



Dornoch Area Community Interest Company

November 2013

'How our Customer Sees Us - Dornoch'

**an independent survey highlighting the visitor customer experience of
Dornoch and enhancement opportunities.**

Prepared by the Highland Retail Academy

Introduction

The Highland Retail Academy (HRA) was commissioned to conduct a local survey identifying the key impressions of 'how the customer sees us,' capturing the appeal of the shopping experience both of the business community in general and of the individual businesses specifically.

The survey includes a high level 'typical shopping' visit, similar to that of the day-cationer and stay-cationer mentioned in the Highlands & Islands Masterplan for Dornoch 2013 - 2023.

The survey highlights both individual and collective strengths and weaknesses that a visitor might meet within the retail and service community. We aim not to identify specifically any outlet, whether highlighting the good or the bad, but report upon our observations, be they areas of concern, such as poor visual presentation both from the kerb or an impression of the welcome projected by a business.

The HIE Masterplan for Dornoch 2013 – 2023 states

“By building on Dornoch’s unique setting in the Northern Highlands and its positive place qualities, the Dornoch Brand can be nurtured; establishing Dornoch and Sutherland as an attractive place to visit, live and invest. This Economic Masterplan aims to ensure that in 2023, Dornoch will be:

- *A First Class Quality Destination*
- *A Distinct and Rich Tourism Product*
- *A Place for Business & Investment “*

Within our submission we feel that there is an opportunity to engage with specific town centre improvement agencies, such as the Dornoch Area Community Interest Company, local businesses and amenity providers, and various appropriate public sector agencies. This will assist the development of a plan that will attain the measures laid out in the HIE Masterplan and also the Sutherland Development Action Plan.

Dornoch as a visitor attraction.

Dornoch is a very pretty, largely unspoilt village with a number of fine attractions that would entice a wide variety of visitor to the town.

Situated 45 miles north of Inverness the drive time is approximately 55 minutes. The town centre is an attractive group of streets mainly surrounding the magnificent 13th century Cathedral, which is noteworthy for an architectural study visit in its own.

Even more historical references can be easily found within short walking distance including a former bishop's palace (now a hotel), a courthouse and old town jail (now a shop), a Mercat Cross, and a commemorative stone marking the last witch to be executed in Scotland. All are interspersed within the open streets of sandstone cottages and town houses.

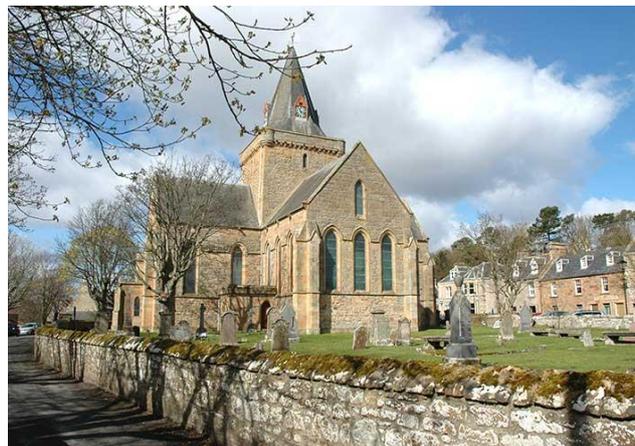


Photo courtesy of Highland Vacation

Dornoch is also renowned throughout the world to golfers for the Royal Dornoch Golf Club. The club consists of two 18 hole courses, the older of which has had golf played on it since the early 17th century. The course is regarded by Golf Magazine to be one of the best 15 courses in the world, and attracts golfers from all over the world. 5 times Open Championship winner, Tom Watson, is quoted as saying of the course "It's the most fun I've ever had on a golf course".

Dornoch is well situated as a base for many popular outdoor pursuits such as angling, bird watching, cycling, walking and wild life. Six distilleries lie within 20 miles of Dornoch, four of which (Balblair, Clynelish, Dalmore and Glenmorangie) have visitor tours available.

To the east of the town centre, is a magnificent sandy beach which holds the EU designation as a beach suitable for bathing.

And Dornoch continues to demonstrate its desire to be highly regarded, having been awarded Fairtrade status in 2005 and has made a commitment to using products with the Fairtrade Mark.

For a comparatively small town, with a population of approximately 1,250, there is much to do and see and the visitor is provided with a surprisingly wide range of services such as shops, cafes, restaurants and hotels.

Arriving in Dornoch

Rail transport directly to Dornoch is no longer possible, with the nearest station being Tain approximately 8 miles away.

Predominantly, the traveller to Dornoch will come to the town by road northward up the A9 as the main Road. The main air and rail hub is Inverness.

Dornoch is situated on the coast and one needs to take the A949 junction off the A9, and the drive for approximately 2 miles.

Obviously some too will approach southward, having possibly previously visited John O'Groats or Wick and Thurso, and they will also come off the A9 trunk road, taking the B9168 to the town centre.

Tourist signs (brown and white signs) initially advise the visitor that the Tourist Information Centre is 1 mile ahead and of caravan parking and a forest walk, and it directs the motorist to a spacious car and coach park to the right (Eaglefield Road).

Having parked up, the informational signage was limited and only advised us of toilets 400 yards away. There was no clear sign informing the whereabouts the town centre so we retraced our steps back onto Castle Street and progressed to the town centre.



There is certainly plenty of car parking in the town centre but the uptake of these parking spaces during busy periods is high. However all parking is free, which is to be commended. Some other towns in the north of Scotland with a similar tourist profile have opted for Pay and Display parking, which is not popular with town centre businesses.

There is more car parking available around the town centre, in the streets adjacent to the Cathedral and off Grange Road.

For some, there is an additional transport option as Dornoch has a grass airstrip just a mile or so from the town centre, which is open to light aircraft only.

The Offer to the Visitor

As the visitor strolls through the town, there are a number of historical illustrated boards which offer very useful and educational information about the location in previous days. These stand in isolation to each other and it might be considered as a missed opportunity to link these as a planned walk, or as rest-points in a guide to view the whole town. Commercially, this could be located to ensure the visitor is enticed and encouraged to stroll to the other parts of the town.



Also the town is well adorned with hanging and standing flower displays, which are well maintained and remain attractive. The barrel tubs have a sign that indicates that these were introduced in support of Highland 2007 which was a yearlong initiative celebrating culture throughout Highland communities. These displays are still in very good order, and the maintenance received again demonstrates a care for the town which one may not find replicated in many other town centre locations.

Our desktop and field research indicates 75 active businesses operating within the town of Dornoch (see Appendix 1).

Dornoch Business Breakdown

Guest House *	16	
Hotel	7	
Restaurant & Café	7	
		<hr/>
	30	39.5%
		<hr/>
Retail	24	
Services	14	
		<hr/>
	38	50.0%
		<hr/>
Finance/ Professional	4	
		<hr/>
	4	5.3%
		<hr/>
Attraction	4	
		<hr/>
	4	5.3%
		<hr/>
Total	76	

*excludes self catering venues

Dornoch offers an attractive range of retail outlets and its character is somewhat unspoilt due to the lack of 'High Street' retail brands.

Indeed the appeal of the range of various retail options from gifts, antiques, grocery, pharmacy, etc. are very much in keeping with the ambience of the town, as most of the businesses are privately owned and/or operated. Most of the retail outlets also can be found in these town centre streets around the cathedral, however a number of the retail and other services can be found away from the town centre streets, such as in the Meadows, Church Street or Station Road.

The awareness raising of the location of some of these more remotely placed businesses is obviously a concern to the owners/operators as there seems to be a lack of 'official' signposting, which has brought about the need for ad-hoc signage appearing in the forms of "A" frame boards, and even a grocery outlet van parked in the town centre with livery indicating where the retail outlet is to be found.

We would suggest that a more uniform and visually pleasing form of signage may be worth investigating, if only to ensure that the aforementioned "A" frames are not actually in contravention of any safe passage for the visitor.



Both a blessing and a disadvantage of the town businesses being independent is that individual shop frontages are displayed in a wide variety of styles, saving us from the bland uniformity that some other towns have inflicted upon them.

But the actual shop frontages are generally very pleasing and do draw the visitor inward. There is a good balance of the high end and niche outlets with the more practical outlets and they sit side by side in a very agreeable and comfortable manner.

Charming hand-written signage can be found either extolling the services of the outlet, such as unique products, special offers or acknowledgement of being short listed for an award.



Similarly, widely witnessed in the window posters was the variety of information. These ranged from the understandable advice about a service or product range found within that outlet, through to community notices informing of forthcoming events or community activities. The purist merchandising expert would possibly shriek at the latter, but it surely can be argued that this does present a comforting indication that the business community still cares and regards itself as integral to the actual community.

However, if a shop displays opening hours, it is the very least expectation of customer service for these hours to be observed and sadly we found 4 examples of shops that indicated that they should be open at the time of our visit, but were not. Granted, our field visit was not in the height of the season, but the customer does deserve to be informed correctly.

A further consideration may be that a number of the key attractions to the town, such as the golf course and some of the larger hotels which are the initial point of attraction for coming to the town, could possibly better signposted.

It was pleasing to see that there was not the curse of many a town centre, namely a high level of empty and vacant retail units. Indeed, it is our understanding that a unit demonstrating its “Closing Down Clearance Sale” has already been identified and acquired by a new operator.

Expected tourist amenities such as a filling station, 24 hour cash dispenser, and a wide range of accommodation including self-catering, guest house and hotels are available, as are a range of eateries from daytime cafés, pub food and fine dining.

The single public convenience block is adequate and is very close to the town centre, but ample additional provision can be found throughout the various eating outlets in the town.



However, on a negative note, as previously mentioned, there is not much sign posting to the retail park. Hence, the Nisa store park their van appropriately in the town centre so that the arrows on the van’s livery point you towards their store and their neighbouring cluster of businesses.

This is not an appealing location. One’s eye is drawn mainly to the defunct and now overgrown abattoir which can only be described as an eye sore. Added to that, there is a recycling provision set very close to the entrance of the Garden Centre and within close proximity of the other businesses. The recycling facilities did not seem to be well maintained, with glass and paper litter clearly visible. Whilst the merits of recycling are to be commended, it must be hard to see how these businesses are not disadvantaged by this and the other detrimental influences.

Impressions

Dornoch is a very charming small town, which is fortunate to have several reasons for attracting a large number of visitors.

Its cathedral, golf course, beaches and unspoilt ambience need to be considered and a plan of how the residential and business communities can 'exploit' the opportunities being presented to the maximum potential whilst still safeguarding the quintessential charm of the town.

The cathedral and historic town centre are worthy of showcasing, and structured, informational walks would ensure that the people visiting are corralled in a manner that is both pleasing and informative to them, whilst being managed and directed in a way that is empathetic to the local community.

The approaches are adequate, but more could be done to ensure that visitors use the parking that suits the community best. Again, signposting to the preferred car and coach parks, and signposting the virtues of the entire town offer, immediately and obviously at that initial point(s) of gathering would be helpful.

Subtle and informative signposting can identify the historic walking trail, a wider wildlife and activities trail and even a town centre map showing the wide variety of retail and eating outlets clearly marked.

The Royal Dornoch Golf Course is world famous. Golfers from all over the world are keen to play the hallowed links course, but there is little in the way to herald the venue or stoke anticipation as one approaches the town.



The type of holiday golfer that the course attracts normally has quite a high level of disposable income. Whilst there currently is a number of retail, food and hotel outlets that are well positioned to maximise upon this opportunity the options are few in number. The purchase of golfing paraphernalia is generally limited to the Golf Club professional's shop. There might be an opportunity to provide a complementary range of product elsewhere in the town.

Indeed the golfer often is accompanied by a partner who doesn't share the golfer's enthusiasm, and again other than the clubhouse or the well located hotels, is there an option to sell more upmarket refreshments?

The proposed significant development of apartment accommodation by the Royal Golf Hotel will provide greater capacity for the more affluent visitor, which must be considered as attractive opportunity for the whole town.

The town's very fabric and its close location to beautiful walking, in either the countryside or the beaches, offer a great opportunity to enhance the short visit. Well signposted, informational guided walks add value and enjoyment to the unfamiliar visitor, and offer the community to ensure that all the points of interest that it wishes displayed, are clearly and methodically presented.

This provides a low cost option for an informed and entertaining attraction to families and enthusiasts alike but would enhance the possibility to increase the potential footfall in the environs. This brings the advantage of additional snacking, ad-hoc refreshments and impulse purchasing.

Less formally, the growing interest on the pastime of geocaching might offer an additional level of interest. Geocaching is one of the fastest growing outdoor activities and is a treasure hunting game using GPS-enabled devices. Participants navigate to a specific set of GPS coordinates and then attempt to find the geocache (container) hidden at a location usually of some interest or note. Recently on a Radio 4 documentary on the subject a number of the enthusiasts interviewed stated that they preferred to be guided by their geocaching directory rather than traditional tourist guides, as they accepted that the geocaches were located and maintained by people who cared for their location and were keen to attract people to it.

Many outdoor locations are now mentioning that they cater for geocaching such as Glenshee and indeed the National Trust.

Acknowledgement of achieved status, such as Fairtrade, is a further affirmation that the community demonstrates a heightened level of standards, but this is not openly displayed within the town.

A decision needs to be made about how best to serve the visitor. The nature of the visitor attraction in Dornoch is generally more toward the higher end, and the type of presentation and offer of customer service needs to reflect this. Within our visit to the individual businesses in our field study, we had the full range of fantastic customer service, from the waitress in a café noticing we had a smart phone and immediately offering the wi-fi key code without prompting, through to just the merest acknowledgement of our presence in two of the higher end shops where we might have expected to be more fully engaged.

Many tourist towns with a similar size and profile to Dornoch have focused upon a specific theme for their development, such as Wigton in Dumfries and Galloway with book festival, and Crail with the Fife Food festival. As we have indicated, Dornoch has much to offer, and if the town were to consider more actively promoting such an event, focusing on a single point of interest may raise something of a challenge.

However, another potential strength can be drawn from the way golf has been marketed. Until very recently, each golf course marketed itself and its own specific playing characteristics. In the last decade or so, we have seen a move away from such an isolated approach, and many courses join with others of a similar profile to provide a wider, joint offer aimed at a specific type of golfing visitor with specific golfing and accommodation expectations.

Dornoch has been very proactive in this area and rather than taking a stand alone offer, it has worked closely and marketed with Castle Stuart and Nairn golf courses, both courses sharing the same high championship standards as Royal Dornoch, packages suited to improve the added value of multi venue golfing breaks.

The mechanics of how this largely positive image of Dornoch is presented to the visitor, is obviously and quite rightly unknown to the visitor, but there is little actual branding evidence to suggest the work being done by the Dornoch Area Community Interest Company, and its networked agencies.

There is absolutely no problem with this as long as all the parties within the CIC and the associated network are aware of the aims and are not only working together as the HIE Masterplan suggests, but all feel as involved and included as they would wish to be.

To develop the 'Quality Destination' brand as suggested requires the engagement of the many individual businesses which trade independently within the town to develop a more symbiotic approach. This is hard to encourage, let alone enforce, as these businesses will, in the first instance see their own specific and individual requirement to trade successfully, before uniting for a joint betterment.

There currently exists within the limited trading environment of the town, some closely similar or even duplication of business offer, such as interior design, hair and beauty, florists, cafés and hotels. Some of these will trade comfortably within the economic spend capacity available, but the some may not, and the question of how these businesses, who may well consider that they are in competition with each other to secure the visitor spend, now unite to present a wider inviting 'Brand' image remains.

Dornoch CIC would appear to be an ideal forum to investigate how the matching how the individual businesses' needs are understood and included in the aims of the Masterplan.

The development suggestions within the Masterplan are to be commended, particularly those aimed at *Forging Stronger links with local community and local business* and *Identifying opportunities for business investment in other economic sectors to diversify the local economy* but many of the business outlets that the visitor sees are independently owned and operated businesses. These businesses will need to see how they engage with such philosophies that are to be introduced and quantify the business enhancement, whilst they continue the operation of their business on a day-to-day basis.

The benefits of wider, themed marketing to encourage more visitors to the town is an obvious attraction. Much of this can be done in a strategic way that doesn't require any onerous investment of time or focus from these businesses. However, they do need to be aware of the scope and requirements that the success of such a development campaign will have upon their business in meeting the expectation of the 'marketed brand image' and so maximise the opportunity from both their own business perspective and the town as a visitor attraction perspective.

Appendix 1 Business Listings.

Company	Type of Business	Category
2 Quail	Restaurant	Guest House
Alex's Chinese	Takeaway	Restaurant
Amalfi	Guest House	Guest House
Arthur & Carmichael	Estate Agents	Finance/ Professional
Auchlea Bed and Breakfast	Guest House	Guest House
Bank House	Guest House	Guest House
Bank of Scotland	Bank	Finance/ Professional
Bay Dornoch Hotel	Hotel	Hotel
Budding Genius	Florist	Retail
Burghfield House Hotel	Hotel	Hotel
Butterfingers Café & Gift Shop	Shop/Café	Restaurant
Castaway	Takeaway	Services
Castle Close Antiques	Shop (antiques)	Retail
Central Garage	Garage	Services
CoCo Salon	Hairdresser	Services
Cottage Workshop	Picture Framers	Services
Country Interiors	Shop (interiors)	Retail
Daisy Chain	Shop (lingerie)	Retail
Del Mar Guest House	Guest House	Guest House
Dornoch Antiques & Collectables	Shop (antiques)	Retail
Dornoch Castle Hotel	Hotel	Hotel
Dornoch Cathedral	Cathedral	Attraction
Dornoch Farm Butchers	Shop (Butchers)	Retail
Dornoch Garden Centre and tool hire	Garden Centre	Retail
Dornoch Library	Library	Attraction
Dornoch Patisserie	Café	Restaurant & Café
Dornoch Pet & Country Store	Shop (pet shop)	Retail
Eagle Hotel	Hotel	Hotel
Elegant Scotland	Gifts etc.	Retail
Ewan Harris & Co	Estate Agents	Finance/ Professional
Framing Room	Picture Framers	Services
Gail Saxton	Interior Design	Services
Gavin Traditional Butcher	Butcher	Retail
Gillian's Salon	Hairdresser	Services
Grants Fine Foods	shop	Retail
Harry Gow	Café	Restaurant & Café
Highcroft	Guest House	Guest House
Highfield House	Guest House	Guest House
Highland Chiropractors	Chiropractor	Services
Hill View	Guest House	Guest House
History Links Museum	Museum	Attraction
Interior Design	Interior Design	Services

<i>Jail Clothing</i>	<i>Shop (clothing)</i>	<i>Retail</i>
<i>Just Sew</i>	<i>Upholstery</i>	<i>Services</i>
<i>Kingcraig Fabrics</i>	<i>Woolen products</i>	<i>Retail</i>
<i>Kyleview House</i>	<i>Guest House</i>	<i>Guest House</i>
<i>Links House at Royal Dornoch</i>	<i>Hotel</i>	<i>Hotel</i>
<i>Luigi's</i>	<i>Café</i>	<i>Restaurant & Café</i>
<i>Mackay & Macaskill</i>	<i>Funeral Directors</i>	<i>Services</i>
<i>MG Ross Radio & TV</i>	<i>Shop (electrical)</i>	<i>Retail</i>
<i>Mitchell's Chemist</i>	<i>Shop (chemist)</i>	<i>Retail</i>
<i>Nisa store</i>	<i>Supermarket</i>	<i>Retail</i>
<i>Post Office</i>	<i>Post Office</i>	<i>Services</i>
<i>Raechels's Hair and Beauty</i>	<i>Hairdresser</i>	<i>Services</i>
<i>Rosslyn Villa</i>	<i>Guest House</i>	<i>Guest House</i>
<i>Royal Dornoch Golf proshop</i>	<i>Golf Shop</i>	<i>Retail</i>
<i>Royal Golf Hotel</i>	<i>Hotel</i>	<i>Hotel</i>
<i>Royal Kashmir</i>	<i>restaurant / takeaway</i>	<i>Restaurant</i>
<i>S C Mackintosh</i>	<i>Surveyors</i>	<i>Finance/ Professional</i>
<i>Simply the Best</i>	<i>Shop (fair trade shop)</i>	<i>Retail</i>
<i>Spar</i>	<i>Shop</i>	<i>Retail</i>
<i>Spar</i>	<i>Shop (supermarket)</i>	<i>Retail</i>
<i>St Finnarr's Charities Shop</i>	<i>Shop (Charity)</i>	<i>Retail</i>
<i>Sule Skerry</i>	<i>Guest House</i>	<i>Guest House</i>
<i>Sutherland House Restaurant</i>	<i>Restaurant</i>	<i>Restaurant</i>
<i>Sutherland Laundry Service</i>	<i>Dry Cleaners</i>	<i>Services</i>
<i>The Bank House</i>	<i>Guest House</i>	<i>Guest House</i>
<i>The Dornoch Bookshop</i>	<i>Shop (bookshop)</i>	<i>Retail</i>
<i>The Dornoch Inn</i>	<i>Pubs & Inns</i>	<i>Hotel</i>
<i>The Gift Shop</i>	<i>Shop</i>	<i>Retail</i>
<i>Toradarroch</i>	<i>Guest House</i>	<i>Guest House</i>
<i>Tourist Information Centre</i>	<i>Info Centre</i>	<i>Attraction</i>
<i>Trevoze Guest House</i>	<i>Guest House</i>	<i>Guest House</i>
<i>Tullochard</i>	<i>Guest House</i>	<i>Guest House</i>
<i>WM A MacDonald</i>	<i>Shop (hardwear)</i>	<i>Retail</i>
<i>Woodlands B&B</i>	<i>Guest House</i>	<i>Guest House</i>

E&OE