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## The Prestonpans Experience

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### Travel Trade Report

An report on the perception of domestic and international Travel Trade markets into The Prestonpans Experience and planned developments for a Battle Visitor Centre

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**05/12/08**

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## Introduction

This report looks at the development of The Prestonpans Experience as currently operated by The Prestoungrange Arts Festival and details research findings from both domestic and international Travel Trade buyers who regularly send tourists to Scotland as a holiday destination.

Source Scotland was approached by Gordon Prestoungrange, the Baron of Prestoungrange and chairman of the Prestonpans Arts Festival Committee, with a view to establishing the wants and needs of the Travel Trade marketplace before developing a model for the product and then promoting it to the desired customers.

All in all, the project has been a great success and has seen visitor numbers increase in 2008 due to the more structured product and the promotion that has been carried out to date.

### About Prestonpans and the Arts Festival

Prestonpans is emerging from its depressed, former industrial past into a vibrant town with many unique and niche “art” and historical features. One of the challenges faced by the committee to date is how to package the diverse elements together in order to promote an attractive proposition public. A secondary challenge is how to get the product to market.

The diverse mix of features and activities in Prestonpans includes the following:

- **The Prestonpans Murals Experience** – A growing collection of in and outdoor life size murals by local painters are located around the town on Prestonpans and depict significant moments in history which helped shape the town and its community.
- Included in the Prestonpans Murals Experience is the **Witches Experience** which tells the tale of 81 men, women, and children who were tried under the witchcraft act until as recently as Helen Duncan in 1944. It is reported that many of these said Witches concocted potions and incantations locally in Prestonpans.
- **The Prestonpans Totem Pole** – as a further development of the Mural Town concept, a totem pole was carved to show four history zones of Prestonpans’ past. The initiative originates from Chemainus in British Columbia; a sister regeneration town in Canada.
- **The Prestonpans Art Festival** – June each year; a growing and vibrant festival showcasing the work of local artists and potters in their own homes.
- **The Battle of Prestonpans** – A re-enactment is performed every September to mark the anniversary of the Battle of Prestonpans where Bonnie Prince Charlie led the Jacobites to victory in 1745.

The logo features the word "Source" in a large, white, sans-serif font, with a blue water droplet falling into a pool of water, creating ripples, behind the letters. Below "Source" is the phrase "Tourism Solutions" in a smaller, blue, sans-serif font.

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- **The Gothenburg** – a public house and restaurant for the community with all but 5% of profits being re-invested into the area. The Gothenburg also produces its own real ale in a microbrewery.
- Plans are in place to open **a pottery with gift shop** close by to the Gothenburg which will showcase Prestonpans history as a significant location for Pottery production in Scotland's past.

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### Tourism Market Evaluation

#### Scottish Tourism Statistics

Visitscotland reports that in 2007, almost 16 million tourists took overnight trips to Scotland. The annual spend was nearly £4.2 billion.

- The UK accounts for 83% of tourism trips to Scotland
- Overseas tourism accounts for 17% of tourism trips to Scotland
- 68% of overseas trips are taken in April-September
- The USA is our biggest overseas market, accounting for 18% of the overseas spend
- 87% of overseas visitors who come to Scotland arrive in the UK by air and 66% of UK visitors come by car
- Overseas tourists stay an average of 8.8 nights, Scottish tourists an average of 2.9 nights and English tourists an average of 4.4 nights
- Average spend per night is £55 for overseas tourists, £65 for English tourists and £46 for Scottish tourists
- A total of over 45m visits were made to Scottish visitor attractions in 2007

International visits to Scotland in 2007 are recorded as follows:

Country	Trips ('000)	Trips (%)	Spend (£m)	Spend (%)
USA	408	15	247	18
Ireland	308	11	96	7
Germany	305	11	186	14
Italy	189	7	92	7
Spain	178	7	79	6
France	164	6	56	4
Netherlands	142	5	55	4
Canada	122	4	83	6
Australia	119	4	52	4
Poland	108	4	38	3
Rest of World	713	26	359	27
<b>Total</b>	<b>2756</b>	<b>100</b>	<b>1343</b>	<b>100</b>



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Of the tourist visits to Scotland, the following percentage split occurred in 2007 when analyzing activities undertaken:

Activity	% of UK Holiday Trips
Hiking/ Hill walking/ Rambling/ Other Walking	49
Visiting museums, galleries, heritage centres, etc.	23
Shopping	13
Touring/Sightseeing	13
Wildlife Watching & Zoo Park Visits	9
Watching Performing Arts (including cinema)	9
Adventure Sports	5
Golf	4
Fishing	4
Cycling	3

Visitscotland also reports on 2007's most popular Visitor Attractions:

Major Attractions with free admission	Visits
Kelvingrove Art Gallery & Museum, Glasgow	2,232,475
National Gallery of Scotland Complex, Edinburgh	1,442,304
National Museum of Scotland, Edinburgh	841,849
World Famous Old Blacksmith's Shop Centre, Gretna Green	709,097
Royal Botanic Gardens, Edinburgh	607,018
Gallery of Modern Art, Glasgow	580,148
Museum of Transport, Glasgow	535,845
Falkirk Wheel, Falkirk	513,907
St Giles' Cathedral, Edinburgh	487,483
National War Museum, Edinburgh	468,125

Major Attractions with paid admission	Visits
Edinburgh Castle, Edinburgh	1,229,712
Edinburgh Zoo, Edinburgh	607,603
Edinburgh Bus Tours, Edinburgh	504,742
Glasgow Science Centre, Glasgow	480,864
Blair Drummond Safari & Adventure Park, Nr Stirling	433,070

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Stirling Castle, Stirling	389,011
Scottish Parliament Visitor Centre, Edinburgh	352,454
Burns National Heritage Park, Maybole	324,838
Our Dynamic Earth, Edinburgh	290,653
Urquhart Castle, Drumnadrochit	277,394

As you can see from these statistics, on the positive side, the figures show a preference for art and history amongst visitors. On the negative, the visitor attractions detailed are mostly city based.

The Prestonpans Experience appeals to visitors on many different levels. Its five different elements; The Witches Experience, The Battle of Prestonpans Experience, The Industrial Heritage Experience, The Arts & Architecture Experience and The Community Experience draw customers interested in cultural Scotland, Scottish History/Heritage & Genealogy, Industrial History and Community/Area regeneration.

In keeping with our thinking, there has been widespread industry recognition that Scotland's Culture, History and People is a major and growing motivator for incentivizing customers to travel to Scotland for a holiday. One major initiative launched collaboratively by The Scottish Executive and VisitScotland is the Homecoming Scotland campaign:

***"Homecoming Scotland 2009 celebrates the 250th anniversary of Robert Burns' birth with a year-long programme of events across the country. We're also celebrating some of Scotland's great contributions to the world: golf, whisky, great minds and innovations and Scotland's rich culture and heritage."***

### **Target Markets for the Prestonpans Experience**

Following consultation with our company, one of the major objectives outlined by The Prestoungrange Arts Festival committee was to identify the main target markets that should be promoted to in the short and medium term. The outcome of market research undertaken is outlined below.



## Market Research

Before developing The Prestonpans Experience, considerable market research was carried out across the Travel Trade by various means, including online and offline surveys as well as telephone and in person interviews with leading industry figures. We also took The Prestonpans Experience to Scotland's largest Travel Trade Exhibition – Visitscotland Expo, to obtain on the ground feedback from the industry. The findings are as follows (full survey information enclosed in supporting documentation):

### General Findings:

- The majority of clients feel their customers would be interested in The Prestonpans Experience
- History/Heritage is the 3<sup>rd</sup> most popular reason for travelling to Scotland; most people surveyed believe that Scotland's Heritage is of increasing interest to their customers and will play a larger role in the future in inspiring visitors to travel to Scotland
- The most popular experience is The Battle of Prestonpans
- A guided tour is seen to be an essential part of the experience
- 45 minutes – 1 hour is the most popular time length for the tour
- Lunch at the Prestoungrange Gothenburg should be offered as an optional extra
- The majority of people surveyed are familiar with the story of Bonnie Prince Charlie

### Findings by Client Type:

- UK Coach Groups – Clients were interested in using The Prestonpans Experience as an excursion alternative for the area. There was some concern from this sector about the amount of walking involved as the age demographic is 55 years + with the majority of customers being 65 years +
- International FITs (Independent Travellers)/Travel Agents – This sector generated the least interest as those buyers we spoke to advised that their clients tend to stick to the main population centres/ main tourist routes and visit the many attractions on offer there.
- International Coach Groups (Independent Operators) – There was interest from this sector, the majority of whom did not feel that translation of the spoken information was a major issue provided they had a guide with the group who could translate as required. This sector

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do often plan their excursions close to the departure date of the group from their home country, sometimes even once they reach Scotland therefore signage and distributed promotional information in local hotels etc. should be a major consideration.

- International Coach Wholesalers/Tour Operators – This sector plan everything out approx. 18 months in advance and each element is rigorously researched and “purchased” in advance. The feeling from this market was, for the most part, that the product was too Niche to feature in their mass-market “general” tours of Scotland. There was scope, however, to in the future create a “Jacobite” theme tour when the Visitor Centre is in place.
- Niche Operators – Walking/Heritage/Photography – This sector was the most interested in the attraction, however it does not bring the same volume of visitor numbers to Scotland as the other clients.

### **Client In-depth Discussions**

One to one telephone and face to face discussions were undertaken to understand further the opinions of some of Scotland’s leading Travel Trade industry figures.

#### ***Diana Thomson, Celtic Welcomes***

Celtic Welcomes is a Scottish based Tour Operator specialising in UK Coach Groups and some in-bound International Groups. Based in Ayr and established for 10 years, Celtic Welcomes prepares itineraries across Scotland, Ireland, Northern England and Wales (but specialising in Scotland) offering sight seeing and accommodation alongside more specific itineraries requested by clients.

Diana was interested to hear about The Prestonpans Experience and likened the experience to Derry Guided Walking Tours <http://www.derrywalls.com> which they currently use to great effect in Ireland. Diana would happily put The Prestonpans Experience trail into her suppliers database and will feature any proposed itinerary on her website which buyers use to research & purchase tours.

Feedback on the experience was that they offered a nice cross section of interests and that the price was acceptable as was the proposed time length of tour.

#### ***Robin Worsnop, Rabbies Trail Burners and Chairman of The Tourism Innovation Group (TIG)***

Rabbies Trail Burners is an Edinburgh Based Tour Operator which is active exclusively in Scotland offering sight seeing tours to mostly international travellers. The USP for this company is that it operates small personally guided tours which allow the customer to get “off the beaten track” thus allowing them to experience a more personal and unique Scotland.

Robin Worsnop is also the chairman of Scotland’s Tourism Innovation Group (TIG).

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Feedback from Robin was that The Prestonpans Experience was a highly niche product and that he didn't feel it could easily be incorporated into their existing programmes which feature mostly sightseeing and whisky. His customer base is also in the age demographic 25 – 35 and he feels that they perhaps would not be as appreciative of an art based attraction. He would be happy, however to receive further information on The Prestonpans Experience and would promote it if a niche enquiry fitted the product.

Robin was also slightly dismissive of the Battle element of the experience saying that if visitors wanted to find out about the Jacobites they would visit Culloden.

### **Gabi Pölkemann, CTS Gruppenreisen, Germany**

CTS is one of Germany largest outbound wholesalers and sends thousands of customers per year to Scotland on a series of pre-planned (brochured) and ad-hoc groups.

Gabi was very enthusiastic about The Prestonpans Experience. When asked what made The Prestonpans Experience so interesting to her market, she said:

“It is good to see new things to see & do in Scotland, the newness makes it interesting and also the fact that there are a variety of things to see – not just one choice.”

“Our customers are very interested in Scotland's history and something visual makes it possible for customers of any nationality to understand what is displayed in their own way.”

### **Janet MacAleese, Scotsell**

Scotsell is a small and highly customised tour operator based in Glasgow. They specialise in “tour Scotland by car” programmes and their market is individual travellers from Europe and the UK. They have just joined forces with a company called MyGuide Travel Group which will also bring North American & Canadian customers to Scottish shores.

Janet is a real art lover and therefore was very excited to hear about The Prestonpans Experience; “I must go myself!” She is a great believer in providing her customers with an informed selection of the best things to see and do in the locations they may be travelling to. She would be happy to receive further information on The Prestonpans Experience and will promote it to her customers as and when it is relevant.

Janet asked about ways in which consumers can find out about The Experience for themselves – she suggested having flyers distributed using PPD or similar to the local and surrounding areas, a customer facing website selling the experience as an attraction and perhaps attending a consumer show such as Great Days Out which is on each February in Bolton <http://www.greatdaysout.com>

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### **Klaus Frömmell, Rob Roy Tours**

Rob Roy Tours is a Scottish Based Tour Operator who specialise in inbound German tour groups looking for a sight seeing tour of Scotland. They have itineraries which cover most areas of Scotland and are based in Berwick upon Tweed.

Klaus was surprised to hear of the Prestonpans Experience as he was not aware of the community movement and developments in Prestonpans. Given his proximity to the location he had thought he would have heard of it.

Rob Roy tours operate walking and culture tours based around the town of Pitlochry which are popular with his customers and feels that something similar for the Jacobite uprising may be suitable but this would be for the future when the Visitor Centre is up and running.

They do have special interest groups and with the upward trend in customers coming to Scotland to trace their roots and have a genuine community experience, he would be interested to receive further information which he can incorporate into bespoke proposals or itineraries.

### **Market Research Outcomes**

Following the market research undertaken, the following outcomes were established:

- There is interest in the medium to long term (18 months – 2 years) in the Prestonpans Product amongst the Travel Trade
- The Prestonpans Experience is seen as a niche product and its appeal would be significantly improved by the provision of a visitor centre
- Individual tourist to Scotland will be difficult to persuade away from the main urban centres & established tourist routes with their plethora of visitor attractions/ sightseeing opportunities
- Consideration should be given to translation of literature and signage for International Groups/ Tour operators
- The Prestonpans Experience should be offered with two different time options; 45 minutes – 1 hour & 1 hour & 30 minutes – 2 hours
- The “Experience” option that captured the market’s imagination most was the Battle Experience and there was considerable interest in the anniversary battle re-enactments

These outcomes leave us with the dilemma of who to sell the product to in the short term and whilst not deemed as “Travel Trade”, the most obvious market for The Prestonpans Experience are the leisure clubs & associations of lowland Scotland, particularly those with an interest in Scottish History, Culture & The Arts. This conclusion has been reached based on the fact that whilst the informal “Experience” has been in existence, the demand had been generated from such clubs.



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Looking further at this marketplace, the evaluation of the market size shows that there are in the region of 850 such clubs and organisations within a 50 mile radius of Prestonpans itself. These clubs and organisations are generally made up of less than 30 people and they typically have 2 to 3 excursions each year.



## Product Development

### The Prestonpans Experience

At the very root of The Prestonpans Experience is the desire for regeneration of the down-at-heel town of Prestonpans. The passionate and committed group of enthusiastic locals, The Prestoungrange Arts Festival Committee, are the driving force behind the development of The Prestonpans Experience. Under the direction and support of The Baron of Prestoungrange, the Experience has gone from a very informal walk to a structured and customizable guided tour and outdoor art gallery.

The hub for the Prestoungrange Arts Festival Committee is the 4 Star Visitscotland Arts Venue; Prestoungrange Gothenburg in the heart of the town of Prestonpans. A historic building in its own right, people come from miles around to see the distinctive architecture of the building and the many indoor art items showcased in situ.

As an extension of the art showcase of The Gothenburg, local artists and the committee became involved in a movement called World Mural Towns which originated in Chemainus, Canada and began taking art outdoors and gradually built up a collection of over 30 life size murals depicting the diverse history of Prestonpans.

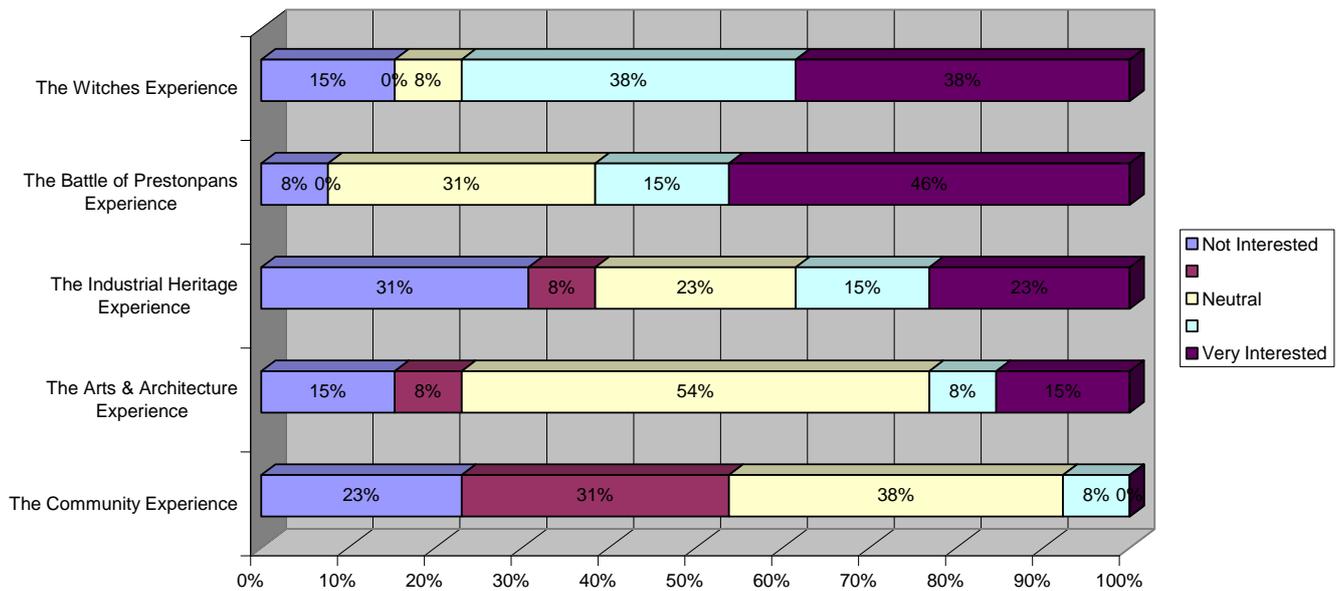
As word spread about the art on display, the committee started to receive requests for more information from local community groups and enthusiasts and as demand grew the committee decided to develop a visitor experience which could be promoted and eventually become a viable revenue stream for the committee.

At this point in the product development, there was “gut instinct” on what people would like to see, created by the existing interest levels. The murals and attractions were separated into five different categories but to determine which were the most popular, a panel was offered the planned selection of experienced. The survey outcome was as follows:

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3. Please rate on the scale below how interested your customers would be in each element of the Prestonpans Experience.



As you can see, The Battle of Prestonpans Experience generated the most popular response with 46% being very interested and The Witches Experience is the second more popular response with 38.5% of the sample returning the same interest level. This was the expected outcome based on the demand of the existing customer base.

Going forward, we then created the marketing literature for The Prestonpans Experience in the form of a flyer which could be distributed at tourist information centres, community centres and at exhibitions. The flyer along with a covering letter was also posted to local clubs & organizations in the immediate area surrounding Prestonpans. (Flyer and letter also enclosed as supporting documentation)

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### Where We Are Now

Following the direct mail of the Prestonpans Experience flyer to local clubs & organizations, we have seen an increase in visitors in 2008 to approximately 100 visitors per day throughout the main season (May – September), however the most positive outcome has been the increase in forward bookings for 2009. The plan now is to continue capitalizing on local interest and in conjunction with PR and regular events spread the word gradually to widen the catchment area.

Part of the local strategy has seen two significant developments this year;

1. A new award winning mural has been created at The Prestonpans Station in collaboration with Scotrail. The Prestonpans Station is a very busy commuter station and thus the visibility has helped to create greater awareness of the Murals and the experience itself.
2. A map dispensing machine has been installed in the car park opposite the Gothenburg where ad-hoc visitors can buy a “do it yourself” map and pick and choose their own selection of murals to visit. The map also invites buyers to the Gothenburg for refreshments and offers a £1 or £2 discount on a £5 or £10 spend.

Observations of this year’s customer have shown us:

- The age demographic is generally visitors in the 40 years + age bracket with the highest density interest age group being 60 years +
- The main days for visiting the murals is Saturday and Sunday
- The most popular time for visiting the murals is between 13:00hrs and 19:30hrs
- The number of visitors fluctuates depending on the weather conditions

Visitors to the Prestonpans Experience this year have included the Norwegian Scottish Association, Adam Smith College from Fife, Historical/educational groups from Jewel and Esk College and Edinburgh University along with members of The Saltire Society and Scottish Arts Club.

Feedback from customers is very positive and most enjoy meeting the artists as this gives greater insight into the motivation & history behind the murals and personality to the Experience itself.



## Success Stories

**A letter of thanks from Bernard Ginty, Chairman of the North Berwick Ramblers Group.**

“Just a note to thank all of you for the performances you put on for us on Friday.

Chatting during our walk on Sunday confirmed what I thought, that everyone enjoyed your interpretation of the historical events portrayed in the murals, and nicely finished off by the refreshments in the Goth. (I think you might have won a few new customers there).

Our congratulations to the performers - singers, actors, John Lindsay's poems and of course the Baron.

Would you pass on our appreciation to them all. Our only reservation is that we saw just a fraction of all the murals. Perhaps next summer we will ask to have a look at the rest - though we don't expect this sort of reception every time!

Finally our congratulations on the success of the 3 Harbours Arts Festival, it must have taken an enormous amount of work to coordinate so many events.

I think you're now due a well earned rest.“



## Development Opportunities For The Future

### **The Prestonpans Experience**

The Prestonpans Experience, now that it has been established, needs to continue the momentum that has been generated over the past 10 years and the recent promotional work carried out.

Plans are in place to increase the number and variety of artworks on display and included in The Experience; there is a great new sculpture at the library by Sue Sheila based on the Rock Trail and Prestonpans Infants has new murals all around the playground. Also the community centre is commissioning a new Gala mural by Tom Ewing. Finally work is now in hand to create not only a miners sculpture, but a trail between the two local coal pits and the miners sculpture.

### **The Battle Visitor Centre**

The most natural development for the future would be to establish a more robust battlefield offering including a visitor centre. The Travel Trade market flock to The Culloden centre by the coach load and have indicated that there is enough demand to justify a second Jacobite centre – not all visitors to Scotland travel to Inverness!

It is also without doubt that the addition of a Visitor Centre would enhance the offering of The Prestonpans Experience. The centre would provide additional insight and explanation of the history of the area and its significance in Bonnie Prince Charlie story which is recognized the world over.

### **Further Recommendations for Promotional Activity**

To continue strengthening the position and awareness of The Prestonpans Experience, we would suggest the following promotion activities are considered as additions to the current marketing plan:

- A stand alone website for The Prestonpans Experience, offering online sale and download of a murals map for those who wish to visit the murals trail independently of the organised tours
- Continued promotion via word of mouth and local initiatives
- Involvement and promotion via the Visitscotland/ Scottish Executive Homecoming campaign for 2009 <http://www.homecomingscotland.com/default.html>. This is your target market and offers an excellent development environment for stronger heritage links and a spring board for further visitor number development

The logo features the word "Source" in a large, white, sans-serif font, with a blue water droplet falling into a pool of water, creating ripples, behind the letter 'o'. Below "Source" is the word "Tourism Solutions" in a smaller, blue, sans-serif font.

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- Development of relationship with existing customers and data capture of email addresses enabling cost effective communication by email to promote up and coming events as well as news on developments.
- Myspace, Facebook, Bebo and/or Twitter pages for The Prestonpans Experience and/or The Arts Festival
- A targeted PR campaign to generate national media coverage
- Distribution of literature across the Lothians
- Strengthening links with Visitscotland, Scotrail, The Arts Council and other relevant public bodies/agencies
- Improved signage and literature distribution across the Lothians
- Key “ambassadors” of The Prestonpans Experience in strategic locations across the Lothians who will keep the buzz going



## Conclusion

In conclusion, it has been determined that there would be interest in The Prestonpans Experience from niche operators and from independent visitors with interest in the arts, culture and Scotland's history.

The more mainstream "sight seeing" visitors to Scotland would be less interested in the current proposition that is The Prestonpans Experience.

Research and public opinion has told us that by combining The Prestonpans Experience with a new Battle Visitor Centre there would be a more general appeal attracting visitors to the area and to Prestonpans itself.

Now that the product is established, as part of the travel trade strategy, the next objective should be to target the domestic coach market who are currently planning their late summer brochures – ideal for the September anniversary celebrations of the Battle of Prestonpans.

January 2009 is the start of the 2010 planning season for the international travel trade and is the ideal time to approach the market with a proposition for including The Prestonpans Experience in the itineraries. It would be ideal, for example for the northern European markets who often travel by car or coach to Scotland via Newcastle.