
DESTINATION ABERDEEN & ABERDEENSHIRE. A FRAMEWORK FOR GROWTH. 2022 - 2030



CONTENTS

1. SETTING THE SCENE	3
2. AMBITION FOR 2030	5
3. THE FOUNDATIONS	9
4. TRENDS	15
5. FUTURE FOCUS	18
6. TURNING WORDS INTO ACTION	27



1. SETTING THE SCENE



1. SETTING THE SCENE

The paper sets out a framework for growth for tourism in Aberdeen and Aberdeenshire.

It provides a focus for investment and innovation by all the players which make up the visitor economy. In particular for businesses providing products, services and experiences directly to visitors – as well as those in wider supply chains - it identifies the opportunities for sustainable growth.

Tourism reaches into communities across Aberdeen and Aberdeenshire. It generates spend, supports businesses and jobs, and brings vibrancy to city, towns and villages. It can and should play a significant role in the future success and sustainability of the region's economy and quality of life. This will mean actively contributing to the regional and national transition to a net zero economy – not only helping to meet targets, but also meeting customer expectations.

The North-east has the capacity to welcome many more visitors, so more people need to know about us and choose to visit.

Of course, this means actively promoting what the area already has, to those most likely to come, but it also means adapting to market changes, and attracting new audiences through investment in new, authentic and distinctive products and experiences that help to sustain businesses and exceed visitors' expectations.

The objective of this strategy is to provide a guiding light towards achieving the ambition set out in the following pages as the region moves beyond the pandemic and responds to a different operating environment, changing visitor expectations and new growth opportunities. It acknowledges the need for actions to be both informed by – and contribute towards – net zero ambitions.



2. THE AMBITION FOR 2030



2. THE AMBITION FOR 2030



The ambition is simple. It is for Aberdeen & Aberdeenshire to become Scotland's leading visitor destination by 2030:

- ▶ Setting the pace for sustainable growth with visitors staying longer and spending more
- ▶ Pioneering tourism business innovation
- ▶ Being at the vanguard of delivering unique, high-quality visitor experiences
- ▶ Going above and beyond customer expectations.

The North-east approach focuses on three components:

Attractors – that provide the greatest opportunities for growth

- ▶ Business events
- ▶ Culture & heritage
- ▶ Festivals & events
- ▶ Natural environment
- ▶ Outdoor activities

Drivers – what is needed to remain competitive and expand

- ▶ Market awareness
- ▶ Product development

Enablers – the fundamentals for a successful industry

- ▶ Digital transformation
- ▶ People & skills
- ▶ Travel connectivity
- ▶ Accessibility



MEASURING SUCCESS

A big-number target – as in the previous strategy - can be eye-catching but as the past few years has shown tourism can be buffeted by factors well outside the control of individual businesses or a Destination Organisation. It also has little direct relevance to the individual businesses that constitute a region's visitor economy. In addition, a step change in estimates for the volume and value of inbound tourism are expected in the next few years due to a revised data capture approach. This could render certain targets superfluous.

For these reasons, a headline big-number value target is not being set within this strategy. Rather a small number of meaningful performance indicators related to the strategy's ambition are included and setting baselines for 2022 as the starting point to monitor progress. These indicators, how they will be measured, and what they will tell us, are shown here:

WHAT	HOW	WHY
Sector Growth (% annual increase in visitor spend in the region compared to Scotland)	National tourism surveys	Once the national surveys recommence a target annual growth rate will be set to monitor progress towards becoming one of Scotland's leading destinations where the target is to exceed the Scottish growth rate.
Business Growth (% annual increase in turnover)	Local business survey	To track business performance and success by setting a market relevant growth target that can be tracked among a sample of local businesses
Awareness of Aberdeen & Aberdeenshire	Omnibus survey	Before people can choose to visit, they need to be aware of the destination and what it offers. This longer term KPI monitors reaching target audiences and achieving market cut-through.
Intention to visit Aberdeen & Aberdeenshire	Omnibus survey	The next step after awareness is getting on people's list of destinations they want to visit. Another longer term indicator, this monitors progress towards conversion.
Views of & attitudes towards the destination	Sentiment research	This measures and tracks the 'happiness' element of the ambition assessing satisfaction, likelihood of repeat visits and recommendations. There should be shifts over the medium term.
Average length of stay (holiday visits)	Visitor survey	If people stay longer the carbon impact of travel to the destination will be reduced as well as longer stays resulting in greater spend across more of the region. There should be shorter term shifts in this KPI.
Average spend per visit (holiday visits)	Visitor survey	The aim is for people to spend more while they are here, contributing to business profitability, sustaining jobs, and distributing expenditure across city, towns and villages. An expectation of shorter term shifts.

Success beyond the numbers...



...and will be guided by four principles:

1. Sustainable Growth: Growth must be sustainable over the long term for the environment, society and economy, protecting the natural and built environment and contributing to the wellbeing of residents, focused on areas where there is the greatest opportunity for growth.

2. Leadership: Businesses should take the initiative in finding ways to work together to create new products, improve the visitor experience and make the region stand out against its competitors

4. People & skills: The tourism sector should provide opportunities for employment, creating jobs that are fair, inclusive and offer good prospects for career advancement, especially for young people

5. Partnership: Tourism stakeholders should work together within Aberdeen and Aberdeenshire, and beyond where relevant, in pursuit of the objectives set out in this strategy. A joined-up approach to planning and implementation, working together to support the sustainable growth of the visitor economy and contributing towards the transition to a net zero economy in the North-east.



3. THE FOUNDATIONS



3. THE FOUNDATIONS

This refreshed framework is not starting from scratch. It builds upon on the foundations and achievements of the previous publication, the destination story or proposition, and of course a understanding of visitors themselves - who they are and what they are looking for.

The other foundation is the policy context which has changed considerably since the original 2018 strategy. There are opportunities to align with this and take advantage of the initiatives, programmes and funding streams that will follow.

Achievements

Despite the pandemic, the development of the North-east visitor economy has come a long way since the last strategy work was commissioned in 2017. Substantial amounts of the £3.2billion worth of investment logged in Aberdeen and Grampian Chamber of Commerce's investment tracker since 2017 directly or indirectly support the visitor economy.

These investments - from roads to buildings of steel, granite and glass - provide a bedrock on which initiatives can be delivered to improve the destination experience, and the way they are taken to market. Equally important are the softer investments made in marketing, working with businesses to improve their knowledge, skills and capacity, and collaboration around new initiatives and programmes.

A summary of just some recent achievements are shown on the next page.

The North-east story

Aberdeen & Aberdeenshire is a place with unique living culture and traditions. The scale of its landscapes and seascapes are so impressive – mountains, rivers and coastline, panoramic vistas, huge dunes, great estates, open expanses of moorland.

Location and latitude produce big skies, changing light, freshness and clarity. In Aberdeen there is a proud coastal city with unique architecture, historic trading links and contemporary global connections, and an enviable range of cultural assets in the city's galleries, venues, festivals and events.

The area's long history is characterised by a multitude of castles and royal associations, strong association with golf and an abundance of quality food and drink producers. And the region is an emerging as an exciting adventure tourism destination. This is a place to explore and experience though doing - or perhaps simply being.



INFRASTRUCTURE & EVENTS 	INITIATIVES 
<p>Aberdeen Western Peripheral Route improved access around region</p> <p>P&J Live opened</p> <p>Airport terminal expanded</p> <p>Aberdeen Music Hall refurbishment completed</p> <p>Aberdeen Art Gallery reopened</p> <p>Provost Skene's House reopened</p> <p>Grey hope Bay Phase One opened</p> <p>Union Terrace Gardens commencement</p> <p>City Centre Masterplan conceived</p> <p>South Harbour commencement</p> <p>Macduff Aquarium reopened</p> <p>Aberdeen Science Centre reopened</p> <p>Rural Tourism Infrastructure Fund projects initiated</p> <p>New, high-class accommodation opened, from cliff top self-catering to globally renowned icons.</p> <p>Air route capacity from around the UK improved</p> <p>Events</p> <p>Iconic events delivered from Tour of Britain and Tour Series to NuArt Great Aberdeen Run, Scottish Traditional Boat Festival, Spectra and Granite Noir, with many more around the region throughout the year including the initiation of the Provenance Festival</p>	<p>44 participants on the Tourism Business Game Changer programme.</p> <p>Ongoing delivery of the Tourism Development / Recovery Programme</p> <p>169 participants in the Travel Trade Ready programme.</p> <p>North East Adventure Tourism (NEAT) project initiated</p> <p>Hospitality Apprenticeship North East (HANE) launched with 18 participants (Four completed, 14 current)</p> <p>Food and drink tourism development programme initiated</p> <p>Event 365 group implemented</p> <p>Great Outdoors in the City pilot programme delivered</p> <p>44 Sustainability Audits delivered</p> <p>Creation of the Welcome to Aberdeenshire volunteer scheme</p> <p>Refreshment of the Aberdeen Ambassador network</p> <p>Three Cruise Ready programme workshops</p> <p>Brand proposition for North-east Scotland developed</p> <p>Strong creative developed for leisure and business event promotion</p> <p>Evaluation methodology developed</p> <p>Insights guides created for businesses</p> <p>Northern Star Marketing Award for VisitAberdeenshire</p> <p>VisitAberdeenshire, runner up, UK DMO of the Year 2020</p>



Market Overview

Visitor markets have been far from typical in the past two years – and there is no hard data from national surveys. Looking back to 2019 visitors were spending £0.5bn annually in Aberdeen City and more than £200m elsewhere in Aberdeenshire.

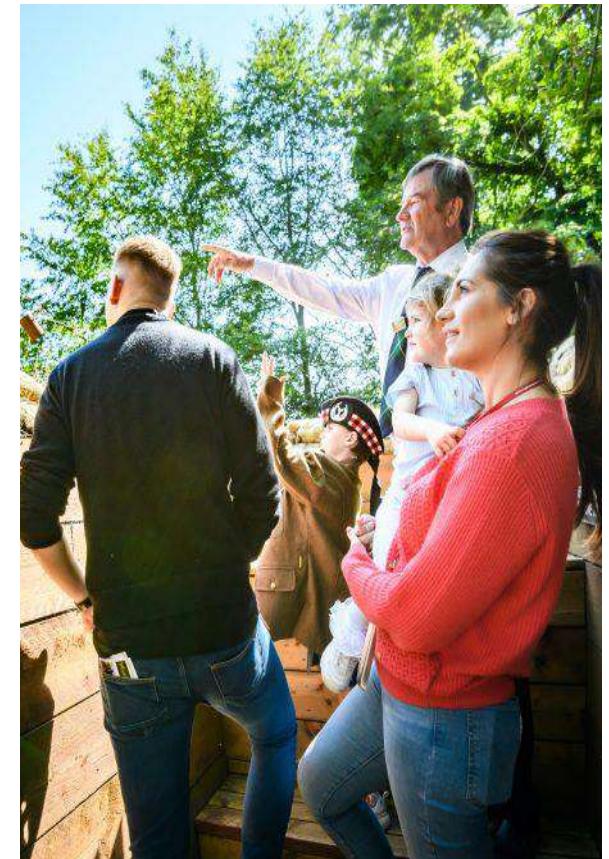
The lion's share of visitor spending came from UK residents, the majority of which were from Scotland, but international visitors on overnight trips represented an important source market for Aberdeen City. International visitors from a host of markets explored the region in the years prior to the pandemic, with primary source markets including the USA, Norway and Germany. This pattern is likely to continue in future.

Visitors travel to the North-east for many different reasons, but within Aberdeen City business tourism remained a vital segment, whereas in Aberdeenshire holiday travel was dominant. In the few years ahead of the pandemic overall business visits had witnessed a reduction, but the desire to connect in person at conferences remains strong, albeit adapting to elements of hybrid meeting.

Taking short walks, enjoying the landscape, visiting historic sites, and shopping for local produce or crafts are among the activities many visitors to the region enjoy, while others indulge in the outdoor pursuits on offer such as cycling, fishing or golf.

In line with many other destinations the region has faced the challenge of declining length of stay in recent years as short-break trips have grown in popularity; the typical domestic overnight visitor to the City staying 2.4 nights and to the Shire 3.8 nights. There is significant market opportunity in reversing this trend to enrich the visitor's experience, spread the benefit across local visitor economy businesses and lessen the environmental impact associated with a trip.

The pandemic resulted in an increase in UK visitors holidaying here – many visiting places for the first time - because they couldn't go abroad. Businesses responded to the opportunity welcoming old and new faces. It remains to be seen whether this will lead to a longer-term staycation effect, but it will have given many a first-hand, first-time experience of the North-east.



Our Visitors

Currently those VisitScotland segments with the best fit and growth potential across the destination as a whole are:

- ▶ **Adventure Seekers** – affluent and typically younger they want an active holiday where they can enjoy both outdoor and cultural activities. They will venture off the beaten track and are keen to try new things.
- ▶ **Curious Travellers** – affluent and typically younger/middle aged; free spirits with a great curiosity about the world and look to broaden their minds through travel and trying new things.
- ▶ **Engaged Sightseers** – mid-affluence, older, take numerous breaks, enjoying general sightseeing and touring, meeting locals, taking in historical places as well as scenery and nature.
- ▶ **Food Loving Culturalists** – very affluent, middle-aged, seek relaxing high-quality, holiday experience with great food and drink and engaging cultural activities.

- ▶ **Natural Advocates** – mid-affluence, middle-aged to older, passionate about Scotland- look for peace and quiet, breath taking scenery, a connection with nature and the chance to get away from it all.
- ▶ **Business event** visitors often share many of these characteristics, although leisure interests are not necessarily the driver to attend a conference. The primary opportunity for Aberdeen comes from UK Association conferences in disciplines aligned to the North-east's academic and sector strengths.

Individual tourism businesses may choose to focus on one, some or all of these segments, while others may focus on particular niche markets depending on their particular service, product and experience.



Policy Context

The national policy context has changed since 2018. Most significantly the targets for greenhouse gas reductions on the journey to net zero, and that this should be a 'just transition' resulting in a fairer society more in tune with the environment. This is reflected in the National Strategy for Economic Transformation published in Spring 2022 which sets out objectives and a suite of strategies and programmes to follow. It is encouraging to see tourism featured prominently.

The national tourism strategy, Scotland Outlook 2030, was published in early 2020 just before the pandemic hit; but its aim for Scotland to be a world leader in responsible tourism focusing on people, places, businesses and memorable experiences remains just as relevant.

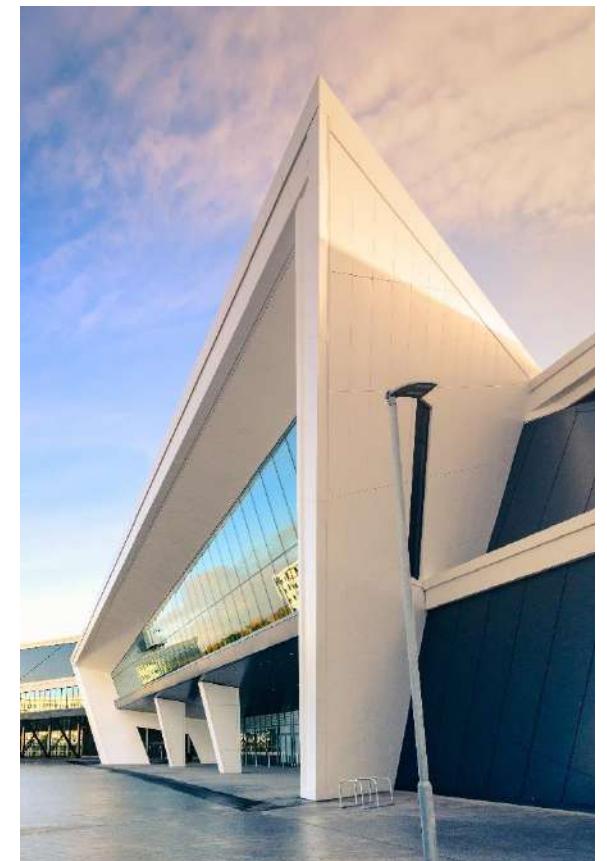
Sectoral strategies for agritourism, events, golf and outdoor activities will inform our actions, as will the anticipated Destination Net Zero strategy for Scottish Tourism.

It is increasingly recognised that tourism, in the North-east and nationally, has a wider contribution to make beyond narrow economic measures – it can play a part in achieving social objectives and environmental sustainability and will continue to form part of the Regional Economic Strategy.

Furthermore, regional plans, in particular Aberdeen City Centre Masterplan have potential to support tourism and the visitor economy.

*We start from a strong position in the innovative technologies that underpin the industries of the future and produce high-quality products and services, such as **our food and drink, our creative industries and our major events and tourism offer**, that are in demand across the world.*

**National Strategy for Economic Transformation
2022**



4. TRENDS



4. TRENDS

The future by definition is uncertain as events of the last few years have demonstrated.

But that should not prevent a reflection on the likely impact of major economic and social trends.

Here are six of these major trends and their implications for the North-east tourism sector to consider.

TREND	IMPLICATIONS FOR TOURISM IN ABERDEEN & ABERDEENSHIRE
Trend 1: Certainty of Uncertainty "Stuff happens" has always been a term that applies to tourism demand and supply, but never more so than in the past two years of pandemic and subsequent geopolitical events. Visitor choices and behaviours will respond to global and national upsets affecting destination choice and activities, some changes may stick but it is likely that the fundamental motivations will remain the same.	Strong rebound in outbound travel likely over the next few years, with inbound recovering far more slowly, may mean fewer visitors Customer expectation of flexibility in booking, cancellation, last minute decision making etc places an increased risk on business
Trend 2: Home Front Spending more time at home, with ongoing working from home likely having several impacts. Those able to afford it have been investing in their indoor and outdoor spaces, leading some to stay home rather than take breaks, whereas others may be desperate to get out. The line between being at work and not is increasingly blurred with many continuing to work while on holiday. The decrease in commuting has impacted the buoyancy of city centres.	The quality of accommodation needs to be as good if not better than home High speed broadband provision and workspaces important in accommodation Towns and villages may be more vibrant while the opposite may be felt in Aberdeen city centre

TREND	IMPLICATIONS FOR TOURISM IN ABERDEEN & ABERDEENSHIRE	TREND	IMPLICATIONS FOR TOURISM IN ABERDEEN & ABERDEENSHIRE
Trend 3: Fresh Adventures in the Fresh Air	<p>Increased appeal of the outdoors was evident during the pandemic and looks set to continue. The benefits to physical and mental wellbeing from being outdoors, especially if the backdrop is a pleasing landscape. Gentle strolls, stargazing, off-road cycling, nature photography - just some of the outdoor pursuits the pandemic encouraged.</p>	<p>Aberdeen and Aberdeenshire have fantastic natural landscape and assets for both 'doing' and simply 'being'</p> <p>Being relatively undiscovered may prove to be advantageous as some outdoor honeypot destinations have suffered from over-crowding in the past two summers</p> <p>Camping and motorhome trips have grown in popularity but can burden local communities/infrastructure unless well managed</p>	<p>Trend 5: Going Digital</p> <p>The pandemic accelerated the use of digital and enabled many of the changes in behaviour brought about by the pandemic. All of these changes from video conferencing to booking flexibility are likely to persist and evolve into improved user interface and digitally enabled experiences. This lessens the requirement for human interaction. While digital technology may assist those with a disability, it is important to remember that it is sometimes a barrier. Using digital effectively rather than being driven by it will be the measure of success.</p> <p>Hybrid business events with an in-person and online may continue, potentially softening overall attendee volumes at conferences and business events in the short term, but potentially widening reach for future in-person events</p> <p>Ways to maintain serendipity while facilitating online planning and booking could bring advantages to a destination</p> <p>Good face to face interactions will continue to be vital to the tourism experience – as will appropriate user-driven use of technology</p> <p>Fast, reliable internet connectivity is expected, and locations or businesses not able to offer this may struggle to compete</p>
Trend 4: All about Value	<p>Whether in economically good times or economically bad times value for money is a crucial determinant of destination choice. With inflation at a high and costs of household bills escalating disposable income and the cost of travel is set to increase. Those who saw their savings grow during lockdowns may either have money to spend or be discovering they are needed to pay for increased living expenses rather than for holidays or days out. Those sitting on travel vouchers in lieu of cancelled trips are likely to redeem them in 2022.</p>	<p>Price matters, but value matters even more so quality and distinctiveness of experience and service at all price points is crucial</p> <p>Increased volume of visitors may not result in increased spend</p> <p>Businesses may not see occupancy convert to income as deposits and vouchers are redeemed</p> <p>Tight labour market and inflation are likely to put upward pressure on wage costs</p>	<p>Trend 6: Changing Behaviours in a Changing Climate</p> <p>The UK and Scottish Government have set targets to achieve Net Zero carbon emissions by 2050 and 2045 respectively. Tourism – particularly because of the carbon impact of transportation – is a contributor to climate change and along with other sectors will be required to reduce its impacts. Despite widespread acceptance of its importance this is yet to translate to widespread, consistent changes in business practice or consumer travel choices.</p> <p>Aberdeen's association with fossil fuel production presents reputational challenges for a tourism destination, although the transition story may offer a different perspective</p> <p>Nationally new strategies, policies, funding and practices are being developed to guide and support a coherent approach</p> <p>Responses will be required by the destination (target markets, transport etc), businesses (waste and energy reduction) and visitors (travel, behaviours, choices such as locally-produced food & drink)</p>

5. FUTURE FOCUS



5. FUTURE FOCUS

The region has to be ambitious and bold. Destinations have to continually refresh what they offer, responding to market demand. Truly 'big ideas' may well be needed to coalesce efforts and give us new stories to tell and new reasons to visit. These will form part of the discussion that will take place around this strategy.

The six trends will have a major impact on the sector over the next few years but they offer opportunities as well as challenges for the destination as a whole and for individual businesses. Responding to these trends, building on where Aberdeen and Aberdeenshire has strengths and addressing the weaknesses which inhibit visits will provide a 'framework for growth' around which efforts can be focussed.

This framework for growth encompasses three categories:

- ▶ **Attractors** – that provide the greatest opportunities for growth
- ▶ **Drivers** – what is needed to remain competitive and expand
- ▶ **Enablers** – the factors that underpin a successful industry

The tourism marketplace is highly competitive, and visitors have an almost unlimited choice of destinations. The destination of Aberdeen and Aberdeenshire remains lesser known within Scotland and the UK ⁽¹⁾.

Innovation and creativity must come to the fore if the region is not only to maintain what it has but to grow value and extend throughout the region and the year.

The imaginative and innovative responses seen during the pandemic restrictions were testament to the entrepreneurial mindset within businesses, large and small. That needs to continue. And as well as imagination it will require investment by private and public sectors.

Even within a challenging economic climate there are resources available through national and regional programmes and initiatives. The region needs to take advantage of those and use them to its advantage at a destination level and within individual business.

A number of priority areas have been identified within each of the categories with the most potential for sustainable growth.

This is where efforts and energies should be placed over the next few years to make sure visitors stay longer, explore deeper and leave happier, and local businesses are profitable and sustainable.

The following pages looks at each of the categories in turn, sets out the reasons why specific areas are included, the opportunity each presents and broadly what needs to be done.

The journey towards net zero is the prism through which the actions taking to deliver this strategy can be viewed. The following section considers that journey specifically.

2030 Scotland's Leading Visitor Destination

Leading on sustainable growth
Pioneering business innovation
Delivering unique, high quality experiences
Exceeding customer expectations

Attractors: that provide greatest opportunities for growth

Business Events | Culture & Heritage | Festivals & Events
Natural Environment | Outdoor Activities

Drivers: that are needed to remain competitive

Market Awareness | Product Development
- Adventure Tourism
- Food & Drink
- The City Experience

Enablers: that will underpin a successful tourism sector

Digital Transformation | People & Skills
Travel Connectivity | Accessibility

Actions are informed by, and contribute toward, net zero ambitions

ATTRACTORS – THAT PROVIDE THE GREATEST OPPORTUNITY FOR GROWTH

Business Events

With around a third of the city's overnight domestic spend coming from business tourism, Aberdeen has historically been a successful destination for conferences, exhibitions and meetings benefiting from its strong academic and industrial base – and now has an excellent new venue in P&J Live. However business events have been badly affected by Covid and with indications that – in the short term at least - events may incorporate 'hybrid' elements (2).

Culture & Heritage

The unique culture and heritage is one of the main reasons that people visit Scotland generally and the North-east in particular.(3) Culture & heritage is broad – it encompasses built heritage (architectural style, castles, historic houses), cultural heritage (galleries, museums, standing stones) as well as traditional and contemporary culture (music, language, stories, crafts). Aberdeen and Aberdeenshire has rich assets across all of these and benefited from significant investment and innovative product development over the last few years.

Festivals & Events

Events are important in generating reasons to visit 'now', providing an immediate call to action which can convert latent interest or overcome lack of destination knowledge. Big commercial events are less about the destination and more a pull in their own right attracting day and overnight visits from a wide catchment; and P&J Live and the region's diverse range of smaller venues provide just such a programme. Home grown events, rooted in the destination, contribute to the image of the place and provide authentic experiences and insights into local culture.

Natural Environment

The area's natural environment is most cited reason for a visit (4). It includes a national park, an award-winning coastline, a city with a beach, mountains, rivers and vistas. 'Breath taking' and 'beautiful' are two of the most common words used to describe Aberdeenshire (5). The natural environment offers opportunities to 'do' and to 'be'. The former picks up interest in activities (see below) and the latter responds to visitor motivations to escape, relax and enjoy wellness experiences on holiday both in the countryside and the urban outdoors..

Outdoor Activities

The region's landscape, seascape and facilities lend themselves to outdoor activities. Activities are a broad church encompassing **easy and gentle** such as wildlife watching through to **adventure and adrenaline** including mountain biking and surfing, and a **well-established golf tourism** offer with its world class calibre of facilities across the region and potential to attract high value visitors from the UK, Europe and North America. Walking is the most common activity for visitors with most happily embarking on short walks and many taking more strenuous hikes. There is also a market opportunity responding to the growing cycling market which again encourages car-free exploration and builds legacy from investment in the Tour of Britain.

DRIVERS – WHAT IS NEEDED TO REMAIN COMPETITIVE AND EXPAND	PRIORITIES
<p>Market Awareness</p> <p>It is self-evident that people need to know where the destination is, and how to get here, what is on offer, why they should choose to come. Research (6) shows that Aberdeen and Aberdeenshire don't yet have the awareness and understanding needed to cut through a highly competitive marketplace and sit alongside Scotland's and the UK's top rural and city destinations. To build the regions' profile requires ongoing, consistent and assiduous promotion of the destination as a whole.</p>	<p>Investment in marketing, communicating clear positioning and narrative</p> <p>Targeting best prospect markets/ segments for the destination as a whole, and for individual businesses</p> <p>Targeting the most influential intermediaries</p>
<p>Product Development</p> <p>Visitors' expectations, needs and wants continually evolve alongside interest in new and different types of experience. No destination can stand still and this region will need to continue to invest in and enhance and develop existing and new products and experiences across the attractors and wider sector for visitors and intermediaries alike. The priorities over the next few years are Adventure Tourism and Food & Drink Tourism and City experiences. The first two of these are the subject of major development initiatives led by Opportunity North East. These need to gather pace to deliver a step change in two experience areas which are known to have market resonance.</p> <p>Aberdeen needs to capitalise on the investment that has taken place, and is planned, to deliver a vibrant city experience to support business events and regional exploration as well as Aberdeen's position as a stand-alone city break destination.</p>	<p>Step up development of Adventure Tourism and Food & Drink projects</p> <p>Further develop Aberdeen city proposition and experience</p> <p>Capitalise on national strategies, initiatives and programmes eg golf, outdoor tourism, agri-tourism</p> <p>Maintain focus on relevant business support programmes including development of packages, itineraries and 'trade-ready' products</p>

ENABLERS – THE FACTORS THAT WILL UNDERPIN A SUCCESSFUL TOURISM SECTOR	PRIORITIES
<p>Digital Transformation</p> <p>The pandemic has transformed digital usage for all elements of tourism. For visitors this embraces inspiration, value and price comparisons, peer ratings, booking/cancelling/rebooking, itinerary planning, ticketing, and recording and sharing the actual visit. For businesses this covers business management systems, managing customer bookings and contacts, marketing. All age cohorts are more reliant on devices than ever before. This creates new market opportunities as the lines between work and leisure time merge and working from home can mean working on holiday. It also means businesses must be geared up to respond quickly and respond digitally to meet customer expectations. Connections must be excellent and geographic coverage available (almost) everywhere.</p>	<p>Digitised business practices Broadband coverage</p>
<p>People & Skills</p> <p>While digital is undeniably important, human contact remains the foundation of an excellent visitor experience. Recruiting the right people with the right skills and attitudes – and retaining them - is currently (summer 2022) a challenge across all sectors and in tourism in particular where long hours, seasonal contracts and wage levels can depress interest. The challenge can be compounded in remoter areas of Aberdeenshire. With a reported shortage of 45,000 tourism industry workers across Scotland (May 2022), it is essential that the profile of the industry is positioned as good career choice – and then make sure it is by providing excellent conditions of employment and opportunities for advancement.</p>	<p>Identify opportunity presented by government and local initiatives Links with education at all levels Apprenticeships Peer learning & mentoring Business training programmes</p>



ENABLERS – THE FACTORS THAT WILL UNDERPIN A SUCCESSFUL TOURISM SECTOR	PRIORITIES
<p>Travel Connectivity</p> <p>Although at some distance from many of its source markets Aberdeen is easy to reach particularly by air and rail and is within the travel time tolerance for a sizeable proportion of the UK population. While it should be accepted that most visitors will use a car to come here and explore, better public transport, better linked up would help, as would alternatives like rental bikes, electronic charging points, local small-scale tours and other imaginative solutions that can lead to longer stays and more enjoyable experiences.</p>	<p>Development of new air routes/capacity Green transport infrastructure – EV charging, hydrogen buses, cycle carrying and rental. Step change in travel trade contracting, including cruise</p>
<p>Accessibility</p> <p>Required by legislation, an ageing population and capturing the considerable holiday spend of people with disabilities – as well as simply being the right thing to do - accessibility is an important consideration to improve the visitor experience and attract new audiences. Around three-quarters of disabled people have experienced a disappointing trip or had to change plans because of poor accessibility (7) and things have worsened during Covid-19 restrictions. Improving accessibility is a complex issue responding as it does to many different visible and non-visible disabilities, which need addressed at business level and destination level. Estimated to be worth £15.3bn (8) expenditure per annum within the UK visitor economy, the ‘purple pound’ represents a significant market opportunity for any destination prepared to claim this territory in a way no Scottish or UK destination yet has. The North-east could actively embrace this opportunity.</p>	<p>Market opportunity explored and established Audit of current infrastructure Basic requirements in public space and businesses – parking and toilets, accessible routes etc Businesses become market ready</p>

CONTRIBUTING TOWARDS THE NET ZERO AMBITION

The drive to net zero will infuse the strategic approach. Actions taken should be informed by – and contribute towards – net zero ambitions

Actively contributing to the journey to net zero is a core element of this strategy and any action taken should consider the impact on the environment as well as looking for synergies and opportunities across the elements of the framework for growth. This might mean encouraging carbon neutral buildings for new adventure tourism centres; activities which help appreciate and support the environment; the focus on food & drink which has market appeal and supports low food miles, local purchasing and the circular economy; encouraging people out their cars and onto bikes and feet to spend time exploring the countryside and urban spaces; carbon neutral events; and so on.

The visitor should, as ever be at the heart of any action. As sustainable credentials move from ‘nice to have’ to an expectation, businesses and destinations have to anticipate and respond. New experiences – and new ways of delivering those experiences – which are more environmentally sustainable will provide a competitive edge for those businesses and destinations which are particularly innovative and creative in their approach.

Aligning and taking advantage of regional and national initiatives – not least the Scotland-wide **Destination Net Zero** - responses should be tailored for the destination, for businesses and for visitors. Often this may be about influence rather than control. Influence with tourism businesses, influencing visitor behaviour, influencing others whose activity impacts on destination management and development (planners, licensing, waste management, highways, transport operators).

The ten-year, £500 million Just Transition Fund for the North-east and Moray will support and accelerate the transition of the region, while positioning it as one of Scotland’s centres of excellence for the transition to a net zero economy. VisitAberdeenshire is already working to raise awareness among businesses and support them with sustainable audits and is engaged with the cross-sector Climate Ready Aberdeenshire project.

The commitment to, and practical actions around, transition provides the North-east tourism industry with a new story to tell, challenging perceptions of oil and gas and inviting reconsideration from visitors, as well as actively helping diversify the economic base of the region

IN CONCLUSION

The 2018 publication responded to the challenges and opportunities of the last decade and took great strides forward. The North-east's visitor economy is now in a very different environment, emerging from a pandemic and facing new challenges, and opportunities.

This refreshed strategy builds on previous progress to face new market realities, seize new opportunities, and reset the focus, priorities and direction of travel.

The region's tourism businesses, providers and supporters have contributed insights, opinions and ideas to the review process, and ongoing engagement and collaboration will be essential to its success.



6. TURNING WORDS INTO ACTION



6. TURNING WORDS INTO ACTION

A series of **roundtables** engaging key partners and invited experts in their respective fields should take stock, explore and agree what needs to happen, and when.

A strategy is of little use without action. However, action to address the priorities identified here will be complex, requiring the input and commitment of multiple partners and stakeholders. Hard choices will have to be made as not everything that should be done will be done, resources will have to be allocated and commitments made and seen through.

The priorities highlighted in this document do not have one owner. In keeping with the principles highlighted earlier, successful implementation will require a collaborative effort, with different stakeholders engaging where there is a natural connection to remit, resource and expertise.

The **Drivers** and **Enablers** set out here are all at different stages of consideration and development and will require different responses. Some are starting from scratch, others will require momentum to be increased, some will benefit from transformative 'big ideas'.

Investment and development is already underway on **Product Development** with the focus on **adventure tourism** and **food & drink**. Within Aberdeen, the foundations of the **city experience** have been laid. For other areas Various initiatives have been taken on **Travel Connectivity** and **Digital Transformation**; and **People & Skills** has been an ongoing concern across the sector. Equally VisitAberdeenshire has made the ongoing job of building **Market Awareness** a priority. **Accessibility** and wider experience development - there are ideas to generate, opportunities to explore, and innovation to apply.

When it comes to **Net Zero** there will be no quick fix; this area is likely to be an ongoing priority with layers of action responding to national and regional programmes and funding.

Over autumn 2022 a series of roundtables will be convened for each Driver and where appropriate for Enablers at this time. They will bring together the key partners with invited experts in their respective fields to take stock, explore and agree what needs to happen next.

In some instances, this might mean setting up Task & Finish Groups to develop and implement action plans; in others it might mean one organisation taking on sole responsibility or a lead role for delivering a specific task; or in others it might mean increasing the momentum on an initiative or project already underway; or commissioning market research or a feasibility study. Each round table will tailor its response according to the needs of its topic area to scope and prioritise actions and agree delivery roles, responsibilities and resources.

Where applicable, the round table process will also consider how activity will be evaluated and these measures will be used to assess overall progress towards the strategic ambition.



The work on this strategy has been funded by Scottish Enterprise and developed by VisitAberdeenshire in cooperation with Blue Sail Consulting on behalf of the tourism industry in North East Scotland. It was compiled following a 6-month consultation process with a wide range of public bodies, tourism industry associations and leading businesses during winter and spring 2021/2022. Sincere thanks to all who took part.