13 March 2006

Briefing Note on the Information and Sales Strategy

Background
In April 2005 the 14 Area Tourist Boards and VisitScotland joined to make one single tourism network. The primary focus was on maintaining business as usual during that first season. In June the review of all the information and sales services across the expanded network was started and a Project team established, led by Willie Macleod, Director of Visitor Services and Quality. On 7-8 June a workshop was held with a range of participants from local authorities and the industry. This group agreed the scope and the timetable for the review.

Scope and Timetable
The review has covered all of the current information and sales activities. These are:

Neighbourhood Information Points
Kiosks
visitscotland.com
Partnerships with local authority and private businesses
The tourism information centre (TIC) network

There are three phases:
June – January 2005/06
Research programme
February – March 2006
Analysis and further research – retail and partnerships
Transition Planning
April 2006 onwards
Implementation of pilot projects, feasibility studies

Consultation
Advisory Group
An Advisory Group has monitored progress and offered guidance on the project. It has 12 members representing the industry and other bodies including visitscotland.com, the Scottish Executive, the Convention of Scottish Local Authorities, the Scottish Tourism Forum and the British Hospitality Association. (Membership of the Group is listed at the end of this Briefing Note).

VisitScotland Chair's COSLA Group
This group comprises representatives from six local authorities. It has taken a keen interest in the project and encouraged a presentation and progress update to be given to the COSLA Economic Development and Planning Executive Group on 1 March 2006. The presentation was well received by this group**.**

Rationale

Tourism is a global and highly competitive sector. The market is changing rapidly. We must adapt our products and services to meet the needs and expectations of visitors now and in the future.

This is the first time Scotland has had a tourism network under one organisation and this creates a unique opportunity to build first class information and sales.

Technology must play an increasingly important role in delivering information and sales to visitors. Many visitors are already very familiar with using the Internet for research and bookings.

Research Programme

An extensive research programme was commissioned to collect feedback from consumers, to review developments in technology, other business sectors and comparator destinations. The programme also carried out in-depth telephone interviews with 40 tourism business owners and 12 representatives from trade associations. During mid-December to mid January we ran an online survey among 8,000 tourism businesses and received 675 responses.

Key Findings

The findings across the different workstreams were all consistent with each other. We held several discussion groups among representatives from industry and local authorities to gauge reaction to the research findings. There was common agreement among these groups that the findings were valid. Key findings were:

Consumer

Visitors want to meet people - the human touch will always be important
Visitors are seeking more than information, they want inspiration

Technology

Technology is moving at a rapid pace - convergence means that consumers may be able to use one piece of equipment in the home for information purposes
Technology is the enabler not driver

Other Sectors

Never second guess the customer – research and carry out continuous feedback
Multi channel – offer as many options as possible
Partnerships – joining forces is the way forward

Comparator Destinations

Changing markets and channels – the same issues around the world
No radical solutions elsewhere – the industry is struggling with the same challenges

Industry

Supported the consumer findings
Areas for improvement including signposting, consistency of info points
TICs play an invaluable role
Industry has role to provide information to visitors

We have also carried out internal research to gather information on all the properties, kiosks, and other static information points around the network and on the financial performance of the TICs**.** This information is currently being analysed.

Transition Planning

The research findings helped us identify where we had gaps in our service or areas for improvement. These opportunities helped determine five key programmes which will enable us to market and promote our services to visitors more effectively. Research has highlighted that there are large numbers of visitors (and residents) who never use TICs. One of the programmes below (Outreach) will address this.

The programmes are:

Outreach – taking our service out beyond the TIC, for example, operating mobile units at major external events or, supporting tourism businesses better to provide visitors with information

Content - ensuring strong emphasis at all times on good quality content for websites and printed material and other media we might use to deliver, or allow visitors to download, information

Partnerships - finding the right kind of partners to maximise any opportunities and enable us to improve the network

Ease of Purchase – looking at ways of improving consumers' ability to buy tourism products and services

Consumer Relationships – maintaining a database of our customers and their interests and managing communications when they return home.

The Way Forward

Technology
There is technology on the market which will help us improve our service to visitors. Research has shown we must offer customers a choice of options. We will improve and invest in our existing services but also introduce some new channels, for example, self service facilities to download information to mobile devices.

Retail
We commissioned some research into our retail operations and are considering the recommendations. We will discuss these with the VisitScotland Management Team and the Board in the coming weeks.

Partnerships
We currently have a number of partnerships with local authorities and with private businesses. We recognise that there are mutual benefits from working in partnership going forward and we have reviewed some of these business models to see if there is scope for improvement. We are also keen to discuss ideas further with possible technology partners.

Contribution to Scottish Economy
The new information and sales network has strong potential. We believe it can play a key role in inspiring visitors and encouraging them to stay longer, to do and to spend more. We also have the opportunity to nurture a positive relationship with them while they are here and, through effective data capture, maintain contact when they return home. This ongoing contact would be a key element of our retention strategy.

Implementation Plan

We are currently working on our HR structure and plan and once we have agreed this, the first step will be to communicate with staff.

We are now finalising our priorities for the coming season and this will form our implementation plan. There will be no immediate changes at the start of the season but we will run some pilots, feasibility studies and longer term projects.

Members of the VisitScotland Project Team
Willie Macleod, Director of Visitor Services and Quality
John Beattie Head of Information and Sales
Ron Alexander, Project Manager
Janice Mack, Communications Manager

Members of the Advisory Group
John Brown   Scottish Executive
Sheila Campbell   TIC Executive, Borders, VisitScotland
Barbara Clark   Head of Communications, VisitScotland
Kirsten Davidson   Scottish Executive
Malcolm Duck Edinburgh Restaurateurs Association
James Fowlie   COSLA
Alan Graham   Area Director, Fife, VisitScotland
Eva McDiarmid   ASVA
Isabella McNamara   Head of E-Business, VisitScotland
Deborah Murray   Stirling Council/Chair of SLAED Tourism Group
Ken Millar   British Hospitality Association
Fiona Ogg   Head of HR, VisitScotland
Ian Ramsay   Scotland's Best B&Bs
Alan Rankin   Scottish Tourism Forum
David Smythe   ASSC
Marco Truffelli Chief Executive, visitscotland.com
David Valentine   Angus Council/Chair of SLAED

Any questions or comments – please email **Janice.mack@visitscotland.com or telephone 0131 472 2309.**