1 RECOMMENDATION

1.1 It is recommended that the Committee note for its information the content of the A&DTB Annual Report 2002/2003 briefly summarised in paras 3.1 – 3.7 of this report.

2 INTRODUCTION

2.1 The Angus & Dundee Tourist Board (ADTB) is the statutory body responsible for destination marketing/promotion of tourism in the Angus & Dundee area. The Council, since its inception in 1996, has provided core funding via a Service Level Agreement with the Board, to enable the Board to provide support infrastructure for tourism promotion and marketing and visitor services across the Angus area. The other funding partners are Dundee Council, Scottish Enterprise Tayside, VisitScotland and subscribing trade members.

2.2 The three Angus Council Board Directors during the year ended 31 March 2003 were Councillor R Leslie-Melville, Councillor W Crowe and Councillor J Gibb.

2.3 The Council received a copy of the Annual Report issued by the Board on 7 November 2003.

3 BRIEF SUMMARY OF ANNUAL REPORT 2002/2003

3.1 The Board’s objectives (as per Business Plan) are:

- Increase awareness of Angus and the City of Dundee as visitor destinations;
- Increase the volume and value of tourism throughout the area;
- Encourage year round tourism and therefore reduce seasonality; and
- Provide a high quality of customer care.

Addressing the Objectives

3.2 Increase Awareness – the report addressed this through a number of activities:

- Attending consumer exhibitions;
- 2003 Holiday Guide – print run of 80,000 copies distributed;
- 2003 Area Guide – 70,000 copies distributed via members;
• Consumer Website – re-launched February 2003 it received 5.26 million hits and 211,000 visits in 2002/2003;

• Short breaks/day trip promotion – three seasonal campaigns offering a total of 117 special discounted offers;

• Picture This 2002 – public campaign to obtain photo images;

• Photo Library – on line for use by Travel Trade writers, journalists who have used 300 images of the area in promotional literature;

• Familiarisation Visits/Press Trips;

• TIC Fun Days;

• Partnership Campaigns
  ➢ Other Side of Scotland -generated additional 28,000 visitors and expenditure of £1.9 million.
  ➢ Superfast Ferry Group - in 2002 approximately one fifth of all inboard ferry passengers visited Angus & Dundee.
  ➢ East of Scotland Golf Tourism Alliance - major events and overseas exhibition attendance.
  ➢ Carnoustie Country – promoted via www.carnoustiecountry.com for “Stay and Play”.
  ➢ Glorious Gardens of Grampian & Angus – A5 leaflet distributed.
  ➢ Walking Wild in conjunction with visitScotland.com.
  ➢ A92 Angus Coastal Trail – 10,000 guides published and distributed.
  ➢ Cairngorms National Park – ADTB playing role in marketing strategy.
  ➢ Travel Trade – booklet to service all enquiries plus stand at Scotland’s Expo 2002.

Increasing Volume of Visitor Revenue

3.3 The Annual Report publishes a table (below) showing visitor revenue (£m) estimated by “STEAM” (2003 – figure not available).

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2001</th>
<th>% change 01-02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angus</td>
<td>91.23</td>
<td>90.51</td>
<td>1</td>
</tr>
<tr>
<td>Dundee</td>
<td>106.46</td>
<td>90.17</td>
<td>18</td>
</tr>
<tr>
<td>Total</td>
<td>197.69</td>
<td>180.68</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: Scottish Tourism Economic Activity Monitor (STEAM).

3.4 The Annual Report offers no comment on the marginal change for Angus over this period and the substantial change for Dundee City. The Chief Executive of the Board has indicated that this may be to do with the ever-increasing number of large conferences taking place in Dundee, but this is speculation and would require further
analysis. However, it is clear that the leisure market across Scotland has declined in the years mentioned and to that end, Angus, with a predominantly leisure based tourism market, is maintaining its position probably by bucking the trend.

3.5 Page 6 of the Annual report identifies that through the various off season campaigns and day trip promotional activities, about £718k of direct expenditure was generated.

3.6 The Annual Report on page 9 publishes a table on Tourist information Centre (TIC) enquiry levels 2001/2002 – although the 2002/2003 figures must be available (since they are monitored on a daily basis by the ADTB TICs). However the Chief Executive of the Board indicates that TIC Figures are collated and compared across Scotland on a calendar year basis. This Annual report covers the Financial Year ending 31st March 2003 so it is not possible to include 2003 TIC figures – these will be reported next year.

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2002</th>
<th>% Change 01-02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arbroath</td>
<td>37,497</td>
<td>36,672</td>
<td>(2.2)</td>
</tr>
<tr>
<td>Brechin</td>
<td>16,683</td>
<td>18,530</td>
<td>11.0</td>
</tr>
<tr>
<td>Carnoustie</td>
<td>8,972</td>
<td>9,126</td>
<td>1.7</td>
</tr>
<tr>
<td>Dundee</td>
<td>118,344</td>
<td>122,188</td>
<td>3.2</td>
</tr>
<tr>
<td>Forfar</td>
<td>13,600</td>
<td>11,590</td>
<td>(14.7)</td>
</tr>
<tr>
<td>Kirriemuir</td>
<td>5,825</td>
<td>6,224</td>
<td>6.8</td>
</tr>
<tr>
<td>Montrose</td>
<td>14,901</td>
<td>11,916</td>
<td>(20.0)</td>
</tr>
<tr>
<td>Total</td>
<td>215,822</td>
<td>216,246</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Table 2 – TIC Enquiries in 2001/2002

There is an error in the Annual Report’s Table 2 in that Forfar has a negative figure (shown above correctly as (14.7%).

On extracting the Angus only figures the following figures are obtained:

<table>
<thead>
<tr>
<th></th>
<th>2001</th>
<th>2002</th>
<th>% Change 01-02</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angus</td>
<td>97,478</td>
<td>84,058</td>
<td>(13.8)</td>
</tr>
</tbody>
</table>

The Annual Report gives no explanation for this decline in Angus enquiries compared to Dundee. The Chief Executive of the Board thinks it likely that this decline is linked to a general downturn in the leisure market however, there are other issues pertaining particularly to the performance and location of TICs in Angus which give the Board great cause for concern.

In relation to customer care, while the training of staff is covered in the Annual Report there is no coverage of customer satisfaction levels/monitoring information regarding training. The Chief Executive of the Board indicates that the Board participated in the 2002 TBT/visitScotland Service Quality Audit and scored very highly. CSA measures customer satisfaction and adherence to standards and that while the content of the audit is not presented in the Annual Report, this has been reported to the Board and details can be provided to the Council.:
• the Board’s TICs scored very highly in The Service Quality Audit undertaken by Tourist Board Training Ltd;
• training and development of staff (23 formal courses/60 places filled);
• individual staff course qualifications obtained;
• seasonal staff (TICs) receive pre-season training including “Welcome Host”.

4 FINANCIAL IMPLICATIONS

4.1 There are no financial implications arising from the presentation of Annual Report which is for information. The financial statement contained in the Annual Report was previously the subject of a Report to the Resources & Central Services Committee on 23 October 2003 (Report No 1215/03 refers).

5 HUMAN RIGHTS IMPLICATIONS

5.1 There are no Human Rights implications arising from this report.

6 CONSULTATION

6.1 The Directors of Finance and Law & Administration have been consulted during the preparation of this report.

7 CONCLUSION

7.1 The Annual Report of ADTB shows that the Board has addressed its objectives through a wide range of activity, although with respect to Angus, TIC enquiry levels were down and visitor revenue was marginally positive compared to the previous year. There are concerns about the performance and location of TIC’s in Angus which the Council is aware of, and is addressing the issue jointly with the Board.

NOTE

No background papers, as defined by Section 50D of the Local Government (Scotland) Act 1973, (other than any containing confidential or exempt information) were relied on to any material extent in preparing the above Report.

DV/SW/IMM

16 December 2003

A B Watson
Chief Executive