

Experiencing Scotland



**Supporting tourism companies
to provide and promote quality Scottish produce**

Introduction to Scottish Enterprise

- Scottish Enterprise is Scotland's main economic development agency and aims to deliver a significant, lasting effect on the Scottish economy
- Our role is to help identify and exploit the best opportunities for economic growth
- We support ambitious Scottish companies to compete within the global marketplace and help build Scotland's globally competitive sectors (including tourism and food & drink)
- As Scottish Development International (SDI) we work with a range of partners in the public and private sectors to attract new investment to Scotland and to create a world-class business environment. SDI is the specialist inward investment and trade arm of the Scottish Government.

Food tourism strengths...

- World class produce
- Environment/landscape
- Iconic brands and produce
- Growing interest in local food and drink
- High quality of local produce
- Volume of small niche producers
- The Food & Drink industry employs 350,000 people and is worth £7.5 billion p/a to the Scottish economy



Food for thought...

- 20p out of every pound that visitors spend in Scotland is spent on food and drink.
- £800 million per year of visitor spend on food and drink



VisitScotland research - 2009

- 80% of UK visitors say food is something they think about when they decide where to go to on holidays or short breaks
- “Quality of food” is one of the top 3 reasons why visitors choose to come to Scotland
- More than 70% of visitors want to taste regional specialities, traditional dishes and fresh local produce
- Most visitors are prepared to pay more for locally-produced food as they expect it to be fresher, better tasting and part of the community they are visiting

However...

- Food and drink experience for customers could be varied
- Little use of local provenance
- Fragmented market for local producers
- Limited use of fresh seasonal produce

Background to Experiencing Scotland

- In 2009 Scottish Enterprise commissioned research into
 - market demand for local produce &
 - business benefits from providing and promoting the provenance of produce
- The research identified a number of issues and opportunities

Issues

- Many tourism businesses did not understand the business case for offering quality local produce
- Low awareness of the marketing & revenue benefits of providing Scottish produce
- Lack of knowledge of local suppliers
- Perceived high cost of sourcing produce locally
- Concerns re guarantee of supply – quality, volume & reliability

Opportunities

- **Businesses** providing locally sourced Scottish produce enhanced their visitors experience and typically enjoyed higher levels of sales
- **Visitors** prefer to buy food and drink with local provenance, that is food with a story behind it of where, when, how and by whom it was produced. They are also prepared to pay a premium for provenance





In late 2010 Scottish Enterprise launched the Experiencing Scotland project to support businesses operating in the tourism environment to share the high quality produce Scotland offers and in doing so add to the visitor experience and bottom line profits

Objectives

- Communicate to tourism businesses, the business case for offering produce highlighting provenance.
- Strengthen linkages and collaboration between food producers and tourism businesses.
- Stimulate business demand for Scottish food and drink.
- Communicate to food and drink companies, the opportunity to supply the tourism market and understand the requirements of the sector.

Activities

- One-to-One Business Support to tourism businesses to develop and implement an action plan to deliver quality, provenance and service.
- Workshop support for tourism groups.
- With Scotland's food and drink industry body (Scotland Food & Drink) we encourage collaboration between food and drink businesses and contract caterers active in the tourism sector.
- Deliver a programme of business communications and case studies to highlight the opportunities to develop product offers in response to market demand.

One-to-one business support

Who is eligible?

Tourism companies of scale with food and drink operations

Business advice includes:

- 2 days consultancy support
- Introduction to business tools and support networks
- Review of operation
- A bespoke action plan

Action plan sample

LOCATION: Crieff Hydro						
	GRADE	1	2	3	Comments/recommendation	Actions required
		Red	Amber	Green		
2.0 QUALITY OF FOOD & PRESENTATION						
2.1 Menu Range, Variety and Content						
Nutritionally and aesthetically balanced menu						
Seasonal and regional foods included in core menu			1		Variable by area - some repetition of ingredients in Meikle menus; emphasis on Mediterranean flavours in Brasserie menus	See menu analysis document for suggested approach
Healthy options available and Healthyliving Award signposted			1		Regional foods included but not routinely signposted;	See menu analysis document for suggested approach
Vegetarian and other diets accommodated			1		Menu includes healthy items but does not signpost	While HLA not particularly relevant at this site, healthier items could be signposted on menu and by waiting staff particularly in key locations e.g. hub and at children's high tea
Children's offer supplied or child-friendly approach adopted in portion sizes etc.				1	Well accommodated - gluten free soups and sauces supplied	
Range of 'grab & go' items available for takeaway including Scottish and regional items				1	Highly child-focussed in approach	
Selection of unit-produced traditional bakery goods		1			Grab and go selection is generic and high street retail in approach, particularly in Winter Garden	Move to range of speciality and Scottish items e.g. from Cress Company, Lomond Foods and Aldomak. Increase range of unit-produced items
Drinks range includes Scottish items		1			Lack of unit-produced goods; most of range bought in and not reflective of traditional Scottish bakery range - this would have been expected in location such as Winter Garden	This offers opportunity for traditional recipes & greater use of local and seasonal produce - see menu document
Weekly/daily specials supplied incorporating Scottish/regional product at provenance premium			1		Alcoholic drinks include Inverlorn Beers (Perth) and Cairn o' Mohr wines; limited selection of soft drinks from Scottish suppliers	Cress Company and Lomond Foods supply quality Scottish soft drinks
Frequency of menu adjustment to accommodate seasonality			1		Specials included but not particularly local/Scottish in approach	Introduce provenance description to specials; aim to drive higher margin of 75% on these
Offer day part to maximise spend			1		Menu development currently being addressed - some non-seasonal items	See menu analysis document for suggested approach
			1		Main venues day part by nature of hotel service; opportunity for better day parting of offer in Winter Garden and Hub areas to drive sales	Winter Garden lends itself to day parting - breakfast/morning pastries, deli style lunch, afternoon tea
2.2 Food Quality						
Food served at correct temperatures i.e. hot above 72°C, cold below 5°C				1	Controls in place	
Batch cooking - no signs of food spoilage				1	Controls in place	
Tasty, good texture, infusion of flavours				1		
Portion sizes appropriate to recipe or specification				1		
Appropriate accompaniments including Scottish and regional items				1	Good approach - breakfast preserves from Mackays; number of relishes, chutneys etc., on dinner menus	Where jams, pickles etc. are made on site or locally/regionally, this should be signposted on menu - adds value
All coffee products produced and served in accordance with appropriate brand standard; range includes ethically traded items				1	Brodies coffee in use	Consider use of Perth-based company as alternative - Bean Shop or Caledonia Coffee Roasters; develop coffee menu and associated staff training
Use of environmentally friendly disposables and packaging				1	Excellent approach - all disposable packaging environmentally friendly; use of corn starch products	Promote in key areas e.g. Hub Café
2.3 Presentation and Garnish						
Food is appropriately presented and garnished				1	Good standards	
Counters are well presented						
			1		Variable standards in Winter Garden and Hub; product range in Winter Garden overly high street retail in emphasis where more bespoke approach would be expected	Review product range; develop in-house range of cakes and pastries; move premium drinks to Winter Garden from Hub. Concentrate Hub on energy and sports drinks and products e.g. health bars, flapjacks (Stoats etc.) Develop planograms for counter set up to ensure consistent standards
Display cabinets are well stocked				1		
3.0 MARKETING & MERCHANDISING						
3.1 Point of Sale Material & Tariff						

Case study

Caledonian MacBrayne



One-to-one support – practicalities

- Site visit
- Engagement with team
- 360° business review – food and beverage procurement – shopping basket, menu planning, service standards, financial performance
- Action plan with growth targets
- Supplier referral
- Reviews 6 monthly

And how?

- Supplier suggestions
- Menu development to include local produce, traditional recipes, food stories
- Financial focus – sales mix, margin management, provenance premium
- Staff training advice –communication, up-selling, soft skills
- Marketing and merchandising – use of web activity and social networking; engaging with suppliers for point of sale materials and advice

Caledonian MacBrayne

- **Challenges** – lack of consistency, group procurement
- Engagement with distributors to support small suppliers - ‘route focus’ – beers, whisky, cheese, ice cream
- Extensive chef skills training to develop dish consistency and menu standards
- **Results** – improved margin and spend per head; customer feedback positive

Businesses benefitting



**THE ROYAL YACHT
BRITANNIA**
EDINBURGH

Scotland's best visitor attraction



Abbotsford THE HOME OF Sir Walter Scott



SURGEONS' HALL
EVENTS AT THE ROYAL COLLEGE OF SURGEONS OF EDINBURGH

THE PLACE TO MEET,
CELEBRATE AND STAY



The National Trust
for Scotland



Feedback on business support

“Experiencing Scotland input has been invaluable in helping us to identify those areas that we can develop further to drive sales and meet expectations of an increasingly discerning visitor market.”

Bob Downie, CEO at The Royal Yacht Britannia

“Experiencing Scotland was able to provide us with lots of practical, yet simple, ideas to help us improve our food offer, make the best possible use of local and Scottish suppliers and get the message out about the positive steps we are taking to use fresh, ethically-sourced produce.”

**Lorna Padden, Hostel Services Manager ,
SYHA Hostelling Scotland.**

Feedback on business support

“The practical advice and support from Experiencing Scotland has helped provide greater clarity as to where we should be heading with our food offer as we seek to expand this side of the business. We can now clearly identify the areas we need to focus on and what steps we should take to better meet the needs and expectations of our guests as well as improve the profitability of our catering operation.”

Scott Mitchell, Royal College of Surgeons of Edinburgh

“Experiencing Scotland’s independent assessment of our operation has highlighted a number of innovative ideas which would give us a real competitive advantage in a crowded marketplace, at the same time helping to develop our partnerships with suppliers and to build on our existing reputation for high quality and service .”

Anne Mulhern, Willow Tearooms.

One-to-one benefits – in first two years...



- 55 businesses (reaching over 14 million visitors) committed to offering Scottish food and drink.
- 10% increase in turnover for participating tourism businesses
- Food and drink sales increases = £44,500/participating business per year

Workshop support for groups

Tourism groups can access workshop support covering:

- Introduction to opportunities
- What works – Scottish business success stories demonstrating how to increase profits, tell food stories and delight visitors
- Business tools and support networks
- Planning to succeed – action planning for your business/group



Workshop support for groups

- Purchasing – top tips
- Meet suppliers of local produce
- Innovating through menu offer and service delivery
- Sharing food and drink stories through marketing and staff



Feedback on workshops

“The networking was excellent.”

“A very worthwhile course, great fun and I learned a lot.”

“I will be looking into changing some suppliers immediately.”

“I am now developing sourcing postcard for tables.”

*“I will build up staff awareness of local stories
and local suppliers”*

Feedback on workshops

“The workshop has made me more confident in applying premium where provenance can be shown.”

“Planning to add a trade section on my website”

“I will be giving much more attention to the sales avenues and menu selection”

“Hope to promote local suppliers”

“We will look at changing the products we leave in welcome packs for guests in our holiday cottages.”

“Working on menus through June. Workshop has been impetus.”

Communication & Promotion



EXPERIENCING SCOTLAND
Driving business through provenance

- Almost 20p out of every pound that visitors spend in Scotland is spent on food and drink.
- 80% of visitors say they think about food when deciding where to go on holiday.
- Quality of Food is one of the top three reasons why visitors choose to come to Scotland.
- Visitors are prepared to pay more for fresh, seasonal, locally sourced food.
- Businesses and events providing and promoting locally sourced food enjoy higher levels of sales (on average 20% more p/s).

By offering and promoting fresh Scottish produce, tourism operators can raise their profile, increase their profit and deliver a better visitor experience.

"Experiencing Scotland has helped us to achieve higher levels of customer satisfaction and improve profit margins on many lines."
Steve Collier, Retail Operations Manager, Calsonic North Glasgow

"The advice we received was really practical and made a lot of sense commercially."
Julie Merrilass, General Manager, Scottish Seaford Centre, North Shields

SCOTLAND
OF FOOD & DRINK

 **Scottish Enterprise**

- Via e-updates the project shares examples of food tourism excellence and signposts to relevant events and resources
- Examples of business growth delivered by capitalising on provenance
- Top tips for showcasing the outstanding produce available in Scotland
- Peer advocates

Communication & Promotion



EXPERIENCING SCOTLAND
Driving business through provenance

Experiencing Scotland offers...

- Access to meet the buyer/producer events
- News and intelligence from the Scottish food and drink community
- Business advice on providing and promoting Scottish produce

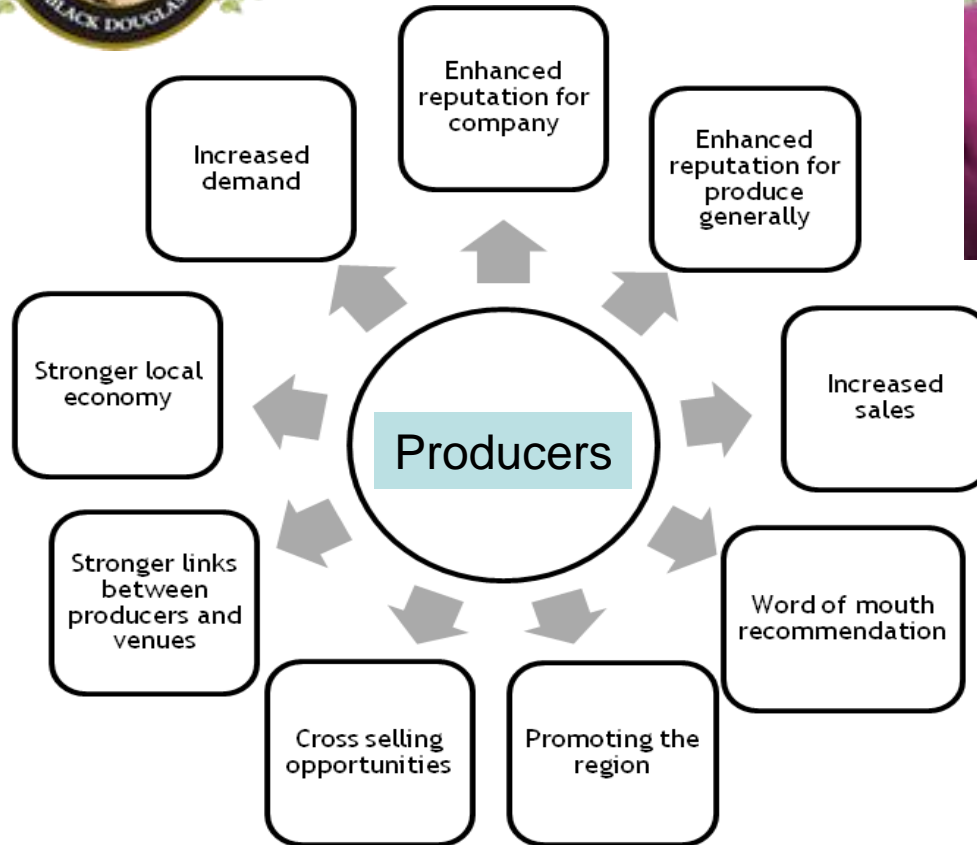
www.scottish.enterprise.com
0845 607 8787

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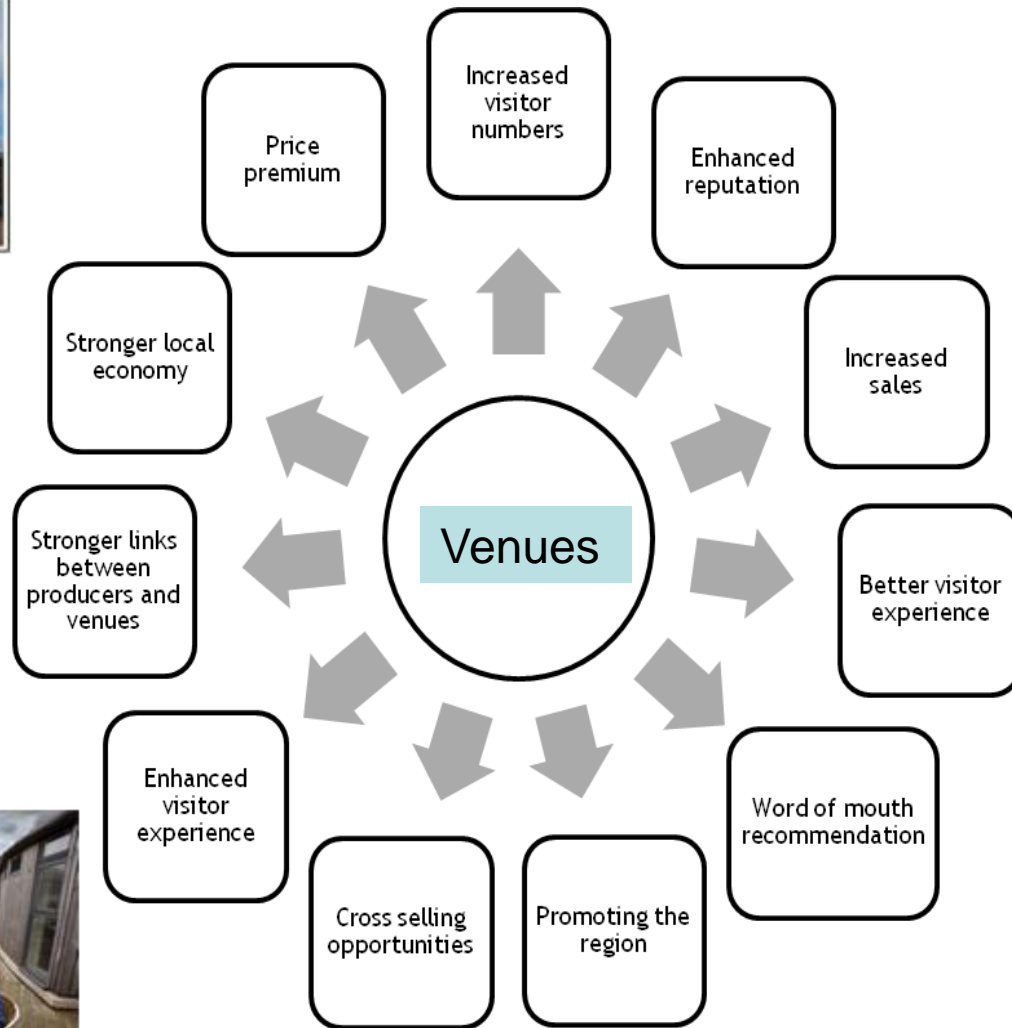
will be launched in late June 2013

- Business opportunities
- How to guides by sector
- Market intelligence
- Scotland Food & Drink's Buyers Showcase highlighting suppliers
- Business case studies
- Supplier networks



Benefits for producers

Benefits for tourism venues





Benefits for visitors



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Questions?

