SCOTTISH ENTERPRISE

Evaluation of Tourism Management and Leadership Development Activities

REPORT

15th August 2009

EXECUTIVE SUMMARY

Scottish Enterprise (SE) has developed and delivered a range of activities to support management and leadership development in the industry, (Collectively referred to as Tourism and Management Leadership Development Activities TMLDA).

This report sets out the results of the evaluation of these activities over the period April 2005 to January 2009 and draws on information gathered from a range of primary and secondary information sources. These included attendance data, the views of public and private participants of the impact of the programme and the views of stakeholders of the programme.

TMLDA comprises three distinct elements: the Tourism Management Development Programme (TMDP) composed of a range of events and conferences; the tourism ebusiness workshops delivered in partnership with the Scottish Tourism Forum and Leading Service Excellence (LSE) a course on customer service delivered by licensed training providers.

The objectives of the TMDP were to raise awareness within the industry of business opportunities, challenges and best practice as well as provide opportunities to network with other businesses. In addition the ebusiness workshops and LSE sought to provide skills to the participants. Each element was targeted to owner/senior managers within the industry.

There are a number of strategies which affect or provide a context for TMLDA. Operationally these can provide challenges such as the alignment of a “one to many” programme to the more focused “one to one” account and historical client managed supports and the delivery approach of organisational development which is moving away from direct and subsidised delivery. Most importantly the operational context at the start of the programme has changed dramatically. The introduction of the more focused account managed business support structure and reduction of the plethora of tourism seminars and conferences held at the Local Enterprise Company level at the start of the programme being examples.

The programme operates within a crowded arena of a wide range of supports. These are operated by SE and other stakeholders and targeted specifically at tourism businesses or to businesses across all sectors. However there is very limited stand alone provision from the private sector, with almost all receiving direct or indirect public sector support.

Stakeholders report a complex picture. The paramount importance of improving leaders and managers in the sector is recognised with differing needs at various stages of development at the business and individual level. However, the level of demand for leadership/management activities is low in the sector. This in part is due to a lack of recognition of need and in part a lack of interest or aspiration to grow. The evidence of benefits from participation in

TMLDA is restricted by the 'transfer' of the knowledge learned to action within the businesses. While not part of the original objectives, this could be enhanced through coordination of implementation support through existing industry groups and other mechanisms.

The overall objectives and targets for the individual components have been broad ranging and have not been clear to all stakeholders. Overall, it could look to improve its positioning in relation to other SE Tourism interventions. There is recognition that the current management and delivery structure of the activities including all marketing aspects will require significant change to support revised objectives and targets.

The programme itself has met the original targets and objectives set. It attracted 3,064 attendances from 846 organisations. Of these around two thirds are from the private sector with 555 businesses and 1,395 unique individuals attending any aspect of the programme. The LSE was run only 2-3 times due to its current delivery structure. The profile of private sector attendances show that:

- There is limited repeat attendance by individuals and only slightly greater by organisations
- At 22% there is a limited penetration of the programme to tourism businesses on SE's CRM system.
- There is a relatively high attendance from owner/managers/senior managers (19%)
- There is a low attendance from tourism businesses within SE's priority destinations. (Between 2-7% of all businesses within the 6 key destinations).
- 39% of businesses who have been account managed at any time during the programme have attended
- Attendees show a willingness to travel, although this does not appear to apply to the more remote businesses or the limited number of non attendees contacted during this work.
- Attendance is dominated by hotels/other accommodation and visitor attractions

Two surveys were undertaken with private sector businesses attending the programme (59 responses to an electronic survey and 56 responses to a telephone survey). This has provided a wealth of information on the views of the businesses on the programme and its effect on their business. Highlights include:

- 93% found the events relevant or very relevant
- The majority found that they had secured significant or very significant improvements in new information/knowledge (81%) and increased motivation/inspiration (71%). They also report a range of personal changes such as strategic thinking (75%) and networking (80% greatly or partly)
- Most (96%) had implemented a business improvement over the previous year. Of these most (61%) undertook these without further public sector support. These

actions were largely prompted by factors generated internally to the business such as changes to their market or economic pressures.
- Attendees are attracted to the events largely via email/ezine and by the topic/speaker of the event
- The majority (71%) have undertaken one or more actions following event attendance
- 93% of those who have taken actions report positive business benefits, but were not able to quantify these against attendance at individual activities
- The additionality of actions undertaken was relatively high at 32%. There is evidence of a 'conversion' of businesses to take action from those who, prior to attending the event, were only considering or did not plan to take any action, of 29%.
- There is limited, if any, substitution or competition with other private sector activities by the programme. If the programme was reduced or stopped companies reported that they would continue to go to the fewer SE events with only 11% attending other events

A summary of these results are set out in figure 1.

A brief survey of non attendees was undertaken but had so few responses it has not been included in this report in detail.

A strategic framework for analysis has been developed which place the activities of the programme into its activities of 'converting' companies to take action (TMDP) and taking those who are already committed to take action to acquire appropriate skills/abilities (ebusiness workshops and LSE).

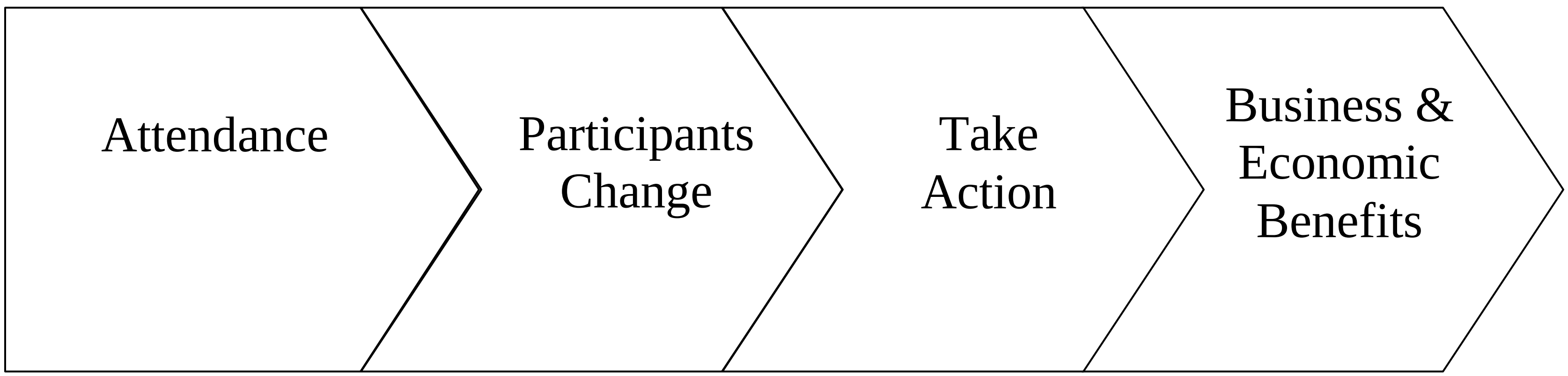
Using this framework it is identified that there are clear and persistent market failures in the support to 'convert' companies to action. These are information deficiencies, risk aversion and externalities in the provision of one to many supports.

In actions that provide skills/abilities the market failure is restricted to smaller companies and externalities of facilitating group provision. These companies already recognise the need to take action, are committed to it and are willing to pay for the advice but require the coordination and provision of events/workshops to facilitate knowledge, understanding and implementation.

The cost per additional action undertaken by businesses appears cost effective at £2,762. However overall programme costs for the evaluation period are substantial, c£1.2M with equates to a relatively high cost per delegate.

While it has not been possible for the companies to quantify business benefits and therefore quantify economic benefits of the programme. It is clear that there has been an economic impact with the attendance of businesses to the programme; companies taking additional

Figure 1: Summary of Impact of Tourism Management and Leadership Development Programme



555 Businesses Attended	81% acquired new knowledge/information	71% take action after event	93% report business benefits
	71% increased motivation/inspiration	32% are additional actions	Unquantified but clear economic benefits
	80% increase networking	29% ‘converted’ to take action	
		c400 additional actions undertaken	

actions for which they have secured benefits; improvements in personal knowledge/motivation. However given the catalytic nature of the intervention it has not been possible to quantify the benefits and economic impact.

It is therefore concluded that the TMDP and ebusiness workshop elements of the TLMDA have met their objectives; however the delivery structure of LSE has been ineffective.

It is therefore recommended that the TMLDA is continued. It should:

- be restricted to securing ‘conversion’ of businesses to take action and facilitation but not direct provision/subsidy of skills/ability programmes
- have clear objectives based on clear industry demand
- have clear priorities and target markets. These are recommended to be priority destinations and product themes and account managed businesses
- be placed within or aligned with other similar activity undertaken by SE tourism
- secure a greater number of businesses and so achieve greater penetration into all tourism businesses and target markets.
- establish an effective local delivery mechanism and improve the marketing of the programme
- alter the delivery and management structure of the programme to establish an alternative financial structure; increase pricing gradually and maintain SE branding
- take measures to reduce the cost of the programme while maintaining its impact
- establish an improved evaluation and monitoring framework and system for all future activity.

Jean Hamilton
15th August 2009

CONTENTS

1 INTRODUCTION AND BACKGROUND

Scottish Enterprise (SE) has for a number of years designed and implemented a series of activities to address a range of market failures identified in leadership and management skills within the tourism sector. This was delivered through three elements to the programme:

(i) Tourism Management Development Programme (TMDP)

(ii) Tourism eBusiness Workshops

(iii) Leading Service Excellence (LSE)

SE subsequently commissioned an evaluation of its current approach to the targeted support of management and leadership development within the Tourism Industry for the period April 2005 to Jan 2009 with the objectives to:

(i) Review the rationale for intervention (and the extent to which it still exists or has changed)
(ii) Assess the extent to which project objectives and targets have been achieved
(iii) Assess project benefits including economic impact assessment (as per HM Treasury Green Book principles)
(iv) Assess the usage, quality and demand for the programme
(v) Assess the management and delivery of the programme
(vi) Assess the fit and contribution to other SE activities and Priority Industry development
(vii) Assess the contribution to the equity and equality agendas
(viii) Present the key findings and recommendations to influence the future direction and delivery of activities of this nature.

This report sets out the findings of this evaluation.

2 METHODOLOGY

To meet the objectives of the evaluation, a methodology was developed which comprised:

(i) **Review of existing documents**. This included approval papers for each element of the programme, strategies and operational plans in place at the time of the commencement of TMLDA and now along with previous evaluation data.

(ii) **Analysis of Participant Information**. Information was secured from the event managers and other sources on the individuals who had booked and paid for each event included in the TMLDA. These were then analysed extensively and are reported in section 7. This was also the basis for the development of a representative sample for the company survey. Event managers provided information for those who were 'booked and paid' to attend however "no-show" were not recorded. The difference between these figures is reported as minimal. Unfortunately due to its delivery format it was not possible to secure equivalent participant information for the LSE programme and so this was excluded from the analysis.

(iii) **Analysis of Participant Feedback**. Some of the elements of TMLDA were the subject of participant feedback surveys at the end or soon after the event. Where these were available these were reviewed, analysed and are reported in section 9.

(iv) **Internal Consultations**. A number of face to face interviews were held with staff of Scottish Enterprise who had been directly involved in the programme or who had a wider involvement in the support of the tourism sector, or other relevant aspects of cross sectoral business development.

(v) **External Consultations**. A number of face to face interviews were held with key stakeholders, outwith SE, including Scottish Government, VisitScotland, trade associations and other providers of skills solutions to the sector.

(vi) **External Consultations: Delivery Agents.** Interviews were held with those who were directly involved in the delivery of the TMLDA. These included the event management company, and deliverers of the Leading Service Excellence and tourism ebusiness workshops.

(vii) **E-Survey of Sector Attendees**. Using surveymonkey, a short electronic survey issued to all attendees of any event in the TMLDA.

(viii) **Telephone Survey of Sector Attendees**. A more indepth survey of a representative sample of tourism businesses who had attended elements of the programme to assess the impact of the programme. 56 interviews were completed.

(ix) **Esurvey of Public Sector and Intermediary Attendees**. Using surveymonkey an additional survey with those attendees of the programme who were employed by the public sector, intermediaries (such as tourism trade associations) or supporters to the sector (eg training providers, consultants etc) but who were not directly employed in a tourism business. This recognised the potential impact of TMLDA on changing and improving the activities of these individuals to support the development of the sector.

(x) **Esurvey of Non Attendees**. A short esurvey was undertaken with the support of the Scottish Tourism Forum, Association of Scottish Visitor Attractions and Association of Scottish Self Caterers to secure feedback from their members on the reason for non attendance on TMLDA.

(xi) **Analysis**. Analysis of the results including performance measurement.

(xii) **Report and Recommendations**.

Definitions Used

During the study it became clear that the terms leadership and management were often used inconsistently by stakeholders and often having substantially different meanings. For the purpose of this report, the following terms have been used and are defined below. While it is not proposed that these terms should be adopted universally, it is recommended that a common set of definitions are determined and used as far as possible.

Industry Leadership. The skills and actions of those in the tourism industry, both nationally and locally, to take leadership in the development of the overall sector in Scotland. This does not relate to effective leadership or management within the individual's own business, but rather the wider development of the sector.

Leadership. The skills and actions of those within tourism organisations, to provide effective leadership of their business to meet organisational objectives. These include specific skills such as motivation, developing vision, setting objectives and culture. This excludes the more functional aspects of management. Leadership, using this definition is typically restricted to the Chief Executive/Owner manager of the organisation and those who are 'emerging leaders'.

Management. The skills and actions of those within tourism organisations to effectively manage the business to meet organisational objectives. These skills are functional management such as people management, financial management, marketing, development of strategy, business planning, customer service standards, innovation/technology and others. Management skills grow from the supervisory to senior management level.

There is a strong inter-relationship between leadership and management skills:

- All organisations need individuals with both leadership and management skills
- For small businesses, typically the owner manager requires to have both these skills
- Some definitions would place leadership within management skills or vice versa, however for clarity in this report they have been distinguished.

People and Organisational Management. The general management of the organisation, typically through the use of organisational and people management techniques such as performance management, training and development, recruitment policies etc. This does not encompass all aspects of business management.

Functional Management. The management of aspects of the organisation, typically covering finance, technology, customer service standards, marketing including market research, strategy development.

Formats of Delivery

Conferences and Seminars. Events which are delivered through formal presentations to groups of participants, typically with limited interaction or participation between the audience and speakers.

Workshops. Events which are delivered through presentations, but with greater interaction between leaders and participants.

Training Courses. Events which are delivered to multiple participants which are designed to impart new skills to the participants. This can be delivered in house to an individual organisation or on a shared basis to individuals from multiple organisations. "Group provision"

Executive Seminars.. Activities where groups of participants visit a different site(s) to learn best or different practice, to then take back to their organisation. Typically longer in length than the other delivery formats and with a structured programme of visits and speakers.

One to One support. Where support is customised to the individual and their organisation, typically by reviewing and advising on the organisation's needs.

Using these definitions, the activities have sought to enhance and develop the knowledge, attitudes, motivation and skills of leaders and senior managers in the tourism sector.

3 THE PROGRAMME AND ITS OBJECTIVES

The overall programme is made up of three distinct elements with individual objectives. This section seeks to provide a broad description of each element.

3.1 Tourism Management Development Programme (TMDP)

The Tourism Management Development Programme accounts for the bulk of the activity and comprises a series of conferences, events and seminars. These are grouped broadly into the following categories:

Gleneagles Master Classes. A series of 10 half day seminars in each of 2005/6 (3), 2006/7 (3), 2007/08 (3) and April to Dec 08 (1) designed to be motivational and stimulate new thinking.

Business Insight Seminars. A series of 9 half day seminars held in 2005/6 (4), 2006/7 (2), 2007/08 (3) and April to Dec 08 (0) which were designed to provide more indepth knowledge and information on key elements of tourism as well as stimulate action by businesses.

Executive Seminars. A series of 7 half day seminars held in 2005/6 (3), 2006/7 (4), 2007/08 (0) and April to Dec 08 (0) which were designed to follow on from the Gleneagles Master Classes, providing more detailed information on the topic raised in the masterclass.

Business Tourism Conference. An annual conference held in each of the four years of the evaluation. The one day conference includes breakout sessions, with a number of international speakers. Targeted specifically at those organisations in tourism who are currently involved in business tourism or who have the potential to become involved.

Schindlerhof Executive Seminars. A series of 6 courses run in the Schindlerhof Hotel in Germany, held in Sept 05, Jan 06, Jan 07, Jan 08 (2 journeys) and Jan 09.

Sustainable Tourism Conference. A one off, one day conference held in October 2007.

Customer Service Standards/Service Conference. A series of three annual conference held in 2005/06, 2006/07 and 2007/08 initially called Service in the City, with a focus on Customer Service and care.

In all, a total of 40 events, seminars and conferences were held during the period of the evaluation as part of the TMDP programme. A full list of events are included in Annex I.

The objectives of TMDP were:

- To enable SE to raise awareness on the part of the industry of key business opportunities and challenges and to provide practical support on how to address these, building on industry best practice examples
- To provide Scottish tourism businesses with access to Scottish, UK and international best practice in key areas of tourism business leadership and management.
- To provide Scottish tourism businesses with networking opportunities.

TMDP was designed to address the market failures of information deficiency where tourism businesses were unaware or had no knowledge of new or best practice. It also sought to address risk aversion by motivating businesses to take action in business improvement and externalities where the establishment of the events providing benefits to individuals and their businesses (such as networking and sharing knowledge with other businesses) which are not available to businesses on an individual basis.

These programmes were project managed and led directly by SE with support from an event management company. The programmes of events were marketed via Scottish Enterprise internal marketing department using the direct mail of an overall programme brochure and individual event brochures. This was supplemented by the use of eblasts. These used an in house SE database of tourism businesses as the priority target market.

A single event management contract was held between SE and an event management company, managed by one SE member of staff in areas such as contract management, securing internal approvals etc. A working group of internal SE staff met periodically during each year to assist in the strategic planning and coordination of events including the identification of event themes and dates. Individuals from different local enterprise companies or offices led the development and design of individual events such as identifying speakers, approving marketing content etc. In total an estimated 6-10 SE executives were involved in the design and implementation of the TMDP.

There were a total of 2,847 individual attendances at the elements of the TMDP over the study period.

3.2 Tourism ebusiness Workshops

A series of two programmes comprising 11 ebusiness workshops were held in 2007/08 and 2008/09. These were held in Aberdeen, Edinburgh, Glasgow, Perth, Stirling and Stranraer (2007/08 only). The workshops were focused on more practical information and skills on ebusiness such as making the most of web sites, and etrading. The programme included small workshops of 10 to 20 participants, with the offer of follow up one to one advice from the tutor to review and develop action plans for their business.

Market failures identified for the workshops where primarily information deficiencies (lack of knowledge of ebusiness, particularly that which is above basic level), and risk aversion of businesses to take action due to uncertainty of business benefits. The objectives of the ebusiness workshops were:

- Enhanced understanding of market trends in relation to visitors' methods of seeking information and making bookings
- An ability to critically evaluate performance of existing web provision
- Improved functionality of existing site, possibly looking at yield and resource management and real time online booking
- Development and integration of emarketing strategies with business planning
- Systems to measure the return on investment (ROI) in relation to ebusiness
- Greater understanding on who can help, and more importantly, what questions to ask.

The ebusiness workshops were delivered in partnership with the Scottish Tourism Forum. Specialist ebusiness subcontractors were identified to deliver the content of the workshops and to provide the follow up one to one advice. Programme design and content was agreed by the partners and marketing and delivery was led through the STF.

There were a total of 217 individual attendances at the ebusiness workshops.

3.3 Leading Service Excellence Customer Service Programme

This is part of a two element programme to improve customer services and care in the tourism sector. The Leading Service Excellence (LSE) programme is targeted at managers within the sector, with a sister one day programme Delivering Service Excellence (DSE) for front line staff. LSE is a two day programme, delivered typically with at least a week between the individual days of delivery. This can be delivered either in house or to groups from multiple organisations.

The programme was developed for the Enterprise networks by the Moffat Centre for Travel and Tourism Development in direct response to a demand from industry to produce a programme specific to Scottish needs. It replaced a number of previous interventions to enhance service excellence namely Welcome Host and Scotland's Best.
The 2 day LSE programme covers the topics of:

- Scottish Tourism, the Big Picture
- The Customer Service Promise
- Mapping the Customer Experience
- Excellent Leadership
- Creating the Place to Be
- Leadership tools and Skills

There are currently 6 trainers licensed to deliver the LSE programme and an additional 13 associated with DSE. It is the responsibility of the licensed deliverers to promote and set up the courses, charging tourism businesses/participants for the course.

Public sector support to the trainers is provided through web and basic marketing materials and monitoring through a trainers quality assurance system.

The level of uptake of the LSE programme has been very limited and for the purposes of this evaluation it has not been possible to identify a robust sample size of participants. However it is estimated that the LSE 2 day programme has been delivered 2 to 3 times.

TMLDA comprises three distinct elements with different objectives and content.

4 STRATEGIC AND OPERATIONAL CONTEXT

The context in which the programme operates has significantly changed since its establishment. The current strategic context is provided by:

4.1 Government Economic Strategy

Published in 2007, this strategy identifies a number of objectives and priorities which relate to this programme:

- A strategic objective of "Wealthier and Fairer: To enable businesses and people to increase their wealth and more people to share fairly in that wealth."
- A strategic priority of "a particular focus on a number of key sectors (including tourism) with high growth potential and the capacity to boost productivity."; and
- a key strategic approach to 'work with businesses to stimulate improvements in work practices and productivity, ensuring Scotland's skills are fully utilised.'

4.2 Smart Successful Scotland

Smart, Successful Scotland which prior to the 2007 Government Economic Strategy directed the activities of the then Enterprise Networks, identified as objectives:

- under the objective of growing businesses, securing 'a culture of enterprise and more businesses of scale' and 'success in key sectors' including Tourism
- under the objective of skills and learning, 'developing people who are in work'

4.3 Tourism Framework for Change

Published in 2006, this tourism strategy provides a context for the work of all government agencies and industry in the development of the tourism sector seeking to achieve an aspirational 50% growth in tourism revenue by 2015. This identified four areas of priority:

- Knowing Your Market. Where both the industry/sector as a whole and individual businesses have a stronger understanding of their market, trends and how they can optimise them
- Exceeding Visitor Expectations. Where the level of customer experience improves at both the sector, location and individual business level. This includes improving the quality of the product, the level of customer service standards, innovation and development of product
- Marketing your product. At both national (primarily through VisitScotland) and individual organisation basis.
- Being Sustainable. In environmental terms.

In delivering these priorities, the strategy identified the specific priority of improving management and leadership skills. *Managers and business owners must value training, have the right management and leadership skills and training themselves, and ensure that their staff have the skills they need to provide a high quality service.* With a specific target for People 1st to develop a training action plan (TAP) to address these gaps.

The strategy also explicitly highlights *the development of 100k Welcomes – a single portfolio of courses ….to enhance tourism businesses' productivity and competitiveness.*

4.4 Skills for Scotland

The lifelong skills strategy for Scotland, published in 2007 has an identified action of Developing the Workforce. To achieve this, priorities have been identified of:

- Encouraging employer demand for skills, as they are linked to the achievement of their business objectives
- Listening to employers, particularly in their articulation of their skills needs
- Improving how skills are used in the workplace through the design and management of jobs. The strategy highlights that ….*'To achieve this, employers need excellent management and leadership skills and this may require a change in the way that they view themselves and their capacities.'*
- Make it easier for employers to access information, advice and guidance and support they need to develop their workforces

4.5 Scottish Enterprise Tourism Priorities

To support the delivery of their contribution to the Tourism Framework for Change, SE has developed with industry an 'Industry Demand Statement' which provides a structure and set of priorities for their actions. Their activity is focused around the mutually supportive areas of Industry Leadership, Innovation, Product Development, Destination Development, Business Enterprise and Leadership Skills and Inward Investment. In support of this SE have identified a six priority themes which receive the focus of resources.

Industry Leadership
Innovation
Product Development, of which key products are:

- Ancestral tourism
- Country Sports tourism
- Food tourism
- Forest tourism
- Golf tourism
- Whisky tourism

Destinations, of which six key destinations are:
- Edinburgh
- Glasgow
- St Andrews
- Rural Perthshire
- Royal Deeside
- Loch Lomond and Trossachs

Business Enterprise and Leadership Skills
Inward Investment

4.6 One to One Business Support Delivery Structure

A newer and more clearly defined business support structure and priorities have been developed in the delivery of information, advice and business development support to individual businesses. In the SE area, business support provision is split between direct provision by SE and support through the Business Gateway, under the direction of the Local Authorities in Scotland.

- *Account Managed Businesses*. The focus of Scottish Enterprise's business support is provided through a series of account managers to a selected number of businesses who have been identified to have the potential to grow their turnover by at least £1m over a 3 year period. Following a growing business review and an account development plan, agreed with the company, a bespoke package of services and products are identified to assist in this growth. There are currently 89 account managed businesses in the tourism sector and an additional 25 designated as important to the economy. Over the period of the evaluation it is calculated that there have been 136 Account managed businesses (although not all these businesses were account managed throughout the period of the evaluation).
- *Pipeline Companies*. Those companies who are supported by the Business Gateway who have the potential to become account managed businesses. These are defined as those who have the potential to grow their turnover by £400,000 over a 3 year period.
- *Other companies*. All companies are provided with basic information, advice and business development tools through the Business Gateway and their web site www.bgateway.com. This includes a range of seminars and workshops and one to one advice from business advisors.
- *Issue Driven Support*. As well as general support for the development of the business provided to account managed businesses, specific grant/loan/investment programmes available for priority issues such as innovation, investment

To supplement this support provided to businesses on a one to one basis, there are also a range of projects which address a common or cross sectoral issue and assist a number of businesses. TMLDA is an example of such a project.

Support to businesses is delivered through a number of mechanisms, eg:

(a) *Information and awareness*. Through the Business Gateway, promotional campaigns, newsletters, PR and other mechanisms.
(b) *Self-help/'self-service'*. Such as using on line diagnostic tools. These are typically accessed through the business gateway
(c) *One to Many Support*. Through the use of seminars, workshops and conferences. This support is not customised to individual businesses.
(d) *One to One*. The provision of one to one business advice, typically through a specialist advisor.
(e) *Implementation Support*. The provision of financial support through grants or subsidised consultancy to assist in the implementation of a business improvement programme.

The cost of interventions increase substantially with the intensity of support which leads to greater focus and prioritisation on those businesses which receive such support.

4.7 Change in Strategic and Operational Context During Programme

Since the period at the start of this evaluation, there have been a number of changes in its context. At the time of establishment of the TMDP, SE particularly through their network of Local Enterprise Companies, organised and hosted a wide range of seminars and conferences, largely uncoordinated with others by the network. These often resulted in duplication of activity in different geographic areas and in practice were presenting a confusing picture of provision, appearing to compete for attendees.

At the same time the cost of design, event management and marketing were thought to be greater than necessary. In response to this SE looked to establish a nationally coordinated programme of conferences and events which would:

- Have a programme which suits the needs of tourism businesses across Scotland
- Establish an internal working group to determine the structure and topics of the programme
- Comprise single events held at a national level on a specific topic and participants would be encouraged to travel to attend
- Establish a single event management contract to minimise the project management time by SE staff and to secure the greatest value for money.
- Introduce a common branding and marketing of the events, increasing SE's profile.

At this time an attempt was made to bring as many SE tourism conferences and workshops under the programme, although it was not possible to achieve this totally. Section 5 highlights some of the events that have continued outwith this umbrella.

Since the establishment of the programme there has also been a major shift within SE to the establishment of the account management structure for one to one support. In practice this transformed the level and coverage of business development support to tourism businesses, with substantially fewer businesses falling within the required definition of account managed business, so reducing the potential extent of follow up support to participants.

There are a number of strategies which affect or provide a context for TMLDA. Operationally these can provide challenges such as the alignment of a one to many programme to the more focused account managed supports and the delivery approach of organisational development which is moving away from direct and subsidised delivery.

5 OTHER RELATED INITIATIVES AND SUPPLY

Within SE and partner organisations there are a number of initiatives which are currently in place or being introduced which are relevant to the TMLDA. This section seeks to document as many of these as possible:

5.1 Tourism Specific Initiatives

Some of the initiatives which are currently operated and are specific to tourism are:

(i) *Tourism Innovation Workshops.* A range of free and charged events, run by SE to assist in the development of new product and service ideas.

(ii) *Tourism Innovation Day*. An annual conference organised and hosted by the Tourism Innovation Group.

(iii) *Visitor Feedback Workshops.* A series of SE events held throughout Scotland, designed to provide practical tools.

(iv) *Scottish Tourism Week.* An annual cluster of events on a range of aspects of tourism in Scotland which typically includes events from a range of partner organisations. In March 2009, the week comprised six separate events including a series of 21 free ScotHot seminars, the Scottish Enterprise Visitor Experience conference, and Scottish Tourism Forum conference and dinner.

(v) *Trade Association Conferences*. Targeted at their membership, such as conferences by the Association of Scottish Visitor Attractions, the Association of Scottish Self Caterers and the Scottish Tourism Forum.

(vi) *Learning Journey*. Organised by Scottish Enterprise, outwith the TMLDA banner.

(vii) *Other SE Tourism Workshops and seminars*. Parts of SE network are delivering workshops and conferences, typically as part of wider projects such as those that support priority tourism products. An example is the food tourism workshops and conferences held as part of the Royal Deeside destination activity.

(viii) *Pride and Passion*. An initiative delivered through the Scottish Tourism Forum with support from SE, HIE and VisitScotland, principally designed to spread good practice through the wider tourism sector. They have undertaken a range of more local events and initiatives including visitor experience workshops and discovery tours

(ix) *Destination Management Organisations (DMOs).* In each of the priority destinations there are emerging industry led groups and more formal structures who are taking forward elements of tourism development for their destination. Each DMO is at different stages and are undertaking different support activities including a range of events and networking meetings. The content tends to be more local with less national and international perspective.

(x) *Local tourism conferences and events.* Other events, seminars and networking opportunities held locally, in non destination areas, often with local SE and local authority support.

(xi) *Scottish Thistle Awards Ceremony*. Annual event which provides networking opportunities and showcases business excellence and quality led by VisitScotland.

(xii) *Tourism Intelligence Scotland.* A joint initiative with HIE and VisitScotland which provides and disseminates market and other intelligence and good practice. This holds an annual event.

(xiii) *Hospitality Industry Trust.* Through support from the hospitality industry, HIT runs a number of events every year as well as offering a range of award scholarships to employees of the industry (including 12 senior managers and 84 middle managers), lasting for an average of 2 weeks and include a range of courses, learning journeys, seminars etc. They also hold an annual Emerging Talent Conference targeted at those who are under 30 who are the future leaders/managers

(xiv) *Colleges and Universities.* Some institutions offer seminars, workshops and courses directly targeted at leaders/managers of tourism businesses (rather than those who will become new recruits or lower level employees) however provision is limited and take up from the sector is reported as very low.

(xv) *St Andrews Skills Academy.* Part of the destination approach a recently established initiative to provide a mechanism to articulate and match demand for tourism skills and course provision, including those from universities and colleges.

5.2 Other Relevant Non Tourism Initiatives

In addition there is a large suite of initiatives and programmes which provide support to tourism businesses, although not customised to the tourism sector, the most relevant of which are:

(xvi) *General Business Gateway advice and support.* Provided on a general basis through the provision of self help/web based guidance and tools and one to one advisors. Basic level of advice is provided to all businesses and more focused support to those ‘pipeline companies’ who have the potential to become account managed.

(xvii) *Ebusiness workshops, advice and support.* Delivered through the Business Gateway, a series of self help information and a range of 15 different seminars on ebusiness topics such as improving effectiveness of web sites, etrading etc. In addition there are c10 specialist ebusiness advisors in place to provide one to one advice to account managed and growth pipeline businesses.

(xviii) *Management and Leadership: Workforce Development Seminar Programme.* Recently developed by SE (9 workshops) which provide support to managers on improved people and organisational development. Delivered by Scottish Enterprise, the cost per seminar is £50. After a pilot, this is now being considered for expansion. Business Gateway also deliver a workshop on 'Getting the Most of your People' however this has limited take up and therefore delivered infrequently.

(xix) *Management and Leadership: Leadership for Growth*: An SE programme targeted at owner managers and future leaders, which provides more intensive support to businesses including an audit/assessment of learning needs, group learning, use of 360 degree assessments, coaching/mentoring. SE meets 50% of the cost of participation, with a fee of £1,000 per business. Currently targeted at account managed and pipeline businesses, but in early stage of establishment with limited levels of take up. Focused on people and organisational management.

(xx) *Account Managed support.* Delivers a high impact service, to growth companies to deliver additional growth- growth that would not otherwise have occurred. Services are offered as a bespoke package, delivered against an agreed action plan. Services are organised around 6 core areas: innovation, market development, strategy development, investment, organisational development and business improvement.

(xxi) *Business Mentoring Scotland.* Delivered in partnership with the Scottish Chambers of Commerce this matches experienced business people who can offer knowledge, expertise and insight to help address challenges and opportunities for senior managers in growing businesses. If provides group and one to one mentoring.

(xxii) *Investors in People*. A business improvement framework which aims to enhance business performance through the effective management and deployment of employees.

In addition, consideration is being made by Scottish Enterprise to the development of initiatives on leadership and management development in functional management (eg finance, marketing, customer services etc) however this has not yet been taken forward.

2.3 Other Leadership and Management Development Provision

On investigation, there is limited provision of leadership and management development courses and seminars outwith those that have public sector support. It was found that:

- While there are a number of tourism conferences and seminars which are hosted and presented by organisations other than SE, many were able to undertake these only with a direct or indirect subsidy from SE. Examples are the Tourism Innovation Day and Pride and Passion Events
- Trade association conferences while including some content on best practice and providing other knowledge, their focus is primarily on the dissemination of new industry developments to their members and to identify issues for action

- Colleges and Universities report the capability and capacity to provide leadership and management development programmes however in practice this is rarely delivered. This is in part due to their limited focus on management development; in part their funding structure which favours students pursuing formal education; in part the risks involved in speculative provision of such workshops; and in part the lack of identified demand from industry.
- Private Sector Consultants. There are a number of consultants who provide such workshops and courses to industry, including ones who specialise in the tourism sector. This provision is, in the main, restricted to the larger companies through the provision of in house courses. Group provision to smaller companies where managers from a number of companies participate, this is typically organised and subsidised by the public sector
- Previous programmes such as that of the Tourism Training Associates, Welcome Host, Hospitality Assured, Scotland's Best and others were all delivered with public funding.
- Hospitality Industry Trust provide and coordinate a series of management skills development programmes including placements, mentoring, specialist training courses.

There would appear to be a failure of the market to provide comparable conferences, seminars and courses without the public sector either providing substantial subsidy or directly delivering.

There is a wide range of existing supports in this area, with only limited provision from the private sector.

6 VIEWS OF STAKEHOLDERS

In the interviews with internal and external stakeholders, views were sought on the current position of the tourism sector in relation to leadership and management, the issues and needs which are currently being faced and the extent to which the TMLDA was having an impact on these. While these views are subjective and 'second hand' the calibre of the interviewees in terms of their knowledge of the sector provides confidence of the robustness of these views. Annex II lists the stakeholders interviewed.

6.1 Priority for Tourism Growth

(i) *Pivotal Role of Leadership and Management Skills.* It is recognised by all stakeholders interviewed that the biggest barrier and greatest potential for growth is the improvement of leadership and management within tourism businesses. This includes all aspects of motivation, knowledge and skills of leaders and managers.

6.2 The Demand Side: Leadership and Management Needs of the Tourism Sector

(ii) *Diverse Position*. There are substantial differences in the issues and needs of different tourism businesses.

a. The large tourism businesses such as large hotels, major visitor attractions have a clear view of their leadership and management needs and frequently have strong leadership and management development programmes in place.

b. Smaller and medium sized businesses may be aware of skills and knowledge gaps however they are less likely to be taking action to address these, for a range of reasons (see below)

c. Micro businesses are businesses which typically do not recognise any leadership and management issues or their relevance to the businesses' performance

(iii) *Low Recognition by business of leadership and management skills need*. With the exception of larger companies, there is a very low level of recognition of leadership and management gaps in the sector. This recognition is also low in terms of the link between leadership/management and business performance. As a result demand is low.

(iv) *Lack of Interest in Growth/Improvement*. For many companies there is little interest in business improvement or growth, this particularly applies to smaller lifestyle businesses.

(v) *Management and Leadership gaps*. The skills gaps are wide, and are particularly weak in the following areas; an ability to step back from day to day operations, strategic thinking, marketing, people management and customer service standards. The smaller the business, the more practical and basic these gaps are.

(vi) *Dependency Culture*. There is an expectation by many tourism businesses that it is the public sectors' role to provide a range of supports to ensure the development of the sector. This gives rise to a reluctance to take full responsibility for the development of their business and sector and so a reluctance to invest financially and personally in their business and wider sector. It is recognised that this culture may make it difficult to secure an increase in price of any events.

(vii) *Best Practice vs Basics*. This is an increased concentration of resources from SE (for tourism and other sectors) and other bodies such as VisitScotland on encouraging best practice and high quality. This raises questions on the future targeting of these activities and in particular whether it seeks to target those that are already committed and taking action at the best practice area, or those who are not taking action and whose needs are more basic.

(viii) *Need for Practical Skills*. A view that for many businesses there is a need for more practical tools and supports rather than the higher level information and knowledge content of the TMLDA. An aspect of this would be greater interactivity within the events such as participative sessions, smaller discussion groups with attendees, question and answer sessions etc.

6.3 The Supply Side: Supports Available

(ix) *Underused Capacity*. There is substantial capacity within the training and education sector to supply appropriate courses, education and workshops however limited uptake of existing provision.

(x) *'Cluttered' Support*. There are a large number of trade associations, public sector organisations, initiatives and training providers which are seeking to support tourism development. This gives rise to confusion in provision, initiative 'fatigue' and competition for potential "customers".

(xi) *Multiple and high volume of SE support*. As well as the programmes run by third parties and intermediaries, Scottish Enterprise itself run a series conferences and workshops in tourism which are targeted at different aspects of support (eg innovation, key products, customer feedback etc) The understanding of how these combine and relate to an overall support "package" is low.

6.4 Attendance

(xii) *Low Take up of Generic Supports*. Supports designed for all businesses (such as those in the Gateway, workforce development and ebusiness) have low take up from the tourism sector. This is thought to be a result of tourism businesses regarding their sector as requiring tourism specific supports

(xiii) *Barriers to Take Up*. For those businesses where there is a recognition of skills gaps and an interest in taking action, there are a number of barriers (as with other sectors) including cost, taking time away from the business, location of delivery and perception of lack of relevance to their business.

(xiv) *Participants are restricted to those already committed*. Those who attend the events are already committed and interested in taking action therefore the programme helps the better businesses improve a bit more. It is rather less effective at simulating additional action and improvements within the wider industry.

(xv) *Importance of public sector attendees*. A number of stakeholders have cited the importance of public sector supporters and intermediaries in attending the programme to allow them to disseminate the lessons and support their businesses. There are some financial and operational barriers to this.

6.5 Securing Business Benefits from the programme

(xvi) *Transfer to Business Improvement thought to be patchy*. Supports, particularly the most intensive ones such as the Schindlerhof Executive Seminars were not seen by stakeholders as being effective at transferring the new skills and knowledge into the implementation of business improvements. It should be noted however that this is *not* supported by the evidence of the company surveys where these programmes have stimulated action. (See section 9)

(xvii) *Disconnect between business needs and event content.* Few companies, if any, are using a process to fit the events into needs of individual participants and their own businesses or ensuring a structured implementation of learning.

(xviii) *Weak wider dissemination*. Some stakeholders believe that the dissemination from attendees to others within their organisations is poor. It should be noted however that this is *not* supported by the reported views of the participants and may highlight a gap in stakeholder follow up engagements. (See below and section 9)

(xix) *Poor follow up*. Many stakeholders believe that there is a weakness in the lack of structured feedback to the events which they believe is necessary to maximise the implementation and action derived from the event. The ability to provide one to one support to these businesses is currently restricted to the account management process. Light touch follow up is restricted to securing participant feedback on the events but does not include re-contact at say 6 months and 1 year after the event.

(xx) *Absence of progression within programme.* The programme is not regarded as effective in providing a programme or structure of progression. However the activities were not set up to deliver this.

6.6 Overall Objectives and Positioning of Programme

(xxi) *Disconnect with other SE supports*. There is a widespread belief within SE that there is a weakness in connections with account management activities and with other destination/product activities. There is also thought to be limited connection between different elements of the programme.

(xxii) *Lack of common understanding of objectives of programme*. There are different views within the stakeholder group on the purpose and objectives of the programme.

(xxiii) *Light Touch vs One to One Supports*. Concerns were expressed that any programme which provides only a one to many, light touch support can have only limited impact compared to one to one supports. However others felt that with appropriate preparation and customisation to participant needs greater impact could be achieved.

(xxiv) *Importance of Industry in Design of programme*. It is recognised that it is crucial that the content and structure of any event and/or programme is driven by the needs of industry. While there are high level mechanisms to input to SE's industry supports, there is currently no clear mechanism to effectively secure this industry input at the level of the programme or individual events.

(xxv) *Who should SE be Targeting?* There is substantial disagreement outwith SE and in some cases within SE on which businesses and elements of the sector should be the focus of support

(xxvi) *Should seek to convert the uncommitted*. The view of many stakeholders is that the focus should be on encouraging a wider group of companies to attend in order to convert them into taking business improvement actions.

(xxvii) *Should seek to convert those close to action*. Those who are closest to taking a business improvement actions were highlighted as the main priority.

6.7 Management and Delivery of the Programme

(xxviii) *Importance of High Profile Activity for SE.* As well as the programmes themselves, it has been an important tool to establish one of the roles of SE in tourism development.

(xxix) *Unique Role of SE to Deliver, weakness of alternative structure to deliver one to many supports*. The role of an independent body to organise and promote conferences and seminars targeted at a number of smaller businesses is recognised as crucial to ensuring their operation. Private sector provision of similar conferences is not available within Scotland. This is due to the size of the Scottish market for such an event and it is unlikely that any other body, without either direct SE delivery or subsidy would be able to provide similar events. Without the public sector or other intermediary to organise and promote these, the events cannot happen, so restricting access and provision to smaller businesses.

(xxx) *Weaknesses in marketing of programme*. Both in terms of the types of businesses targeted, the method of marketing (ie restricted to mailing and eblasts to limited businesses) and the lack of clear business benefits in marketing messages. There is also seen to be a weakness in branding the programme as SE. There is limited targeted marketing by topic of event to specific market segments.

(xxxi) *Low Word of Mouth*. One of the most effective methods of marketing is seen to be recommendation through word of mouth. This is not regarded as fully exploited or proactively managed. With SE and Business Gateway advisors, VisitScotland staff, Local Authorities, and other local champions opportunity exists for having positive engagement with the programme.

(xxxii) *Role of Sponsorship*. Opportunity exists to identify and secure greater sponsorship of activities however concerns were expressed that this may detract from their independence.

(xxxiii) *Long Term Planning Weak*. Changes within SE over the evaluation period have impacted on the long term planning and management of the programme. Improved marketing and delivery efficency savings through negotiations, group purchasing and single contracting has been restricted. The ideal for the event and project managers moving forward would be a 3 year programme.

(xxxiv) *Poor Promotion of Leading Service Excellence*. While the lower level delivering service excellence programme is promoted and sold to larger organisations as in-house programmes for multiple members of staff, the LSE programme has not been as successful marketed. The only LSE which is known to be run outwith a single employer was coordinated and promoted by a public sector (North Lanarkshire Council) to secure attendees from multiple organisations. It is the view of deliverers that the current delivery model of LSE is unlikely to result in an increase of LSE programme activity without such public sector intervention.

(xxxv) *Lack of Clarity of Delivery Roles*. In the management, organisation and marketing of the events there is a lack of clarity of roles within SE and delivery organisations, particularly in the TMDP

(xxxvi) *General Dissatisfaction with internal SE programme management structure*. Although there are differing views on how the internal SE management of the programme could be improved there was no single view that provided a clear solution. Key areas of concern were the separation of marketing and event management; varying levels of input from the project managers to the design and ‘pushing forward’ of individual events; the lack of coordination/collaboration between events; and with the central/local interface.

(xxxvii) *Improved use of speakers*. There is a view that some speakers, particularly those from overseas could be utilised more effectively by SE by scheduling more events/meetings for that speaker while they are in Scotland

(xxxviii) *Improved use of technology*. A number of suggestions were made to improve the effectiveness of the programme including the use of remote access to events through videoconferencing, various ebased discussions and improved dissemination of content through web sites and others.

7 WHO ATTENDED: THE PARTICIPANTS

It has been possible through the collation of information on those who booked to each event, to provide a picture of the nature of participation in the programme. Unfortunately, while information is available on the TMDP events and ebusiness workshops, because of the nature of delivery of the Leading Service Excellence programme and the low number of participants, information on participants of that element has not been available. (See section 3.3)

The information provided by the event managers for TMDP events related to those who had registered and paid for the event rather than those who had actually attended. The event managers reported that the difference in these groups was minimal however no accurate data on numbers is available.

7.1 Attendances

Table 1 shows the number of unique individual attendances, individuals and organisations attending any event of the programme. The programme accounts for 3,064 individual attendances, from 2,058 individuals, from 846 unique organisations. Around a third of individuals and organisations attending are drawn from the public sector/intermediary organisations.

The primary database (target market) used for the marketing of activity was SE's CRM system. This contains some 2,500 tourism entries that have, at some point, had a "live" relationship and expressed an interest in services provided by SE. The programme has a penetration of c22% of these businesses.

There are a wide range of estimates of the number of tourism businesses in the SE area, with the most accepted being 18,000. With this estimate, the target market for these activities has been 14% of SEs total tourism businesses.

The level of penetration at c22% into the CRM listed companies is limited.

Table 2 provides a summary of high level information for each individual event, with the ebusiness workshops grouped into the 07/08 and 08/09 programmes for ease of presentation. This shows that across the 42 events included in the evaluation there is a wide disparity in the number of participants and organisations attending, varying from 11 to 224 attendees.

Table 1: Participation in All TMLD Programmes

	Private sector		Public Sector/intermediaries		ALL
	Number	**% of all**	**Number**	**% of all**	**Number**
Number of Individual Attendances	1,988	65%	1,076	35%	3,064
Number of Unique Individuals Attending	1,395	68%	663	32%	2,058
Number of Organisations Attending	555	66%	291	34%	846

Source: Analysis of Participant Information

Table 2: Analysis of Basic Event Participant Attendances

Event	Title	Year	No of Participants	No of organisations	Average Attendees per Organisation		% owner manager	% Female	%Private
April 05 ES	UNKNOWN TITLE	2005/06	11	9	1.22		27%	36%	91%
Sept 05 LJ	Schindlerhof Learning Journey, Sept 05	2005/06	18	14	1.29		30%	61%	67%
Oct 05 BTC	Setting New Standards, 11th Oct 05, Glasgow Hilton	2005/06	177	129	1.37		14%	59%	67%
Oct 05 BI	Slow food - the future, 26th Oct 05, The Hub Edinburgh	2005/06	36	26	1.38		19%	53%	69%
Nov 05 GMC	Business Development (Don Peppers) 3rd Nov 05	2005/06	74	60	1.23		36%	50%	72%
Dec 05 BI	Wellbeing - the Future, 16th Nov 05, Cameron House Hotel	2005/06	41	33	1.24		24%	68%	54%
Jan 06 BI	The Future of Technology, Apex Quay, Dundee, 26th Jan 06	2005/06	16	13	1.23		19%	50%	63%
Jan 06 LJ	Schindlerhof Learning Journey, Jan 06	2005/06	16	12	1.33		31%	50%	81%
Feb 06 ES	Key Drivers of Service Excellence (Robert Johnston), 2nd Feb 06, Gleneagles	2005/06	9	5	1.80		33%	56%	89%
Feb 06 GMC	Personal Development (Paul McKenna), 7th Feb 06	2005/06	170	106	1.60		16%	71%	75%
Mar 06 BI	Environmental Tourism - the Future, Perth Concert Hall, 1st March 06	2005/06	46	37	1.24		13%	39%	48%
Mar 06 CSS	Raising Service Standards in Scotland's tourism industry, 14th March 2006, Radisson SAS, glasgow	2005/06	177	104	1.70		11%	55%	76%
Mar 06 ES	the Top 10 technology trends transforming the meetings and associations industry (Corbin Ball), 28th March 06, Gleneagles	2005/06	11	9	1.22		27%	18%	73%
Mar 06 GMC	Future Development (Michelle Harrison, Henley Centre) March 06	2005/06	90	66	1.36		26%	59%	68%
April 06 BI	Maximising visitor Revenue - the Future, Dunblane Hydro, 18th April 06	2006/07	38	27	1.41		18%	61%	76%
April 06 ES	Customers Don't get stolen - they walk (Phillip Festa and Paul Alexander), 19th april 06 Gleneagles	2006/07	14	12	1.17		7%	57%	86%
Nov 06 BI	Adventure Sports Tourism, 17th Nov 06, Peebles	2006/07	79	58	1.36		30%	28%	63%
Nov 06 BTC	Share Ideas, Identify Trends, Build Connections, 22nd November 2006, Raddisson SAS Glasgow	2005/06	135	93	1.45		13%	70%	62%
Nov 06 ES	Legendary Service at the Ritz-Carlton, 28th Nov 06, Gleneagles	2006/07	15	11	1.36		27%	40%	80%
Dec 06 GMC	Personal Development: Karaoke Capitalist (Kjell Nordstrom) 7th Dec 2006	2006/07	26	22	1.18		19%	58%	58%
Jan 07 GMC	Business Development (Chris Daffy) 18th Jan 07	2006/07	52	37	1.41		23%	52%	88%
Jan 07 ES	Mind Maps - The Colour of Creativity, 30th Jan 07, Gleneagles (Tony Buzan)	2006/07	19	15	1.27		11%	68%	47%
Jan 07 LJ	Schindlerhof Learning Journey, Jan 07	2006/07	15	11	1.36		13%	40%	87%
Feb 07 GMC	Future Development (Michelle Harrison, Henley Centre) Feb 2007	2007/08	90	65	1.38		21%	62%	40%
Mar 07 ES	Marketing Judo, (Richard Richardson), 6th March 2007, gleneagles	2006/07	14	13	1.08		0%	50%	50%
Mar 07 CSS	Delivering Winner Service in Scotland's Tourism Industry, 14th March 07, glasgow Hilton	2006/07	224	134	1.67		20%	61%	68%
Jan 08 11th LJ	Schindlerhof Learning Journey, 11th Jan 08	2007/08	19	15	1.27		37%	58%	95%
Jan 08 13th LJ	Schindlerhof Learning Journey, 13th Jan 08	2007/08	31	23	1.35		29%	55%	94%
Jan 08 BI	Food Destinations, Perth, 29th Jan 08	2007/08	43	34	1.26		2%	63%	47%
Jan 08 GMC	Creating Legendary Customer Service (Paul Cookley), 21st Jan 08	2007/08	135	63	2.14		10%	59%	83%
Feb 08 BI	Heritage Tourism, 5th Feb 08, Stirling	2007/08	57	48	1.19		21%	53%	54%
Feb 08 GMC	Marketing Judo, (Richard Richardson), 26th Feb 08	2007/08	90	58	1.55		17%	61%	86%
Mar 08 CSS	Service by Design, 11th March 2008, Old Fruit Market, Glasgow	2007/08	167	91	1.84		11%	60%	69%
Mar 08 BI	Performance Venue Management, 18th March 08, Edinburgh	2007/08	35	31	1.13		3%	69%	77%
E Bus 07-08	Misc	2007/08	114	103	1.11		0%	60%	72%
Oct 07 Sus Tour	Sustainable Tourism Conference, 2nd Oct 07, Radisson SAS, Edinburgh	2007/08	107	80	1.34		12%	59%	56%
Nov 07 GMC	Attracting, Developing and Retaining Top Talent (Jane Sunley), 14th Nov 07	2007/08	85	42	2.02		12%	62%	69%
Nov 07 BTC	Business Tourism Conference, 20th Nov 07, Crowne Plaza Hotel, Glasgow	2007/08	204	125	1.63		16%	68%	62%
E bus 08-09	Misc	2008/09	103	85	1.21		0%	60%	74%
Nov 08 GMC	Creating Opportunities through Productivity (Henry Stewart), 6th Nov 08	2008/09	72	44	1.64		18%	57%	89%
Nov 08 BTC	Rising to the Challenge, SECC Glasgow, 27th Nov 08	2008/09	162	103	1.57		15%	62%	70%
Jan 09 LJ	Schindlerhof Learning Journey, Jan 09	2008/09	27	18	1.50		17%	67%	96%
ALL			**3,064**				**16%**	**59%**	**69%**

Source: Analysis of Participant Information

The average number of individuals from an individual organisation who attended a specific event varied from 1.08 (for the Marketing Judo Executive Seminar of March 07) to 2.18 (for the Jan 08 Masterclass).

7.2 Private vs Non Private Participants

A further categorisation was made to identify those from the private and non private sector organisations. Non-private organisations were identified as those from the public sector, intermediaries such as trade associations, consultants/advisors, training providers and general suppliers. Those organisations who were categorised as private sector were tourism businesses and those primary suppliers to the tourism sector (eg caterers for venues). An anomaly in this categorisation was those tourism visitor attractions run by the public sector. These organisations were classified as private sector as they provide a key tourism product offering.

In total 65% of individual attendances were from the private sector. (Table 1)

The majority of attendees, 65% are from the private tourism sector.

7.3 Frequency of Attendance

Table 3 shows there is a significant growth in the number of participants per event from 05/06 and 06/07 to the latter 2 years of the evaluation, of around 50%, to an average attendance per event of 91 individuals, although the number of events dropped significantly in 2008/09.

Table 4 shows the frequency of attendance by organisation, broken down by private and public sector. This demonstrates that there are relatively low levels of concentration of attendance by the same organisation. Almost half of all organisations (46%) have sent only one individual to any event throughout the period of evaluation. Equivalent figures for the private sector (41%) and public sector/intermediaries (56%) demonstrate a strong spread of attendance across organisations.

A relatively small proportion of organisations have accounted for more than 10 attendances over the whole programme of 42 events – 6% of all organisations; 7% of private sector who attended any event and 4% of all public sector/intermediary organisations.

Table 5 provides equivalent information on the frequency of attendance by individuals across the programme. For this analysis, matches were made using the names of individual attendees, so that if an individual had moved organisations they would still be identified as someone who had attended a subsequent event. A weakness of this methodology is where two separate individuals have identical names, they would be identified as multiple attendances so overestimating the frequency of attendances by unique individuals.

Table 3: Number of Attendances by Year

Year	Number of events held	Number of Individual Attendances	Average attendances per event	% of all attendances
2005/06	14	892	63.71	21%
2006/07	12	721	60.08	20%
2007/08	12	1087	90.58	30%
2008/09	4	364	91.00	30%
Total	42	3064	305.38	100%

Source: Analysis of Participant Information

Table 4: Frequency of Attendance to TMLD by Organisation

No. individual attendances per organisation	ALL ORGANISATIONS Individual attendances	Organisations	% of Organisations	PRIVATE SECTOR Individual attendances	Organisations	% of Organisations	PUBLIC SECTOR/INTERMEDIARIES Individual attendances	Organisations	% of Organisations
1	392	392	46%	230	230	41%	162	162	56%
2	368	184	22%	264	132	24%	104	52	18%
3	159	53	6%	114	38	7%	45	15	5%
4	216	54	6%	168	42	8%	48	12	4%
5	200	40	5%	130	26	5%	70	14	5%
6	168	28	3%	126	21	4%	42	7	2%
7	154	22	3%	98	14	3%	56	8	3%
8	104	13	2%	72	9	2%	32	4	1%
9	72	8	1%	27	3	1%	45	5	2%
10	80	8	1%	70	7	1%	10	1	0%
11 to 15	272	22	3%	186	15	3%	86	7	2%
16 to 20	145	8	1%	108	6	1%	37	2	1%
21-50	326	11	1%	326	11	2%	0	0	0%
over 50	408	3	0%	69	1	0%	339	2	1%
Total	**3064**	**846**	**100%**	**1988**	**555**	**100%**	**1076**	**291**	**100%**

Average Attendances per organisation	**3.62**	**3.58**	**3.70**

Source: Analysis of Participant Information

Table 5: Frequency of Attendance in TMLD by Individual

	ALL ORGANISATIONS			PRIVATE SECTOR			PUBLIC SECTOR/INTERMEDIARIES		
No of individual attendances per individual	**Individual attendances**	**Individuals**	**% of attending individuals**	**Individual Attendances**	**Individuals**	**% of attending individuals**	**Individual Attendances**	**Individuals**	**% of attending individuals**
1	1509	1509	73%	1025	1025	73%	484	484	73%
2	670	335	16%	496	248	18%	174	87	13%
3	375	125	6%	234	78	6%	141	47	7%
4	156	39	2%	96	24	2%	60	15	2%
5	85	17	1%	35	7	1%	50	10	2%
6	66	11	1%	30	5	0%	36	6	1%
7	42	6	0%	14	2	0%	28	4	1%
8	48	6	0%	8	1	0%	40	5	1%
9	36	4	0%	27	3	0%	9	1	0%
10	30	3	0%	10	1	0%	20	2	0%
11 to 15	27	2	0%	13	1	0%	14	1	0%
16 to 20	20	1	0%	0	0	0%	20	1	0%
Total	**3064**	**2058**	**1**	**1988**	**1395**	**100%**	**1076**	**663**	**100%**
Average Attendances per individual	**1.49**			**1.43**			**1.62**		

Source: Analysis of Participant Information

Table 5 shows that a substantial majority of individuals (73%) have attended only one event across the whole programme, a proportion which is consistent across all types of organisations. Only 2% of individuals have attended 5 or more events.

Events are not dominated by 'the usual suspects' but rather a breadth of individuals and organisations.

Analysis has also been undertaken by 'Type of Event' grouped into:
- Customer Services Conferences/Service in the City conferences
- Business Tourism Conferences
- Executive Seminars
- Business Insight Seminars
- E Business workshops
- Schindlerhof Executive Seminars
- Gleneagles Masterclasses
- Sustainable Tourism Conference

Table 6 provides a picture on the characteristics of private sector participation for these different types of events. This shows that the most popular events are the Gleneagles Master Classes, Business Tourism Conferences and Customer Services Conferences.

There is a wide variation in individual participation in the types of events. Each individual on average attended 1.43 events across the programme, however for the ebusiness workshops the average frequency of attendance at the two programmes rises to 1.96, indicating that almost every participant attended the workshops in both 2007/08 and 2008/09. It should be noted that the workshops included different content in each year.

The different levels of ebusiness workshops were attended by broadly the same individuals in each of the two years of operation.

No type of event achieved an average individual attendance of twice, however the Gleneagles Masterclasses had the greatest repeat individual attendance of 1.84. The average individual attendance across the 4 Business Tourism Conferences was 1.37, showing less than anticipated repeat attendance. Other types of event show almost no repeat attendance from individuals (ranging from no repeat attendance to only 1.18 for the Customer Services Conference).

Equivalent figures for repeat attendance by private sector organisations are reported in Table 7. On average, across all programmes, each organisation sent 3.58 individuals to specific types of event. Again, the level of repeat attendance varies significantly with organisations sending an average of 3.01 individuals to the masterclasses; 2.44 to the Business Tourism Conferences and 2.45 to the Customer Services Seminars.

Table 6: Frequency of Attendances from Private Sector Individuals by Type of Event

	Individual Attendances	% of all private attendances	No. of unique individuals attending	Av frequency of an individual attending that type of event
Customer Services Seminars	373	19%	315	1.18
Business Tourism Conference	410	21%	299	1.37
Executive Seminars	61	3%	56	1.10
Business Insights	209	11%	180	1.16
E Business workshops	156	8%	80	1.96
Learning Journeys	96	5%	96	1.00
Gleneagles MasterClasses	632	32%	344	1.84
Sustainable Tourism Conference	51	3%	51	1.00
Total	**1988**	**100%**		**1.43**

Source: Analysis of Participant Information

Table 7: Frequency of Attendances from Private Sector organisations by Type of Event

		Individual Attendances	No. unique organisations attending	Average no. of individuals attending from each organisation
Customer Services Seminars		373	152	2.45
Business Tourism Conference		410	168	2.44
Executive Seminars		61	33	1.85
Business Insights		209	135	1.55
E Business workshops		156	64	2.44
Learning Journeys		96	48	2.00
Gleneagles MasterClasses		632	210	3.01
Sustainable Tourism Conference		51	37	1.38
Total		**1988**		**3.58**

Source: Analysis of Participant Information

There is limited repeat individual attendance by type of event but a higher degree of repeat organisational attendance – ie where a different individual from the same organisation attends subsequent events.

It was the intention with some of the events to encourage attendance at other events within the programme – most notably encouraging follow up attendance at Executive Seminars from the Gleneagles Master Classes. The extent of cross over of attendance at different types of events by private sector attendees is reported in Table 8. The level of such 'crossover' attendance is low. The ebusiness workshops are particularly isolated as part of the programme with only 8% of their attendees participating in any other type of event.

However, all events have a low level of cross over with no more than 58% of individuals having attended any other type of event.

Referral and securing attendance between different types of events is relatively limited.

7.4 Attendance by Priority Destination

Although not a priority or target at the start of the programme, Scottish Enterprise's tourism plan has now identified six priority destinations. By matching postcode definitions of the destinations and the attendees, an analysis has been undertaken on the degree of fit of the TMLDA activity with these destinations.

Table 9 shows that 59% of individuals and 49% of organisations who attended any element of the programme were based in priority destinations, dominated by the two city key destinations of Edinburgh and Glasgow.

The level of penetration into all tourism businesses within these destinations is limited with between 3% and 7% of all tourism businesses in these areas attending any element of TMLDA. Overall, 4% of tourism businesses within priority destinations attended any event in the programme.

Penetration into priority destinations is limited

7.5 Attendance by Account Managed Businesses

Account Managed businesses, selected to be those with greatest growth potential, are expected to be those who are most involved in business improvement programmes. However, Table 10 shows that of the 136 businesses that have been account managed at any time during the period of the evaluation, only 53 (39%) of these businesses have attended any

Table 8: Extent of Cross Over of Participation across Types of Events (private)

		Individual Attendances	Average no. of attendance within that type of event	Average no. of attendances at other events	% of cross over by individuals to attend other types of events
Customer Services Seminars		373	1.18	0.55	32%
Business Tourism Conference		410	1.37	0.68	33%
Executive Seminars		61	1.10	1.49	58%
Business Insights		209	1.16	0.61	34%
E Business workshops		156	1.96	0.18	8%
Learning Journeys		96	1.00	0.93	48%
Gleneagles MasterClasses		632	1.84	0.55	23%
Sustainable Tourism Conference		51	1.00	0.78	56%
		0			
		0			
Total		**1988**			

Source: Analysis of Participant Information

Table 9: Private Sector Attendance by Priority Destination

Destination	Number individual	% of individual attendances	Number of any organisations attending	% of organisations attending	Number of organisations in priority destination	% of priority area businesses, attending
Edinburgh	419	21%	114	21%	2500	5%
Glasgow	375	19%	81	15%	2500	3%
Perthshire	182	9%	32	6%	1000	3%
St Andrews	60	3%	10	2%	140	7%
Cairngorm	39	2%	7	1%	459	2%
Loch Lomond	98	5%	28	5%	512	5%
Not in Key Destination	810	41%	276	50%		
Unknown	5	0%	5	1%		
Total	**1988**	**100%**	**553**	**100%**	**7111**	**4%**

Source: Analysis of Participant Information

Table 10: Private Sector Attendances from Account Management Businesses

Total No. account managed businesses	136
No. account managed businesses attended	53
% of account managed businesses at any event	39%
% of all businesses attending, acount managed	10%

Source: Analysis of Participant Information

Table 11: Attendances from Account Managed Businesses by Type of Event

Category of Event	No. attendees	Attendance from account managed businesses	% attendees from account managed businesses	% of account managed attendees
Business Insights	209	40	19%	9%
Business Tourism Conference	410	79	19%	19%
Customer Services Conferences	373	67	18%	16%
E business Workshops	156	22	14%	5%
Executive Seminars	61	17	28%	4%
Gleneagles Masterclasses	632	176	28%	42%
Learning Journeys	96	14	15%	3%
Sustainable Tourism Conference	51	9	18%	2%
Grand Total	**1988**	**424**	**21%**	**100%**

Source: Analysis of Participant Information

Table 12: Extent of Travel to Events

Category of Event	No Travel	Travel	unknown	Total	% of attendees travelled
Business Insights	50	159		209	76%
Business Tourism Conference	155	255		410	62%
Customer Services Conferences	175	198		373	53%
E business Workshops	70	86		156	55%
Executive Seminars	8	44	9	61	72%
Gleneagles Masterclasses	111	521		632	82%
Learning Journeys		96		96	100%
Sustainable Tourism Conference	18	33		51	65%
Grand Total	**587**	**1392**	**9**	**1988**	**70%**

Source: Analysis of Participant Information

Table 13: Attendance by Sex by Type of Event

	% of Attendances			
Category of Event	**Female**	**Male**	**Unknown**	**Total**
Business Insights	50%	48%	2%	209
Business Tourism Conference	65%	35%		410
Customer Services Conferences	57%	42%	0%	373
E business Workshops	56%	44%		156
Executive Seminars	48%	52%		61
Gleneagles Masterclasses	57%	42%	1%	632
Learning Journeys	57%	43%		96
Sustainable Tourism Conference	61%	39%		51
Grand Total	**58%**	**42%**	**1%**	**1988**

Source: Analysis of Participant Information

of the 42 events. These account managed businesses represent just under 10% of attending businesses.

Table 11 shows the pattern of individual attendances from account managed businesses, who account for 21% of attendances overall. The greatest level of account managed attendances are to the Gleneagles MasterClasses.

There is limited penetration into account managed businesses during the period of the evaluation, however for those who attended, attendance by their employees is higher.

7.6 Extent of Travel to Events

It was a clear policy of SE for the TMLDA to comprise a series of national events, rather than the delivery of a series of local events with the same content or topic. It was envisaged that individuals would travel to attend these national events.

Table 12 shows the extent to which attendees have travelled to events, by the broad type of event. While it has not been possible to undertake this analysis by distance travelled, it is found that there is a high proportion of individuals who have travelled to these events (an average of 70% of individuals travel). While this varies by type of event, each has achieved more than 50% of attendees from outwith the area of its delivery.

The majority of attendees are willing to travel to the events.

7.7 Attendance by Gender

In considering one aspect of the equity agenda, Table 13 shows that the programme has been successful at securing both male and female attendees to the programme with 58% attendees of the programme being female.

The programme has been successful at securing female attendance.

7.8 Rural/Urban Attendance

It has been possible to provide an analysis of attendance at the events by rural/urban location of the business. Although 15% of attendances and 17% of businesses attending no postcode was available, it has been possible to provide an analysis of participation using the Scottish Government Urban Rural Definitions.

Table 14 shows that most attendees (57% of businesses and 64% of individual attendances) are from urban areas. Only 21% of businesses and 16% of attendances are from areas which are more than 30 minutes travel from an urban area.

Table 14 Analysis of Private Sector Attendances by Rural/Urban Location

		Individual Attendances			Businesses Attending		
SE Rural Definitions	**Category**	**No. private attendances**	**% of all**	**% of known location**	**No. private businesses attending**	**% of all**	**% of known location**
Large Urban Areas	1	828	42%	49%	185	33%	40%
Other Urban Areas	2	248	12%	15%	78	14%	17%
Accessible Small Towns	3	60	3%	4%	20	4%	4%
Remote Small Towns	4	12	1%	1%	6	1%	1%
Very Remote Small Towns	5	9	0%	1%	5	1%	1%
Accessible Rural	6	340	17%	20%	101	18%	22%
Remote Rural	7	96	5%	6%	36	7%	8%
Very Remote Rural	8	87	4%	5%	28	5%	6%
Location not known	n/a	308	15%		94	17%	
		1988	100%	100%	553	100%	100%

Source: Analysis of Participant Information

Scottish Government Urban Rural Classification

Large Urban Areas	1	Settlements of over 125,000 people
Other Urban Areas	2	Settlements of 10,000 to 125,000 people
Accessible Small Towns	3	Settlements of between 3,000 and 10,000 AND within 30 minutes drive of a settlement of 10,000 or more
Remote Small Towns	4	Settlements of between 3,000 and 10,000 AND with a drive time of between 30 and 60 minutes drive of a settlement of 10,000 or more
Very Remote Small Towns	5	Settlements of between 3,000 and 10,000 AND with a drive time of over 60 minutes drive of a settlement of 10,000 or more
Accessible Rural	6	Settlements of less than 3,000 people and AND with a within 30 minutes drive of a settlement of 10,000 or more
Remote Rural	7	Settlements of less than 3,000 AND with a drive time of between 30 and 60 minutes drive of a settlement of 10,000 or more
Very Remote Rural	8	Settlements of less than 3,000 AND with a drive time of over 60 minutes drive of a settlement of 10,000 or more

Unfortunately there is no available figures on the spread of tourism businesses by urban/rural classification so it is not possible to gauge the extent of penetration of the programme to these groups.

The programme has been less successful at securing attendees from remote areas.

7.9 Level of Participant

It was possible by considering the job titles of each individual to identify those who were owner/manager or those who were the most senior manager within an organisation. This categorisation was used to identify the number and proportion of owner/senior managers who attended elements of the programme.

It should be noted that there are weaknesses in this methodology. Firstly the information on job titles was not comprehensive within the participant information received and so the figures presented of numbers of owner/managers are under-estimated. This is particularly the case for the ebusiness seminars where job titles were not provided. Similarly for some of the job titles it was not possible to identify with certainty the 'level' of the individual. In these circumstances, the individual was noted as a non owner/senior manager.

Table 15 shows that an average of 19% of participants in the programme were owner/senior managers. (20% if the ebusiness seminars with partial information are excluded). There is only limited variation in the level of attendance between types of events with the Executive Seminars and Business Insight seminars being most successful at securing this level of staff and the Business Tourism Conferences being least successful.

The programme appears successful in securing senior staff in attending the events

7.10 Attendance by Type of Organisation

A categorisation was also undertaken by the type of tourism business and this is shown in Table 16. This shows that the largest source of individual attendees are hotels (35%) and visitor attractions (29%). There is also a significant representation from other accommodation (19%)

Attendance of the programme is dominated by accommodation and visitor attractions.

Table 17 shows that there are some variations in the type of organisations who are attending different types of TMLDA events.

Of note is the greater attendances of other accommodation providers to the ebusiness workshops; greater attendance of hotels to the Executive Seminars; attendance of non tourism businesses to the sustainable tourism conference and greater attendance of venues to the business tourism conferences and executive seminars.

Table 15: 'Level of Attendee by Type of Event

Category of Event	Owner/CEO	Non Owner/CEO	Total	% owner/CEO
Business Insights	54	155	209	26%
Business Tourism Conference	63	347	410	15%
Customer Services Conferences	67	306	373	18%
E business Workshops		156	156	0%
Executive Seminars	15	46	61	25%
Gleneagles Masterclasses	137	495	632	22%
Learning Journeys	25	71	96	26%
Sustainable Tourism Conference	11	40	51	22%
Total	**372**	**1616**	**1988**	**19%**
Excluding ebusiness:	**372**	**1460**	**1832**	**20%**

Source: Analysis of Participant Information

Table 16: Organisations who Attended by Type of organisation

	No individual Attendees	% of individual attendees	No organisations	% of organisations
Hotel	702	35%	151	27%
Attraction/activity	574	29%	136	25%
Other accommodation	170	9%	67	12%
Tourism supplier	80	4%	43	8%
Non Tourism Business	56	3%	35	6%
Venue	175	9%	31	6%
Eating out	77	4%	29	5%
Tours/holidays	69	3%	28	5%
Transport	43	2%	12	2%
Estate	24	1%	6	1%
Unknown	18	1%	15	3%
Total	**1988**	**100%**	**553**	**100%**

Source: Analysis of Participant Information

Table 17: Attendance by organisation type, by type of event

Category of Event	Other Accommodation	Attraction/activity	Eating out	Estate	Hotel	Non tourism business	Tourism supplier	Tours/ holidays	Transport	Unknown	Venue	Grand Total
Business Insight Seminars	14%	34%	3%	4%	20%	2%	5%	4%	0%	4%	10%	100%
Business Tourism Conference	2%	26%	3%	0%	35%	3%	7%	3%	1%	0%	18%	100%
Customer Service Conference	6%	36%	7%	0%	32%	0%	4%	1%	6%	1%	6%	100%
E Business workshops	22%	30%	0%	1%	23%	5%	5%	9%	0%	0%	4%	100%
Executive Seminars	10%	20%	2%	2%	38%	0%	2%	2%	3%	5%	18%	100%
Gleneagles Masterclasses	9%	25%	5%	2%	44%	3%	2%	3%	2%	0%	5%	100%
Learning Journeys	8%	29%	1%	1%	52%	0%	1%	1%	0%	0%	6%	100%
Sustainable Tourism Conference	10%	33%	0%	0%	29%	18%	2%	8%	0%	0%	0%	100%
Grand Total	**9%**	**29%**	**4%**	**1%**	**35%**	**3%**	**4%**	**3%**	**2%**	**1%**	**9%**	**100%**
% of all attendances	**9%**	**29%**	**4%**	**1%**	**35%**	**3%**	**4%**	**3%**	**2%**	**1%**	**9%**	

Source: Analysis of Participant Information

8 MARKETING AND RECRUITMENT TO THE PROGRAMME

A range of different marketing activities were undertaken to recruit attendees to the events and are outlined below:

8.1 Tourism Management Development Programme

Marketing for the Tourism Management Development Programme (TMDP) was led by Scottish Enterprise Marketing team and comprised overall programme and individual event level activity. Over the period this included:

- A brochure including all events in the programme, and where known, other tourism events held throughout the year produced using SE branding
- Brochures for 'series' of events such as for MasterClasses
- Brochures for individual events
- Mailing of the above brochures to an internal SE database of 2500 tourism businesses, based on Scottish Enterprise's Customer Relationship Management database. These mailings typically went out 6-8 weeks prior to an event, but on occasion later
- These brochures were also distributed at events within the programme and via other stakeholder organisations
- Promotion of events on SE's internet web site
- Promote the events through SE's monthly tourism Ezine successfully issued to c3,000 CRM database contacts
- Use of 'eblasts' for individual events, typically close to the event to secure additional attendance
- Encouraging other tourism organisations and intermediaries such as STF to promote the SE events to their members through enewsletters and other forms.
- The promotion of the most recent customer services conference in March 09 included contracting attendees of previous similar events

In addition, event managers Stark Events undertook further promotion of the events using eblasts and follow up telesales in the latter stages of recruitment to the event, largely to widen the availability of audiences for the events that were proving difficult to sell.

The content of all brochures and promotional materials was typically written and approved by the individual project managers within SE, and passed to SE marketing who project managed and coordinated the production of the brochures.

Effectiveness of TMDP Marketing

There is some evidence on the effectiveness of the marketing of these programmes, which has been pulled together from a number of sources.

Ultimately the success of the marketing of the events is securing the right type and number of participants to the events. Section 7 provides a greater analysis on the nature of participants in terms of their level within organisation, location etc, however Table 18 reports on the overall number of attendees by type of event. The target numbers for each type of event vary significantly with the conferences seeking the greatest number and the Executive Seminars the least.

Table 18 shows that the ability of the marketing effort to recruit is effective for most types of event. The performance of recruitment to the events varies significantly with the Customer Services Conference, Business Insights, Business Tourism Conference and Gleneagles Masterclasses all, on average, exceeding their target markets. The other events only partially met their target with the Executive Seminars performing particularly poorly.

Although there are no specific targets for the number of private attendees by type of event, Customer Services Conference and Gleneagles Masterclasses were the most successful in securing attendance from these groups. Table 19 shows that while recruitment to the ebusiness workshops was below target (of 25-30 per workshop), this improved from 07/08 to 08/09.

It can be concluded that if these events were to continue and reach larger numbers of tourism businesses, increased capacity would be required for the Customer Services Conference, Business Tourism Conference and Business Insight events which may be achievable simply, and without reducing the quality of the event, by increasing the venue size. All other events could cope with increased attendance easily.

Table 20 draws information from the available early participant feedback, of individual events on how the attendees found out about them. This shows that the most common source of information is through email (37%), although it is unclear if this is from a monthly enewsletter or through specific event eblasts. This is then followed by personal recommendation/word of mouth (26%) and direct mail/information from organiser (22%). Unfortunately this information is too patchy to draw robust conclusions, with substantial variations between events and no clear trends over time.

A comparison was made between SE's database used for marketing and the attendees of the programme. This concluded that:

- Only 9% of the organisations who have received direct mail shots from SE have attended any event over the period of the evaluation
- 40% of the organisations who have attended one or more of the events were also on the SE mailing list.

Analysis of the enewsletters and eblasts issued by SE show that:

Table 18: Success of Recruitment per Type of Event

	Individual Attendances	Private sector Attendances	No events	Average attendance (all)	Target	% target achieved	% of private to target
Customer Services Seminars	568	373	3	189	150	126%	83%
Business Tourism Conference	678	410	4	170	150	113%	68%
Executive Seminars	94	61	7	13	35	38%	25%
Business Insights	390	209	9	43	35	124%	66%
E Business workshops	217	156	11	20	25	79%	57%
Learning Journeys	126	96	6	21	30	70%	53%
Gleneagles MasterClasses	884	632	10	88	75	118%	84%
Sustainable Tourism Conference	107	51	1	107	150	71%	34%

Table 19: Success of Recruitment to Ebusiness Workshops

	Individual Attendances	Private sector Attendances	No events	Average attendance (all)	Target	% target achieved	% of private to target
2007/08	114	81	6	19	25	76%	54%
2008/09	103	75	5	20.6	25	82%	60%
Total	217	156	11	19.8	25	158%	
Number unique individuals attending	108	79					

Source: Analysis of Participant Information

Table 20: Source of Attendees to events

	Customer Service Conference 07	Customer Service Conference 08	Nov 08 Masterclass	Business Tourism Conference 2008	Visitor Experience Conference Mar 09	Average
Personal Recommendation/word of mouth		23%	32%		24%	26%
Direct Mail/organiser	39%	27%	0%	25%	17%	22%
Email	27%	41%	50%	27%	38%	37%
Internet			9%		8%	9%
Press					1%	1%
Partner organisation			9%		9%	9%

Source: Early Participant Feedback

- For the regular Ezine, 3,003 messages were delivered, 22% of emails are opened and 12% 'click' a link in the email to find out more information
- For the promotion of a sample typical event (Innovation Day Jan 09), 3,410 messages were delivered, 21% opened the email and 4% 'clicked' to find out more information
- For a series of 6 eblasts on the visitor experience conference in March 09, 20,387 messages were delivered, 6% of emails were opened and 4% were 'clicked'

It has not been possible to secure information for similar programmes or activities external to SE to allow a comparison of this effectiveness of the marketing.

Improving Marketing of TMDP
There is a general view from stakeholders that while the marketing of events has provided satisfactory participant figures a number of areas for improvements have already been identified including:
- Improved message of the benefits of each event with a clear statement of what an organisation would get out of attendance of the event, to produce a clearer 'sell'
- Secure clarity on the target audience sought for each event, recognising this is expected to be different for each event
- Introduce positive PR to promote the events.
- Introduce segmented or customised marketing of the event by topic or issue covered.
- Undertake specific promotion at key destination level
- Improved promotion through SE network staff, such as account managers to encourage attendance from their client companies
- Increased long term planning of events, particularly the availability of promotional materials on schedule.
- Improved allocation and implementation of roles within the SE network. In particular clarity of roles, improved communications and achievement of deadlines are required.
- More innovative, web based marketing mechanisms should be explored and used
- Use of information on previous attendees in the promotion of future events

While those involved and other stakeholders feel that the marketing of the programme has been suboptimal, the programme has secured participants.

8.2 Tourism E Business Workshops

The ebusiness workshops were delivered and marketed by the Scottish Tourism Forum (STF) over 2007/08 and 2008/09. They comprised 11 separate workshops delivered in locations throughout Scotland. The workshops were delivered to basic (yr1) and intermediate (yr2) levels

The key target for the ebusiness workshops was smaller companies with a desire to improve their ebusiness capabilities.

STF undertook a range of marketing of the workshops focusing on the use of word of mouth recommendations and promotion to their members (largely through e-communications).

As a result of this they secured attendances at their workshops of 217, set out in Table 19. This is an achievement of an average of 20 attendances, which is below the 25-30 target recruitment for the workshops. On closer inspection, between the two years of provision there is a high level of repeat attendance to the workshops, so that only 108 unique individuals (79 from the private sector) attending the workshops.

As a mechanism for recruiting high volume of smaller tourism businesses, this draws some doubt over the effectiveness of the STF marketing and recruitment approach.

STF were relatively successful in recruiting to the ebusiness workshops, however this was achieved largely through attendance of the same individuals in each of the two programmes.

8.3 Leading Service Excellence

The delivery structure of Leading Service Excellence (LSE) is unique. The programme identifies and provides a license to individual training providers, gives them developed course materials and encourages them to market and deliver the course themselves. This was designed to stimulate private sector provision to meet the identified needs of the sector.

To support this, SE/HIE developed and provided core marketing materials on the programme including leaflets/brochures and through a One Hundred Thousand Welcomes web site.

While the provision of the short course for front line staff (Delivering Service Excellence) has had some provision, this has not been achieved with the leadership/management level course (LSE).

Demand has been highly limited with resulting delivery being mainly through in house provision. Only one open course has been delivered to leaders/managers from a range of tourism businesses. This was achieved when a local authority – North Lanarkshire Council – took a proactive role in establishing the event and actively promoting it to local tourism businesses.

It is the view of the interviewed providers of LSE that such a ‘group’ programme would not be established without such as an impartial third party organising and promoting the event. This would leave the only potential market for provider driven provision as in house courses to larger organisations with sufficient managers to justify holding the course.

It was the aim of this innovative delivery structure for private sector supply chain to take the lead in establishing provision and securing private sector demand. The absence of an ‘honest broker’ to establish the provision for cross company attendance and the latent nature of the demand for leadership and management skills in smaller businesses has conspired against this delivery mechanism. It is concluded that this delivery mechanism has been ineffective.

The delivery mechanism and marketing of LSE programme has been ineffective.

9 VIEWS OF ATTENDEES: PRIVATE SECTOR

9.1 Early Participant Feedback

For some of the conferences and events, participant surveys were undertaken at or immediately following the event to secure feedback on the quality and relevance of the events.

While the questionnaires did not contain a standard set of questions and were therefore inconsistent, it has been possible to provide some high level results for seven of the events, which are shown in Table 21.

Covering both public and private sector participants, this shows that early feedback was very positive with over 90% citing the events as good or very good overall for each of the events. These also show a high impact on the way participants and their businesses will work (between 74% and 88% of respondents report some impact).

A *note of caution* is required here as it is rarely the case that events receive negative feedback from participants immediately after an event, and where there are indications of further actions, these may not be followed through on the participants' return to work.

9.2 Private Sector esurvey

As well as the analysis of existing early participant feedback, two surveys were undertaken with participants from the private sector. The first was a short esurvey of participants to any event. A copy of the questionnaire used for the survey is attached at Annex III.

A total of 975 unique participants had available email addresses and were invited to participate in the esurvey (70% of all private sector attendees). Of these a small proportion (3%) of these emails bounced back due to incorrect emails or mail delivery failures. A total of 59 individuals responded to the survey, representing a response rate of 6% of successfully delivered esurveys. No sample frame was established for this survey, so it is not possible to assess the extent to which it is representative of all attendees, however at a confidence level of 95%, the confidence interval of results for this random survey is +/- 12. This level of confidence is seen as acceptable to produce robust results for most questions, but where it raises doubts, these are highlighted below.

The aim of the survey was to secure high level indications on how relevant individuals found the events; what they had secured from it and if they had taken any action following the events. More detailed investigations were restricted to the subsequent telephone survey. The key findings of this esurvey are set out in this section.

Table 21: Summary of Early Participant Feedback

Event		Ebusiness Workshops	BTC 2006	BTC 2007	BTC 2008	CSS 2007	CSS 2008	Nov 08 GMC
Number of attendees		103	167	204	162	224	167	72
Number of respondents		70	42	65	77	59	56	22
Overall Response rate		67%	25%	32%	48%	26%	34%	31%
How do you rate:								
Event overall	Very Good or Good	97%	91%	97%	95%	98%	91%	95%
Speaker	Very Good or Good	94%	81%	87%	77%	90%	84%	100%
Impact on the way you and your business work	Yes		76%	81%	74%	81%	88%	
Shared messages with colleagues?	Yes		91%	98%	97%	98%	91%	
Workshop content	Very Good or Good		82%	88%	70%	47%		
How did you hear about event?	email	44%			27%	27%	41%	50%
	Organiser	23%			25%	39%	27%	
	word of mouth	20%			20%	9%	9%	14%
	other						23%	36%
Recommend the event to others	yes	87%						91%

Source: Early Participant Feedback

Table 22: Relevance of the events to your business

	Number of responses	% of responses
Very Relevant	13	22%
Relevant	41	71%
Only a little	4	7%
Not at all relevant	0	-
Total	58	100%

Source: Esurvey of Private Participants

Table 22 shows that the majority of respondees found the events relevant (71%) or very relevant (22%) to their business. Table 23 shows that respondents felt that they had gained new knowledge/information and increased motivation or inspiration more than new skills. In both these areas the majority of respondents reported that the events provided a significant or very significant impact.

Table 23: Extent, following the events of personal gains in:

	New knowledge and Information	New Skills	Increased Motivation or inspiration
Very significantly	17%	3%	17%
Significantly	64%	32%	54%
Only a Bit	19%	52%	29%
Not at all	0	12%	0
Average Score*	**1.98**	**1.27**	**1.88**

(*) Score where Very Significant = 3; significant = 2, Only a bit = 1, not at all = 0

Source: Esurvey of Private Participants

A substantial proportion, 90%, took action back in their business following attendance of the event(s). Of those who took action, the areas are reported in Table 24. Given the size of the sample, these should be regarded as indicative areas of action undertaken.

Table 24: Area of Action Taken in Business following the Event

	Number of responses	**% of responses**
Undertaking some action: Of which:	53	90%
General business strategy/planning	22	42%
Marketing including market intelligence	25	48%
Customer Service	26	50%
Developed or improved a product	13	25%
Capital Investment	0	-
Resource/Cost efficiency	5	10%
New or improved technology including web	10	19%
People and organisational development	12	23%
Networks/partnerships with other businesses	21	40%
Total no. actions taken	134	
Average actions taken per respondent taking any action	2.5	

Source: Esurvey of Private Participants

A total of 134 actions were reported as having been undertaken (on average 2.5 actions per respondent who took any action). Of these the most common areas of action were customer service and marketing including market intelligence.

To ascertain the extent to which the events had stimulated additional action, those who had undertaken action were asked what their actions would have been without the event. (See Table 25)

Table 25: Influence of the events on the Action (additionality): Behaviour if didn't attend the event

	Number of responses	**% of responses**	**'Additionality Score'**
Would have undertaken it anyway, in the same way	4	8%	0
Would have done it but later	17	33%	0.5
Would have done it but smaller or of less quality	25	48%	0.5
I would not have undertaken it at all	6	11%	1
No response	1		
Average additionality			0.52

Source: Esurvey of Private Participants

Using the simple ranking system where those who indicated absolute additionality are scored 1; partial additionality 0.5 and absolute deadweight 0, the average additionality is 0.52.

Respondents were then asked whether they had attended other similar conferences or seminars and, if they had, their views of how the SE events compared with them.

A total of 61% of respondents indicated that they had attended other events, these were reported, by 13 respondents, as a wide range including events by Scottish Tourism Forum, EventScotland, VisitScotland, chambers of commerce, tourism area partnerships, Highlands and Islands Enterprise as well as others on identified topics but where it was not clear who had hosted them.

Of those who responded, Table 26 shows that the majority felt that the other events were comparable with those held by SE (65%). For those who noted a difference, slightly more felt that SE events were better (23%) than worse (11%).

Table 26: Comparison of SE events with Others

	Number of responses	% of responses
SE events were better	6	23%
About the Same	17	65%
Others were better	3	11%
Total respondents	26	

Source: Esurvey of Private Participants

Finally, respondents were asked how SE could improve the quality and relevance of the events and the following suggestions were received:

Getting industry to speak more (1)
More on retail (1)
Information on SE policies, accessing SE funding (1)
Make more accessible by taking them into the regions or using virtual technology (3)
Hold events on topics of more direct relevance to businesses (2)
Event on the current financial situation and sustainability of businesses (1)
No comment/good (2)

9.3 Private Sector Telephone Survey

The second and more indepth investigation was undertaken through a telephone survey of companies who had attended one or more events. A copy of the questionnaire used can be found in Annex IV.

9.3.1 Sample Frame and Responses.

A structured sample was selected for the survey which was based on the overall population of participants, where the sample was selected to be representative of business type and the frequency of attendance at any event. This approach has ensured that there is a breadth of companies interviewed which are broadly representative of the total population, so that the results are not skewed by the responses of ‘unusual’ attendees.

Table 27 Shows the breakdown of the overall population and the telephone interviews achieved. 56 interviews were completed, representing 10% of the total population of companies who attended any aspect of the programme. The sample achieved is broadly representative by type of organisation (although less representative for those less common types of organisations, due to the small numbers of participants) and broadly representative by frequency of attendance.

Table 28 presents the attendance of the businesses who responded to the survey, by type of event. The respondents represent 22% of all attendances, split broadly consistently across type of event (ranging from 12% to 29% of attendees to that type of event).

It is concluded that the survey is representative of the private sector businesses attending the ebusiness and TMDP events of the programme. Given the use of the sample frame the results are regarded as equivalent to a random sample of 10%, so giving rise to a confidence interval of +/- 12 at a 95% confidence level. This level of confidence is seen as acceptable to produce robust results for most questions and their responses, but where it raises doubts, these are highlighted below. It should be noted that given the performance of the LSE programme, no interviews were held with the limited number of their participants.

Where more than one individual from an organisation had attended an event, the survey was undertaken with the most senior member of the organisation who had attended an event, to allow them to comment on the overall impact on the organisation.

In undertaking the survey the length of time between attendance at the events (sometimes 05/06) and the time of interview meant that for many respondents they found it hard to respond to specific questions on individual events. This was probed as far as possible; however for most respondents this was difficult. Linked to this, the respondents also found it impossible to isolate the effects of individual events on their business, and responses therefore relate to all events attended.

9.3.2 The Respondents

The majority of interviewees (75%) were at the owner/manager level. This is substantially higher than the 19% of overall attendees to the events who were from this level. This provides stronger confidence in the ability to report on business actions and benefits. 52% of respondents to the survey were female, slightly less than the 58% of all attendances.

Table 27: Sample Frame for Telephone Survey

Overall Population
Frequency of Attendance

Type of Organisation	1	2	3	4 plus	Total
Other Accommodation	35	20	5	7	67
Attraction	49	24	12	51	136
Eating Out	16	4	3	6	29
Hotel	41	42	7	61	151
Estate	2		1	3	6
Non Tourism Business	22	8	2	3	35
Tourism Supplier	24	13	3	3	43
Tours	12	8	2	6	28
Transport	4	3	2	3	12
Venue	8	7	1	15	31
Unknown	14	3			17
Total	**227**	**132**	**38**	**158**	**555**

Source: Analysis of Participant Information

Surveys Achieved
Frequency of Attendance

Type of Organisation	1	2	3	4 plus	Total	% achieved
Other Accommodation	3	2	1		6	9%
Attraction	4	3	3	10	20	15%
Eating Out				1	1	3%
Hotel	3	2		11	16	11%
Estate	1				1	17%
Non Tourism Business	1				1	3%
Tourism Supplier	3			1	4	9%
Tours	1				1	4%
Transport	2				2	17%
Venue	1			2	3	10%
Unknown	1				1	6%
Total	**20**	**7**	**4**	**25**	**56**	**10%**
% achieved	**9%**	**5%**	**11%**	**16%**	**10%**	

Source: Analysis of Respondents to telephone survey

Table 28: Event Attendances by respondent organisation by Type of Event

Type of event	Attendances from Respondents	Total Private Attendances	% coverage of attendances by survey
Customer Services Seminars	94	373	25%
Business Tourism Conferences	78	410	19%
Executive Seminars	14	61	23%
Business Insights	46	209	22%
Ebusiness Workshops	18	156	12%
Learning Journeys	16	96	17%
Gleneagles Masterclasses	147	632	23%
Sustainable Tourism Conference	15	51	29%
Total	**428**	**1988**	**22%**

Source: Analysis of Private Telephone Responses

Table 29: Level and Sex of Respondents

	Number of responses	% of responses
Owner/Manager	42	75%
Junior Manager	14	25%
Front Line Staff	0	-
Male	27	48%
Female	29	52%

Source: Telephone Survey of Private Participants

9.3.3 Sources of Information

Prior to detailed discussion on the benefits and impact of the events on the respondents, for context, interviewees were asked how they currently seek information on market, new trends, and business improvements (see Table 30 below)

Table 30: Sources Used to secure information on business improvements

	Number of responses	% of responses	% felt most important
Don't seek this information	0	-	
Internet	53	95%	64%
Conferences/events	17	30%	7%
Training Courses	15	27%	5%
Networking with other businesses	35	63%	16%
Advisors	12	21%	5%
Other	28	50%	29%

NB where businesses were unable to identify the most important, they cited more than one.

Source: Telephone Survey of Private Participants

A wide range of other sources of information were identified which can be broadly categorised as:

Public Sector organisations	12	(such as SE, VisitScotland, Local Authorities)
Trade Associations	10	
Specialist journals/publications	6	
Industry Contacts	3	
Research into competitors	2	
Customers	1	

Table 30 shows that while all companies are seeking information in relation to business improvements that use a breadth of sources. These are dominated by the use of the internet (95% use this as a source and 64% cite this as the most important source of information) and networking with other businesses. While 30% cited events and conferences as a source of information, only 7% identified them as the most important.

Events and Conferences are only one source of information to businesses and is substantially less used that the internet and contact with other businesses.

9.3.4 Business Changes and their Prompt

To further examine the context, prior to discussing details of the impact of the events, attempts were made to ascertain the nature of business improvements that businesses were already making and what had prompted the business improvement.

Firstly interviewees were asked the nature of any business changes they had made within the last year and Table 31 shows that almost all businesses (96%) had made some change, with an average of just under 5 actions taken by each respondent. The most common areas for improvement in the last year were improved technology, including web; customer service; marketing and general business planning. Given the size of the sample and the confidence interval of +/- 12, these results of area of business change should be regarded as indicative.

Table 31: Area of Business Changes or Improvements within the Last Year.

	Number of responses	% of responses
Undertaking some action: **Of which:**	54	96%
General business strategy/planning	30	54%
Marketing including market intelligence	31	55%
Customer Service	33	59%
Developed or improved a product	31	55%
Capital Investment	22	39%
Resource/Cost efficiency	25	45%
New or improved technology including web	36	64%
People and organisational development	24	43%
Networks/partnerships with other businesses	21	38%
Other (driver training)	1	16%
Total no. actions taken	254	
Average actions taken	4.7	

Source: Telephone Survey of Private Participants

Table 32 reports the initial prompt or motivation for the business improvement. These were dominated by general business pressures, and internally driven factors such as a general push for continuous improvement and business identified areas for improvement. The traditional external mechanisms of intervention to prompt change appear to have had a limited affect on recent changes – discussion with business advisor (2%), attendance at event or workshop (6%).

Table 32: Initial prompt to the change/improvement or motivated the change?

	No responses	% of respondents
Businesses taking some action. Of which prompted by:	54	96%
Major change in your market/customer needs	17	31%
General continuous improvement; business review driven; continued competitiveness	16	30%
Current Economic/Business pressures	15	28%
Learning of other approaches/good practice	5	9%
Attendance at event/workshop	3	6%
Business networking/discussing with other businesses	3	6%
To establish new business or part of business	2	4%
New management/owner	1	2%
Discussion with a business advisor	1	2%
Changes in legislation	1	2%
Staff morale	1	2%

Source: Telephone Survey of Private Participants

Prompts to make changes are reported as being largely generated from within the business.

Table 33 : Public sector support or assistance to the implementation any of these changes?

	No responses	% respondents
NO	33	61%
YES – financial support/grant	16	30%
YES – business advice	7	13%
YES – training/workshop	5	9%
YES – other: Equipment Support	1	2%

Source: Telephone Survey of Private Participants

While businesses report that business improvements are prompted by themselves, 39% have received some form of public sector support to implement an action including 9% attending a workshop/training course.

However most (61%) of businesses implemented business improvements without any public sector support.

9.3.5 Attraction to Events

Table 34: How participants heard about the events

	No responses	% respondents
Direct mail	12	21%
Web site	3	5%
Email/Ezine	53	95%
Business Advisor	1	2%
Word of mouth	2	4%
Other: DMO (2) Trade Association (2) Event Manager (1)	5	9%

Source: Telephone Survey of Private Participants

Table 34 reports how participants had heard about the events. The most commonly cited mechanism was email/Ezine (95% citing this as a mechanism). A small proportion (21%) had heard about the events through direct mail. This represents a much stronger role for email/ezines than in the previously reported early participant feedback. This may in part be a reflection on the length of time between attendance at the events and this research with a poor recollection of direct mail exercises, or word of mouth/advisor discussions.

Table 35: Reason for Attendance

	No. respondents	% of respondents
Format	5	9%
Topic	50	89%
Speaker	18	32%
Venue/location	3	5%
Recommendation by Colleague	1	2%
Other: Networking opportunity	2	4%

Source: Telephone Survey of Private Participants

The over riding reason for attendance at events is the relevance of the topic, with the speaker a secondary factor. For those who have attended the location and format are of importance to only a few respondents.

Table 36: Reason for Non Attendance of other events

	No. respondents	% of respondents
Format	1	2%
Topic	33	59%
Speaker	2	4%
Venue/Location	5	9%
Price	10	18%
Time out of the office	18	32%
Date/time clashed	8	14%
Other, pls specify New business (1) Not considered others (2)	3	5%

Source: Telephone Survey of Private Participants

For events that they had considered attending but had decided against attending, the dominant factor was also the topic. Taking time out the office was cited by 32% of respondents with price (18%) and clash of date/time (14%) also important. For those that have attended other events, location is not a significant factor. Interesting while price is not a major factor in non attendance of other events, by attendees of the SE events, the same group indicate that if the price of SE events increased they would reduce their attendance (see below). This provides a contradiction which casts doubt on the negative impact of increasing prices of events.

9.3.6 Personal Effects of Attending the Day

Interviewees were asked to report the extent to which they had benefited personally from attending the events and the results are reported in Table 37. There is a strongly positive report on positive impact on individuals. The most common personal changes were cited as great improvements in networking and motivation, with the less common changes being risk taking and greater development of staff. Only one business reported that they had not experienced some form of personal change as a result of attending the event.

Table 37: Personal Changes as a result of attending the event(s)

	Greatly	Partly	Not at all	n/a
Motivation	30%	54%	9%	5%
Making Changes at Work	29%	54%	13%	4%
Strategic Thinking	25%	50%	14%	7%
Innovation	21%	54%	18%	4%
Risk Taking	7%	32%	36%	21%
Networking	34%	46%	14%	2%
Greater Development of Staff	14%	48%	18%	16%

Source: Telephone Survey of Private Participants

9.3.7 Events with Greatest Impact

For those who had attended more than one event, the respondent was asked to identify the event which they felt had the greatest impact and least impact on them. Although unscientific and with low robustness, these are reported below. In addition, interviewees were asked to identify the events which provided the greatest benefit to them.

Table 38: Events cited as having Greatest/Least Impact

	With Greatest Impact	Greatest Benefit to you
Gleneagles Masterclasses	7	8
Executive Seminar	4	6
Ebusiness workshops	3	3
Business Tourism Conference	3	2
Customer Services Conferences	3	3
Sustainable Tourism	1	1
Heritage Business Insight	1	
Event on Management Training	1	1
Innovation events	2	2
IIP events	1	1
No SE event – Glasgow Caledonian event on Family businesses		
No comment/unable to say	7	

	Events with least impact
Gleneagles Masterclasses	3 (2 Paul McKenna)
Business Insight seminar	1
Olympic event	1
Business Tourism Conference	1
Food related event	1
Innovation workshop	1
Marketing European Speaker	1
Don't know/unable to say	13
All well run/good	4

Source: Telephone Survey of Private Participants

The Masterclasses and the Executive Seminars appear, in the view of respondents to have had the greater impact and benefit.

9.3.8 Further Action Taken

Table 39 reports on the action taken by the businesses to follow up on the topics raised at the event (s), separate from any business improvements which they may have taken. The most common follow up action identified is to undertake further research with further attendance at courses, seminars/conferences less usual – taken up by 11% of respondents.

Table 39: Follow up action taken

	No. respondents	% of respondents
Attending Further Training Courses/Conferences	6	11%
Further Research	20	36%
No further action to follow up learning	25	21%

Source: Telephone Survey of Private Participants

Respondents reported extensive dissemination to others within their organisation with only 11% of respondents citing that they had not disseminated. The most common method of dissemination was through verbal briefing/discussion with other members of staff.

Table 40: Dissemination within Organisations

	No. respondents	% of respondents
No dissemination	6	11%
Verbal briefing of other staff	34	61%
Pass round handouts/presentations	26	46%
Other: - Use of web site/online tutorial (2) - Passed onto others in sector	3	5%

Source: Telephone Survey of Private Participants

Those who had attended the ebusiness workshops and responded were asked the relevance of the one to one follow up advice they had received. (9 respondents). As this advice was optional, not all businesses took the offer up, but the feedback from those who did receive the follow up advice was that it was partly or greatly relevant and of value to their business.

Table 41: Relevance and Value of ebusiness Follow up advice

	No. respondents	% of respondents
Didn't receive follow up advice	3	33%
Not at all	1	11%
Partly	1	11%
Greatly	3	33%
N/A	1	11%
Average Score	1.4	

Average Score where Greatly = 2, partly = 1, not at all = 0
Source: Telephone Survey of Private Participants

9.3.9 Implementing Actions within the Business

Table 42: Taking Action After Attending Events

	No. respondents	% of respondents
YES	40	71%
Not Yet, but plan to take action		
NO action taken	15	27%
No response	1	2%

Source: Telephone Survey of Private Participants

A total of 71% of respondents reported that they had taken some action after attending the event. Although less than the proportion reported in the private sector esurvey (90%), this remains substantial. Illustrations of the actions reported are listed in Annex V.

Table 43 reports the degree of action undertaken broadly across type of event attended. Because the interviewees were unable to separate the impact of attendance at different elements of the TMLDA, if they had attended more than one type of event, these results are from interviewees who had attended that type of event at least once, but may have attended other types of events as well. As a result this analysis over-represents the level of overall activity. It does however provide a broad indication of variations between respondents who have attended different types of events.

All those who attended Executive Seminars and ebusiness workshops reported that they had taken action. Those who attended Business Insights (60%), Gleneagles Masterclasses (72%) and Business Tourism Conferences (75%) were least likely to take action, but all showed substantial actions.

The 15 (27%) of businesses who had NOT taken any action, reported the main reasons were lack of relevance to the organisation (33%) and no requirement for action in the business (20%). (Table 44)

Table 44: Reasons for No action being taken

	No. respondents	**% of respondents**
Our organisation already does this	2	13%
Not relevant to my organisation	5	33%
Lack of staff time or resources	2	13%
Nothing required in business	3	20%
Event too general	2	13%
Other - Can't remember (2)	2	13%

Source: Telephone Survey of Private Participants

For those 40 businesses who had taken some action, they were further asked the areas in which they had taken action (Table 45). Due to the confidence interval of the survey, the type of action should be regarded as indicative in their ranking.

Table 43: Action Taken after the event by type of Event and its additionality

Type of Event	% taking action	Additionality of action taken	Net Additional actions
E Business workshops	100%	0.25	0.25
Customer Service Conference	84%	0.24	0.20
Gleneagles Master Classes	72%	0.14	0.10
Business Tourism Conference	75%	0.23	0.17
Executive Seminars	100%	0.08	0.08
Learning Journey	80%	0.20	0.16
Business Insight	60%	0.05	0.03
Sustainable Tourism Conference	88%	0.25	0.22

Source: Private Sector Telephone Survey

Table 45: Area of Business changes or improvements taken after the events.

	No. who took action after event	% of companies after event	% of companies in last year undertaking any action*
General business strategy/planning	20	50%	54%
Marketing including market intelligence	22	55%	55%
Customer Service	21	53%	59%
Developed or improved a product	17	43%	55%
Capital Investment	10	25%	39%
Resource/Cost efficiency	10	25%	45%
New or improved technology including web	15	38%	64%
People and organisational development	11	28%	43%
Networks/partnerships with other businesses	11	28%	38%
Other improved working practices (2); general cutbacks (1), Freedom of Information (1)	4	10%	16%
Total no. actions taken	141		254
Average actions taken	3.5		4.7

(*) from Table 31

Source: Telephone Survey of Private Participants

The businesses who took action, reported undertaking a wide range of actions, with the most commonly cited marketing and market intelligence (55% of businesses), general business strategy (50%) and customer service (53%).

It is possible to make comparisons to the actions which companies reporting having undertaken over the last year, and not necessarily as a result of attendance at any event. This shows that:

- As expected fewer actions were taken specifically as a result of attendance of events than for any wider reason
- Action on new or improved technology including web, capital investment and people and organisational development are significantly more likely to be undertaken by the company generally, than specifically related to an event.

Table 46 reports the tendency of respondents who had sent at least one individual to that type of event, to undertake different types of actions. The actions that are most and least likely to have been stimulated are:

Table 46: Performance of Business Attending Different Events by Action taken

	More Likely	Less Likely
General business strategy/planning	ES, CSS	Ebus, Sus Tour
Marketing including market intelligence	ES, BI	Sus Tour
Customer Service	Sch ES, BTC	E Bus
Developed or improved a product		
Capital Investment	BTC, Sch ES	EBus, CSS
Resource/Cost efficiency	BTC, ES	EBus
New or improved technology including web	Ebusiness, BI	Sus Tour
People and organisational development	BTC, Sch ES	Sus Tour, EBus
Networks/partnerships with other businesses	BTC	Sch ES

Source: Telephone Survey of Private Participants
Where ES = Executive Seminar; Sch ES = Schindlerhof Executive Seminar; CSS = Customer Service Standard Conference; BI = Business Insight Seminars; GMC = Gleneagles Masterclasses; Sus Tour = Sustainable Tourism Conference; Ebus = Ebusiness workshops; BTC = Business Tourism Conference

9.3.10 Impact on Business Performance

Unfortunately the companies interviewed were unable to quantify the benefits of the programme on their business. Half of those who had taken action found it impossible to make any comment as they did not have any quantification of performance of the relevant improvements.

While the remaining half was able to identify the type and direction of business benefits that they had experienced from attending the events, all but two were unable to quantify the benefits to their business.

The inability to quantify the business benefits was due to a number of factors, those that were cited by the interviewees were:

- Difficulties in attribution of changes in the business's performance to the specific business improvements that had been undertaken
- The time elapsed since they had attended the event(s)
- Lack of performance measures within the business to report such figures.

While this evaluation has failed to secure quantification of business benefits, given these reasons it is unclear whether any retrospective survey methodology would have been able to secure the appropriate estimates of impact. In consideration of an alternative methodology which has been examined in the recent evaluation of the Tourism Innovation Approach, measurements were taken of changes in overall business performance and not those that were attributable to the support received, and this may be the only inaccurate but indicative measures available.

In retrospect, any methodology is likely to find this difficult or impossible unless the companies supported have established a clear monitoring system of business performance and measures which are specific to the improvement undertaken. An approach which is thought to be very uncommon in tourism businesses.

While it has not been possible to quantify the impact of the actions undertaken, on business performance, it has been possible to provide some analysis of the type and direction of business impact. Tables 47 to 49 show that, of those businesses who had undertaken a change and felt able to comment (50% of those who made a change). 93% reported an increase in visitor numbers and all reported an increase in turnover. Only one business reported a negative impact of the programme as a decrease in visitor numbers.

Companies were also asked to identify other benefits that they had received and a wide range of softer benefits were identified. The most significant was networking, cited by over half the businesses surveyed (54%). In addition 3 (5%) cited the ability to benchmark themselves against other businesses and the opportunity to market and promote their business was cited by 5%. Other benefits cited were that staff recognise that their company has a commitment to personal development and the attendee felt more empowered as a leader.

9.3.11 Market Displacement

While it was not possible to quantify the business benefits and subsequently the economic benefits of the programme, an attempt was made to estimate the extent of market displacement (eg where a hotel has increased their visitor numbers after improving their marketing, but only at the expense of taking visitors from other Scottish hotels) and additionality of the benefits identified. It should be noted that market displacement does not relate to product displacement (ie substitution) which has been caused by the programme where a publicly funded course competes against a private conference for attendees.. This is commented on at 9.3.16

Market displacement within the tourism sector is notoriously difficult to estimate as it depends on the hypothetical alternative behaviour of tourists/new tourist spend. This is something which is rarely known by tourism businesses themselves. Recognising this difficulty, the views of the tourism businesses were asked on what they felt the alternative action and related spend would have been which presented their estimate of this market displacement It should also be noted however in relation to displacement there is the

Table 47: Business Benefits Identified from those who have taken action

	Visitor Numbers	Turnover/ Sales	Profitability	Employment	Cost Reduction	Resource Efficiency/ sustainability	Other	Across measures
Increase, unquantified	12	9	1	0	0	1	4	27
Increase, quantified	2	1	0	0	0	0	0	3
No change				2	0	0	0	2
Decrease	1	0	0	0	0	0	0	1
Unable to comment	25	30	39	38	40	39	36	50%
Total	40	40	40	40	40	40	40	

Source: Private Sector Telephone Survey

Table 48: Proportion of Business Benefits Identified from those who were able to answer question

	Visitor Numbers	Turnover/ Sales	Profitability	Employment	Cost Reduction	Resource Efficiency/ sustainability	Other
Increase, unquantified	80%	90%	100%	0%	n/a	100%	100%
Increase, quantified	13%	10%	0%	0%	n/a	0%	0%
No change	0%	0%	0%	100%	n/a	0%	0%
Decrease	7%	0%	0%	0%	n/a	0%	0%
Total	100%	100%	100%	100%	n/a	100%	100%

Source: Private Sector Telephone Survey

Table 49: Overall responses across all Measures

Number identifying	Number	%	% of those able to comment
One Increase in business measure	10	25%	50%
Two increases in business measures	6	15%	30%
Three increases in business measures	1	3%	5%
Increase with quantification	2	5%	10%
One decrease in business measure	1	3%	5%
No figures/unable to respond	20	50%	
Total	40	100%	

Source: Private Sector Telephone Survey recognition that in the longer term, investment in and improvement to the tourism product will be required to increase and improve Scotland's general tourism offering overall – both domestically and internationally. This in turn is critical for repeat, referral and reputational effects.[1]

Around half of those who had experienced an increase in visitors/spend were able to comment on the potential alternative behaviour of their tourists/spend. (see Table 50) Of these the majority (83%) felt that without their business improvement project, their extra visitors would have gone to, and spent their money elsewhere in Scotland. The remaining 17% felt that they would have either spent the money outwith Scotland or not have spent the money at all. Given the level of response to a hypothetical question, it is not considered appropriate to attempt to infer a robust displacement figure.

Table 50: Responses to Market Displacement question

	No. respondents	% of respondents
Would not have gone anywhere/wouldn't have spent it at all	1	6%
Would have gone/spent it elsewhere in Scotland	15	83%
Would have gone/spent it elsewhere, outside Scotland	2	11%
Don't know	16	
No increase in visitors expected	6	
Average displacement		

Source: Telephone Survey of Private Participants

9.3.12 Additionality

While it has not been possible to quantify the business and economic benefits, it has been possible to estimate the additionality of the benefits secured. To facilitate cross reference and confirmation, three questions were used.

[1] The development of the tourism sector in Scotland is undertaken by multiple agencies with responsibilities split (including VisitScotland leading on marketing and Scottish Enterprise on the development and improvement of the product). There is evidence that the diversity and overall quality of the product are significant factors in influencing the decisions of tourists to come to Scotland. As such, it is the author's view that any evaluation where the methodology is based on the quantification of displacement which can be directly attributed to improvements in an individual tourism product does not fully reflect its contribution to improving the overall Scottish tourism product and therefore its contribution to generating net additional visitors to Scotland.

Table 51: Intention to take action BEFORE you attended the event (additionality)

	Number of responses	% of responses
Yes definitely	20	42%
I was considering something	11	23%
Nothing was planned	17	35%
Number respondents	48	
No Comment	8	

Source: Telephone Survey of Private Participants

Within the telephone survey, interviewees were asked whether they planned to take action **before** they attended the event. 42% of respondents reported that they did plan to take action and a further 23% were considering some action prior to attending the event. This clearly shows that the majority of those who attend the events are expecting to and committed to taking action in their business. (See framework for analysis section 12).

Subsequently, as shown in Table 42, 71% reported that they had taken action after the event. This would indicate a degree of conversion of those who were 'considering' action into action as a result of the events and a conversion of those who had no prior intention of taking action, to take action, so indicating at least 9 businesses or 29% of those taking action after the events as being totally additional.

Table 52 reports the views of respondents on the additionality of actions taken. This presents a broadly consistent picture with 21 businesses (53%) reporting that they would have undertaken the action in the same way, without the event.

A further 12 (31%) of businesses reported partial additionality (broadly equivalent to those who were considering but not committed to action.) A further 6 (15%) reported absolute additionality. These results, which are reinforcing, provide an estimate of 0.325 additionality of actions undertaken after the event.

This degree of additionality is however substantially different from the level identified by the esurvey of participants of 0.52 (see Table 25 above). There is no clear explanation for the discrepancy in these figures, however it may be that the respondents to the esurvey, which are not necessarily representative, and those who had benefited most from the programme and were therefore more likely to undertake the survey.

Table 52: Action if you hadn't attending the event(s) (additionality)

	Number of responses	% of responses	'Additionality Score'
Would have undertaken it anyway, in the same way	21	53%	0
Would have done it but later	3	8%	
- Significantly	1		0.75
- Partly			0.50
- Only slightly			0.20
- Don't know	2		0.50
Would have done it but smaller or of less quality	9	23%	
- Significantly	3		0.75
- Partly	2		0.50
- Only slightly	1		0.20
- Don't know	3		0.50
I would not have undertaken it at all	6	15%	1
No response	1		
Average additionality			0.325

Source: Telephone Survey of Private Participants

The events appear effective at converting those 'considering action' to take action. The events appear largely of interest to those who are already planning or considering action in the area.

Table 53 reports the intention of participants to take action PRIOR to their attendance of the event by type of event. Respondents who had attended each type of event appear to have converted all those considering taking action to taking action (or an equivalent number of companies who were not planning to take action) In addition, most appear to convert substantial numbers who were not planning to take action. The variations shows that the most successful at converting to action were the Executive Seminars, ebusiness workshops with the Executive Seminar also significant. Business Insights, Business Tourism Conferences and Customer Service Standards conferences appear less effective at converting participants to take additional action.

Table 43 reported previously also reports the degree of additionality of actions, by organisations with attendees at different types of event. In the same way that actions by each event are over-represented by this methodology, the level of deadweight, as the largest proportion of responses is also over-represented. However, this does provide an insight into the variations of additionality by type of event. Those which are relatively more additional

Table 53: Plans to take action PRIOR to attending event by Type of Event, compared to Actions undertaken

	% who took action after event		PRIOR TO EVENT Yes	Considering	No	Total planning to, or considering Action prior to event	Additional Conversion (1)
E Business workshops	100%		43%	29%	29%	71%	29%
Customer Service Conference	84%		43%	33%	24%	76%	8%
Gleneagles Master Classes	72%		38%	19%	43%	57%	15%
Business Tourism Conference	75%		47%	21%	32%	68%	7%
Executive Seminars	100%		50%	17%	33%	67%	33%
Learning Journey	80%		63%	0%	38%	63%	18%
Business Insight	60%		35%	24%	41%	59%	1%
Sustainable Tourism Conference	88%		43%	29%	29%	71%	16%

Source: Private Sector Telephone Survey

(1) Additional conversion is the proportion of businesses, over and above those who had reported planning or considering action, who subseqently took action.

are ebusiness workshops and Sustainable Tourism Conference and those that are least additional were Executive Seminars and Business Insight Seminars.

9.3.13 What would it take to Stimulate Further Action

In order to assist in the future design of the programme, respondents were also asked to identify what could be done to stimulate more action. There were a range of suggestions, the most commonly cited was the provision of financial support (46% of respondents). More practical events (29%), follow up events (20%) and one to one support (20%) were also significant.

Table 54: What would encourage more action

	No Responses	% of responses
More practical events	16	29%
Follow up events	11	20%
One to one support	11	20%
Financial support	26	46%
Nothing	3	5%
Other, pls specify - Sector specific event (2) - More networking - Business mentoring - More business relevance - Longer - Staff training courses	7	12%

Source: Telephone Survey of Private Participants

The most commonly cited constraint in undertaking more action (See Table 55) is the cost or scale of investment required (57%) with the time of management and leaders being significant (36%). The current economic climate/uncertainty was also cited by 12% of respondents.

This highlights that rather than knowledge, information or skills constraints, the major constraints are time of the management and the costs of investment. This would raise doubts on the ability of the type of events that TMLDA offer, to be amended in any way to deliver greater actions from these businesses, independently of other supports or changes within the business. It should be remembered however that these businesses are largely those who are already implementing business improvements, and represent a small proportion of all tourism businesses in Scotland.

Table 55: Main Constraints in undertaking more action

	No Responses	% of responses
No desire to undertake these	3	5%
Don't know what to do	0	-
Don't know how to do it	1	2%
Skills of staff	0	-
Time of management/leadership	20	36%
Cost/scale of investment required	32	57%
No clear incentive/benefit	0	-
Other, pls specify - Current economic climate (7) - No improvements required (2) - External Conditions (landowner, parent organisation) (2) - Employee resources - No constraints	13	23%

Source: Telephone Survey of Private Participants

9.3.14 Costs of Attendance

While the majority of businesses reported that they had incurred travel costs, no business was able to quantify this cost and while some businesses cited staff wages as a cost, this related to in kind contributions of taking time off work and no business was able to quantify the cost.

It is therefore unfortunately concluded that analysis of full costs of the project will be restricted to the costs of fees and these are reported in Section 13.

9.3.15 Affects of SE altering Programme

The companies were asked their likely response to a number of potential changes to the design and delivery of the programme. Reported below, these show that, as expected, a doubling of the price is reported likely to reduce attendances at events with 21% reporting they would stop attending altogether and 57% would attend less often/send fewer to the event.

While 21% felt that they would attend less often if events were held locally, 75% of respondents saw this as a positive move. Only 27% of companies reported a reduction of attendance if there were fewer international speakers at the events.

Interestingly, most businesses (43%) felt that there would be no difference in their attendance if the events were for tourism and non tourism businesses and 27% commented that it was best if they were delivered cross sectorally.

Table 56: Response of Businesses to changes to delivery of events/conferences

	Stop attending	Fewer attend/less often	no difference	Comment
Doubling price	21%	57%	11%	
Holding same event more frequently in Scotland	2%	9%	52%	More attendances (5%); Benefit/positive (25%)
Holding events locally	0%	21%	0%	Benefit/positive (75%) More attendances (4%)
Contracting to a training provider/college to deliver	5%	5%	64%	As long as quality maintained (23%) Bad Idea (11%)
Fewer international speakers	7%	20%	71%	
Developing a programme for tourism and non tourism businesses	0%	2%	43%	Best tourism specific (21%) Best cross sector (27%) Both types useful (7%)
Longer notice of events	0%	0%	79%	Useful (21%)

Source: Telephone Survey of Private Participants

Table 57 shows the variations in the effects of the proposed changes to delivery by those who have attended the different types of event.

Table 57: Variation in views of the Effects of Design Changes, By Type of Event

	Most Negative	Least Negative/Positive
Doubling price	Sus Tour, GMC, BTC	Sch ES, ebus
Holding same event more frequently in Scotland	Sch ES	-
Holding events locally	-	BI, CSS
Contracting to a training provider/college to deliver	Sch ES, Sus tour, GMC	-
Fewer international speakers	Sch ES, ES	-
Developing a programme for tourism and non tourism businesses	-	Sch ES, BTC
Longer notice of events	-	Sch ES, BTC, CSS

Source: Telephone Survey of Private Participants

9.3.16 Substitution (Displacement of other 'products' by the programme)

The level of substitution caused by the programmes is low. During the interviews with stakeholders there was limited provision of similar conferences and events held without direct or indirect SE subsidy. The only other activities identified were trade association conferences such as those by Scottish Tourism Forum, Association of Scottish Visitor Attractions etc which are only partly comparable.

When asked, the attendees confirmed this low level of substitution. Table 58 shows the uniqueness of the SE events/conferences. If SE stopped some or all of their events, the majority would continue to attend the fewer events that SE offered or stop attending events altogether (10%). Only 11% would seek to attend other events, although most were unable to specify which they would be.

Table 58: Response if SE stopped some or all events

	No. responses	% responses
Go to the ones that SE continued to offer	45	80%
Go to no events at all and find out information from other sources	3	5%
Go to no events at all and don't find out this sort of information from elsewhere	3	5%
Go to different events/conferences. Chamber (1) Don't know (3) Edinburgh based events (1) Events very relevant to their industry (1)	6	11%

Source: Telephone Survey of Private Participants

There is limited, if any, substitution of these events from private sector provision.

9.3.17 Future Topics and Areas for Improvement

Finally the companies interviewed in the telephone survey were asked to identify future topics of interest and areas for improvement in the programme. Topics identified were numerous and are set out in Annex VI. Other suggestions for the improvement of the programme were made:

Suggestions for improvement of events	
No suggestions/already good	5
More industry input/liaison	4
Hold events off peak	3
Improved communication/notice of event	3
Introduce follow up advice	2
Workshop events with more interaction	1
More sub-industry Specific	1
More contacts with public sector organisations eg SE, Local Authorities, etc	1
Spend less on evaluation and more on the events	1
Secure a mixture of attendees from different industries	
Motivational/inspirational events are best	1
For charities and social enterprises	1

Other not directly relevant to events	
SE database of support consultants	1
Would like direct contact from SE	2
Consider different venues for conferences	1

10 VIEWS OF ATTENDEES: PUBLIC SECTOR AND INTERMEDIARIES

A substantial proportion of attendees are drawn from organisations outwith the private sector. Defined as those who are employed by the public sector (excluding public sector tourism attractions and venues), intermediaries such as trade associations and general suppliers such as consultants, this group accounted for 1,076 (35%) of all individual attendances; 32% of the unique individuals and 34% of unique organisations who attended.

While the programme was primarily designed to benefit the managers and leaders of the private tourism sector, it is recognised that the development of this public sector/intermediary group can have an indirect impact on the growth of the tourism sector through the wider dissemination of the outcome of the events, changing and improving public sector supports and other benefits.

When the significant number of such attendees were identified in the analysis of participant information, an additional esurvey was designed for the participants of this group. Of the 663 unique individuals from the public sector/intermediaries who attended any aspect of the programme, 462 had email addresses noted in the participant information.

A short esurvey was undertaken, using the questionnaire shown in Annex VIII. A total of 60 responses were received, providing a respectable 13% response rate of those contacted through the survey and 9% of all unique individuals from the public sector/intermediaries who attended any event of the programme. No sample frame was established for this survey, so it is not possible to assess the extent to which it is representative of all attendees, however at a confidence interval of 95%, the confidence level of results for this random survey is +/- 12. This level of confidence is seen as acceptable to produce robust results, but where it raises doubts, these are highlighted below.

The survey was designed to ascertain the extent to which the programme had directly helped the individual attendees; how it had indirectly benefited tourism businesses and the views of the respondents on the programme itself.

10.1 Relevance of Events

Public sector/intermediary attendees were asked how relevant they saw the events to their own work and organisation and then their view of the relevance of the events to tourism businesses in Scotland.

Table 59: Relevance of Events to you own work and organisation

	No. respondents	**% of respondents**
Very relevant	25	43%
Relevant	24	41%
Only a little	9	16%
Not at all relevant	0	-
No response	2	n/a
Total Responded to question	58	100%
Average Score	2.27	

Source: Analysis of esurvey of public sector participants
Average score where very relevant = 3, relevant = 2, only a little = 1, not at all relevant = 0)

The respondents reported a high degree of relevance to their own work and organisation. Just under half (43%) of respondents found the events very relevant, with 16% finding it only a little relevant. This is a higher reported relevance than from private sector respondents (see Table 21), where only 22% felt the events were very relevant.

Table 60: Relevance of Events for Tourism Businesses

	No. respondents	**% of respondents**
Very relevant	28	48%
Relevant	19	33%
Only a little	11	19%
Not at all relevant	0	-
No response	2	n/a
Total Responded to question	**58**	**100%**
Average Score	**2.29**	

Source: Analysis of esurvey of public sector participants
Average score where very relevant = 3, relevant = 2, only a little = 1, not at all relevant = 0)

The respondents were then asked their opinion on the relevance of the events to tourism businesses. All reported that there was some relevance, with just under half regarding these as very relevant. Compared to the relevance to their own organisation, more participants reported their view that the programme had ‘only a little’ relevance. This was however compensated by a higher number reporting that the events were ‘very relevant’ providing, on balance, in the views of the public sector/intermediaries a marginally greater relevance for the tourism businesses than to themselves.

The public sector/intermediary attendees found the events relevant to very relevant to both themselves and, in their view, tourism businesses.

10.2 Who should be the target of the events?

Table 61 demonstrates the views of the public sector/intermediaries that a wide range of groups should be included in the TMLDA's target market. While the most frequency noted target market is 'those who can influence the sector' (60%); businesses with growth potential (59%) and those who are already (59%) or could be persuaded to improve (59%). On average respondents identified over 5 target markets for the events.

Table 61: Ideal Target Market for Events

Target Audiences	No. respondents	% of all respondents citing this target market	% of all citations
Business with growth potential	34	59%	11%
Businesses in key destinations	33	57%	11%
Those who are already committed to improve	34	59%	11%
Those who could be persuaded to improve	34	59%	11%
Medium to larger businesses	16	28%	5%
Small businesses	17	29%	6%
All businesses	32	55%	11%
Anyone with an interest in the sector	29	50%	10%
Those who can influence others in the sector	35	60%	12%
Advisors and supporters to the sector	32	55%	11%
Other (students and those outwith Scotland)	1	2%	<1%
Total	**58**	**100%**	**297**
Average no of citations			**5.12**

Source: Analysis of esurvey of public sector participants

On further examination, where respondents had not cited the target audiences of medium to larger and small businesses, most identified all businesses as a target.

While this presents a picture of a general and unfocused target market, a substantial proportion - 24% - felt that the events should NOT be targeted at all businesses, but rather at one or more of the priority groups (ie those with growth potential, in key destinations or already committed or could be persuaded to improve)

Table 62 shows that the majority of respondents felt that the programme was partly or only a little effective at securing its target market (77%), although 20% of respondents thought that the programme had been very effective at securing attendance from this target market.

Table 62: Effectiveness of event in securing target market

	Number	% of respondents
Very Effective	11	20%
Partly effective	36	64%
Only a little	7	13%
Not at all effective	2	4%
Total	**56**	**100%**

Source: Analysis of esurvey of public sector participants

When the responses of effectiveness of securing the target market is cross tabulated against the target market sought, (Table 63) the respondents viewed that the programme had been least successful at securing attendance from smaller businesses and advisors and supporters to the sector, and most successful at securing attendance from the group that had an interest in the sector and those who were already committed to improve.

There is a diverse view of who should be the target of the audience with most identifying multiple markets. It was viewed that the events were partly effective in securing this market

10.3 Benefits to Participants

Respondents were asked the extent to which they had gained new knowledge or information; new skills or increased motivation or inspiration. Table 64 reports that 73% of respondents felt that they had significantly or very significantly gained new knowledge and information with 67% reporting a significant gain in motivation or inspiration. The gain of new skills was limited with the majority reporting only a bit or no new skills gained at all. (67%).

Table 64: Extent of Gains from the Event

	Very Significantly	Significantly	Only a Bit	Not at All	Average score
New Information or Knowledge	20%	53%	23%	3%	1.9
New Skills	8%	23%	43%	25%	1.2
Increased Motivation or Inspiration	22%	45%	27%	7%	1.8

Average score where very significantly = 3, significantly = 2, only a bit = 1
Source: Analysis of esurvey of public sector participants

Participants reported significant gains in new information/knowledge and increased motivation/inspiration.

Table 63: View of Effectiveness of TMLD in securing Target Market, by Target (public/intermediaries)

	very effective	partly effective	only a litle	not at all	total
Business with growth potential	21%	70%	9%	0%	100%
Business in the key destination areas	19%	66%	13%	3%	100%
Those who are already commited to improve	22%	69%	9%	0%	100%
Those who can be persuaded to improve	21%	64%	9%	6%	100%
Medium to larger businesses	27%	60%	7%	7%	100%
Small businesses	25%	50%	13%	13%	100%
All businesses	19%	71%	10%	0%	100%
Anyone with an interest in the sector	28%	62%	10%	0%	100%
Those who can influence others in the sector	18%	74%	9%	0%	100%
Advisors and supporters to the sector	16%	68%	13%	3%	100%
% overall	20%	64%	13%	4%	100%

Source: Analysis of esurvey of public sector participants

85% of respondents reported that they had taken some action back in their organisation. Of these a total of 83 actions were identified and are reported in Table 65 below. Given the confidence level of the survey of +/- 12, these should be regarded as indicative.

Table 65: Actions Taken back in own organisation, following the events

Action	No. actions	% of all those taking action	% of all actions
Disseminated the information learnt to other tourism businesses	26	52%	31%
Improved/developed an existing project/programme	19	37%	23%
Developed a new project/programme of support	9	18%	11%
Changed the advice/support that you give tourism businesses	16	31%	19%
Formed networks/partnerships with other organisations	12	24%	14%
Other (disseminated to students)	1	2%	1%
No response on nature of action	10	20%	n/a
All Actions	**83**		**100%**
Individual taking any action	**51**	**100%**	

Source: Analysis of esurvey of public sector participants

A substantial proportion (20%), although reporting that they had taken some action, did not specify the nature of that action. Of those that did report the nature of the action, the most commonly cited was the dissemination of the information learnt to other tourism businesses (52%) and the improvement of existing activities either through developing an existing programme (37%) or changing advice provided to tourism businesses (31%).

85% of respondents had undertaken some action in their own organisation, with dissemination of the information to other tourism businesses the most commonly cited.

Those respondents who had identified that they had undertaken an action back in their own organisation, where then asked the extent to which attendance at the event(s) had affected this, in order to assess additionality. (Table 66).

Table 66: Additionality of Event on participants' actions by participant

Scale of additionality per respondent	Total Who took action	% of respondents
I would not have undertaken it at all	6	14%
I would have done it but later	14	32%
I would have done it but smaller or of less quality	18	41%
I would have undertaken it anyway, in the same way	6	14%
No response	7	
Total who took action	**51**	

Source: Analysis of esurvey of public sector participants

While only 14% of those who took action and responded to the question reported total additionality, a further 74% reported partial additionality.

Those who took any action and reported partial additionality were then asked the extent of that additionality. This is reported in Table 67. Using the scale of 75% for those who reported a significant difference as a result of attending the event; 50% for partial significance and 25% for only a slight difference, the average level of additionality of these actions is 51%.

Table 68 shows the degree of additionality of all actions reported (as opposed to individuals who took any action), across type of action reported, showing that the average level of additionality is higher across actions (58%). This is a result of those participants who undertook more actions, reporting a higher level of additionality than those who had undertaken fewer actions after the events.

The highest degree of additionality reported is attributed to the development of new projects/programmes of support (64%).

On average the actions were just over 50% additional as a result of the event attended.

No attempts were made to estimate the impact of each action undertaken by the public sector/intermediary attendees, but it is possible to estimate the overall number of actions and an estimate of the likely extent of additional actions by applying the same proportions reported by the respondents to this survey, to the total population of 663 unique individuals attending the events in the programme.

A note of caution is provided to these calculations as the self-selecting nature of the respondents to the survey means that the results are not representative. Given the confidence

Table 67: Extent of influence on actions on participants from public/intermediaries

	% of respondents who took action	Extent of additionality: Totally	Significantly	Partly	Only slightly	No response	None
Scale of Additionality per respondent		*1*	*0.75*	*0.5*	*0.25*	*0.5*	*0*
I would not have undertaken it at all	14%	6					
I would have done it but later	32%		1	9	4		
I would have done it but smaller or of less quality	41%		5	12		1	
I would have undertaken it anyway, in the same way	14%						6
No response							

Source: Analysis of esurvey of public sector participants

Average degree of additionality per respondent 0.51

Table 68: Extent of Additionality by action undertaken by Public/intermediaries

			Done it later, smaller or of less quality and:					
		None	Slight	Partial	Significant	Not have undertaken it at all		Average for action
		0	0.25	0.5	0.75	1		
Disseminated the information learnt to other businesses		1	3	13	5	4	26	0.58
Improved/developed an existing project/programme		3	1	7	4	4	19	0.57
Developed a new project/programme of support		1	0	3	3	2	9	0.64
changed the advice/support that you give tourism businesses		1	1	9	3	2	16	0.56
formed networks/partnerships with other organisations		2	0	5	2	3	12	0.58
Other (disseminate to students)		0	0	0	0	1	1	1.00
Total Actions		8	5	37	17	16	83	0.58

Source: Analysis of esurvey of public sector participants

Table 69: Estimated Actions of all Public Sector/Intermediary Attendees

	Respondents to survey	Total Population	Average degree of additionality	Estimated Additional Actions
Unique Individuals	60	663		
Estimated Number individuals taking any action	51	564		
Estimated number of actions undertaken	83	917	0.58	532

Source: Analysis of esurvey of public sector participants

level of the survey of +/- 12, these should therefore be regarded as indicative. It is likely that the respondents are those who are more positive towards and have taken more actions as a result of attending the programme and therefore these results are likely to be over estimated.

The results are however reported in Table 69. This shows an estimated 564 attendees of the programme taking some action, undertaking a total of 917 reported actions. These represent the equivalent of 532 additional actions using the previously reported scale to estimate additionality.

While it has not been possible to estimate the benefits of such actions this provides an indication that the first essential stage of taking action is in place to allow any degree of impact to occur.

It is estimated that a total of 917 actions and 532 additional actions have been undertaken by public sector/intermediary organisations who attended over the period of the evaluation.

10.4 Comparison with Other Events

Respondents were also asked if they had attended or considered attending other events and the majority, 90% reported that they had. Those who had considered but had not attended other events were asked the primary reason for non attendance at other events.

Table 70: Reason for Non Attendance at Other Events

	Number of responses	% respondents
Topic Not relevant	8	24%
Price	8	24%
Location	5	12%
Lack of Time	14	41%
Total	34	100%

Source: Analysis of esurvey of public sector participants

The most common reason for non attendance was lack of time (41%) with non relevant topic and price also being significant factors.

For those who had attended other events, they were asked to compared them against the Scottish Enterprise ones and Table 71 reports these results. A total of 22 (34% of respondents) responded to this question. The majority of respondents felt that overall, the SE events were about the same as other events that they had attended, with no respondent feeling that the SE events were worse.

Almost half of respondents felt that the content and speakers of the SE events were better than other events they had attended.

Table 71: Comparison of SE events with others

	SE were better	About the same	Others were better	Total Respondents	Average score
Overall	28%	72%	0%	18	0.28
Relevance to your work	32%	64%	5%	22	0.27
Practical Use	30%	65%	5%	20	0.20
Quality	29%	71%	0%	21	0.29
Location	36%	55%	9%	22	0.27
Value for money	41%	46%	14%	22	0.27
Content/speakers	47%	37%	16%	19	0.32
					0.27

Average score where SE were better = 1; about the same = 0; others were better = -1

Source: Analysis of esurvey of public sector participants

Most found the SE events comparable with or better than other events.

10.5 Suggestions for Improvement

Finally, respondents were asked to identify areas for improvement to increase the relevance and quality of events. Suggestions are broadly categorised below:

Content and Speakers

Ensure the voice of the customer as well as industry is included
Provide a blend of both inspirational and practical events
Improve relevance of speakers to the audience
Repetitive content of the events
Tighten the focus of events
Events specific to self catering
Event specific to event management

Overall design/positioning

More practical events, with ready made solutions to cater to needs of smaller businesses
Use of high powered, international speakers can put off smaller businesses, focus on local/national good practice (2)
Provide after event support mentors
Spend more on peer to peer learning rather than facilitators
Hold local events (3)
Hold in key destinations (2)

Marketing/Target Audience

Target a wider audience than currently
Longer term planning to improve marketing
Stronger partnership links to maximise marketing
Specifically target decision makers within the public sector
Cost is prohibitive to smaller businesses, should reduce

11 VIEWS OF NON PARTICIPANTS

At an early stage of the study, it became clear that there was a relatively low penetration of the programme into all tourism companies (see Section 7). In order to ascertain the reasons for this an additional esurvey was undertaken. This short survey was promoted by the Scottish Tourism Forum, Association of Scottish Self Caterers and Association of Scottish Visitor Attractions to their membership through their ezines/enewsletters.

The questionnaire used in this survey is included in Annex VIII and this section sets out the results of this survey.

11.1 Indicative Results

A total of 24 organisations responded to the survey. The respondent level is regarded as too low compared to the overall tourism sector, and therefore that the results are not sufficiently robust to report in detail.

12 STRATEGIC FRAMEWORK FOR ANALYSIS

12.1 The Framework

During this evaluation, it has become apparent that the area of management and leadership within the context of business improvement is highly complex. As well as different understandings of the terms used, there are different elements to stimulating business improvement through the use of management and/or leadership interventions.

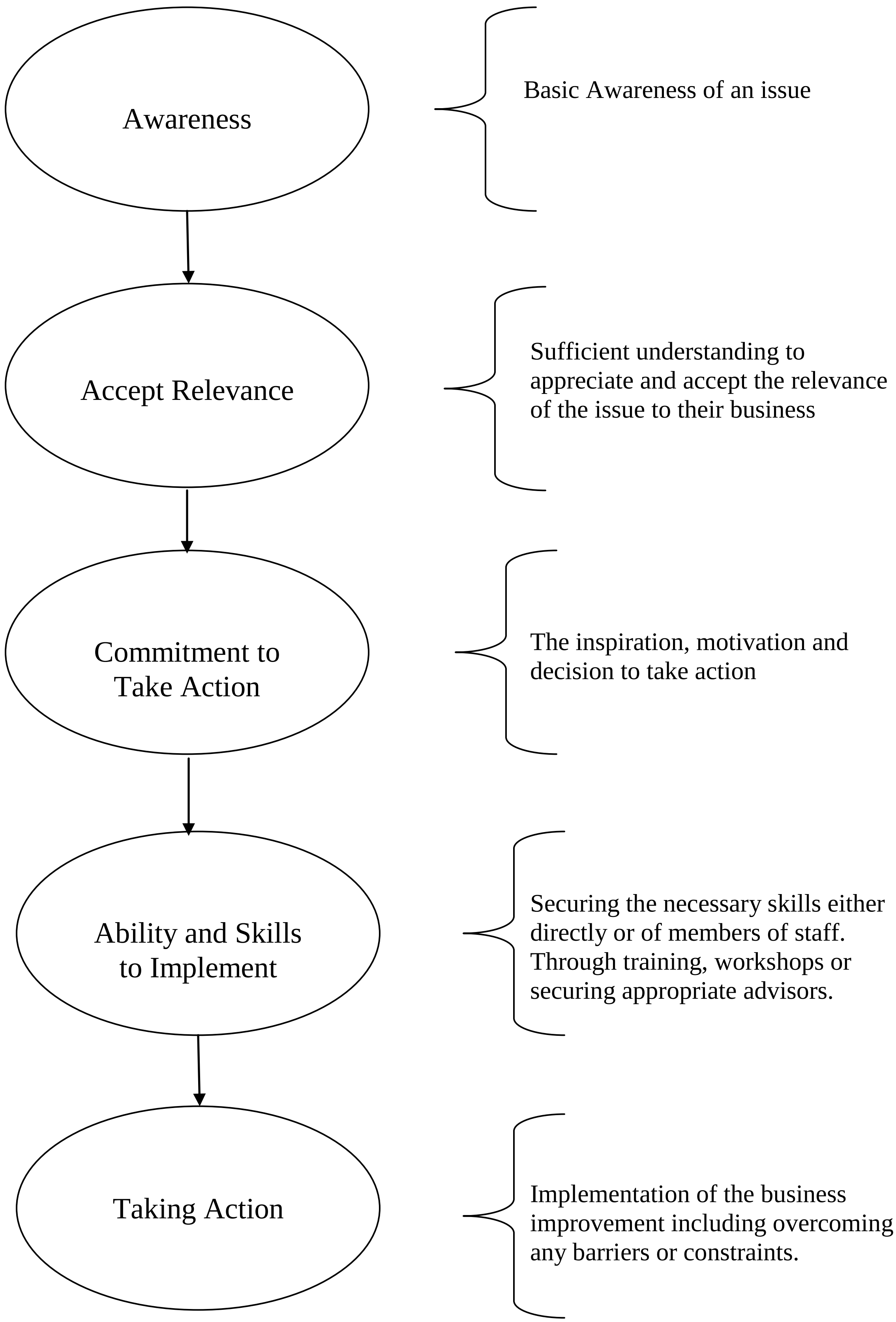
To assist in the evaluation, a framework for analysis has been developed which is set out in Figure 2. This aims to provide a context for theconclusions and recommendations for the way forward for the programme. It is proposed that there are five distinct elements required for a business, through its leaders/managers to implement a business improvement. These are required at the point of the owner/manager of the business or those that are taking decisions on the operation of the business.

- (i) *Awareness.* The basic awareness and understanding of an issue or area for improvement, say customer service standards.
- (ii) *Appreciation of Relevance*. Having a broad understanding of the issue and acceptance that the issue has a relevance to their own business and they could benefit from taking action in that area.
- (iii) *Commitment to Take Action.* Taking a decision that action is required, achieved through motivation, inspiration or other mechanisms.
- (iv) *Ability and Skills to Implement*. Securing the appropriate skills or resource (say external advisors) to implement the business improvement. This could be achieved either by applying existing skilled resources; training up existing resources; recruiting or appointing skilled resources.
- (v) *Taking Action.* The implementation phase, where typically more substantial resources and investment is required and the business improvement is actioned.

In order for a business improvement to take place, each of these steps are vital. With a commitment to take action, but not the ability/skills to do it, the implementation would not happen. Similarly no action would be taken if they have the skills/ability to take action, but no commitment to take action. No commitment would be secured without an awareness and appreciation of the relevance of the issue to their business.

If all stages are not in place, this may lead to ineffective business improvement plans where action is taken as a consequence of a motivation to take action, but without the knowledge/information or the skills and ability to implement, the action fails.

Figure 2: Framework for Analysis: Business Improvement



Companies and individual leaders and managers differ largely in their positioning against this framework. For example consider larger tourism businesses with skilled managers in relation to a new leading edge approach to customer service standards: these businesses are likely to be aware of any business issues, have the motivation/commitment to take action and the resources to implement any action but may not have the knowledge of the new approach or the skills to implement it.

A small lifestyle self catering cottage in relation to ebusiness may have an awareness of the issue, no appreciation of its relevance to them and no motivation or ability to take action.

A medium sized hotel with a restaurant with regard to improving food provision may be aware of the issue, appreciate that there is a relevance to them (say improve quality of food, use of local produce), have the motivation to improve but have no skills or ability to take action and no resources to invest in the improvements.

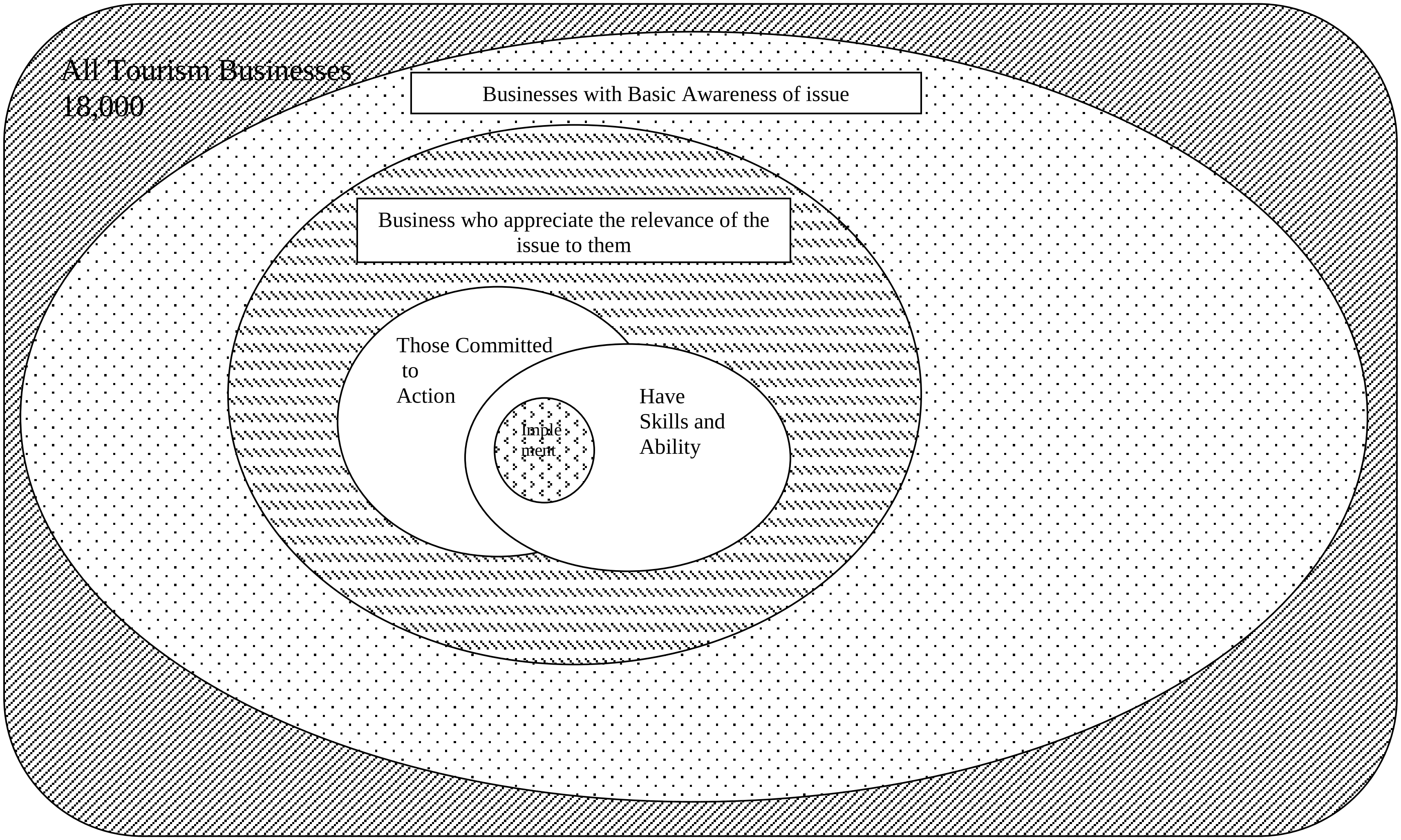
Different businesses can also be at different stages in relation to different business issues eg committed to customer service standards, but no awareness or motivation to take action on people/staff issues.

In the implementation of business improvements, there is no standard process through these elements. Some companies may go through the framework sequentially where they become aware of the issue, gather more knowledge/information, become committed to take action, acquire the skills/ability to implement the action and then implement the action. It is more common however the companies go through the process through different stages. Eg If a business has a new member of staff with skills and knowledge of how ebusiness can be used effectively they may persuade and secure commitment from the owner/manager to take action. Where a grant is provided to train staff in ancestral tourism a business may acquire those skills and then take the decision to take action.

In the context of business development, it is the aim of SE and other partners to stimulate further implementation of business improvements by addressing market failures. In the context of leadership and management interventions this often seeks to stimulate awareness; basic information; securing commitment to take action and providing management skills and ability to take action. With these, companies may implement business improvements without further intervention, or interventions are provided which are outwith management and leadership activities (eg subsidised consultancy advice) to stimulate and support these actions.

Based on the views of stakeholders interviewed, Figure 3 represents an estimate of the likely scale of tourism businesses in relation to these stages where the majority are thought to be aware of the issue; with fewer having a basic appreciation of the relevance of the issue and fewer still having a commitment to take action. The scale of these groups are unknown, however those who are seen to be implementing improvements and who have commitment to

Figure 3: Tourism Businesses Mapped Against Framework



take action are seen as being a very small proportion of the 18,000 overall tourism businesses.

12.2 Matching TMLDA against the Framework

The different elements of the TMLDA, with different objectives and content, seek to address different elements of this framework. Broadly:

(i) the TMDP events are directly targeted at the motivation and inspiration of businesses to take action, and to a lesser extent the provision of information/knowledge. It makes no attempt to provide a basic awareness of the importance of the issue (participants attend because they are already aware of and accept its relevance to their business) or skills/ability to take action or provide support for implementation. Some of the events such as Business Insight Seminars and the workshops within the conferences, provide more detailed information/knowledge for participants, but do not provide skills.

(ii) the ebusiness workshops are directly targeted at the provision of skills and ability to implement. As an unexpected consequence, it has also raised appreciation of the relevance of ebusiness to their business and secured commitment to take action from those who were not previously committed. It does not support the actual implementation

(iii) the Leading Service Excellence programme is directly targeted at skills and ability to take action, however businesses who attend are already aware of the importance of the issue of customer service standards, broadly know what is required and committed to take action.

In considering the participants to the programme, using Figure 3:

(i) TMDP is of potential interest to those who have an awareness and acceptance of the relevance of it to their business, but not necessarily have any commitment to take action or have skills in that area

(ii) Ebusiness Workshops are of potential interest to those who have already made a commitment to taking action but do not have the skills/ability to implement

(iii) LSE similarly is of interest only to those who have already made a commitment to taking action but lack the skills/ability.

12.3 Marketing and Recruitment to the Programmes

Unless the business is broadly aware of the issue and accept its relevance to their business, they will not participate in any of these programmes. In some circumstances this can be addressed through the marketing and recruitment to the programmes.

LSE and ebusiness workshops will appeal to those who are aware of the issue, have some basic knowledge and are already committed to taking action. These are not designed to be programmes which will ‘convert’ businesses to take action.

In order to recruit to the programme, the potential participants of the event must firstly know of the event and either already fulfil the audience criteria or be persuaded of this. Any barriers to attendance such as location which have been identified by the survey of non participants would also need to be addressed.

The existing marketing of the programmes, broadly raises awareness of the events, targeting these groups who fall into the audience criteria outlined above. (ie already have an understanding of the importance of that issue to their business for TMDP or are already committed to take action for LSE or the ebusiness seminars). It is only through more one to one 'sales' or contact that other potential participants would be converted to the audience criteria.

12.4 Matching Current Supports to the framework

While it is recognised that some of the existing activity in this area has wider objectives than stimulating business improvements (eg the representation and lobbying role of trade association conferences), using the framework, it is possible to match existing activities and supports to this strategic framework. This is shown in Table 72.

Attempts have been made to simplify the priorities of the SE Tourism Industry Demand Statement (Jan 09) to allow an analysis however this would benefit from a review from SE on its appropriateness.

The match of the existing supports to the key priority destinations is achieved through the take up of any of these activities by businesses in those areas.

Although Business Tourism is not identified in the industry demand statement, it has been added as a priority in the framework.

This mapping, although necessarily crude, highlights that it is thought that:

- There is little activity to raise awareness of issues where a tourism business does not already have an awareness of the issue.
- Securing acceptance of the relevance of the issue from those who have a basic awareness also has limited activity with the promotion of, and attendance at events are restricted to those who already have an appreciation of the relevance of the issue.
- There is a large range of events and initiatives which are designed to take those who already have an appreciation of the relevance of the issue to become committed to take action
- There is limited provision of skills/ability tools, however this is due largely to lack of demand rather than lack of potential provision
- Support for implementation, from within SE is broadly restricted to account managed and through the business gateway, growth pipeline businesses.

Table 72: Strategic Framework matched to Existing Activities

			Objectives of Different Measures		
SE Tourism Industry Statement Priority	**Raising Awareness**	**Securing Acceptance of Relevance**	**Securing Commitment to action**	**Provide Skills and Ability**	**Support Implementation**
OVERALL	Trade Associations Conferences; STF conference; Pride and Passion; local seminars; Scottish Thistle Awards	Scottish Tourism Week; trade associations conferences; local seminars/workshops; one to one advice from advisors	Masterclasses; Learning Journeys	Account Management Support; growth pipeline support; hospitality Industry Trust; Colleges and University provision; learning journeys	Account Management Support; growth pipeline support
Industry Leadership		Scottish Tourism Week	Destination Management Organisations; STF conference		
Innovation		ebusiness web site and tools; TIG web site	Tourism Innovation Day; BI future of technology; ES top ten technology trends	Innovation Workshops; Innovation Toolkit; tourism ebusiness workshops; ebusiness workshops	Tourism Innovation Awards
Key Products:					
Ancestral Tourism			BI Heritage Tourism		
Country Sport			BI Activity Tourism; BI Adventure Sports		
Food			BI Food	Food tourism workshops; web site;	
Forest			BI Environmental tourism		
Golf			BI Golf Tourism		
Whisky					
Emerging Product			Sustainable Tourism Conference		
Business Enterprise and Leadership Skills:					
Customer Care		Customer Service conference	Customer Services Conferences; ES Customers walk away; ES Ritz Carlton; GMC Customer Service	Leading Service Excellence; Visitor Feedback Workshops; business gateway workshops	
Marketing and market intelligence			Masterclasses; Tourism Intelligence Scotland conference; GMC: Henley; BI Maximising visitor revenue; GMC Business Development; ES Marketing Judo	Tourism Intelligence Scotland research and booklets; business gateway workshops	
People and Organisatonal Development			GMC: Paul McKenna; GMC Karaoke Capitalist; ES Mind Maps; BI Performance vs management; GMC Attracting and retaining talent	Workforce Development Seminars; Leadership for Growth; St Andrews Skills Academy; business gateway workshops	Investors in People
Inward Investment	n/a	n/a	n/a	n/a	n/a
Business Tourism		BTC Conference	BTC Conference		

It may be that in some instances the marketing and 'sell' of the activity to businesses may in itself achieve the objectives or raising awareness or securing acceptance of the relevance of the issue, however the relatively high level marketing of the events using ezines and direct mail are not expected to achieve this. (although one to one sales, referrals are more likely to achieve this).

12.5 Market Failure, Adjustment and Substitution

The nature of the market failures in each of these potential areas of intervention are reported below as are the prospects of securing market adjustment or causing substitution.

Raising Awareness and Securing Acceptance of Relevance

Market Failure:	There is a clear information deficiency for these businesses who are unaware of a business issue with a clear rationale for public sector intervention.
Market Adjustment:	While the public sector can address the information deficiency in a business, for that issue, the underpinning market failure of information deficiency will continue to apply to these businesses for other issues and to other businesses, providing no realistic prospect of market adjustment
Substitution:	No Substitution There is no incentive for the private sector to be involved in this area. Unless as a first stage to the sale of a product, but those businesses who lack awareness are unlikely to move straight to implementation. There is also an inbuilt incentive to provide biased information.
Delivery Structure:	The most appropriate method to deliver this would be general awareness (eg PR etc), web based and one to many supports.

Securing Commitment to Action

Market Failure:	<u>Information Deficiencies</u>: Covering more sophisticated and detailed knowledge and information to allow sufficient consideration to make a commitment. <u>Risk Aversion</u>: Need to have clear benefits identified and confidence in the action to overcome this aversion <u>Externalities</u>: In the use of one to many mechanisms to address this market failure, it is not viable for one business to organise and benefit from such events.
Market Adjustment:	<u>Information deficiencies and risk aversion</u> – the underpinning market failure of information deficiency will continue to apply to these businesses for other issues and to other businesses, providing no prospect of market adjustment <u>Externalities</u>: As long as the one to many support structure is used to address this market failure, these will continue to be an externality market failure

Substitution:	No Substitution There is no clear incentive for the private sector to be involved in this area with companies unwilling to pay commercial rates for the one to many supports, no prospect of private sector provision.
Delivery Structure:	The most appropriate method to deliver this would be one to many supports (through motivational events) and one to one advice.

Provide Skills and Abilities

Market Failure:	The provision of skills has a wide range of acknowledged market failures, including information deficiencies, risk aversion, externalities through free riding as well as externalities of group provision. However, assuming that businesses already have the commitment to take action, the market failures are: For Larger companies: Market failures are limited, where companies are willing to pay full rate for provision and can organise these in house. For Smaller companies. The delivery of any skills/ability event has externality market failure where smaller companies do not have sufficient staff to justify in house courses.
Market Adjustment:	For larger companies, this is secured if they have the commitment. (see above) For smaller companies, the externality market failure of the establishment of coordinated group provision and its promotion continues to apply to those smaller companies and is persistent. This has been evidenced by the performance of LSE.
Substitution:	With substantial capacity in the private sector, the direct delivery of skills and ability programmes generates substitution. The only area where the public sector does not provide the prospect of substitution is the coordination, organisation and promotion of such group provision to smaller businesses. The actual subsidy or direct provision of the courses may however provide substitution.
Delivery Structure:	The most appropriate method to deliver this would be one to many supports (through motivational events) and one to one advice. This may be supplemented by consultancy advice.

Implementation

This is a particularly complex area as this depends widely on the issue being addressed, the action required and position of the business in question. As this is beyond the remit of the evaluation to secure business improvements through leadership and management, it is not commented on here.

13 ECONOMIC BENEFIT AND PERFORMANCE MEASURES

Unfortunately as reported in section 7, the companies who were interviewed were unable to quantify the impact of their participation in the TMLDA in terms of business benefits. It has however been able to draw some indications of likely economic benefit and performance measures/cost effectiveness of the programme.

13.1 Programme Costs

The structure of the individual parts of the TMLDA in financial terms is complex . Table 74 shows that the total delivery cost to SE of the TMLDA programme over the period of the evaluation is £1,114,150, coupled with sponsorship from VisitScotland for the Business Tourism Conferences (£30,000), this generates a total cost of delivery of £1,144,150

The partnership delivery approach of the activities attracts a range of in kind and sponsorship type support as well as direct delegate fees. In practice this has off set further “real” costs which has been accounted for through a degree of delegate income being waived for such partners.

Delegate fees range in value depending on the activity, location and duration. To simplify the calculation of potential delegate income generated, an estimated figure has been used, based on number of delegates attending the various activities and the delegate fee (Table 73).

Taking the above into account the programme *potentially* generates a substantial income stream of an estimated £253,510. This would equate to 22% of the costs of the events across the period of evaluation. However the delivery structure of the programme means that the income from delegate fees is not offset against the project delivery costs. This is unusual in the operation and funding of conferences elsewhere in the public and private sector. This was however the approach which was recommended by SE Internal Audit, given the structure of the programme.

It should be noted that due to the absence of event specific costs, it has not been possible to analyse these figures by event or event type. There is known to be substantial variations in the extent to which delegate fees meet the costs of individual events.

If however delegate fees were available to be offset against the organisational costs, this would reduce the net project costs to SE to £860,640

Table 75 sets out the leverage of the programme under the existing financial structure where the leverage of public:private is low at 1 to 0.14, with SE’s contribution to total programme costs of 80%. However if comparable, but hypothetical, figures were calculated for a

Table 73: Potential Delegate Fees to Programme

Type of event	Charge per delegate (excl VAT)	Total Attendances	No. private attendances	No. public attendances	Total income	Total Private Income	Total Public Contribution
Customer Services Seminar	£65	568	373	195	£36,920	£24,245	£12,675
Business Tourism Conference	£85	678	410	268	£57,630	£34,850	£22,780
Executive Seminar	£45	94	61	33	£4,230	£2,745	£1,485
Business Insights	£45	390	209	181	£17,550	£9,405	£8,145
Ebusiness workshops	£45	217	156	61	£9,765	£7,020	£2,745
Learning Journeys	£500	126	96	30	£63,000	£48,000	£15,000
Gleneagles Masterclasses	£65	884	632	252	£57,460	£41,080	£16,380
Sustainable Tourism Conference	£65	107	51	56	£6,955	£3,315	£3,640
Total		**3,064**	**1,988**	**1,076**	**£253,510**	**£170,660**	**£82,850**

Source: Analysis of Financial Information provided on delegate fees

Table 74: Programme Costs

	2005/06	2006/07	2007/08	2008/09	Total
Event Management	70,000	70,000	80,050		**220,050**
Delivery (incl event management in 08/09)	120,000	120,000	171,000	154,750	**565,750**
Marketing	50,000	63,000	87,400	57,800	**258,200**
Visit Scotland contribution to BTC		10,000	10,000	10,000	**30,000**
Subtotal Tourism Management Development Programme	**240,000**	**263,000**	**348,450**	**222,550**	**1,074,000**
Ebusiness workshops (split by 2 years)			34,075	34,075	**68,150**
Marketing ebusiness workshops				2,000	**2,000**
Subtotal Ebusiness Workshops	**-**	**-**	**34,075**	**36,075**	**70,150**
Total TLMD costs	**240,000**	**263,000**	**382,525**	**258,625**	**1,144,150**
Total SE Costs	**240,000**	**253,000**	**372,525**	**248,625**	**1,114,150**

Source: Analysis of SE Financial Information

Table 75: Overall Cost and Leverage of Programme

	Public	Private	Total
Organisation Costs	£1,114,150		£1,114,150
Public Sponsorship (VS to BTC)	£30,000		£30,000
Delegate Fees	£82,850	£170,660	£253,510
Total Programme Costs	**£1,227,000**	**£170,660**	**£1,397,660**
Public to Private Leverage 1 to	0.14		
SE Contribution to Total Costs	80%		

Source: Analysis of Financial Information provided

Table 76: Overall Cost and Leverage of Programme if fees netted off against costs

	Public	Private	Total
SE Organisation Costs (net of delegate fees)	£860,640		£860,640
Public Sponsorship (VS to BTC)	£30,000		£30,000
Delegate Fees	£82,850	£170,660	£253,510
Total Programme Costs	**£973,490**	**£170,660**	**£1,144,150**
Public to Private Leverage 1 to	0.18		
SE Contribution to Total Costs	75%		

Source: Analysis of Financial Information provided financial structure where delegate fees were offset against costs (See table 76), this would increase the public to private leverage to 1 to 0.18 and reduce SE's contribution to programme costs to 75%.

13.2 Performance Against Activity and Output Measures

On the basis of the performance of the programme it is possible to generate metrics on the cost effectiveness of the programme in relation to activity and output measures. Table 77 shows that the cost per business who has subsequently taken some action which they feel has shown a positive, but unquantifiable impact, is £3,142. The cost per additional action undertaken by the private sector attendees is estimated at £2,762 per additional action undertaken. The average cost per attendance is £364 and cost per private sector attendances is £560.

Table 77: Performance of TMLDA against activity and output measures

Activity	All organisations	Private Only	TMDP only	Ebusiness Only
Average cost per attendee	£541	£799	£794	£877
Average cost per organisation	£1,317	£2,007	£2,126	£1,096
Average cost per individual attendance	£364	£560	£570	£450
Cost per business taking action	n/a	£2,827	£2,995	£1,544
Cost per business taking action, reporting positive benefits	n/a	£3,142	£3,328	£1,715
Cost per business undertaking an additional action	n/a	£8,700	£9,215	£4,750
Cost per additional action undertaken	n/a	£2,762	n/a	n/a

Source: Financial Information provided and Analysis of Private Telephone Survey and Participant Information

If the alternative financial model was developed, these would improve these performance measures as SE's net contribution reduces, improving the measures by around a fifth.

Unfortunately it is outwith the scope of the evaluation to assess the cost effectiveness of securing the overall action in circumstances where companies may have received additional support. However, with the low participation of account managed businesses and with 61% of businesses reporting that they had received no public sector support to implement other changes in the last year, it is expected that the instance of further support to these actions is low.

13.3 Economic Impact

The business benefits and subsequent economic impact of the programme is expected to be achieved through the process outlined in Figure 1. While unfortunately it has not been possible for companies to quantify the business benefits that they have experienced as a result of participating in the programme, it has been possible to confirm that business and therefore economic benefits have been secured.

As reported in Figure 1, there is clear evidence that:

(i) Businesses have attended (555)

(ii) As a result participants report a range of changes to their abilities and motivation including:

   a. that they have significantly or very significantly acquired new knowledge/information (81%)
   b. significantly or very significantly increased their motivation/inspiration (71%)
   c. Participants report that they have increased their networking (80%)

(iii) Participant organisations have subsequently taken actions to improve their business as a result of attending the events

   a. 71% have taken action after the event
   b. Of these 32% are additional actions (ie they would not have been undertaken without attending the event)
   c. Businesses were converted to attend to take action as a result of attending the event. 29% of those who attended, were either only considering taking action or not planning to take action subsequently took action

(iv) Businesses have report they have experienced business benefits as a result of these actions (93%)

The inability to quantify the business benefits and then subsequently the economic impact is not an indication that the programme has not generated economic benefits, but rather that the nature of the programme means that measurement of this impact is not possible.

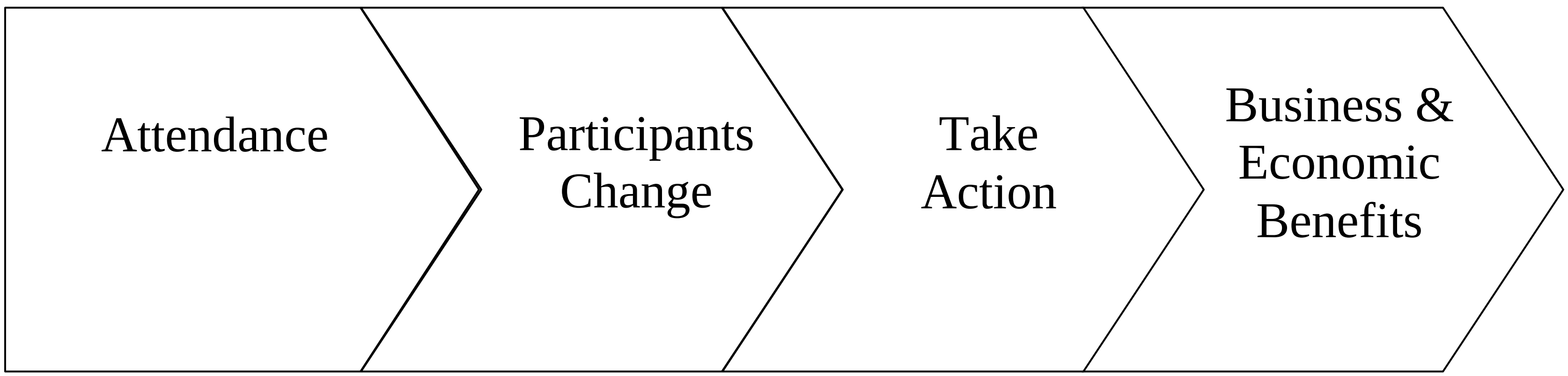
Using Figure 1, and given the high performance at securing change in participants and beneficial actions undertaken after the event, the impact of the programme can best be increased through increasing the number of attending businesses and increasing the 'conversion' of businesses to take action and therefore additional actions as a result of the programme.

There are a number of reasons why businesses were unable to measure the benefits of the actions they had taken. These included:

(i) **Lack of baseline information**. For many of the businesses, they had not recorded the baseline of performance measures prior to the start of the business improvement action undertaken. In the cases where the businesses were able to estimate the business impact of the programme, they were only able to indicate the proportional increase in the performance (eg 33% increase in web site visitors).

(ii) **Difficulties in attribution of changes in business performances**. Businesses were able to indicate the nature of the business benefits were received (see Table 47) which were dominated by increase in visitor numbers and sales. However, they did not have the management information to attribute the effect of individual actions taken on these changes in performance.

Figure 1: Summary of Impact of Tourism Management and Leadership Development Programme



Attendance

555 Businesses Attended

Participants Change

81% acquired new knowledge/information

71% increased motivation/inspiration

80% increase networking

Take Action

71% take action after event

32% are additional actions

29% 'converted' to take action

c400 additional actions undertaken

Business & Economic Benefits

93% report business benefits

Unquantified but clear economic benefits

(iii) **Reluctance to Reveal Information**. As with other surveys of this type, the businesses interviewed were reluctant to provide confidential information on their business performance.

These issues of quantification will persist in any economic impact measurement of a programme where the effect is to be catalytic in prompting action. Without the use of more resource intensive long term tracking of supported and unsupported businesses or undertaking indepth monitoring of business performance measures within individual businesses, it is unlikely that quantification of business benefits would be secured.

14 CONCLUSIONS

The **Tourism Management Development Programme (TMDP)** events have been effective at meeting their objectives including generating business and likely economic benefits. For those who attended the programme:

(i) The events were successful in converting businesses who were not yet committed to take action on business improvements, to take action. Prior to the event only 42% planned to take action with a further 23% considering action. The programme converted an additional 29% of attendees to take action in improving their business. This is equivalent to converting all who were 'considering' and a further 6% of those who had, prior to the event, no plans to take action.

(ii) TMDP provided new information and knowledge to participants with 81% reporting a significant or very significant gain (Table 23)

(iii) TMDP provided increased motivation or inspiration with 71% reporting significant or very significant gains (Table 23)

(iv) On a personal basis, attendees reported great improvements in motivation (30%), making changes at work (29%) and strategic thinking (25%) (See Table 37). These are key indicators of improved leadership.

(v) The events provided opportunities to stimulate greater networking. 80% reported greatly or partly improving their networking (Table 37). In addition 28% had taken action, in the formation of networks and partnerships following the event. (Table 45)

(vi) Following the events, the majority (71%) undertook action to improve their business (Table 42). The most common actions taken were marketing and market intelligence; customer service and general strategy/planning.

(vii) Of those who had taken action following the event (71%), the majority (93%) reported a benefit through increased visitor numbers. Unfortunately all but 2businesses were unable to quantify this.

(viii) The events have been partly successful in meeting recruitment targets (See Table 18) with the conferences and Masterclasses exceeding their targets.

(ix) The cost per business taking action after the event is £2,995, and cost per each business undertaking an additional action rises to £9,215. The cost per additional action undertaken (for all TMLDA was substantial lower at £2,762)

However, TMDP performed less well in:

(i) Only equivalent to a third of actions (Table 52) were additional as a result of the event.

(ii) The penetration of the programme into priority groups of account managed companies is low. (39% who have been account managed at any time during the period of the evaluation have attended any element of the programme – Table 10)

(iii) The penetration of the programme into key destinations is also low with between 2% and 7% of tourism business in the key destinations attending any aspect of the programme – Table 9.
(iv) The level of market displacement from the activities is high at 83% but is thought to be comparable with other tourism supports (Table 50)
(v) While the TMDP has been successful in securing action from those who are already committed or considering taking action, it has had much limited success in attracting participation from those who did not plan any action with only 35% of the attendees falling into this group. (this is offered as an observation as it should be noted that there was not any specific targeting of any particular type of business)
(vi) The cost of the programme is high at £364 per delegate. (See Table 84).

The impact of the TMDP is principally restricted by the overall number of businesses who participate in the programme and the proportion of those who have NOT already planned to take action (and are therefore available to persuade/convert to take action). While the company targets of TMDP has not been explicit, it has been poor at addressing this group. (noting comment immediately above)

The **Tourism Ebusiness Workshops** which were facilitated through the Scottish Tourism Forum were successful in meeting their objectives, with the results of their performance reported as part of the TMDP results above. Specifically for attendees of the ebusiness workshops they:
(i) All respondents reported that they had taken action after the event with an additionality of 25% of these actions. (lower than TMLDA overall)
(ii) Compared to the participants of other elements of TMDP, the ebusiness workshops were more likely to implement new or improved technology. (Table 46)
(iii) Of those who received it, 60% rated the follow up advice they received as greatly relevant and a further 20% partly relevant (Table 41).

However, recruitment to the programme was below target and achievement relied on attendance from the same individuals for both programmes. The cost per action taken after the event is high at £1,544, and rises to £4,750 for each business undertaking an additional action.

The delivery format of the **Leading Service Excellence** programme has failed for small tourism companies. Without a structure to provide an honest broker to organise and promote the course to multiple smaller tourism businesses, there appears no prospect of this delivering any events. Unfortunately because of the low level of activity, it has not been possible to assess the potential effectiveness or impact of the programme, if delivered.

If Scottish Enterprise withdraws their support for these activities, it is clear that:
(i) The private sector would not meet this gap, with the exception of skills programmes for large companies
(ii) There is no other public sector organisation who would provide such activities.

Therefore the activities and their associated benefits would cease.

Considering the TLMDA activities overall.

Strategy and Aims

(i) There is a lack of clarity of the objectives and target of the programme, although in part explained by the diverse nature of the events included within the programme.

(ii) The programme is making clear contributions to the tourism framework for change and SE tourism priorities.

(iii) There are large number of SE tourism business improvement programmes seeking to influence leaders and senior managers, but only some of which are operated under the TMLDA banner.

(iv) There are poor connections between the programme and the SE priorities of key destinations and account management support. Although it needs to be recognised that these were not key targets during the duration of the programme.

Attendees

(i) A total of 2,058 individuals attended any event, making 3,064 attendances from 846 organisations

(ii) Around a third of attendances and organisations attending were drawn from the public sector and other supporters/intermediaries

(iii) An average of 19% of attendees from the private sector were at owner/manager or CEO level.

(iv) Attendances are dominated by hotels and visitor attractions

(v) Although it was not possible to undertake an analysis by size of company, subjective analysis concludes that attendees are drawn from medium to larger businesses.

The Tourism Sector

(i) The sector varies substantially in their quality of leaders/managers in relation to business improvements

(ii) For the majority of tourism businesses there is a limited recognition, by leaders and managers of the implications and acceptance of the relevance of issues to their business.

(iii) The majority of business improvements (from those who attended the programme) are stimulated and motivated from issues which are internal to the company and not stimulated by external interventions such as events.

(iv) The most common sources of information that businesses seek to find out about business improvements is the internet and other businesses.

(v) Almost all attendees reported that they had taken a business improvement in the last year (Table 30) of which the majority (61%) undertook this without any support or assistance in its implementation.

Market Failure and Adjustment

(i) There is a clear and persistent market failure in the provision of events and other activities, which seek to stimulate commitment to take action on business improvements

(ii) There is also a persistent market failure in the provision of skills/abilities actions which is restricted to the provision of an honest broker role to set up, market and recruit small companies to attend group provision.

(iii) SE is in a unique position to deliver motivational/commitment events and no other organisation can do this

(iv) In the provision of events to stimulate motivation and secure commitment to action there is no credible alternative provider. If SE ceases this provision, only 11% reported that they would go to other events, but few were able to name those events.

Marketing and Recruitment to the programme

The programme has been largely untargeted and in practice has been blanket marketed to encourage any tourism business with an interest to attend. Driven in part by the lack of a clear target audience for the programme, the marketing has been unfocused and as a consequence provides poor connection to the SE tourism priorities.

(i) There is a relatively low overall market penetration with only 555 attending any aspect of the course. This represents; 22% of tourism businesses on Scottish Enterprise's CRM system, 39% of account managed businesses, between 3 and 7% of total destination businesses and 3% of all SE area tourism businesses.

(ii) The attendees of the course are largely restricted to those who have already decided to take a business improvement or considering taking an action. The programme has had limited success in attracting businesses who have no interest (yet) in undertaking business improvements.

(iii) Although the overall number of attendees is limited within the context of the tourism sector, the programme does not have a high level of repeat attendances from individuals

(iv) The most important factor cited for non participation was lack of awareness of the events followed by location, and time away from the office, although the majority of attendees travel to events

(v) The marketing of the programme is relatively unsophisticated and restricted to repeated contacts to the same group of individuals. Rearticulating the target market will increase the potential reach of the programme.

(vi) Although reported as a factor which would reduce attendance from existing attendees, price is not an over-riding factor in the recruitment of non attendees.

(vii) Email/ezines were the common source of participants hearing about the events

Other Supports and Initiatives

(i) There are a large number of supports which have the same broad objectives as TMLDA which are operated outwith the programme. Many of these are led by SE Tourism and other parts of the SE and the Business Gateway
(ii) There is very limited private sector provision, although no lack of capacity to deliver skills/ability programmes
(iii) The majority of attendees and non attendees rate the SE events comparable to events held by others

(Changes in) Format of Delivery
(i) The most important factor for attendees is the topic of the event. Format and location are relatively unimportant
(ii) While existing participants report an increase in price as leading to reduction in attendances, this is not the most significant factor preventing attendances from non attendees
(iii) Surprisingly, attendees felt that the provision of a cross sectoral programme would make no difference to their attendance or improve their relevance
(iv) A reduction in the number of international speakers would make no difference to the majority of attendees (Table 55)
(v) Areas cited for improvement include more practical events, and follow up support

Equity and Equality
(i) The programme has been successful at securing participation from women (58% of all attendees)
(ii) The programme has been less successful at securing attendance from those individuals from remote locations with only 13% of attendees more than 30 minutes drive from an urban area. (See table 14)

Other
(i) Public sector/intermediary attendees reported higher relevance of the events than those from the private sector
(ii) The Masterclasses, followed by the Executive Seminars were cited most frequently as the events with greatest impact
(iii) The ebusiness workshops, masterclasses and Executive Seminars were the most effective at converting intention to action

Although it has not been possible to provide estimates of economic benefits and effectiveness, performance measures indicate that the programme appears costly at £364 per delegate. With 61% of businesses reporting that they undertake business improvements without public sector support, the programme appears more cost effective at being catalytic in stimulating additional business improvements with a cost per additional business improvement stimulated of £2,762.

15 RECOMMENDATIONS FOR THE WAY FORWARD

The programme operates in an area where there are two persistent market failures:

(i) In the conversion of businesses who accept the relevance of an issue to them, to stimulate them to take a business improvement action (Information deficiencies, risk aversion and externalities)

(ii) The coordination and recruitment of smaller businesses to group delivery of programmes to provide more detailed skills/ability. (Externalities)

No other private sector or public sector agency is in a position to address these market failures. The only method to seek some market adjustment is to reduce the cost of intervention, by increasing the delegate fees and/or reducing the costs of provision.

The TMDP programme has proved able to stimulate this conversion of businesses to action and the coordination of group provision for smaller companies. The programme has also provided clear but unquantified business and subsequent economic benefits.

Within the context of economic development through business development this research has found that a substantial proportion (61%) of businesses who undertake business improvements, undertake these without public sector support. As a result, the conversion of businesses to make the commitment to implement business improvements is perhaps the most critical and catalytic intervention that can be made, where this will stimulate additional actions, without further public sector support.

It is therefore recommended that SE continue to intervene to address the issues in the tourism sector of:

(i) Securing commitment from leaders and managers to take action on business improvement

(ii) Coordination and facilitation of group provision of skills and ability programmes for small businesses.

However, in taking some activity forward, a number of areas for improvement are recommended.

1) Clear objectives for any action is required.

It is paramount that clarity is provided on the aims and objectives of any activity. Although this would need consideration by SE, the following is suggested as an overall aim for any future activity:

'To increase the performance and growth of tourism businesses through the application of improved knowledge, skills and motivation of current and future leaders and managers.'

This recognises that any activity is undertaken for business improvement rather than skills reasons; and that there is no value in the programme unless the managers take action and apply their knowledge, skills and motivation to improving their business.

2) Clear priorities are required for any programme going forward

The scale of the tourism sector, the number of businesses who are not undertaking relevant business improvement programmes and the limit of resources available require that priorities are set for any future intervention.

On the basis of the evidence gathered from this evaluation, it is recommended that priority is given to companies who are:

(i) in key destination areas and account managed companies
(ii) not yet committed to take action, who could be persuaded to take action.

Activity should be consistent with all relevant strategies including tourism, organisational development and issue driven strategies such as innovation. All topics and content should be restricted to those priority issues and key product areas identified within the SE Tourism Industry Demand Statement.

Impact would be greatest and therefore priority should be given firstly to activities which:

(i) seek to convert companies to action (rather than provide them with skills/abilities)
(ii) facilitate and recruit attendees to group provision of skills/abilities programmes, but not meeting the costs of the actual provision.
(iii) Measures to promote tourism businesses to participate in any existing tourism specific or general business support (as a substantial proportion are interested in using such provision but don't appear to be using this)

Areas of less priority which should not be taken forward on a tourism specific basis are:

(i) direct provision of skills/ability programmes in generic business areas where there is already public sector provision of cross sectoral supports. (eg ebusiness, marketing, customer service standards, people and organisational development etc)
(ii) the subsidy of most skills and abilities programmes (although their facilitation and recruitment of companies to them would be valid)

In practice, in the context of the existing TMLDA this would imply:

- continuation of motivational/inspirational events, in tourism priority areas to convert attendees to take action

- the withdrawal of subsidy for the attendance at skills/abilities programmes, although not their facilitation and recruitment of attendees. This would include the Executive Seminars and more practical events
- withdrawal of provision of skills/ability programmes which are directed at cross sectoral issues (ie ebusiness workshops), although continue the promotion and facilitation of tourism businesses to participate in generic supports
- facilitate and promote the provision of group provision of LSE, most appropriately at local, key destination level .

Although not part of this evaluation, there would appear to be an ongoing rationale for tourism-specific skills/ability programmes to be led by SE such as food tourism, tourism innovation as these are not available through cross sectoral initiatives.

3) A framework for all SE Tourism Activities. A framework is required to encompass all activity which falls under the overall aim above. Although this may not be branded as a single programme, coherence of provision and it's role in delivering the Tourism industry statement would add value as well as minimise duplication of activity. On the basis of the current provision, and potential future provision a suggested framework could comprise:

Priority	Secure Commitment	Facilitate Skills/Ability
Innovation	Innovation Day	Innovation Workshops, toolkit etc; attendance at cross sector supports
Customer service standards	Customer Services Conference (ongoing TMLDA)	Visitor Feedback Workshops
Marketing and Market Intelligence	Tourism Intelligence Scotland conference	TIS guides; stimulate attendance at cross sector supports
People and Organisational Development	Future TMLDA provision	Stimulate attendance at cross sector supports
Key Products	Extended TMLDA provision	None or limited (as provided through innovation, customer service standards, marketing/market intelligence and POD activities)
Business Tourism (assuming added as a priority)	Business Tourism Conference (ongoing TMLDA)	None as above

It would not be appropriate to run all these activities within a year.

In practice this would withdraw some of the TMLDA activities, to allow the other events such as Innovation Day and Tourism Intelligence Scotland conference to deliver these (as long as they addressed the motivational/commitment element). In addition, if going forward, the Masterclasses, Business Insights and Executive Seminars would be repositioned as motivational events in People and organisational development and key product areas to complement these.

4) Programme within Wider Implementation context

Any programme should be undertaken within the wider process of stimulating and securing business improvements. Using the strategic framework set out in this evaluation, this would cover:

- Raising awareness
- Persuading companies to accept the relevance to their business
- Securing commitment
- Companies securing skills/abilities needed
- Implementation

Although it is not recommended that there should be formal subsequent support structures established within or as a formal run on from the event programme, it is recommended that each is more clearly positioned within the context of seeking business improvement, that there are clear routes for further support (such as account managers, destination groups and third party supporters, Business Gateway and other self helps), with appropriate referral undertaken and that there is some participant follow up (see evaluation and monitoring).

In this way, any event programme, should be regarded as a mechanism to identify and convert businesses to action, who would then become the participants in other business supports, so assisting in their recruitment/management. In the future, this referral and recruitment to other programmes would be a valid performance measure.

With the focus of any future programme on securing commitment to action and the organisation of but not provision of skills/abilities programmes, there would be no relevance for progression within the programme.

5) Increase the Penetration of any programme into target markets

To increase the impact of any interventions, an increased number of tourism businesses attending and penetration into priority targets will generate the greatest increase in benefits. A number of measures are suggested to achieve this for any forthcoming programme with the company target markets identified above. These should include:

(i) **local delivery of 'conversion' events** in key destinations, potentially through the emerging DMO structures. This is necessary to secure the attendance of those who are currently not attending, but accept the relevance of that issue to their business. It is important that such events are motivational/inspirational and not about providing skills/ability.

A more detailed delivery plan would be required which separates out the national and local delivery to ensure there is a balance between securing greater attendance and unnecessary costs and duplication. One option would be to hold different types of events, with different speakers. Eg following a national visitor experience conference, seek the input of each of the inspirational speakers to hold a seminar in a key destination, the subsequent day. This may be a viable approach for each of the key issues, at minimum additional cost.

(ii) **Improved marketing**. An improved marketing approach is required. As a minimum this should include:

- Clearer messages on business benefits from attending to address the barrier of the perception of low relevance
- Development of a larger database of tourism businesses, ideally including information which relates to their activity/relevance to key products, information on past attendance, job function and other characteristics to allow targeted marketing
- Establish a targeted and more focused marketing approach, customised to the topic of the event
- Both direct mail and email/Ezine methods should be used in marketing, although it should be reviewed regularly to ascertain the extent to which the use of email overtakes direct mail in its importance, and the marketing approach adjusted accordingly
- Branding. There is substantial confusion in the businesses interviewed as to which events were regarded as TMLDA, and whether SE was responsible for different events. It is recommended, that consideration is given to a clearer and simpler branding. The brand which appears to have greatest profile is ‘Masterclass’ and it may be appropriate to use this across all future TMLDA motivational activities. Eg Food in Tourism Masterclass; Visitor Experience Masterclass; Innovation Masterclass.
- Establish an effective method to engage third parties, SE and business gateway advisors and other organisations to persuade businesses to attend the events. This will be particularly important for provision at key destination level (see below) and for those who are not yet committed to taking any action.
- Examine alternative measures to reach those businesses who accept the relevance of an issue to their business, but who have not made a commitment to take action. An illustration of more innovative measures would be the use of ‘ambassadors’, perhaps through the Pride and Passion structure, who have benefited from taking similar business improvements, undertaking direct, one to one, contact with other tourism businesses to secure their participation.
- The goal to establish single marketing actions across events is not seen to add substantial value and leads to a number of project management issues. As a result it is recommended that for cost efficiency and practical reasons that this is dropped
- Introduce PR activity, particularly to target those that have an awareness, but not yet an acceptance of the relevant of the issues and those who are not yet committed.

6) Establish Local Delivery Mechanism

In order to more effectively target the priority non attending businesses as well as facilitate the establishment and recruitment to group skills/abilities programmes, a local delivery structure is required. It is recognised that this will depend on local partners and the stage of their development, but it is proposed that the following are considered:

(i) Centrally manage motivational/conversion events, but that these are held in the key destinations with the local structures driving the recruitment and attendance of the events. This is likely to be necessary in order to identify high calibre speakers and to allow cost efficiencies through duplication of content across locations and alignment with national events.

(ii) Seeking third parties such as the emerging DMOs or local business gateways to facilitate the establishment of group delivery of skills/abilities events. This is thought to be viable if the provider of the content (ie training provider, business gateway trainer) is paid through the fees paid by participants, however an additional cost is expected to be required for the local management, establishment, and recruitment of local tourism businesses to the events. Once established, this delivery mechanism would in practice ensure the delivery of the LSE programme, recruitment of tourism businesses to generic workshops and any other required skills/abilities events.

While it is recognised that this is, to some extent, a return to the previous structure of multiple similar events held in different locations, the reintroduction of this in a more coordinated and cost efficient manner will be essential to secure larger attendance and penetration into target markets.

7) Delivery Structure and Management

A number of areas for improvement in the management of the programme were raised during the internal stakeholder interviews and some suggestions for improvement are set out below. The following are recommended for consideration:

(i) **Alternative Financial Structure**. Investigate as a matter of priority an alternative delivery structure to any ongoing programme which allows SE to offset the income from any delegate fees against their programme costs

(ii) **Event Management**. Consideration should be given to the most appropriate and cost effective event management structure. However, with organisations such as TIG and TIS leading on some events and the implementation of any local delivery through the key destinations, it would NOT be appropriate to have a single event management contract for all events. There may however be value in establishing such a contract for the remaining national events, depending on their number.

(iii) **SE branding, positioning and ownership**. Although it is not recommended that there is substantial value is cross event marketing (such as the marketing brochure for the programme), it is appropriate for SE to position itself as the provider/driver of all the events with the strategic framework above as well as other business improvement support. This would appear most effective to be undertaken within a positioning of SE tourism driving business and product improvement in the sector.

(iv) **Pricing**. Recognising that the market failures present in the motivational events are related to externalities and the relevance of the topic to the business, price should not be a substantial factor. While, when asked, respondents reported that they would stop attending/attend less often if the price was doubled, it is not a significant factor in the reason for non attendance. Recognising that there is a substantial 'dependency' culture for the sector, it is likely that the reported views may not reflect actual future behaviour.

It is therefore recommended that a gradual programme of, say 25%, increase in prices is initiated for those national events, with it's impact on attendance reviewed after 1 year and if there has been limited effect, look to increase the price further until the events are operated on a full cost recovery. In practice this would increase the price of the BTC to c£110 and shorter events to c£55-c£85 per head in the first year.

(v) **Use of technology.** While the use of increased technology to allow remote attendances/dissemination of the events have been suggested, there does not appear to be a clear solution to allow national and local attendance. The importance of the inspirational/motivation nature of the content and the value of networking, does not lend itself well to such technologies and it is recommended that a watching brief is kept on potential new technologies, but major investment is not considered at this time.

(vi) **Local vs National**. In order to reach the target groups of those who are currently not participating, it is recommended that there is increased provision locally (see above). Although some events are most effectively undertaken nationally (eg Business Tourism Conference, any events surrounding key products due to their specialist nature), other motivational events around key issues, should be delivered locally in the key destinations. To continue to make the events available to non destination tourism businesses, there should be an additional 'national event'. In practice this could be one of the 'local' events for Glasgow or Edinburgh. A clear plan for events and their location of delivery would be required.

To achieve this clear project management is required from Scottish Enterprise, particularly in stimulating and establishing the local delivery mechanism.

8) Reduce Costs of Programme

The costs of the programme are high and it is anticipated that there can be substantial savings in the costs of the programme without negatively affecting the outputs and impact of the programme. Areas recommended for action which would secure the reduction in costs are:

(i) seek to increase the price of attendance (see above)

(ii) establish an alternative financial structure to allow the delegate fees to be offset against the programme costs to SE

(iii) reduce the marketing expenditure on the programme. Principally this would be achieved by a shift from existing print marketing to the use of ebased marketing and promotion through partner organisations (such as STF, VS, trade associations, DMOs, Business Gateways) and account managers.

(iv) Reduce the number of international and high fee speakers. This does not appear to be a major attraction to encouraging attendance and for some people there is a preference for local but respected speakers to be used.

(v) Restrict support for skills and ability programmes (such as the Schindlerhof Executive Seminar) and local seminars, to the cost of organisation and recruitment of participants to the seminar and remove any subsidy for participation costs.

(vi) Integrate the programme with other existing SE Tourism conferences and events, so reducing the number of events. Businesses report that is SE reduces the number of events, they will continue to attend the smaller number of events, so it is not anticipated that there would be any reduction in attendances.

(vii) Establish cost effective local delivery mechanism. By using existing local organisations (DMOs and Business Gateways and restricting support to an organisation/facilitation fee it would be possible to establish a large number of events at minimal cost.

9) Event Content

The events which are targeted at converting businesses to make a commitment to action should have content which is:

- Inspirational/motivational
- Best practice
- Practical in as much as it is clear how it applies to other tourism businesses, but not practical in terms of providing tools/guides to action
- Relevant to smaller businesses
- Drawing on both national and international speakers, with a preference for national speakers, if they are of sufficient quality.
- Placed clearly in the context of encouraging commitment and following up. This could be achieved through simple mechanisms such as chairman introduction to events; appropriate information on other supports/initiatives held within the delegate packs; contact points for further information (largely 'your account manager' or business gateway contact).
- Have sufficient time to allow networking between delegates

10) Evaluation and Monitoring

This evaluation has shown the difficulties in quantifying business and subsequent economic benefits from such a programme. It is recommended that consideration is made to the establishment of a more structured evaluation and monitoring framework with any continuing programme. This should:

- Include all those activities under the strategic framework

- Establish and continue to monitor the success of each event in terms of recruitment of attendees (not just those who paid to attend), measuring against key metrics such as whether they are from the target groups (key destinations, account managed businesses) and if they are new to the programme.
- Terminate the immediate participant feedback. This information provides limited information of value to the design of events and costs substantially in terms of participant good will.
- Undertake a survey of participant feedback which is build around a set of common questions to allow comparison across events, but may include additional event specific questions. This should be undertaken at 3-6 months after each event and focus on the extent to which the programme has improved skills, knowledge, motivation and participants have undertaken business improvement actions.
- Encourage businesses, potentially at the time of the 3-6 months participant survey, to establish business measures and targets for the business improvement planned. This is likely to be practical only with those businesses such as account managed and destination businesses where there is a closer contact with advisors.

Metrics should be established to allow analysis of performance against targets and baselines generated from this evaluation.

This evaluation has not considered Industry Leadership, however it is recognised by most stakeholders that this is paramount. It is recommended that this is considered further separately.

Jean Hamilton
15th August 2009

16 ANNEXES

Annex I	List of Events Included in the Evaluation
Annex II	List of Stakeholders Interviewed
Annex III	Private Sector esurvey Questionnaire
Annex IV	Private Sector telephone survey Questionnaire
Annex V	Illustrations of Business Improvements Undertaken
Annex VI	Suggestions for Future Topics
Annex VII	Public Sector esurvey Questionnaire
Annex VIII	Non Participant esurvey Questionnaire

ANNEX I

LIST OF EVENTS INCLUDED IN THE EVALUATION

Event	**Title**	**Year**
April 05 ES	UNKNOWN	2005/06
Sept 05 Sch ES	Schindlerhof Executive Seminar, Sept 05	2005/06
Oct 05 BTC	Setting New Standards, 11th Oct 05, Glasgow Hilton	2005/06
Oct 05 BI	Slow food - the future, 26th Oct 05, The Hub Edinburgh	2005/06
Nov 05 GMC	Business Development (Don Peppers) 3rd Nov 05	2005/06
Dec 05 BI	Wellbeing - the Future, 16th Nov 05, Cameron House Hotel	2005/06
Jan 06 BI	The Future of Technology, Apex Quay, Dundee, 26th Jan 06	2005/06
Jan 06 Sch ES	Schindlerhof Executive Seminar, Jan 06	2005/06
Feb 06 ES	Key Drivers of Service Excellence (Robert Johnston), 2nd Feb 06, Gleneagles	2005/06
Feb 06 GMC	Personal Development (Paul McKenna), 7th Feb 06	2005/06
Mar 06 BI	Environmental Tourism - the Future, Perth Concert Hall, 1st March 06	2005/06
Mar 06 CSS	Raising Service Standards in Scotland's tourism industry, 14th March 2006, Radisson SAS, Glasgow	2005/06
Mar 06 ES	The Top 10 technology trends transforming the meetings and associations industry (Corbin Ball), 28th March 06, Gleneagles	2005/06
Mar 06 GMC	Future Development (Michelle Harrison, Henley Centre) March 06	2005/06
April 06 BI	Maximising visitor Revenue - the Future, Dunblane Hydro, 18th April 06	2006/07
April 06 ES	Customers Don't get stolen - they walk (Phillip Festa and Paul Alexander), 19th April 06 Gleneagles	2006/07
Nov 06 BI	Adventure Sports Tourism, 17th Nov 06, Peebles	2006/07
Nov 06 BTC	Share Ideas, Identify Trends, Build Connections, 22nd November 2006, Raddisson SAS Glasgow	2005/06
Nov 06 ES	Legendary Service at the Ritz-Carlton, 28th Nov 06, Gleneagles	2006/07
Dec 06 GMC	Personal Development: Karaoke Capitalist (Kjell Nordstrom) 7th Dec 2006	2006/07
Jan 07 GMC	Business Development (Chris Daffy) 18th Jan 07	2006/07
Jan 07 ES	Mind Maps - The Colour of Creativity, 30th Jan 07, Gleneagles (Tony Buzan)	2006/07

Event	Title	Year
Jan 07 Sch ES	Schindlerhof Executive Seminar, Jan 07	2006/07
Feb 07 GMC	Future Development (Michelle Harrison, Henley Centre) Feb 2007	2007/08
Mar 07 ES	Marketing Judo, (Richard Richardson), 6th March 2007, Gleneagles	2006/07
Mar 07 CSS	Delivering Winner Service in Scotland's Tourism Industry, 14th March 07, Glasgow Hilton	2006/07
Jan 08 11th Sch ES	Schindlerhof Executive Seminar, 11th Jan 08	2007/08
Jan 08 13th Sch ES	Schindlerhof Executive Seminar, 13th Jan 08	2007/08
Jan 08 BI	Food Destinations, Perth, 29th Jan 08	2007/08
Jan 08 GMC	Creating Legendary Customer Service (Paul Cookley), 21st Jan 08	2007/08
Feb 08 BI	Heritage Tourism, 5th Feb 08, Stirling	2007/08
Feb 08 GMC	Marketing Judo, (Richard Richardson), 26th Feb 08	2007/08
Mar 08 CSS	Service by Design, 11th March 2008, Old Fruit Market, Glasgow	2007/08
Mar 08 BI	Performance Venue Management, 18th March 08, Edinburgh	2007/08
E Bus 07-08	Misc	2007/08
Oct 07 Sus Tour	Sustainable Tourism Conference, 2nd Oct 07, Radisson SAS, Edinburgh	2007/08
Nov 07 GMC	Attracting, Developing and Retaining Top Talent (Jane Sunley), 14th Nov 07	2007/08
Nov 07 BTC	Business Tourism Conference, 20th Nov 07, Crowne Plaza Hotel, Glasgow	2007/08
E bus 08-09	Misc	2008/09
Nov 08 GMC	Creating Opportunities through Productivity (Henry Stewart), 6th Nov 08	2008/09
Nov 08 BTC	Rising to the Challenge, SECC Glasgow, 27th Nov 08	2008/09
Jan 09 Sch ES	Schindlerhof Executive Seminar, Jan 09	2008/09

ANNEX II

LIST OF STAKEHOLDERS INTERVIEWED

Scottish Enterprise: Tourism
Eddie Brogan
Stephen Williamson
Stephen Baillie
Kirsteen Binnie
Elaine Booth
Anne Marie Burns
Stella Callaghan
Carrie Cusick
Rosemary Findlay
Julie Franchetti
Aileen Lamb
Paul McCafferty
Katriona Morrison
Lynn Pringle
Russell Stephenson
Gillian Swanney

Scottish Enterprise: Others
Darren Campbell, Marketing
Silvio Clemente, ebusiness
Lynn Curran, Organisational Development
Linda Murray, Organisational Development
Brian Smail, Business Gateway

External Stakeholders
Richard Arnott, Scottish Government
David Cochrane, Hospitality Industry Trust
Sue Crossman, Tourism Innovation Group
Riddell Graham, VisitScotland
Iain Herbert, Scottish Tourism Forum
John Lennon, Glasgow Caledonian University
Bryan McCabe, Adam Smith College
Eva McDiarmid, Scottish Association of Visitor Attractions
Caroline Packman, VisitScotland
David Smythe, Association of Scottish Self Caterers
Gillian Stirton, Pride and Passion

Deliverers
Ian Hunt, Training Solutions re Leading Service Excellence
Stuart McDonald, NetData
Anne Stark, Stark Events
Fiona Young, Fiona Young Training and Consultation re Leading Service Excellence

ANNEX III

PRIVATE SECTOR ESURVEY: QUESTIONNAIRE USED

Tourism Leadership and Management Development Activities:

Your views of the events

Considering all the Scottish Enterprise conferences, masterclasses and workshops that you have attended:

How relevant were the events to your business?

- Very relevant
- Relevant
- Only a little
- Not at all relevant

* To what extent do you feel, following the events, that you have gained:

	Very significantly	Significantly	Only a bit	Not at all
New knowledge or information				
New skills				
Increased motivation or inspiration				

* Following your attendance at these events, have you taken any action back in your business?

- YES
- NO

Tourism Leadership and Management Development Activities:

Actions you have taken

In what area was the action you took? (please tick all that apply)

- General business strategy/planning
- Marketing
- Customer care
- Developed or improved a product
- Further investment
- Resource/Cost efficiency
- New or improved technology including web
- Staff training
- Networks/partnerships with other businesses

Other (please specify)

* Considering these actions, how did attending the event(s) influence this? Which statement best fits your organisation?

Without attending the event ....

- I would have undertaken it anyway, in the same way
- I would have done it but later
- I would have done it but smaller or of less quality
- I would not have undertaken it at all

Tourism Leadership and Management Development Activities:

Other Conferences and Seminars

* Have you attended any similar conferences or seminars?

- YES
- NO

Tourism Leadership and Management Development Activities:

How do these events compare?

How do these events compare with the Scottish Enterprise ones?

- The SE events were better
- About the same
- The others were better

Any comments

Tourism Leadership and Management Development Activities:

Other Comments

Do you have any suggestions for how Scottish Enterprise can improve the relevance and quality of their events?

Many thanks for your help in this survey.

ANNEX IV

BUSINESS PARTICIPANTS: TELEPHONE SURVEY: QUESTIONNAIRE

TOURISM MANAGEMENT AND LEADERSHIP DEVELOPMENT

FINAL QUESTIONNAIRE
BUSINESS PARTICIPANTS: TELEPHONE SURVEY

To be completed for 'all events' together, but a question on which event was most relevant.

ABOUT YOU

Contact Name ……………………………….
Business Name ……………………………………..
Contact/tel number ……………………………………
Events Attended (pre provided for reference) ……………………..

(IDEALLY PRE COMPLETED AND CHECKED)

Q1 Type of Business

Hotel/Accommodation	
Visitor Attraction	
Restaurant/Café	
Retail/shops	
Other tourism	
Other non tourism	

Q2 Level of respondent (tick highest level that is relevant)

Owner/General Manager	
Junior Manager	
Front line staff	

Q3 What Sex? Male Female

OTHER SOURCES OF INFORMATION

Q4 When you are seeking information on the market, new trends, business improvements, what mechanisms do you use?

	Any	Most imp
I don't seek this information		
Internet		
Conferences/events		
Training courses		
Networking with other businesses		
Advisors		
Other		

…which is the most important to you?

WHAT PROMPTS BUSINESS CHANGES

Q5 Considering any business changes or improvements you have made in your organisation over the last year, in what area were they? (tick all that apply)

General business strategy/planning	
Marketing including market intelligence	
Customer service	
Developed or improved a product	
Capital investment	
Resource/cost efficiency	
New or improved technology including web	
People and organisational development	
Networks/partnerships with other businesses	
Other pls specify	

Q6 What initially prompted the change/improvement or motivated the change? (unprompted)

New management/owner	
Major change in your market/customer needs	
Learning of other approaches/good practice	
Discussion with a business advisor	
Attendance at event/workshop	
Business networking/discussing with other businesses	
Other pls specify	

Q7 Did you receive any public sector support or assistance to the implementation any of these changes?

NO	
YES – financial support/grant	
Yes – business advice	
YES – training/workshop	
YES – other	

ABOUT THE EVENTS/WORKSHOPS

Considering the events you and others in your organisation attended:

Q8 How did you hear about the event? (unprompted)

Direct mail	
Web site	
Email//Ezine	
Business advisor	
Word of mouth	
Other, pls specify	

Q9 What prompted your attendance?

Format	
Topic	
Speaker	
Venue/location	
Recommendation by Colleague	
Other, pls specify	

Q10 Have you considered other events in the past and decided against attending? If so, what were the reasons for this?

Format	
Topic	
Speaker	
Venue/Location	
Price	
Time out of the office	
Date/time clashed	
Other, pls specify	

EFFECTS OF ATTENDING EVENT

Q11 As a result of attending the event (s), to what extent do you feel you have personally changed in:

	Not at all	Partly	Greatly	N/A
Motivation				
Making changes at work				
Strategic thinking				
Innovation				
Risk Taking				
Networking				
Greater development of staff				

FOR THOSE WHO ATTENDED MORE THAN ONE EVENT, IF NOT GO TO Q14

Q12 Which event(s) had the greatest impact on you?

………………………………………………………………………………………..
………………………………………………………………………………………..
………………………………………………………………………………………..

Q13 Which event(s) had the least impact on you?

………………………………………………………………………………………..
………………………………………………………………………………………..
………………………………………………………………………………………..

FOR ALL

Q14 Have you or other members of your organisation taken other action to follow up topics raised in the event(s)?

Further conferences/seminars	
Attending training courses	
Further research	
Other pls specify	

FOR EBUSINESS WORKSHOPS ONLY

Q15 Did you receive one to one support and advice? If so, how relevant and valuable was it:

Not at all Partly Greatly N/A

FOR ALL

Q16 After the event, did you disseminate or pass on the content of the event to others in your organisation?

NO	
Verbal briefing of other staff	
Pass round handouts/presentations	
Other pls specify	

ANY CHANGES

Q17 After attending any of the events, did you take any action back in your organisation?

YES ……………

NOT YET but I plan to ………..

NO …………… GO TO Q24

Q18 Were you intending to take any action BEFORE you attended the event?

Yes definitely	
I was considering something	
Nothing was planned	

FOR THOSE WHO HAVE TAKEN ACTION (complete for each ACTION that has been prompted)

Q19 In which areas were these actions taken? (tick all that apply)

General business strategy/planning	
Marketing including market intelligence	
Customer service	
Developed or improved a product	
Capital investment	
Resource/cost efficiency	
New or improved technology including web	
People and organisational development	
Networks/partnerships with other businesses	
Other pls specify	

Q20 What increase in business performance/benefits have you achieved or expect to experience in your business as a result of this action?

	Now	In Future	Comment
Visitor Numbers			
Turnover/Sales	£	£	
Profitability	£	£	
Employment	FTE	FTE	
Cost reduction	£	£	
Resource efficiency/sustainability			
Other			

IF VISITOR NUMBERS OR TURNOVER/SALES INCREASE, GOTO Q21, OTHERWISE GO TO Q22

Q21 If you have experienced an increase in visitor numbers and/or turnover sales, in your opinion, where do you feel these visitors/spend would have gone otherwise:

Would have gone anywhere/wouldn't have spent it at all	
Would have gone/spent it elsewhere in Scotland	
Would have gone/spent it elsewhere, outside Scotland	
Don't know	

Q22 If you hadn't attended the event(s), what would you have done in relation to these improvements?

I would have undertaken it anyway, in the same way GOTO Q26	
I would have done it but later	
I would have done it but smaller or of less quality	
I would not have done it at all GO TO Q26	

Q23 If you feel that you would have done this later, smaller or of less quality, how significantly would this have been different?

Significantly	
Partly	
Only slightly	
Don't know	

GO TO Q26

FOR THOSE WHO DIDN'T TAKE ACTION

Q24 What were the main reasons that you didn't take any action?

Our organisation already does this	
Not relevant to my organisation	
Lack of staff or financial resources	
Other, pls specify	

Q25 Which event(s) prompted this action?

………………………………………………………………………………………..
………………………………………………………………………………………..
………………………………………………………………………………………..

FOR ALL, COMPLETED ONCE FOR EACH COMPANY.

Q26 What, if anything, would encourage you to take more action?

More practical events	
Follow up events	
One to one support	
Financial support	
Nothing	
Other, pls specify	

Q27 Overall, what are the main factors which are constraining you from undertaking more business improvements and actions? (unprompted)

No desire to undertake these	
Don't know what to do	
Don't know how to do it	
Skills of staff	
Time of management/leadership	
Cost/scale of investment required	
No clear incentive/benefit	
Other, pls specify	

Q28 Do you think your organisation has received other business benefits through your attendance at these event (s)

………………………………………………………………………………

………………………………………………………………………………

COSTS OF ATTENDANCE

Q29 In attending these events, excluding the attendance fees, did you incur any other costs?

Item	Costs
Travel expenses	
Staff wages	
Other pls specify	

FOR THOSE WHO ATTENDED MORE THAN ONE EVENT

Q30 Which event have you found of most benefit to you?

………………………………………………………………………………

………………………………………………………………………………

CHANGES IN DELIVERY

Q31 SE are considering changing the delivery of the events/conferences. What effect would these changes have on your organisation?

	Stop attending	Fewer attend/less often	no difference
Doubling price			
Holding same event more frequently in Scotland			
Holding events locally			
Contracting to a training provider/college to deliver			
Fewer international speakers			
Developing a programme for tourism and non tourism businesses			
Longer notice of events			

Q32 If SE stopped some of all of the events, what would you and your organisation do?

Go to the ones that SE continued to offer	
Go to no events at all and find out information from other sources	
Go to no events at all and don't find out this sort of information from elsewhere	
Go to different events/conferences. If so which ones	

Q33 What future topics would be of most interest to you?

……………………………………………………………………………………

……………………………………………………………………………………

Q34 Do you have any suggestions for how SE could improve the effectiveness and relevance of the programme?

……………………………………………………………………………………

……………………………………………………………………………………

Many thanks for your help

ANNEX V

ILLUSTRATIONS OF BUSINESS IMPROVEMENT ACTIONS UNDERTAKEN

Major Visitor Attraction
Attended 25 events, benefited from MC (Gleneagles). Actions: developed online ticketing; web2 developments; improved customer feedback procedure/analysis

Golf Club:
Attended: Ebusiness in 2007 and 2008. Action: Developed an online booking system

Major Visitor Attraction
Attended: Nov 05 GMC, 05 BTC. Actions: through better visitor feedback, improved their attraction; new education suite

Major Visitor Attraction
Attended: Mar 06 CSS, Oct 07 Sus Tour which was of most benefit. Actions: aiming for Green Tourism Award standard and keeping up standards to improve customer service.

Caravan Park:
Attended: Ebusiness in 2007 and 2008. Actions: Developed a website with booking system and optimise use of search engines.

Activity Business
Attended: Mar 07 CSS. Action: Developed a business plan to expand business [more plans and routes]

Other Accommodation Business:
Attended: Feb 07 GMC. Actions: Developed online bookings system; comprehensive customer feedback form and visitor book; put procedures in place for every element of business to ensure customers always have same experience whichever holiday let they are in. Invested heavily and must retain 5 star rating achieved.

Major Visitor Attraction
Attended: Mar 06 CSS – Raising Service Standards. Actions: Revamped visitor centre to encourage more visitors; developed online shop; staff development - put staff through 1000 welcome training

Major Visitor Attraction
Attended: 27 events in past 4 years – Schindlerhof ES was of most benefit. Actions: optimise use of search engines; involve staff more in developments; use of reports and utel to gather market intelligence; develop customer surveys

Activity Business
Attended: Ebusiness in 2007 and 2008. Action: carried out more marketing of business through use of website.

Eating Out
Attended: Dec 05 BI. Action: website implemented and continually improved.

Hotel:
Attended: 11 events, 'Service in the City and Schindlerhof ES of most benefit. Actions: have shaped business to offer a more personalised customer experience and won the Thistle Award for customer service standards; developed a photography side to business – offer customers chance to have family photos taken while there.

Hotel:
Attended: Jan 08 Sch ES. Action: completed changed customer market; refurbished; developed out of season business. If hadn't don't refurbishment when they did, they'd be closed by now; had they left it, they wouldn't have got the funds to do it either.

Hotel
Attended: Nov 08, Oct 07 GMC, Mar 07 CSS – benefited most from GMC (Gleneagles). Action: diversified into outside catering for weddings;

Pub/Eating Out
Attended: GMCs, Jan07 Sch ES – Dec 06 GMC of most benefit. Action: developed as music venue to grow winter business, won award as UK Music Pub of the Year.

ANNEX VI

SUGGESTED FUTURE TOPICS FOR EVENTS

Market Trends incl credit crunch 7
Internet based tools eg web2, twitter etc (7
Industry specific events (eg Mountain biking, outdoor activities (2) .
Staff Training at reasonable prices
- Telephone Techniques
- Web usage
- Delivery of customer service (2)
- Marketing/sales
- Employment law
- Health and safety
- Legal and licensing
- Hotel management

Encouraging innovation/innovative management/new technology (8)
Increasing yields without further investment (1)
Finance (eg tax, accounting for small business, financing an expansion) (2
Partnership events including mentoring (2
Olympic and Commonwealth Games 2
Marketing (7
- Business development in current climate
- Emarketing and sales
- Specific to sub-sectors
- Increasing sales/lead generation
- Regional promotion outwith Scotland

Customer Service:
- Balance between excellent customer service and cost control
- Language Barriers
- Service development
- Cultural changes
- Behaviour of customers in industry
- Customer retention

Retaining people
How to benchmark against other businesses
Green Tourism
Consultation Panel with key industry people
Coping with global recession
Raising Standards
Managing in a downturn

How to develop a business further
Finding finance for charities and social enterprises

Case study based delivery
Learning from other business leaders
Relevant – suggest Hospitality Assured

ANNEX VII

PUBLIC SECTOR ESURVEY: QUESTIONNAIRE USED

Tourism Leadership and Management Development Activities:

Your views of the events

Considering all the Scottish Enterprise conferences, masterclasses and workshops that you have attended:

How relevant were the events to your own work and organisation?

- Very relevant
- Relevant
- Only a little
- Not at all relevant

How relevant do you feel the events were for tourism businesses in Scotland?

- Very relevant
- Relevant
- Only a little
- Not at all relevant

Who do you feel is the target market for the events? (Tick all that apply)

- Businesses with growth potential
- Businesses in the key destination areas
- Those who are already committed to improve
- Those who could be persuaded to improve
- Medium to larger businesses
- Small businesses
- All businesses
- Anyone with an interest in the sector
- Advisors and supporters to the sector
- Other (pls specify)

How effective do you think the events have been in securing the attendance of the target market?

- Very effective
- Partly effective
- Only a little
- Not at all effective

Tourism Leadership and Management Development Activities:

* To what extent do you feel, following the events, that you have gained:

	Very significantly	Significantly	Only a bit	Not at all
New knowledge or information	☐	☐	☐	☐
New skills	☐	☐	☐	☐
Increased motivation or inspiration	☐	☐	☐	☐

* Following your attendance at these events, have you taken any action back in your organisation?

○ YES

○ NO

Tourism Leadership and Management Development Activities:

Actions you have taken

In what area was the action you took? (please tick all that apply)

- Disseminated the information learnt to other tourism businesses
- Improved/developed an existing project/programme
- Developed a new project/programme of support
- Changed the advice/support that you give tourism businesses
- Formed Networks/partnerships with other organisations

Other (please specify)

* Considering these actions, how did attending the event(s) influence this? Which statement best fits your organisation?

Without attending the event ....

- I would have undertaken it anyway, in the same way
- I would have done it but later
- I would have done it but smaller or of less quality
- I would not have undertaken it at all

Tourism Leadership and Management Development Activities:

Other Conferences and Seminars

* Have you attended any similar conferences or seminars?

- YES
- NO

Tourism Leadership and Management Development Activities:

How do these events compare?

How do these events compare with the Scottish Enterprise ones?

- The SE events were better
- About the same
- The others were better

Any comments

Tourism Leadership and Management Development Activities:

Other Comments

Do you have any suggestions for how Scottish Enterprise can improve the relevance and quality of their events?

Many thanks for your help in this survey.

ANNEX VIII

NON PARTICIPANT ESURVEY: QUESTIONNAIRE USED

1. About your organisation

1. What best describes your organisation?

- Hotel/Accommodation
- Activity/Attraction
- Restaurant/Cafe
- Retail/shops
- Supplier to the tourism sector
- Other tourism

Other (please specify)

2. How many employees do you have?

- 0
- 1
- 2-5
- 6-10
- 11-50
- 50+

3. What is your postcode?

4. Are you currently looking at making any changes or improvements to your business? (Tick all that apply)

- General business strategy/planning
- Marketing including market intelligence
- Customer service
- Develop or improve your product/service
- Capital investment
- Resource/cost efficiency
- New or improved technology including web
- People and organisational development
- Networks/partnerships with other businesses

Other (please specify)

2. Scottish Enterprise Conferences, Events and Workshops

Scottish Enterprise hold a series of conferences, master classes, workshops and courses and they are interested in your views and attitudes to these, particularly if you have not attended them, to ascertain the main reasons why.

1. What were the reasons why you did not attend the following SE sponsored events?

	Gleneagles Masterclasses	Business Insight Seminars	Executive Seminars	Annual Business Tourism Conferences	Annual Customer Service Conference	Learning Journeys	ebusiness workshops (delivered through STF)	Sustainable Tourism conference	Leading Service Excellence Courses
I did attend									
Unaware of them									
Not enough notice									
Lack of relevance									
Cost/value for money									
Location									
Time away from business									
Not practical enough									
No interest in changing my business									

Other (please specify)

2. Have you attended other events, conferences or workshops?

- YES
- NO

3. Other Events attended

1. What other events have you attended?

- Scottish Tourism Forum annual conference
- Annual conference of trade association such as ASSC, ASVA and others
- VisitScotland national events
- Local seminars/workshops by national organisations
- Local seminars/workshops organised by local tourism groups
- Seminars, not specific to the tourism sector
- College or University events

Other (please specify)

2. Why did you attend these events rather than the SE ones?

- Greater relevance
- Better Value for Money
- Location
- More practical

Other (please specify)

4. How the SE programme could be improved

1. In your view, how could SE change their leadership and management development activites to improve their relevance and benefits to you and your organisation?

Many thanks for your help in this research