member benefits.
- STF move offices at 29 Drumsheugh Gardens. Single floor houses STF, Tourism Innovation Group and Pride and Passion.

Board of Directors

The board of directors is made up of ten elected members with a further five co-opted at the discretion of the board. One third must retire each year with the chair elected by the board of directors. The board meets on six occasions each year.

The Scottish Tourism Board since September 2005:

- ***Business Tourism Food Drink & Retail***
Peter Taylor The Townhouse Company **Chairman**
- ***Edinburgh & Lothians***
Ian Gardner National Trust for Scotland **Joint Vice Chair**
- ***Accommodation***
Andy Machen-Young Windsor Hotel **Joint Vice Chair**
- ***East Central***
Roger Brown Promotional Print Distributors Ltd
- ***Skills & Training***
Geoff Fenlon People 1st
- ***Glasgow & Strathclyde***
Ian Fleming Glasgow Restaurateurs Association
- ***South of Scotland***
Kevin Keenan Dryburgh Abbey Hotel
- ***Business Development & Tourism Services***
Douglas Logan Scottish Destination Management Association
- ***Attraction/Activity***
David Adams McGilp Dalriada Project
- ***Highlands & Islands***
Laurence Young Lochaber Centre for Tourism Excellence
- ***Co-opted***
John Lennon Moffat Centre for Travel and Tourism
- ***Co-opted***
Iain Limond JAC Travel
- ***Co-opted***
Marjory Rodger Confederation Passenger Transport UK
- ***Co-opted***
Jeanette Wilson British Holiday & Home Parks Association

Management Committee

The Management Committee have met on a regular basis throughout the year with the following remit:

- Monitoring of monthly accounts and resources
- Personnel, office and housekeeping
- General direction and strategy testing
- Company protocols and procedures

Management Committee:

- Ian Gardner (Chair)
- Douglas Logan
- Geoff Fenlon
- Andy Machen-Young

Financial Report

Scottish Tourism Forum

Profit and Loss Account

Year ended 31 March 2006

	Note	2006 £	2005 £
TURNOVER		980,618	544,045
Cost of Sales		867,835	407,883
		112,783	136,162
GROSS PROFIT		112,783	136,162
Administrative expenses		106,299	122,139
		6,484	14,023
OPERATING PROFIT	2	6,484	14,023
Interest receivable		2,672	1,506
Interest payable and similar charges		—	(34)
		9,156	15,495
PROFIT ON ORDINARY ACTIVITIES BEFORE TAXATION		9,156	15,495
Tax on profit on ordinary activities		—	—
		9,156	15,495
PROFIT FOR THE FINANCIAL YEAR		9,156	15,495
Balance brought forward		6,531	(8,964)
		15,687	6,531
Balance carried forward			6,531

Auditors

McCabes
Palmerston Place
Edinburgh

STF Members

Members of the Scottish Tourism Forum as of 5th October 2006:

Patron Member

Macdonald Hotels

Members

- 1745 Trading Company Ltd
- 21C Scotland Ltd
- Aberdeen City Centre Association
- Activity Scotland
- Adam Smith College, Fife, The
- ADGAP
- Alliance Hotel Consultants Ltd
- Angling Tourism Development Group
- Arioso Entertainment Ltd
- Ascension Solutions Ltd
- Association of Scottish Self Caterers
- Association of Scottish Visitor Attractions
- Ayrshire Chamber Tourism Forum
- BAA - Scottish Airports Ltd
- BII
- British Holiday & Home Parks Association
- British Hospitality Association Scotland (BHA)
- British Horse Society (Scotland)
- British Waterways Scotland
- Buccleuch Visitor Services
- Business Tourism Scotland
- Cairngorm Attractions Group
- Calyx, The
- Camping and Caravanning Club, The
- Caravan Club, The
- CBTS (Catherine Bowie Training Services)
- Christiansen Management Ltd
- Company Growth Team Ltd, The
- Confederation of Passenger Transport UK
- Continuum Group Ltd, The
- Cromasaig B&B
- Culdees Bunkhouse and B & B
- Dalriada Project, The
- Dal Riata
- Destination Arran

Profitable Growth for Scottish Tourism

- Direct Distribution
- Dryburgh Abbey Hotel
- Dunedin Guest House
- Easyway Scotland
- Edinburgh Capital Group
- Edinburgh Chamber of Commerce
- Edinburgh International Conference Centre
- Edinburgh Military Tattoo
- Edinburgh Principal Hotels Association
- English Language Consultancy
- EventScotland
- Explore Scotland
- Farm Stay UK
- Federation of Small Businesses
- FishScotland
- Forbes of Kingennie
- Forestry Commission Scotland
- French Kiss Design Ltd
- G&M Promotions (Scotland) Ltd
- Glasgow Caledonian University, Moffat Centre
- Glasgow Metropolitan College
- Glasgow's Leading Attractions
- Glasgow Restaurateurs Association
- Glasgow Science Centre
- Global Connections (Scotland)
- Goal Training Ltd
- Great Time Scotland
- HCIMA
- Highland Business Research
- Highland Cottage
- Highlands and Islands Tourism
- Historic Houses Association
- Historic Scotland
- HM Revenue & Customs
- Holyrood Communications Ltd
- HotelReviewScotland.com
- Hub Agency, The
- Inn at Lathones, The
- Isle of Eriska Hotel
- JAC Travel Scotland
- Langbridge Partnership
- Language Network Scotland
- Lifetree (Scotland) Ltd
- Lightershade
- Lochaber Centre for Tourism Excellence
- Loch Lomond Seaplanes Ltd
- Lodge - Daviot Mains, The
- Lynn Jones Research Ltd
- Manuela Fraenkel
- Marcliffe at Pitfodels
- Marketing Matters

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- Melfort Pier and Harbour
- Mercat Tours Ltd
- Morton of Pitmilley
- Napier University
- National Caravan Council Ltd
- National Galleries of Scotland
- National Museums of Scotland
- National Trust for Scotland
- Nethy Bridge Tourist Association
- Oban & Lorn Tourism Association
- Original Edinburgh Medical Tour, The
- Par Excellence
- People 1st
- Pitcairnie Leisure Business
- Portland Hotel Group
- Profile Plus
- Promotional Print Distributors Ltd
- Queen Margaret University College
- Rabbie's Trail Burners
- Radical Travel Group
- Reid Kerr College, Centre for Travel & Tourism
- Retail Magic
- Robert Gordon University, SCoT
- Rosslyn Chapel Trust
- Roxburghe Hotel & Golf Course & Floors Castle
- Royal Yacht Britannia, The
- Scotia Charters
- Scotland's Best B & Bs
- Scotland's Hotels of Distinction
- Scottish Destination Management Association
- Scottish Equestrian Association
- Scottish Hotel School, University of Strathclyde
- Scottish Incoming Golf Tour Operators Association
- Scottish Museums Council
- Scottish Retail Consortium
- Scottish Tourist Guides Association
- Scottish Traditional Boat Festival
- Scottish Youth Hostels Association
- Seabridge Consultants
- SELTIC English Language Consortium
- Smartcityhostels (Europe)
- Source Tourism Solutions
- Springboard Scotland
- St Andrews Bay Golf Resort & Spa
- Stevenson College Edinburgh
- Stirling Gallery Publications
- Sunsol International
- Targeting Tourism
- Tartan Ink Ltd
- Three Chimneys (Scotland) Ltd, The
- Tourism Society Scotland

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- Tourism Support Services
- Townhouse Company, The
- Training Matters
- Transvercia Chauffeur Drive
- Ullapool Tourism & Business Association
- UKinbound (formerly BITOA)
- VisitScotland.com
- West Lothian Tourism Forum
- Windsor Hotel, The
- Wing Ding
- Xpress Recruitment

Contact Details

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