

# Ear to the Ground



Newsletter from Tourism Intelligence Scotland June 2010.

Issue 7

[www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk)



## Focus on our overseas markets

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This month's edition of Ear to the Ground has been edited by **Iain Limond**, JAC travel Scotland.



## Welcome to the June edition of Ear to the Ground

Ear to the Ground – the newsletter from Tourism Intelligence Scotland – is a must read for all businesses who want to get ahead and stay competitive. It is designed to be practical, useful and timely, with ideas and tips to provide you with a snapshot of some of the relevant issues in the tourism industry in Scotland and beyond.

Register now at [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk) to keep up to date with all the hints and tips and exciting new resources being released.

# The Big Picture

## A round-up of the latest statistics and trends

The last few weeks have seen unprecedented unpredictability in the holiday market and it is difficult to discern the underlying trends. VisitBritain have estimated that whilst the number of inbound visitors will decline by 0.7%, inbound visitor spending is set to increase by 1.3%.

The current strength of the dollar against sterling continues to make the UK an attractive destination for US visitors. It is also likely that we will continue to see a good performance from other long haul markets including Australia and South Africa. But in these uncertain market conditions, Europe and the UK look set to remain our key target markets for the remainder of 2010.

Whilst there is some uncertainty over taking flights and overseas trips for the rest of 2010, with 14% stating that they are less likely to choose to fly on holiday this summer due to the volcano incident, a much larger proportion (46%) disagreed. Media speculation that the event could have a positive effect on the British travel and tourism industry may therefore be wide of the mark, with just one in five of those surveyed saying they were more likely to choose a holiday destination within Britain to avoid having to fly.

Along with an increasing trend towards train travel, consumers may increasingly look to purchase packages which provide an element of security and protection, and independent bookings might therefore decline.

In response to the changing market environment, VisitScotland has launched a £5 million marketing campaign designed to attract visitors from continental Europe and the UK, specifically targeting potential visitors who, it's anticipated, may book late to avoid travel disruption and uncertainty. It will be equally vital for businesses to be aware of likely changes to booking and travel patterns and to react accordingly.





# The key trends and why they're important to your business



Young families are looking for more traditional holidays, according to a YouGov survey. The research, which was carried out for VisitGuernsey, reveals that 75% of parents planned to include traditional activities such as walks and cycling on their trip. A further 77% said a coastal location and great beaches appealed, while being able to potter and explore at one's own pace appealed to 80%.

*"Young parents seem keen to provide their children with wholesome, authentic breaks rather than artificial tourist experiences", said Guernsey's Director of Marketing and Tourism, Chris Elliott. "It's clear that traditional activities like cycling, walking in the countryside and rock-pooling are rapidly regaining popularity".*

**Think about what information you could provide to visiting families, to help them make the most of the local area.**



A new breed of OAP is fast becoming a lucrative source of business for tourism operators. 'Thrivers' are part of a generation of women who have taken control of their lives following a marriage break-up, regained financial independence after the children left home, and are now creating new experiences to savour with friends or partners.

Highly influenced by travel features in the Sunday newspapers, for this group it's not about securing a bargain - instead they're looking to see if the holiday is good value and that it doesn't come with lots of surcharges, because they will often require single rooms. They tend to be more flexible about holiday dates and, because they are less price-sensitive,

thrivers will often be loyal customers to those who have provided them with excellent experiences in the past.

**Think about what products and services you could offer this growing market and how best you could reach them through your marketing activity.**



Thistle Hotels report that more families than ever are choosing cities for short breaks to combine fun with learning. The 33-strong chain says it has seen a substantial increase in enquiries and bookings of 'kidcations' at city centre hotels across the UK. The trend signals a change in attitudes, with parents looking to treat the family to short breaks that combine fun with learning - showing that city breaks are no longer just the preserve of romantic couples and serious culture vultures.

To capitalise on the growing interest from parents and young children, they have introduced a new family package which includes 50% off an additional room, half-price dining for under-12s, a goody bag for children including novelty treats and an organic children's menu offering local produce.

**What could you offer to make your business more attractive to families with young children?**

# What our overseas visitors really want

Figures confirm international inbound travel to Scotland has held up well and forecasts for the rest of the year are positive, businesses have a great opportunity to capture on the lucrative overseas market.

Although less in number than our UK visitors, overseas visitors spend more when here and are therefore extremely important to the tourist economy. But how do you identify which overseas visitors are the best prospects for your business and, when you do, how can you make sure what you offer matches and exceeds their expectations?

## Follow our 3 key tips!



- Be aware of the available direct flights and ferries from UK and overseas destinations to your region in Scotland. For more information on travel links go to [www.citybreaks.visitscotland.com/travel-info/partners.aspx](http://www.citybreaks.visitscotland.com/travel-info/partners.aspx) or [www.transportdirect.info/web2](http://www.transportdirect.info/web2)
- Know what attractions and activities are available in your area, for example, if you have excellent golf courses nearby, it would be worth trying to develop some collaborative initiatives with these providers, for visitors such as the Swedish and Germans that are more likely to be interested in golf.
- Keep track of your overseas visitors, so that you can develop an understanding of who visits and why. This will help you to tailor your offers more directly and in collaboration with others in your area.

The guide 'Knowing our Markets... Scotland's Visitors' provides a wealth of useful information on who comes to Scotland, hints and tips on how best to reach them, and ideas for tailoring your products and services to meet the needs of overseas visitors. Download the guide at [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk).



# What you need to know

Although people from overseas visit for many different reasons, the disappointments and frustrations they sometimes express about Scotland are often the same!

Consult our country profiles for the key things you need to know about our main international markets.....



Country	Profile	Why they come	Main focus	How they plan	Highlights	Disappointments
Netherlands	- 45 - 54 - Travel as a couple - Particularly enjoy camping - Come with own car - Main holiday - Strong affiliation with Scotland	- Scenery - Nature & wildlife - Things to see & do - Outdoor activities - History	- Touring - Activities	- Internet - Guide books - Travel review sites	- Scenery - Walking - Ben Nevis - Edinburgh	- Accommodation - Poor public transport - Quality of food & restaurants
Spain	- Under 45 - Travel as a couple - Stay in hotels/B&Bs/ Hostels - Use public bus, hire car or train - Main holiday - Likely to be first visit to Scotland	- Scenery - Nature & wildlife - Things to see & do - Culture & traditions - Ease of travel to Scotland	- City breaks - Touring	- Book late! - Internet - Electronic brochures - Consult friends & relatives	- Scenery - Local people - Lochs - Highlands - Greenery - Nature	- Lack of multilingual signage & info - Roads - Early closing times - Quality of food
Sweden	- 45-64 - Travel as couple or group of 4+ - Stay in hotels/ B&Bs - Use public bus/train or hire car - Less likely to be main holiday - Lasting relationship with Scotland	- Scenery - Ease of travel to Scotland - Ease of travel around area - Attitude of locals - Things to see & do	- City break - Combine city with country - Touring	- Internet - Guide books - Recommendation from friends & relatives - Travel review sites - VisitScotland.com - Price comparison websites	- Nature - Scenery - Local people - Everything!	- Not enough time - Quality of food & restaurants - Early closing times - Poor public transport - General costs

Country	Profile	Why they come	Main focus	How they plan	Highlights	Disappointments
France	- 30 - 55 - Travel as a couple - Stay in B&Bs/camping - Use hire car/own car public bus/train - Main holiday or short break - Majority are first-time visitors	- Scenery - Sightseeing - Ease of travel to Scotland - Visiting cities - Culture & traditions - History - Walking	- Touring - City breaks	- Internet - Recommendation from friends & relatives - Travel agents - Printed brochures	- Scenery - Culture - Local people	- Weather - Value for money - Lack of multilingual signage & info - Quality of food & restaurants - Early closing times
Germany	- 30 - 60 - Travel as a couple - Stay in B&Bs/camping - Use hire car or come by ferry with own car - Short breaks or main holidays - May be first visit to Scotland	- Scenery - Sightseeing - History & heritage - Walking - Nature & wildlife - Outdoor activities - Ease of travel to Scotland	- Touring - City breaks - Activities	- Internet - Travel review sites - Price comparison websites - Guide books	- Nature - Scenery - Walking - Local people - Culture - History	- Weather - Food - Expensive accommodation - Lack of multilingual signage & info
Italy	- 25 - 55 - Travel as a couple - Stay in high quality B&Bs hotels - Use hire car/public bus/train - Main holiday or short break. - First time visitors - Spend well	- Scenery - Sightseeing - Visiting castles - Touring & exploring - To learn about culture & people - To see a new place	- Touring - City breaks	- Book late! - Internet - Travel agents - Travel review sites - Guide books	- Scenery - Local people - Culture - History & heritage	- Weather - Cost of eating out - Quality of food & restaurants - Early closing times - Lack of multilingual signage & info
USA	- Over 45 - Travel as couple or group of 4+ - Stay in hotels/B&B or VFR - Use hire car/public bus/train - Main holiday / may combine with other locations - Lasting relationship with Scotland	- Visit friends & relatives - Scenery - Culture & traditions - History - Things to see & do - Interact with locals - Ancestral roots	- Touring - City break - Combine city with country	- Book early! - Internet - Travel agents - Travel review sites - Price comparison websites	- Scenery - Edinburgh Castle - Nice people - Highlands - Castles	- Weather - Not enough time - Exchange rate - Value for money - Cost of eating out
Australia	- Over 35 - Travel as a couple or single - Stay privately or in hotels/self-catering - Use hire car/public bus/train - Price/location top priorities - Often combine with other locations. May be 'once in a lifetime trip'	- Visit friends & relatives - See iconic sites - Culture & traditions - Strong sporting links - Ancestral roots - Interact with locals - Scenery - History - Share same language	- Touring - Combine city with country	- Book early! - Travel agents - Personal recommendation - Internet	- Scenery - Local people - History - Culture - Events	- Weather - General costs - Poor food/service - Accommodation

## Top Tips for Overseas Visitors

- Be flexible with meal times as some visitors, such as those from Mediterranean countries, tend to go to bed and rise later than us.
- Provide plenty of wet-weather options and have local transport information on display. Provide recommendations for local restaurants and cafes, and have opening times to hand. Have local transport information and options on display.
- Provide a folder with comprehensive information on local walks, activity operators and attractions for guests to browse through at their leisure.
- Consider offering translated menus and itineraries and also the key information on your website in other languages.
- Go to **www.foodtourismscotland.com** and also **www.eatScotland.com** to get tips on the sorts of food to offer your international guests to truly delight them.
- Remember that international visitors are above all looking for a warm interaction with both the places they visit AND the people they meet. Allow them to see behind the scenes a little to make their visit special, or provide recommendations for places where they can sample local flavour, culture and traditions.



## VisitScotland guide gives hospitality tips for a new wave of Chinese visitors

VisitScotland has launched a new online guide to help tourism businesses cope with the increasing number of Chinese holidaymakers flocking coming to Scotland.

The Toolkit includes a raft of hints and tips on how to meet the needs and expectations of Chinese guests, as well as a number of useful phrases translated into simplified Chinese.

About 12,000 Chinese visitors already visit Scotland every year, contributing about £7million to the Scottish economy, but as the Chinese middle classes grow along with their wealth, many more are expected to make the trip. With a population of 1.3 billion and despite its communist background, China has become the world's fifth-biggest tourist market and has more billionaires than any other country. Access the Toolkit at <http://www.visitscotland.org/default.aspx?page=1036>



## The importance of customer feedback



With the use of social media growing at such a phenomenal rate, your visitors have, for the first time, an opportunity to talk about their experiences – good and bad – to a truly worldwide audience. In view of this, it's vital that you are the first person they speak to!

Harnessing and using both glowing praise and harsh criticism is key to a profitable business, particularly as customers' tastes become more refined and expectations get even higher, and as such gathering customer feedback is absolutely essential.

The 'Listening to our Visitors' guide from Tourism Intelligence Scotland highlights some great success stories which will show you what can be achieved from feedback, and how a business can transform both itself and, at the same time, help to transform the area where it's located.

Download a copy of the guide - or view the online version - at [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk). Many tourism operators are already successfully collating and using customer feedback to develop their business and improve their bottom line. Read on for a snapshot of what others across Scotland are doing....



### The Shore Hotel, Kirkwall

The drive to utilise spare capacity in the kitchen and restaurant during

the day time, together with an awareness that there was scope to offer tour itineraries beyond the traditional sight-seeing coach tour, has led The Shore Hotel in Kirkwall to introduce a 'Taste of Orkney' tour aimed at visiting cruise passengers.

Owner Gareth Crichton says:

*"Feedback from cruise handling agents and directly from passengers suggested that one key aspect that many touring guests felt they were missing out on during their visit to the islands was 'what of Orkney today? - what do people do, how do they make a living, how do the islands connect with the wider world'...if you like, how does it all fit?"*

Working with a local consultant, ideas were pitched to shore handling agencies dealing with UK cruise ship calls. Two versions of the tour were initially presented in order to give different price options - the 'Island Laird's Dinner' and the 'Orkney Farmhouse Tea' - each based around a taster menu of local food and drink and linked with a narrative of life in the islands from past times to present, along with stories and music".

The tour itself involves Gareth taking guests from the Neolithic through to the present day, with information on the fishing, farming and modern food production industries. Through video clips guests meet the people behind Orkney Herring, Orkney Crab, Orkney Fudge, Orkney Ice Cream and Orkney Beef, and can even watch The Shore's butcher roll a roast! With support from Gareth's father and friends, guests are also given a taste of Orkney music and a couple of songs illustrating the islands' food heritage.

### Crowberry Guest House, Stornoway

At Crowberry Guest House in Stornoway, the owners have been gathering customer feedback since opening 2 years ago.

Partner Lisa Maclean says:

*"In the beginning we used the fairly traditional method of guest feedback cards in the rooms. However this year we moved to an online feedback survey which we email to guests after they have stayed at Crowberry. We also promote online feedback through forums such as Tripadvisor and find this invaluable for marketing purposes".*

*"The biggest benefit to our business is the direction the feedback gives us. We try to use the feedback constructively and think of every guest as a "free" mystery shopper! I think the fact we are willing to listen and also feedback to our guests that we have made changes as a result of their feedback also shows we really do care. We issue an e-newsletter and in this we let guests know of changes we've made and also tell them what we've kept the same - if they told us they loved it!"*

*"As we are a fairly small establishment we have the luxury of being able to act on most things straight away. For example, when guests told us they would appreciate more information on walks, we purchased a selection of maps and a walker's diary. When we received feedback that signage from the main road was an issue, we applied for planning permission to install a sign whilst continuing to email directions and a link to Google Maps. And when feedback suggested that guests would appreciate somewhere to sit outside, we built a patio area which enjoys views over the bay".*



### Bonkers Gift Shop - St Andrews

Lindsey Adam, owner of Bonkers Gift Shop in St Andrews, attended a Listening to our Visitors workshop in the summer of 2009 which she says was 'packed full of practical and useful ideas'. After completing the workshop and reading the Listening to our Visitors guide, Lindsey decided to implement a programme of customer feedback in her shop.

Lindsey says:

*"Unlike most tourism businesses, shops do not lend themselves to having customers fill out feedback cards. Once customers are at the till, however, the staff record customer comments and requests. Since introducing our feedback programme, staff are listening more to customers and asking more questions".*

*"We had a lot of requests for balloons which previously we did not stock, but because of the volume of requests we now stock them. We listen to all our customer comments e.g 'You have a great selection of cards - do you have anything else suitable for five year olds?', 'I don't like the music', 'I like this item' etc. The staff record what our customers like, and occasionally they'll even get a new idea for a gift from a customer. Once we've gathered this information from customers, we then act on it!"*

Lindsey intends to implement further improvements going forward. "We have had a transactional website for a long time but decided to renew it last year with more user-friendly features. One of the improvements we've made is to add an online feedback and product reviews facility. It's a really easy way to find out if customers are happy with their purchases and if their orders arrived on time".

## What's new on the Tourism Intelligence website

Tourism Intelligence Scotland's website contains a great range of practical insights and inspirational ideas, hints and tips to help your business grow and develop.

Recently added items include:

### News

- Tourism 2012 Games website launched
- Glasgow's stylish new welcome
- Edinburgh Festivals Passport

### Resources

- Golf Tourism guide
- The Scottish Borders - best for an authentic cycling holiday
- Sailing Tourism in Scotland
- Provenance on a Plate

Check out all the new content at [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk)



## Food Tourism Guide being launched soon

Register now at [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk) to receive your copy.

## Golf Tourism guide launched



The latest guide in the TIS 'Opportunities for Growth' series, **Golf Tourism**, has been published. The guide is aimed at golf clubs/courses and tourism businesses, to help them develop innovative products and services that will provide a more enjoyable and more collaborative experience in Scotland for golf visitors.

The guide will provide you with the key facts about golf tourism, and tell you who comes to Scotland to play golf and what these golfing visitors want. It also highlights opportunities for tourism businesses, golf clubs and courses looking to get the most out of the

visiting golfer market, and outlines the next steps for Scotland and your business.

*'The industry has long been waiting for a guide like this. It not only clearly sets out the issues, challenges and opportunities for tourism businesses and golf courses, but backs this up with numerous sound ideas and suggestions to help them work together to make the most of this valuable market to Scotland.'*

Nick Hunter, Chair, Golf Tourism Scotland

To download a pdf version visit [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk), alternatively if you would like a hardcopy contact Tourism Intelligence Scotland at [info@tourism-intelligence.co.uk](mailto:info@tourism-intelligence.co.uk).

## Tourism Support from Scottish Development International

Scottish Development International (SDI), a joint venture between



the Scottish Government and economic development agencies Scottish Enterprise and Highlands & Islands Enterprise, offers a comprehensive programme of support to key tourism businesses looking to conduct business in international markets.

### Services include:

- Bespoke support provided by a dedicated SE/HIE Account Manager
- Help with identifying overseas tourism market opportunities
- Identification of potential overseas business partners via the network of SDI trade offices
- Provision of on-the-ground support for key Scottish companies in overseas markets and at targeted overseas events

For more information on how SDI could help your business develop international markets, go to [www.sdi.co.uk](http://www.sdi.co.uk) or phone **0800 917 9534**

## Top Tips for Success

- Remember that your loyal customers are the easiest group to market to, so develop good value offers and packages specifically for them, and communicate these regularly.
- Try to recognise the different visitors who come to you and keep track of it, so that you know who comes and why.
- Make sure that the products and experiences that you offer are flexible/appealing enough to meet the needs of your key markets.
- Ask visitors and listen to their feedback, and then use their comments to develop new, improved experiences, products and services.



# Ear to the Ground

## This month – a comment from Susan Crosthwaite,

Chair of Holiday Southern Scotland and owner of Cosses Country House, a VisitScotland 5 gold star B&B

2010 is proving to be another challenging year in the tourism sector. The extended cold winter weather, the volcanic ash fallout from Iceland causing the cancellation of flights, plus the extended election have all combined to slow down the beginning of the tourist season in Southern Scotland. Many businesses have suffered cancellations from the growing European market. Here at Cosses Country House we lost a 21 night booking from Norwegian guests, as did colleagues in North Berwick.

There has been a trend for European bookings to grow over the last year due to the strength of the Euro against the pound, so we have to hope that the volcanic cloud drifts away from Europe and stays away! The current turbulence in the economies of the Mediterranean countries also provides an element of uncertainty going forward. The up side, however, may be that the British tourist will stay home again for their holidays and discover Southern Scotland as a 'new' holiday destination.

Holiday Southern Scotland is a collaborative group of tourism businesses working together to promote all the answers to planning the perfect Southern Scottish Holiday.

With support from VisitScotland's growth fund we have developed an online and social media campaign at [www.holidaysouthernscotland.co.uk](http://www.holidaysouthernscotland.co.uk) to showcase the attractions and benefits of a holiday in the area, raising its profile and encouraging visitors to take longer holiday visits to the area. The social media strategy includes a blog and the use of Twitter to help members promote themselves to a globally-networked market. Our blog and Twitter postings are all related to things that have just happened, or are about to happen, in order to keep them fresh and topical. This might be the latest wildlife sighting or events of interest to locals and visitors alike. By using these simple tools, we've been able to create the impression that there's a fantastic range of things to see and do right across the area and that the South of Scotland is an 'unmissable' destination in its own right.

This is the first time many of the group's members have used social media and it's already beginning to pay dividends, with bookings and interest being generated through Twitter. We hope that by working together in this way we'll be able to persuade visitors to stay longer and savour the best of this wonderful area.

[www.cossescountryhouse.com](http://www.cossescountryhouse.com)



We have a variety of 'Ear to the Ground' contributors who represent many associations, initiatives and businesses in Scottish tourism. We want to be able to share the latest news and ideas with you on a regular basis.

These people have promised to let us know what is going on at the various tourism network events and gatherings. If you would like to become a Tourism Intelligence 'Ear to the Ground contributor' please get in touch with us [info@tourism-intelligence.co.uk](mailto:info@tourism-intelligence.co.uk)

Please encourage as many people as you can to register on [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk)

This newsletter is produced regularly so look out for the next one in August for more intelligence, trends and top tips.

*Tourism Intelligence Scotland team*

Tourism Intelligence Scotland is a joint venture developed by Scottish Enterprise, VisitScotland and Highlands and Islands Enterprise in partnership with the tourism industry. We distribute a range of materials to Scottish tourism businesses to help grow business and drive innovation through effective use of market and other intelligence. Please register now to be part of Tourism Intelligence Scotland in the future. [www.tourism-intelligence.co.uk](http://www.tourism-intelligence.co.uk)