

Report from Area Director, Edinburgh & Lothians Network Office

Area Tourism Partnership, Friday 9 June 2006

1. Staffing Matters

All seasonal staff have been recruited to Tourist Information Centres (TICs).

The comparability process for TIC staff was completed on 31 May 2006. All Edinburgh and Lothians staff have been successfully job matched.

Three permanent appointments have been made to vacant posts within the Edinburgh and Lothians Network Office: Sharon Watt (Office Administrator), Kirsten Bell (Marketing Assistant) and Tracy Logan (External Relations Executive).

2. Property

The Edinburgh Convention Bureau (ECB) Limited have moved into new premises at Drumsheugh Gardens, Edinburgh in April 2006.

The Edinburgh & Lothians Network Office property at 4 Rothesay Terrace is currently on the market. Proceeds of the sale will be applied towards:

- repaying any outstanding loan secured over the property,
- repaying or reducing the loan taken out by Edinburgh and Lothians Tourist Board to finance the purchase of the Maximiser CRM system now used by ECB Limited.
- repaying all sums due to City of Edinburgh Council

In the event of there being surplus funds, these would be made available for local activity.

3. Local Authority Agreements

Separate agreements are to be put in place between VisitScotland and each of the four local authorities, which will document the activities that VisitScotland will undertake in the area during 2006-07. This will be progressed by the Area Director in June 2006.

4. Tourist Information Centres

VisitScotland operates 7 tourist information centres throughout Edinburgh & Lothians.

The relocated and expanded Airport TIC was officially opened in May 2006. The TIC is located at International Arrivals and staff there provide airport and

tourist information. We aim to generate increased traffic to the TIC and to better meet customer needs.

All seasonal TICs reopened in April 2006.

Year to date TIC figures are shown below with a significant increase over prior year in visitor numbers to the Edinburgh and Scotland Information Centre (ESIC) recorded over prior year. Accommodation bookings continue to fall as internet bookings rise (see later section on increase of web bookings through www.visitscotland.com).

TIC figures – Year to date (as at 31 May) versus prior year

Centre	Year	Visitors		Bookings	
Edinburgh, Princes Street	2005	170,852	16%	2376	-23%
	2006	198,186		1840	
Edinburgh Airport	2005	64,531	-22%	283	-31%
	2006	50,106		198	
North Berwick	2005	8,755	7%	63	-71%
	2006	9,367		18	
Dunbar	2005	2,827	13%	14	-21%
	2006	3,196		11	
Linlithgow	2005	4,878	-16%	17	-82%
	2006	4,089		3	
Newtongrange	2005	1,315	-41%	22	145%
	2006	778		54	
Old Craighall	2005	2,374	4%	48	-44%
	2006	2,473		27	
Total	2005	255,532	5%	2,823	-24%
	2006	268,195		2,148	

5. Marketing Activity

2006/07 Essential Guide

The 2006/07 Edinburgh & Lothians Essential guide was launched in April with an initial print run of 80,000 copies. The guide, which details all that there is to see and do in the shape of attractions and activities, has undergone a major revamp and will help spread visitors throughout the city and beyond.

Spring DM campaign

VisitScotland Edinburgh & Lothians extended the national Spring Freedom campaign with 50,000 direct mails sent to consumers in the UK at the end of February. Focusing on the 'Senses' theme, the piece highlighted attractions and experiences throughout Edinburgh and the Lothians. Consumers were encouraged to go online to book a number of special offers or to request their free guides to the area.

Spring eDM

An electronic Direct Mail (eDM) was sent to 25,000 names in March promoting shopping and events. The eDM promoted the Fashion Festival, Cow Parade, Van Gogh exhibition and the CityShopping guide. Results show that 30% of the eDM's which were received were opened, and of this 44% clicked on links within the piece (CowParade proving most popular).

Edinburgh International Fashion Festival

The Edinburgh International Fashion Festival took place 26-29th April. VisitScotland Edinburgh & Lothians worked with Edinburgh City Centre Management (ECCM) to incorporate the festival in a number of communications and included copies of the CityShopping guide in VIP and media goody bags. VisitScotland PR teams worked closely with ECCM to bring a number of UK and International journalists to the event.

US and Canadian Spring campaign

VisitScotland Edinburgh & Lothians extended the national Spring cities campaign in US and Canadian markets. Our additional budgets allowed extra placements of Edinburgh adverts in press and online activity.

Cow Parade

VisitScotland Edinburgh & Lothians' cow has now been installed outside the Edinburgh and Scotland Information Centre on Princes Street. We are running a competition in conjunction with Princes Mall to promote traffic to each cow (and in turn to ESIC).

Summer DM

A direct mail piece promoting Edinburgh during the summer period (June – September) will be sent to 25,000 names in mid-June. The theme of 'Which Edinburgh will you discover this Summer?' will be used to attract visitors throughout the whole season, not just the peak August time. GNER have taken out a flyer advertisement within the piece promoting their first class leisure fares (from £59). Consumers will be encouraged to book a number of accommodation offers or to request their free guides (Essential Guide & Shopping Guide).

Da Vinci Code

To extend the activity that VisitScotland and VisitBritain have been carrying out surrounding the launch of the Da Vinci Code film, VisitScotland Edinburgh & Lothians and VisitBritain co-funded copies of a VisitBritain produced Da Vinci Code map. The map was inserted with The Times newspaper (1.6 million circulation) on 7th May.

Rugby sponsorship

As part of VisitScotland's sponsorship of Scotland's three professional rugby teams, VisitScotland Edinburgh & Lothians work closely with Edinburgh Gunners to promote key matches. Recently, a two part competition ran in The Western Mail (Cardiff) in conjunction with BMI baby and Cardiff Blues for Edinburgh vs. Cardiff match on 7th April.

Lothian leaflets

Work is progressing with the Midlothian & West Lothian leaflets. The advertising deadline has passed and proofs are at final stages. These will be passed to forum representatives for feedback week ending 16th June. Initial discussions will take place on 8th June with East Lothian Tourism Forum reps for East Lothian leaflet.

City Break, Helsinki

Marketing Manager Linda Galt will represent Edinburgh when VisitScotland exhibits for the first time at City Break 2006. This annual trade workshop will involve meeting tour operators from around the world to answer questions on Edinburgh and promote the city to potential operators. 12-14 June.

6. Partnership Activity

The Area Director continues to meet with representatives from each of the four local authorities, Scottish Enterprise Edinburgh & Lothians, and many industry representatives.

Network office personnel continue to participate in meetings of Edinburgh Tourism Action Group (ETAG), and the tourism forums of East, Mid and West Lothian.

The Tourism Framework for Change has been published. VisitScotland Edinburgh and Lothians are working with local partners to adopt a consistent format in future action plans so that they are aligned with the framework for change and allow monitoring of progress and sharing of best practice across common themes.

7. Edinburgh Pass

The pilot year for the Edinburgh Pass (26 April 05 – 31 March 06) has been completed. The final year position was 3,700 units sold. This pilot year saw wide participation in the scheme with 27 attractions in the all-inclusive section of the Pass. Positive customer testimonials have been received which highlight the value for money of using the Pass. The technology used has operated as required with no teething problems. At the outset of the pilot year, sales were through tourist information centres and the web site. Throughout the year more than 30 sales channels were added with pre-arrival (web and agent) sales accounting for over 60% of sales in the last three months. All attractions have demonstrated their commitment to the future success of the Pass by continuing to participate beyond the Pilot

Year.

The Edinburgh Pass User Group continues to meet quarterly to discuss progress and developments.

The 06/07 Edinburgh Pass was launched on 1st April by Rory Lawson of the Edinburgh Gunners. The new Edinburgh Pass now offers visitors free entry to 32 of Edinburgh and the Lothians' top attractions, including 5 exciting new attractions. These are The Queens Gallery (Palace of Holyroodhouse), 3D Loch Ness Experience, Surgeons Hall, Edinburgh Butterfly and Insect World and Seafari Adventures. The prices of the Edinburgh Pass have been adjusted to 1 day £20, 2 day £36 and 3 day £45 offering great value to customers. Other new additions are a new transport offer of 50% discount on return Glasgow Airport bus transfer to Edinburgh with Scottish Citylink, a new tours section in the Exclusive Offers and a new child discount scheme. Children accompanied by an adult with a valid Edinburgh Pass will receive a 25% discount at 11 attractions.

Sales to date

Sales to date (April-May)	2005-06	2006-07
No. of cards	199	2,165
Revenue	£6,938	£64,611

The first two months for the 06/07 Edinburgh Pass have both resulted in record monthly sales.

The increased sales are due to a number of factors including

- More attractions participating
- Improved pricing strategy
- Greater penetration of the market through more and improved sales and marketing activity
- Increased word of mouth

There have been over 7,200 visits to Edinburgh Pass attractions in April and May 06, making the Edinburgh Pass a significant marketing tool for generating footfall to attractions in Edinburgh and the Lothians.

8. Industry Engagement

Our industry engagement team held industry focus groups to coincide with the reopening of seasonal TIC's and to discuss Marketing Opportunities

2006/07. Over 100 businesses attended the workshops and similar workshops will be held in 2006/07.

Many businesses have already signed up for this year's opportunities and our business relationship managers are working with businesses who require assistance or further information.

The network office industry engagement team can provide information regarding account management or details of the Challenge Fund. Please contact:

catherine.brodie@visitscotland.com

diana.bulfo@visitscotland.com

ann.jones@visitscotland.com

9. **The 2006 Season to date**

Accommodation Occupancy

The table below shows occupancy figures (research conducted by TNS Travel and Tourism) for the first three months of 2006 versus prior year:

Sector	Area	Occupancy (%)		Overseas (%)	
		2005	2006	2005	2006
Hotels (room occupancy)	Scotland	49	51	2	2
	Edinburgh & Lothians	62	65	8	9
Guest House / B&B (room occupancy)	Scotland	29	27	4	3
	Edinburgh & Lothians	35	40	8	10
Self-catering (unit occupancy)	Scotland	35	31	3	4
	Edinburgh & Lothians	58	54	23	20

Edinburgh and Lothians continues to outperform the rest of Scotland for occupancy figures and the proportion of overseas figures.

At previous ATP meetings, it has been asked how accommodation providers can get involved in this research and how they can benefit. If more businesses participate, the research will be more reliable for informing strategy development and decision-making. Any business interested in participating in the accommodation occupancy survey should contact TNS Travel & Tourism (19 Atholl Crescent, Edinburgh EH3 8HQ):

eileen.henderson@tns-global.com Tel: 0131 656 4027

vicky.wilson@tns-global.com Tel: 0131 656 4047

In return for providing occupancy data, participants receive monthly reports showing their own occupancy rates compared with averages for their area and for Scotland as a whole.

Edinburgh Principal Hotels Occupancy – Lynn Jones research forecaster

The table below shows that 2006 to date occupancy statistics show an increase over 2005 for each of the first four months.

Visitor Attractions

The table below shows figures to end April 2006 from the Scottish Visitor Attractions barometer produced by the Moffat Centre at Glasgow Caledonian University.

	Jan-Apr 06	Jan-Apr 05	Change
Edinburgh & Lothians	1,694,420	1,646,839	+2.9%
Scotland	7,917,905	7,859,375	+ 1.5%

The Visitor Attraction Monitor for 2005 shows a total of 9,562,846 to attractions in Edinburgh and Lothians compared to 9,564,918 visits in 2004.

[Visitscotland.com](http://visitscotland.com)

For the period 1st January to 24th April, accommodation internet bookings made through visitscotland.com have shown a significant increase over prior year.

	Bookings			Revenue		
	2006	2005	Change	2006	2005	Change
Edinburgh & Lothians	1,935	1,008	+92%	£293,772	£118,833	+147%
Scotland	4,832	2,739	+ 76%	£561,743	£266,455	+111%

To 4th June 2006, 10,888 accommodation bookings (internet, call centre and TIC) have been made through visitscotland.com. This represents 28% of the Scottish total.

The breakdown of method of bookings for the area is:

- Contact centre (55%)
- TIC (21%)
- Web (24%)

This represents a continued shift from TIC bookings to web bookings.

To end of May 2006 the total number of bookings made using visitscotland.com is consistent compared with prior year, whilst the total value of bookings has increased by 4%. The breakdown by area is shown below:

Area	2006 bookings vs. 2005 (January to May)	2006 value vs. 2005 (January to May)
Edinburgh	+0%	+4%
East Lothian	-11%	+6%
Midlothian	-6%	-11%
West Lothian	+2%	+13%
Edinburgh and Lothians	+0%	+4%

10. **Wider VisitScotland Activity**

A summary of the Progress Against Objectives Board paper presented to the recent VisitScotland Board is provided as appendix 1.

Ben Carter

Area Director

Edinburgh & Lothians

Appendix 1: VisitScotland Progress Against Objectives - Summary

Attract visitors by building a successful tourism brand for Scottish tourism

Marketing Strategy

- Segmentation Strategy Refresh – quantitative work amongst 10,000 respondents complete. Key findings are as follows:
 - i. Respondents on average take 2 holidays of 7 nights or more and 3 short breaks of 6 nights or less but visitors to Scotland spend more nights in UK/Ireland than abroad
 - ii. 10 – 11% are regular visitors to Scotland, 14 – 17% are occasional visitors and 26 – 27% are likely to visit
 - iii. 94% agreed that there was much more in the UK that they wanted to see and do
 - iv. Key influencing factors are personal recommendation, a good deal, seen the ads

- v. 35% book accommodation 1-3 months in advance; 70% contacted the accommodation provider direct
- vi. Those who have been to Scotland have a very strong relationship with the country and are very knowledgeable about Scotland

Next steps are to overlay the qualitative data and then segment the database by value and frequency of visit which will then be reflected in our communications and investment strategies

UK & Ireland Marketing

- Generic campaign running as follows:
- Events & Festivals in Scotland
- Urban Freedom in North England
- Spring/Summer Senses in Ulster
- Spring/Summer Senses in Midlands
- Spring/Summer Senses in Republic of Ireland
- Burns Festival, May 2006 – programme launched and activity underway
- Spring 'Freedom to Explore' mailer despatched

International Marketing

- Tartan Week deemed a huge success for VisitScotland and full debrief and analysis due in June. Planning for 2007 underway.
- Da Vinci activity commenced in conjunction with Maison de la France and VisitBritain
- Review with Ryanair took place. Extremely positive and constructive
- Expo will host 500 overseas buyers, up on last year's figure of 441. Included are 10 buyers from India, 20 from China, 10 from Czech Republic, 20 from Russia, 8 from Poland and 5 from Hungary. 40 journalists are attending from UK (24); USA (10); Germany and Belgium (3 each)

Business Tourism

- Input to ECB Ltd business plan given
- Editorial desksides held in Boston with 12 key editors from Meetings Group publications
- Update meetings held in New York with Incentive Magazine and Physician's Travel

- BTU teamed up with SDI (Int'l) to host a networking evening "Scotland on the Hudson" as part of Tartan Week

Quality and Standards

- Q&S supported the premiere of Greyfriar's Bobby in Edinburgh. This was a good opportunity to promote the new Children's Welcome Scheme and highlight the forthcoming Dogs Welcome and Film Crews Welcome schemes.

Sectoral Development

- The litter campaign goes from strength to strength with more organisations agreeing to distribute our biodegradable bags. Support of various forms is also being provided by a wide range of other organisations including Superfast Ferries, National Trust for Scotland, ASVA, Forestry Commission Scotland and West Lothian Council
- City Family - City brand managers and executives have drawn up shortlist of family-friendly attractions (city centre or within 45 mins drive), family restaurants, family accommodation and family events in all six cities.

Information and Sales

- The Information and Sales Project Advisory Group, continues to meet and act as a sounding board and communications outlet for the review. At its March meeting it endorsed the proposals contained in "*The Way Forward*" document and stressed the importance of moving on to implementation of the ideas it set out.
- On 1 March 2006 the Director of Visitor Services and Quality gave a presentation to COSLA on "*The Way Forward*" and used the new short video as part of the presentation for the first time. The Head of Information & Sales also presented to the SLAED Tourism Sub-group at its March meeting. This was a very positive meeting and the proposals were agreed as setting out an exciting way forward for the delivery of information and sales in the future. There was discussion on funding and how VisitScotland and the local authorities could most effectively work together to jointly implement some of the recommendations. Overall there was a willingness to work towards the vision set out by VisitScotland. However, this was tempered by awareness that there was unlikely to be additional funding for new projects across the board, and that some rationalisation of existing spend on information and sales activity would be required to invest in new activity.

Engage and work in partnership with the tourism industry

Sector Development

- Dine Around Edinburgh 2006 evaluation - Feedback from Edinburgh Restaurateurs' Association revealed that Dine Around resulted in over 5,600 covers (2,700 in 2005) (over £100,000 in business - £51,000 in 2005). In

2005 19 restaurants participated rising to 29 this year; this year the event lasted for four weeks compared to two. Full debrief with early discussions for Dine Around 2007 planned for 20 April.

- Quality Meat Scotland / Mackies / Tesco sampling - Sampling across South East England and Midlands in Tesco supermarket car parks, with distribution of EatScotland branded tourism literature. Activity coming to an end with full evaluation available next month.
- Scottish Association of Farmers Markets - QA Pilot with 15 markets due to be completed in mid-April. To date, results have been good, markets easy to assess and we are confident of getting consistent scoring. Post test, agreement sought on how to extend to all 60+ markets across Scotland. Exploring possibility of producing jointly with the SAFM a Farmers Market green map, exploiting consumer interest in locally sourced food.

Challenge Fund

- The assessment panel has met to consider the round 4 applications. Of the 17 received, 9 were successful. The total value of the projects is £249k and the amount awarded is £99.5k. Contracts have been issued and work is ongoing with unsuccessful groups to achieve a positive outcome.
- A challenge fund seminar was delivered as part of the Scottish Tourism Forum tourism week attended by a number of groups from across the country.

Events & Exhibitions team

- The Village element of the Tartan Week activity has been successfully delivered with very good anecdotal feedback to date. Re-design of the exhibit created a great improvement in the use of space, making it easier to attract visitors in to speak to the industry and public sector partners. 2nd year of VisitScotland involvement in this way and now firmly established as the focal point for Tartan Week activity.
- VisitScotland Expo plans are being finalised. Tourism Minister has confirmed attendance.

Enhance the visitor experience

Information and sales

- A 3-minute DVD illustrating how information & sales services could look in the future has been completed and shown at the above staff events and to other groups such as the Project Advisory Group. The DVD has been well received, and key stakeholders have expressed the view that it is an extremely useful way of illustrating our future approach

Quality & Standards

- Q&S has commissioned research on the effectiveness of the consumer promotion of QA schemes. An online survey with respondents to any of the advertising undertaken in the past year will be the main part of the work, followed by focus groups to give qualitative findings on how best to promote the schemes

Provide strategic direction to the industry

Communications

- The Tourism Bill was laid before Parliament in late March. VisitScotland has provided written evidence to the Finance Committee on the Financial Memorandum and to the Enterprise & Culture Committee on the generalities of the Bill itself.
- Support was provided for the Scottish Tourism Forum Scottish Tourism Week which was held in the final week of March. In addition to co-ordinating VisitScotland input to a number of events, support was given to the organisation of the MSP Challenge, matching MSPs with tourism businesses
- The Chief Executive attended the Tesco “Taste of Scotland” event held at the Hub and met with Tesco Chairman, David Reid. This provided an opportunity for the organisation to begin to build a relationship with a key non-tourism business

Press and Media

- The discovery of Avian Flu in a swan in Fife was a major issue dealt with by Press Team for the month of April. A suspected case in Orkney earlier in March was a good exercise in preparation for the confirmed case in April. As a result a thorough communication strategy was already in place and was able to be implemented as the story broke. Coverage included all national and local television and radio bulletins and newspapers
- The launch of the documentary produced by VisitScotland and Scottish Screen ‘the Rosslyn Engima’ took place during Tartan Week. The documentary highlights the myths on legends of Rosslyn Chapel, which have been made famous by the Da Vinci Code film and book. This received extensive positive media coverage including a feature piece by BBC Reporting Scotland on film tourism and its benefits
- The Thistle Awards 2006 were launched by the Press Team this month. A hat in the shape of a thistle was commissioned for photos to launch the awards at (previous winner) Musselburgh Racecourse. Coverage included a full colour page lead in the Scotsman, trade website Attractions Management, live radio interview on Talk 107 and news coverage on BBC Radio Scotland