

# **NORTH EAST SCOTLAND TOURISM PARTNERSHIP** **A STRATEGY AND ACTION PLAN FOR GROWTH**

## **1. Introduction and Background**

The Scottish Executive recently published a **Tourism Framework for Change** "Scottish Tourism - The Next Decade", which sets out what the industry will need to do to provide a step change in Scottish tourism and the ways that the various national public agencies will support the industry to do this. The Area Tourism Partnerships (ATPs), which have been established across Scotland, are tasked with driving and supporting change at a local level, by interpreting the national framework to reflect local opportunities and aspirations, through the development of Area Tourism Partnership Plans. The ATPs will promote close partnership working with local businesses, culture and heritage organisations, local authorities and other public sector support agencies to: deliver a range of activities and actions; act as ambassadors to spread the message that Tourism is Everyone's Business and ultimately, to make a significant contribution to the growth ambitions for Scottish tourism and the vision to make: **"Scotland one of the World's Foremost Visitor Destinations by 2015"**

The North East Scotland Tourism Partnership (NESTOUR) was established in 2005 serving the local authority areas of Aberdeen City, Aberdeenshire and Moray. Representatives are nominated by a range of trade, community and business organisations with a keen interest in tourism and members and officers of the Aberdeen City, Aberdeenshire and Moray Councils; the local Enterprise Companies; the Cairngorms National Park Authority and VisitScotland. (A full membership is shown at Appendix A).

This Strategy and Action Plan for Growth demonstrates how the tourism industry, with support from the public sector, will meet the challenge to grow tourism in the North East of Scotland over the period 2006-15.

This Document provides a strategic link between the national tourism strategy and any more localised tourism action plans that may be developed. It will also link with the other Area Tourism Plans that are being developed and will be implemented by other Area Tourism Partnerships, in order to promote greater co-ordination of activity and consistency of approach on strategic issues. It sets out the market context, the key trends, themes and issues and the main objectives, priorities and targets that will guide and influence tourism growth in the area. The Action Plan goes on to outline the main actions that will be taken by all partners, focusing on the four themes for action outlined in the national strategy:

- **Knowing Your Market**
- **Exceeding Visitors' Expectations**
- **Marketing Your Product**
- **Being Sustainable**

NESTOUR has included a fifth theme:

- **Status of the industry**

Many of the action areas will be delivered by specific projects or initiatives. A lead organisation(s) has been identified for each action area, and will monitor and report on delivery on a regular basis with the support of NESTOUR. A full annual review of the Strategy and Action Plan will be co-ordinated by NESTOUR, with specific input from the lead organisations. This will form the basis of reports to the Scottish Executive on the activity and progress being made in the North East of Scotland to grow tourism on a sustainable basis.

## **2. The Challenge**

The Scottish Executive, in consultation with industry and tourism and development agencies, has set a national "ambition" target to grow the value of Scottish tourism by 50% over the same period. This equates to a consistent annual growth rate of 4% - the figure by which global tourism is currently expanding, which will be generated by a 20% increase in the number of visitors, accompanied by increasing average spend by 25%. This is a challenging target given that Scottish tourism has never achieved sustained growth at this level; that other Western European destinations are currently, at best, growing their tourism economy by 2% per annum; and that the competition for tourism spend has never been tougher. However, it is acknowledged that there is scope and capacity for significant growth in Scottish tourism - particularly given that annual occupancy levels across all types of accommodation are running at less than 50%; that 75% of tourism revenues are generated in 3 months of the year; and that Scotland's "product" offer aligns well with today's market needs.

The previous Aberdeen and Grampian Tourism Strategy (2001 – 2005) had the following key objectives:

- To achieve sustainable growth, value and share of the tourism market all year round
- To build world class experiences and service levels for our target customers
- To make a step-change in our performance as a local tourist economy.

These objectives were addressed by a comprehensive seven step action plan - much of which has been delivered during the five year time span of the strategy. In parallel with the delivery of the Area Tourism Strategy, tourism locally has been, and continues to be, a focus within the wider economic aspirations for the region - most notably through the work of the two local economic forums - Aberdeen City and Shire and Moray - but also within the various regional, community and local plans, including those being developed by the Cairngorms National Park.

So far, good progress has been made in establishing the foundations for a successful and sustainable Tourism industry, namely:

- The industry and the public sector working together in true partnership and pooling resources to establish quality standards and facilities which enable the area to compete more aggressively in premium leisure and business tourism markets
- Investment in niche markets, particularly quality short breaks, targeting higher spend visitors seeking largely rural escape; and seeking competitive advantage from the quality of our natural environment - epitomised by the designation of the Cairngorms National Park
- A concerted effort to improve conference facilities and target the business tourism market by capitalising on the region's acknowledged expertise in oil, gas, health, food science and sustainability issues to attract UK and International Association conferences

The success of the last strategy - measured by the Scottish Tourism Economic Activity Monitor (STEAM) - is that the North East of Scotland has enjoyed a sustained period of tourism growth since 2001 and in 2005; the value of tourism to the area was calculated to be worth £547m - a growth rate of 22% over the five year period.

The challenge for the industry for the next period is to sustain and increase these levels of growth within a more competitive environment, with reduced availability of resources within the public sector agencies that support tourism. Also, it has become clear during the development of this strategy, that there are some potential major barriers to growth:

- The lack of a strong identity and awareness in key markets
- A lack of cohesion within the industry and across the whole area
- Some supply issues related to the quantity and quality of accommodation in some locations and at certain times of year; and some labour supply issues to cope with greater demand
- Access constraints - travel to the area, visiting places of interest and obtaining information

Added to this is the effect of the current buoyancy (related to the region's strong economy) of the non-discretionary business tourism market, which has little to do with the efforts of the tourism industry and may be subject to wide fluctuations in the future, potentially impacting on the growth target.

To meet the challenge of the 50% growth target, we will need to fundamentally change the way we do business. The industry will have to become less reliant on the activities of the public sector for support. The public sector agencies and the industry will have to form a stronger partnership, where all activity is focused on meeting our strategic objectives. The providers of products and services will need to adapt to the changing needs of their customers. The levels of customer expectation for quality, service and value will have to be exceeded. New products and innovations will be required to attract new and repeat customers, and to add value to their experience. Individual businesses, associations and communities will have to work together rather than be competitors. Above all, this strategy needs to be the catalyst for a step change in this region's tourism economy - to provide the message that tourism is everyone's business and everyone will benefit from a strong, vibrant and sustainable tourism industry in the North East of Scotland.

### **3. The Vision**

Our vision is that the North East of Scotland will be a prime must visit, must return destination that competes well in the national and global market places. It will be a premier visitor destination within Scotland for discerning leisure and business visitors all year round. We will build on what is unique about the area and make the most of products, which differentiate it from other destinations.

This will result in:

- A vibrant tourism industry central to the area's economy
- A range of first class visitor "experiences" which encourage return visits and enhance the area's reputation
- Quality products and services which meet the aspirations of our visitors
- Cultural Heritage, People and Environment at the centre of our area's identity
- A place which welcomes visitors and is proud to do so
- An industry that is fully engaged in working collaboratively to grow tourism

### **4. Aims**

**We aim to:**

Successfully promote the North East of Scotland to target audiences

Deliver a consistently high-quality visitor experience, with high standards of facilities, customer service, career opportunities and income levels.

Further develop a competitive industry that is economically, socially and environmentally sustainable and that supports and builds on the history, culture, environment and hospitality of its people and communities.

Ensure that everyone living and working in the area understands the value of tourism to the local economy and actively get involved in growing tourism.

Overall, we aim to grow tourism value by around 4% annually, although this will not be achieved consistently across the whole area.

### **5. Strategic Context**

Nationally this Plan is set in the context of the Tourism Framework for Change which itself is drawn from the Scottish Executive's Framework for Economic Development outlined in "Smart

Successful Scotland". The Plan is further influenced through a number of national industry-led initiatives, such as the Tourism Innovation Group and the Pride and Passion Initiative; the impact of service and hospitality initiatives such as People 1st, Springboard and Quality Assurance Schemes; and the marketing framework developed by VisitScotland.

Regionally the Plan is designed to fit with and contribute to the economic vision and objectives developed by the Aberdeen City and Shire Economic Forum (ACSEF) - in particular Objective 4, "To be a Unique Destination for Leisure and Business Visitors" - and the Moray 20/20 vision and action plan developed by the Moray Economic Forum. It also takes account of Local Development and Structure Plans, the Community Planning process and the consultative draft of the Cairngorms National Park Plan (as well as the Cairngorms National Park's Sustainable Tourism Strategy).

Other current, or future, points of reference include the strategic regional transport priorities being developed by the Regional Transport Partnerships and the measures being developed by the Moray Firth and the East Grampian Coastal Partnerships. Many other national strategies have been considered in the development of this Plan. Among these are the priorities set out by VisitScotland, Scottish Enterprise and Highlands & Islands Enterprise, EventScotland, sportscotland, Forestry Commission Scotland, Scottish Natural Heritage, Historic Scotland, the National Trust for Scotland, and the Scottish Museums Council.

Primarily, this Plan is the result of extensive consideration by members of NESTOUR; considerable input from officers representing all the main tourism support agencies; and a series of industry workshops held in different parts of the area and involving a large number of local businesses, communities and organisations involved in developing and promoting tourism. The Plan has also benefited from the Aberdeen City and Shire, Highland and Cairngorms Visitor Surveys; and further guidance and support in drawing up the Strategy was provided by David MacIntyre from the company The Market Specialists - who were also responsible for the 2005 Aberdeen City and Shire Visitor Survey.

## **6. Market Context**

### **6.1. The World**

Globally, tourism is growing strongly and demonstrating strong resilience to adverse factors such as terrorism, pandemics and economics. The World Tourism Organisation is forecasting 4-5% growth until 2020. The increased importance that working people place on precious leisure time and the need for that time to provide renewal, well-being and fulfilment, indicate that the current trend to travel more frequently will continue. Increasingly, people are seeking out new and different "experiences" - often with greater connectivity with their chosen destination; there is no doubting the move towards a more sophisticated and informed choice being made. In all respects this trend should be to Scotland's advantage.

**However, the competition has never been so fierce with over 200 countries all chasing the same business and, in many cases, offering similar products.**

The world's leading tourism destinations have similar characteristics:

- Wide choice and variety of holiday experiences that are successfully marketed
- Target growing consumer interest in activities, culture, well being, city breaks and business tourism
- Use culture and heritage to differentiate themselves from other destinations, and use events to stimulate visits
- Promote themselves effectively through the internet including ease of booking and good access to information
- Deliver key roles and services in a joined up way
- Understand the importance of both international and domestic tourism to their economy, and work hard to encourage tourist - friendly attitudes
- Invest in, and continually refresh, their tourism infrastructure

It is important that we learn from these competitor destinations and adopt actions which ensure we at least match, and hopefully exceed, international standards.

## **6.2. Scotland**

The All-Scotland picture is very encouraging. Scottish tourism has grown since 2002 and occupancy rates are at record levels. The UK market is hugely important with over 90% of trips (47% England and Wales, 44% Scotland) being made by domestic visitors. International visits are currently showing even stronger growth and, because overseas visitors tend to stay longer and spend more money, this is very important to our tourist economy. Although the US is still Scotland's biggest overseas market (and showing good signs of recovery since 9/11 and SARS) it is our European markets which are growing most strongly (assisted by improved air access and the Rosyth ferry). A major advantage that Scotland has over many of our competitors is that our biggest market is also our nearest and most accessible market, and the opportunities for growth are considerable, given that over half of the population of England and Wales has never visited Scotland.

Visitor surveys consistently show that the important factors in choosing Scotland as a holiday destination are the beauty and grandeur of our scenery and countryside, the natural environment and its unspoilt nature, the number and range of things to see and do, and the friendliness and welcoming attitude of our people. VisitScotland surveys reveal that:

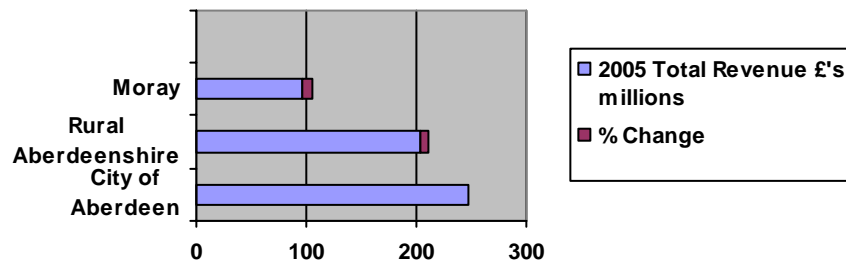
- 96% of visitors were satisfied with their visit and would be likely to recommend Scotland as a holiday experience
- opportunities to mix with local culture at events or visiting pubs/bars is extremely popular
- the authenticity of the "experience" is vital to all visitors; and
- the opportunity to interact with Scots is important especially for North Americans who want to meet the locals
- Although satisfaction levels are very high, the most mentioned criticisms were about the weather, value for money (particularly when calculated against exchange rates), the quality of accommodation, and the general standard of food in eating places.

## **6.3. North East Scotland - Aberdeen City, Aberdeenshire and Moray**

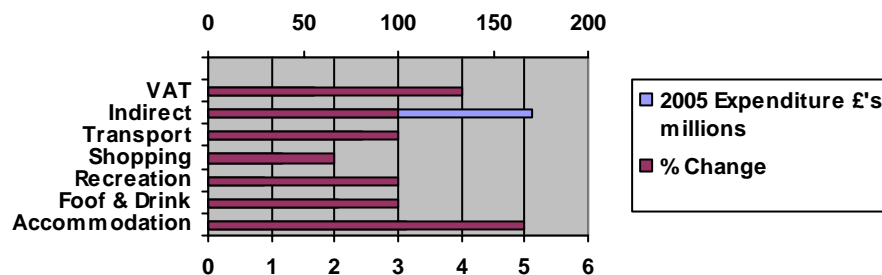
The picture for the North East of Scotland is very similar to the rest of Scotland, although there are some particular variances in relation to Aberdeen City. Most notably, the tourism industry in the City has enjoyed unprecedented levels of occupancy and yield on the back of a very strong upturn in the region's economy - no doubt driven by the high prices of oil and the business activity this has stimulated. However, although there is evidence of good growth from discretionary business tourism in the form of attracting valuable conference and association meetings to the City, the high levels of non-discretionary business traffic tend to disguise a relatively flat leisure tourism market.

The Volume and Value of Tourism in the area has been calculated for the past six calendar years using the Scottish Tourism Economic Activity Monitor (STEAM). This provides consistent data across the whole area and for Aberdeen City, Aberdeenshire and Moray of Visitor numbers, Tourist days, Tourism revenue and Employment levels within the sector. It also provides a breakdown between visitors staying in serviced and non-serviced accommodation, visiting friends and relations, or on a day trip.

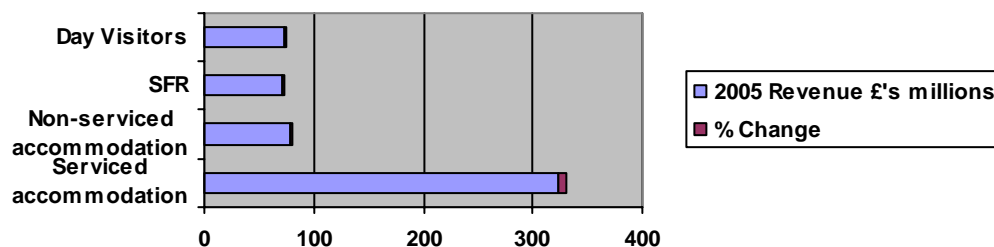
Overall, there has been a 4% increase in tourism revenues between 2004 and 2005. At the District level, there was no change in visitor expenditure in the City of Aberdeen and revenue increases of 6% and 8% in rural Aberdeenshire and Moray respectively. In 2005, there were more than 4.2 million visitors to the North East, (including around 1.8 day trippers), who spent more than 9.9 million days in the area, spending £547.59m and supporting 16,568 FTE jobs, most of which were in the accommodation sector.



Accommodation showed the biggest percentage increase in visitor expenditure.



By far, the highest revenue and the greatest increase since 2004, has been in serviced accommodation.



A number of visitor surveys have been carried out in the last three years: Highland (including Moray) 2003; Cairngorms National Park 2003 – 2004 and Aberdeen City & Shire 2004 – 2005. Key findings to emerge from all these visitor surveys on the motivating influences to visit the area, the popular activities they participate in, and the origin and profile of visitors can be summarised as follows:

### 1) Motivating Influences

- Scenery and landscape
- Peace and relaxation
- Nice walks
- Visiting Castles and Whisky Distilleries
- Visiting friends and family
- Return visit

### 2) Popular Activities

- Countryside walks
- General touring/sightseeing
- Visiting places of interest (attractions, visitor centres, museums, gardens etc)
- Shopping
- Attending events
- Special Interest – e.g. bird watching, wildlife watching
- Sporting activity – e.g. snow sports, golf, water sports

### 3) Visitor Profile

- 42% of visitors to the area are from Scotland
- 34% are from England
- 23% are from Overseas with Germany, Scandinavia, Benelux and North America being the main markets
- 56% of visitors are over 45
- The average party size is 2.65 persons
- The average length of stay in the area is 5.4 nights
- 44% stay in serviced accommodation; 34% with friends and relations; 15% in non-serviced accommodation; and 7% other (Touring caravans, camping)
- 63% of visitors are repeat
- 72% are car borne

## **7. The Customer is Changing! – Future Tourism Markets in the North East**

### **7.1 The Current Picture**

We need to be aware of some of the current and longer term trends which may impact on tourism to North East Scotland. Current trends clearly show that customers are:

- Looking for customised and flexible travel to a destination usually within 3 hours travel time (particularly for short breaks and holidays)
- Seeking to pursue special interests when on holiday (sometimes with an educational value) which are sufficiently different from everyday
- Wanting the experience to be real and authentic which often means meeting and mixing with locals
- Demanding good value for money

An increasing tendency (at least for many sectors) to shorter lead-in times, late booking and a very strong trend towards shorter breaks, is driving the increase in popularity of city breaks. Visitors often want more than one experience on a trip, even a day trip, such as walking combined with retail or theatre combined with sport.

### **7.2 The Future Picture**

Future trends indicate a number of areas where demand from consumers is on the increase, including:

- Interest in good health leading to a demand for activity breaks
- Breaks which offer some form of renewal, restoration or well being experience
- Extended education with more demand for cultural "learning" holidays or the acquisition of a new skill
- Environmental awareness becoming increasingly important with visitors being very conscious of their own impact on the destination and prepared to pay a premium for "green" accredited products
- Increased interest in natural heritage and wildlife – leading to increased demand for opportunities to watch wildlife and experience "wild" landscapes.

Scenario planning, which predicts what the possible outcomes of these trends will be in the future, has painted a picture of what Scottish tourism could look like in 2015:

- Continued strong growth in leisure short breaks and business tourism
- An ageing population taking more out-of-season breaks but seeking fulfilling and varied experiences
- Ease of booking and "hassle free" travel will be vital
- A warm welcome, a can-do attitude and the highest standards of quality will be essentials
- Customers will be looking for memorable and distinctive experiences with an element of self - discovery and renewal
- Greater interest in culture and arts

- UK still the dominant market but strong growth from predominantly Europe and North America

The rapidly changing market emphasises the need for the North East of Scotland's tourism industry to continually innovate, improve and respond to customer feedback. It is a cliché to say "standing still is not an option" but retaining those qualities which are currently highly valued by customers, is equally important. This includes authenticity, unique features, warm welcome, helpful attitude and anticipation of customers' requirements. Key to maintaining this business momentum is having a thorough knowledge and understanding of customers; and developing the "life time" value of each and every one.

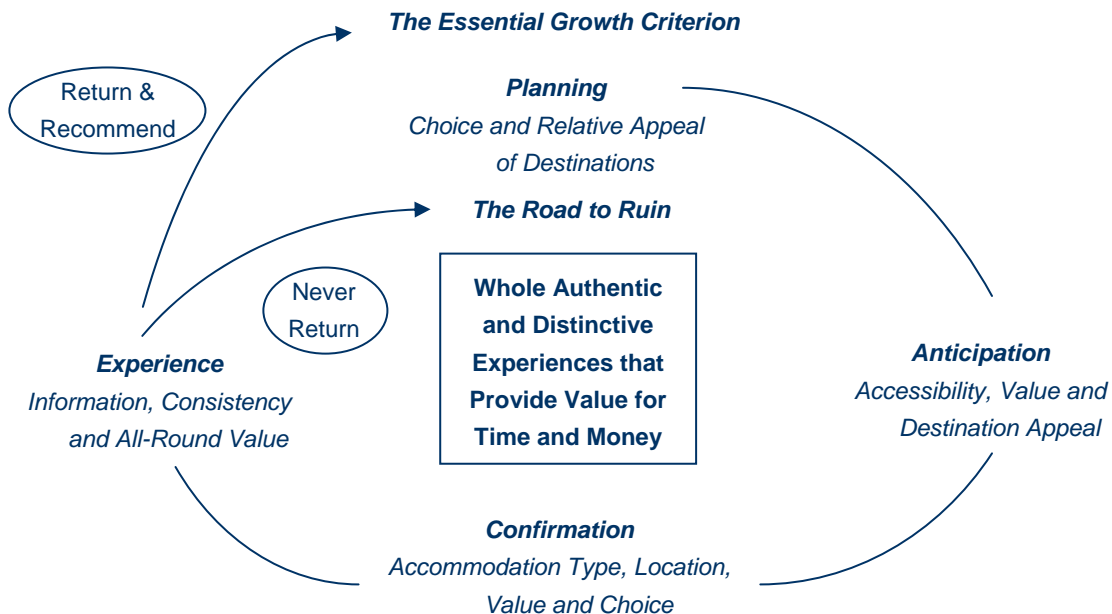
## 8. Tourism Drivers of Growth – Issues, Constraints and Opportunities

We need to ensure that customers receive a consistently good experience whatever they do, wherever they go and whoever they meet; and, crucially, that they have had good value for their time and money. If these experiences exceed expectations the end result will be satisfied customers who will return and recommend; if they disappoint they are unlikely to do either!!

Tourism is a complex business because it comprises a range of "experiences", which are provided by a wide number of independent suppliers, to an even greater variety of increasingly independent and discerning customers. The decision on whether or not to come to the North East of Scotland is about anticipation that the visit will meet and hopefully exceed these expectations - whether a new visitor or not. Generally, the area's appeal is based on natural features such as forests, rivers, mountains, lochs and coast; and the scenery, heritage, culture and people that such an environment has produced is both authentic and distinctive. But none of this will induce a visit by itself without strong evidence that there is plenty to see and do in the area; that the area is easily accessible, and that suitable accommodation - in terms of type, location, price and quality - is readily available. These are holiday necessities and their providers are therefore important drivers of growth, through making sure that their customers are well looked after during their WHOLE stay.

This can be represented as a virtual cycle:

### Tourism Cycle of Success or Failure



In drawing together this Strategy, this potential "Growth Cycle" has been uppermost in our thinking. If our customers are 100% satisfied by their visit, then this would most likely be all that is required to achieve, and probably exceed by a large margin, the 50% national growth target – through return visits and by growing reputation. For this to happen, we need to recognise excellence and also to continue to improve quality - albeit that this is already very good - at every

level and across all aspects of the visitors' stay. This includes visitor experiences (events, activities and tours), accommodation, places to eat and drink and visitor attractions, but also transport, retail, the general environment and local communities across the area. We also need to increase the range of things to see and do throughout the year, to encourage visitors to come more frequently, at different times of the year, and to stay longer and spend more when they are here.

### 8.1. Key Opportunities

We know from research that our customers generally like and are satisfied with our "product" offering. In terms of Scotland's Product Portfolio, the area has a strong representation in all product areas as shown below:

<b>Freedom</b>	<b>Active</b>	<b>Culture</b>	<b>City</b>	<b>Business</b>
Wildlife	Golf	Whisky	Shopping	Conferences
Gardens	Walking	Museums	Night Life	Association Meetings
Castles /Heritage	Water sports	Galleries		Corporate Organisations
Touring Trails	Country Pursuits	Events		Incentive
	Sailing	Year of Homecoming		
	Snow Sports	Genealogy		
	Game Shooting	Food & Drink		
	Fishing	Music/Arts/ language		
	Sport	Archaeology/ Heritage		

This "Product fit" is clearly encouraging and in terms of the overall promotion of Scotland should be advantageous. However, many of these products are "mature" and may be seen as being part of our traditional offering. Our area tends to appeal to a market that is generally older, discerning and looking to follow a special interest or enjoy an authentic experience. Invariably, our area is chosen as a second holiday option or as a short break; the trip is independently assembled and booked direct; the lead in times are increasingly shorter (at least in some sectors); and the time of year no longer matters.

The tourism product currently known as **Aberdeen and Grampian Highlands - "Scotland's Castle and Whisky Country"** is in reality a large and varied collection of experiences. Although there is great appeal in destinations which offer a wide range of things to see and do, there are also dangers in that "variety" is not always a strong selling point. The area needs some distinctive features which can help to pull visitors in and provide "reasons to visit", to help overcome any locational disadvantages or negative perceptions. A challenge will be to more clearly define our product to appeal to the active younger element, without turning off the more mature, high spending visitor.

One of the best means of providing a reason to visit is through **events**. The region already has a very good share of events from traditional, such as the 16 Grampian Highland Games (including the world's oldest - the Braemar Highland Gathering); through sports events such as major golf championships, multi-participation runs, triathlons and youth tournaments; to celebrations of our and others culture such as the Aberdeen International Youth Festival, Scottish Traditional Boat Festival and Speyfest. The area has also had some success in attracting high profile events such as the Tall Ships Race, the British Seniors Open Golf Championship, The Balmoral Great Caledonian Run and the Aberdeen Cup Tennis Tournament. Other events such as the Spirit of

Speyside Whisky Festival or Aberdeen University WORD are capable of attracting attention from international participants and audiences. Despite these great foundations, the area has not consistently devoted the same relative resources to event development and promotion; and there are clearly lessons which can be learned from other cities or regions which have used events as a catalyst for tourism regeneration.

The North East's **Business Tourism** market is primarily (but by no means exclusively) based in and around Aberdeen City. This reflects non-discretionary business generated by the area's strong economy but also importantly the premium business tourism market derived from Conference and Association meetings. The Aberdeen Convention Bureau, together with key partners such as Aberdeen Exhibition and Conference Centre and the Universities, have established Aberdeen as a key centre for conferences relating to oil and gas, technology, health and life sciences, and environmental and sustainability issues. A successful strategy, based on targeting through an Ambassadors' Programme, has seen the City destination "win" a number of large and high profile conferences; and year on year growth of 10%. The Conference market is particularly attractive because it generates a high economic return, creates a positive destination profile and provides opportunities for extended stays and return leisure trips. It also contributes to a key objective for the area in terms of attracting business investment and links. The Corporate Incentive Market is also hugely important, particularly within the whisky sector in Moray. There are many opportunities to capitalise on the non discretionary business market – to make our business visitors into ambassadors for repeat (leisure) visits and bringing spouses/families on future business trips.

The North East of Scotland has been at the forefront of **trail development** - particularly the Castle and Whisky Trails - which are much appreciated by visitors and continue to provide a strong promotional "hook" for the region. The lesser known trails such as the Coast, Victorian Heritage, Stone Circle, Galleries and City Granite have also made a significant contribution to enhancing the area's position. The Trails help to confirm that the area is well served by a range of high quality visitor attractions (there are more 5 star visitor attractions in the North East than any other region of the UK) and help to bring a series of smaller attractions into a defined "collection". The potential exists for parts of our area to apply for World Heritage Status and NESTOUR will actively support any applications.

Along with other attractions, the area boasts a wealth of good quality places to visit, but arguably there is currently no "must visit" location that stands out. An exception to this could be the **Cairngorms National Park**. As one of only two National Parks in Scotland and the largest in the UK, the Cairngorms is a unique natural feature of outstanding landscape quality. It is not just a special place for the mountain range, which bears its name - a colossal area of high arctic tundra which dominates the landscape and provides a wonderful range of recreational opportunities - but also for the towns, villages, communities, straths and estate lands which surround it. It provides the source waters for three of the area's other great natural features - the Rivers Spey, Don and Dee - and provides a backdrop to Royal Deeside, Strathdon, Glenlivet, Speyside, Badenoch and the Angus Glens. The National Park is a bridge between these areas and can be a strong way of connecting the North East with the Highlands. It is one of the strongest and most significant tourism assets of the area; and, although the National Park is still in its infancy in terms of management and development, it is an opportunity that needs to be enthusiastically embraced within this Strategy.

The North East of Scotland is a nationally significant producer of **food and drink** and high quality food and drink is available in locations across the area. Aberdeen Angus beef is world renowned and fish produce landed at the area's ports is both significant in terms of the number of companies it supports and the quality and variety that is available. Dairy products from the area's naturally rich pastures help to make Mackies and Rizzas Ice Cream, while similar natural and locally sourced ingredients have been the foundation for hugely successful (and to a large extent tourism related) food producers such as Baxters of Speyside, Walkers of Aberlour and Deans of Huntly. In addition, whisky is a locally produced international product in Moray and Aberdeenshire: Morayshire is home to more whisky distilleries than any other part of the world and produces the top three best selling single malt whiskies. It can truly wear the title, "Scotland's Whisky Country". Other well known local products help emphasise the high quality of the environment in which they are produced.

The North East of Scotland is **culturally diverse and unique**. The area includes Scotland's third largest City and various market towns, traditional farming and fishing communities and a significant oil industry that has developed over the last 30 years. It has language, music, traditions and buildings, which do not exist anywhere else. It also has exported much of this rich cultural heritage to other parts of the globe and welcomed other people, traditions and culture to add to the mix. The result is an area rich in heritage but cosmopolitan in outlook. Nowhere is this more evident than in Aberdeen City - a city built on trade and education, which continues to thrive on vibrant energy, technology and life science industries; attracts a range of people from other parts of the world to live and work in the area; and has two large and successful universities, which add to the area's vitality, diversity and colour. North East communities celebrate a rich cultural heritage, adding considerably to the visitor experience and providing further tourism opportunities, such as ancestral tourism and genealogy, which are rapidly growing in popularity. The area is home to some of the great Scottish surnames such as Gordon, Keith, Hay and Forbes; and through organisations such as the Aberdeen & North East Family History Society, information about ancestors (and evidence of their ancestry) is available and accessible. The North East supports a rich and diverse archaeological landscape; there are nearly 21,000 sites of archaeological and historical interest in Aberdeenshire and Moray, with a key attraction being the Archaeolink Prehistory Park at Oyne. Visitors also have the opportunity to enjoy a large number of local events which have their roots in the area's cultural heritage.

The area provides a wide range of **activities** at all times of the year - from sedate to insane! Golf is hugely popular with 70 golf courses from Championship links such as Royal Aberdeen, Cruden Bay, Murcar and Moray Old to excellent parkland facilities such as Inchmarlo or Hazlehead. The recent staging of the Senior British Open at Royal Aberdeen has helped to raise the area's reputation as a golf destination - a reputation enhanced by the possibility of new world class facilities attracted to the area. Walking - particularly at low levels - is consistently the most popular leisure activity while on holiday and the area is well served by a network of well maintained and publicised "community" walks. The Speyside Way long distance footpath - together with other "routes" such as Nortrail, the Buchan & Formartine Way and the developing Deeside Way ensure there is plenty of scope for serious walkers; while facilities developed by bodies such as Forestry Commission Scotland, the Upper Deeside Access Trust and Scottish Natural Heritage add to the quality, variety and interest. The coastal areas provide ample opportunities for water based activities including superb environs for all types of surfing, sailing and diving, while the landscape, rivers and mountains provide for a huge range of country pursuits and sports such as game shooting and fishing. The area supports some of the best fishing waters in Scotland, including notably, the Spey and the Dee. These activities need to be carefully managed and marketed; in order to reduce any tensions that may arise with wildlife watching and nature based tourism. Snow sports at the Lecht and Glenshee provide a welcome boost during the winter while indoor facilities exist for a wide range of popular sports. Cycling and mountain biking are growing in popularity and Forestry Commission Scotland have done a great deal of work to develop high quality forest trails specifically to accommodate these activities. Horse riding continues to be a popular activity and forestry developments have provided many access opportunities for horse riders. There are also opportunities for open air swimming, not only in rivers/lochs and from beaches, but also in the open air pool at Stonehaven, which is a unique attraction in a national context.

## **8.2. Strengths, Weaknesses, Opportunities and Threats (SWOT analysis)**

The key Strengths, Weaknesses, Opportunities and Threats for growing tourism in N.E Scotland are listed below. This is not an exhaustive list; only the key factors that may impact on tourism growth have been included, in order to keep the list to a manageable size and to retain a strategic focus. While this was a challenging exercise it has produced a concise picture of tourism in the region and provided a clear guide for the Action Plan.

### **NORTH EAST SCOTLAND TOURISM S.W.O.T. ANALYSIS**

STRENGTHS	WEAKNESSES
-----------	------------

The City Region The Strong Business Economy Castles and Countryside Scotland's Whisky Country Fit with National Product Portfolio Cairngorms National Park	Awareness in key markets Negative Perceptions Identity Crisis Tourism's perceived importance to the economy Complacency Limited internationally recognised features Inconsistencies in the quality of service
<b>OPPORTUNITIES</b> Culture and Heritage - genealogy Events Food and Drink Health and Well-being New Accommodation Development Improved air access The range of outdoor activities available Golf	<b>THREATS</b> Fragmented industry Inconsistent standards of operation Lack of focus Actions of competitors Overlooked Downturn in the economy Reduced resources

### 8.3. BRANDSCAPE

One of the key components for promoting any successful tourism destination is having a strong brand. Indeed, one of VisitScotland's core Business Objectives is to attract visitors to Scotland by building a strong Scottish tourism brand. A tourism brand should not be confined to a name, logo and invitational message. It has to be a subtle combination of marketing messages combined with delivery of the promise. It has to have elements that seek to give a destination a strong proposition and a brand personality, which appeals at both a rational and emotional level to a prospective visitor.

A good deal of work has been done by the Scottish Executive to create a strong brand position for Scotland to appeal as a country to a wide audience. This includes a range of stakeholders, potential investors; the business; education and corporate communities; and visitors by positioning Scotland as:

**"The Best Small Country in the World".**

VisitScotland has developed two brand positions for Scotland as a visitor destination based on the brand co-ordinates of "Dramatic, Enduring and Human" to provide:

**"Live It - Visit Scotland" for the UK Market and**

**"Scotland - Welcome to Our Life" for International Markets**

VisitScotland has further refined the product offering of Scotland by developing a series of brand wheels - initially in some geographic parts of Scotland such as Aberdeen City, the Cairngorms and Speyside - but increasingly within the product portfolio, for instance, for Walking, Fishing, Mountain Biking etc.

Further work is now being done to develop the brandscape of Scotland, in order to know and understand what the truly iconic brands of Scotland are, and where they can be found. Work to date has revealed that Aberdeen and Grampian has a premier position for **Whisky and Castles**; a strong position for wildlife, walking and activities (mostly as a consequence of the Cairngorms National Park); and good product position for fishing. It has to be said that work on the City product, cultural heritage and events and festivals has not yet been done.

The traditional brand position for the North East which has been used for the last five years (and tested most strongly in consumer research carried out by System Three in 2002) is:

**"Aberdeen and Grampian Highlands - Scotland's Castle and Whisky Country"**

A number of brand identities have also been developed for different parts of the area. In 2004 the Cairngorms National Park Authority commissioned design agencies to develop a Park brand to be

used as a consumer facing logo separate from that which had been earlier developed for the Authority. The result of this work is a stylised logo and legend for the **Cairngorms National Park** which includes strict guidelines for its use and positioning. Criteria for the use of the brand by tourism businesses, has been linked to participation in VisitScotland Quality Assurance Schemes and the Green Tourism Business Scheme.

In 2005, the then North East Scotland Economic Forum (NESEF) undertook a project to develop a regional identity to align with the key objectives of the economic forum. Although not primarily a destination branding exercise it was recognised that the presence of a strong regional identity would raise awareness and provide benefits to the area in terms of inward investment and business location; global and strategic connections; competitive businesses and communities; and as a destination for leisure and business visitors. The scope of the project also included engendering a stronger sense of place, pride and community spirit within the local population.

Corporate Edge - a leading branding company which had been responsible for the VisitScotland brand - developed a new regional identity for Aberdeen City and Aberdeenshire of:

### **Aberdeen: City and Shire**

#### **A Brighter Outlook**

This identity has subsequently been adopted by the economic forum (including changing the name to Aberdeen City and Shire Economic Forum - ACSEF) and is currently being rolled out to the business community as well as being the subject of a number of promotional initiatives.

In response to the fact that Moray did not participate in the ACSEF regional identity initiative, VisitScotland commissioned the production of a tourism brand wheel for Speyside/Moray. This involved some intensive input from a number of Moray tourism businesses and organisations. The result was a proposition to "Discover the Real Spirit of Scotland" and a brand position of:

#### **"Speyside and Moray"**

#### **"Scotland's Whisky Country"**

A large number of sub-brands used in tourism promotion also exist in the North East. These include some strong traditional destination brands such as "Royal Deeside" to newly created straplines for tourist promotion. A proposal to audit and possibly organise some of this sub-area branding for tourism promotion purposes, together with guidance on appropriate use of the various brand identities, is included in the action plan.

## 9. THE FRAMEWORK - Key Objectives and Priorities

At the very start of the process of developing the Strategy and Action Plan, members of NESTOUR participated in a "Prioritisation Workshop". This was designed to reveal the current strengths of the area's products, how these can be best developed and what actions may be required to maximise their impact. The workshop revealed 51 Key Priorities, which have been subject to further refinement and analysis by NESTOUR officers and tested with the industry. Some of this work was done in advance of any information about the Scottish Executive's "Framework for Change" and the known outcomes of the recent Aberdeen City and Shire Visitor Survey and, for this reason, the Key Priorities have been re-organised to present a shortened and more coherent set of strategic priorities.

The majority of growth potential lies in providing the places, facilities and service that make up an experience that will encourage visitors to want to stay longer, spend more and recommend others to come. We must use the knowledge we have of our customers to guide investment in creating the experience that will exceed their expectations and ensure there are no weak links in the chain.

### 9.1. Knowing Your Market

The National Framework aims to establish a Tourism Research Network, in order to ensure that we have up to date market information. We need to ensure that the information gathered locally is relevant and that we can use it effectively to plan our activities. There is an opportunity to input to, and influence, the work undertaken by the Tourism Research Network to ensure that it meets local needs. We need to identify new research requirements, promote information sharing and networking between partners and gather feedback and monitor performance on a regular basis. In particular, we must try to ensure the inclusion of Aberdeen Airport in the International Passenger Survey information, in recognition of the value of the international market to the area.

#### Strategic objectives

To develop a set of information foundations, which: provide customer information for the industry; monitor the performance of the tourism sector, and track market, consumer and industry trends.

#### Priorities

Collect and disseminate appropriate tourism research data to tourism businesses, stakeholders and relevant groups, using co-ordinated approaches and partnership working.

Encourage all tourism businesses to collect information about their customers and use the data to enhance the "value" of those customers.

Improve information on international passenger usage at Aberdeen Airport.

#### Key Targets

Establish mechanisms for collecting and sharing relevant information by 2007

### 9.2 Exceeding Visitor Expectations

The majority of the growth potential of Tourism in the North East of Scotland lies in providing the things to see and do that will make visitors want to stay longer and spend more money.

#### 9.2.1. Quality of Experience

It is essential that there is a consistently high standard across all services, facilities and attractions, to ensure a total quality experience. Tourism nowadays is about selling dreams, stories and personal experiences, rather than just a bed to sleep in and transport from A to B. All businesses and service providers must do all they can to deliver a quality product based on local market needs and attention needs to be paid to providing and improving basic facilities such as public toilets, car and coach parking etc in some areas. We need to improve co-ordination of

services such as public transport and ensure that visitors are able to access up-to-date information about them.

### Strategic objectives

To give our visitors an authentic experience that meets or exceeds their expectations and provides good value for money.

To encourage everyone living and working in the North East, through the Pride and Passion Initiative, to act as ambassadors for the area and promote it as a must see/must return destination.

### Priorities

Encourage the industry to develop "quality networks" to offer whole and consistent experiences for customers and prepare a communications strategy to promote greater industry involvement.

Engender a sense of pride and passion in our area so that individuals and communities provide a genuine and warm welcome for visitors

Improve co-ordination of activities between public sector bodies involved in growing tourism to ensure that infrastructure, amenities and services provide multiple benefits for communities and visitors and make best use of resources.

Ensure that all accommodation, facilities and services (including retail, transport etc) provide a high quality and value for money experience, with a flavour of local traditions, character and style.

Improve the quality and availability of information provision to increase visitor satisfaction and dispersal.

Raise the level and quality of professional standards within the tourism industry.

### Key Targets

Increase the number of appropriate tourism businesses participating in Quality Assurance Schemes to 90% by end of 2008; and promote the uptake of new quality and welcome schemes

Work with local friends of "Pride and Passion" to encourage the positive attitude the initiative promotes and to double the number of "Friends" annually - 300 by 2010

Develop a series of "quality networks" within the industry - at least five new networks per annum.

NESTOUR to consider a position on mandatory registration or licensing for tourism businesses during 2007.

## **9.2.2. People and Skills**

A great deal of good work has already been done to provide training and raise the profile of tourism as a career, but negative perceptions of working in tourism and the service industry persist. Decreasing labour availability and a lack of affordable housing for rent and purchase make it increasingly difficult for employers to find local staff and they have had to rely on a transient workforce, with a high proportion of immigrant workers with little knowledge of the local area, and sometimes poor language skills – decreasing the authenticity of the product. Staff shortages, perceived costs, the short-term nature of contracts and past availability of training programmes, have discouraged businesses from enabling staff to participate in training.

A very diverse range of skills are required in order to deliver tourism, which includes provision of services as diverse as outdoor activities, wildlife watching, heritage/interpretation and genealogy. Although these skills already exist, much can be done to develop them further. Greater knowledge and use of foreign languages by staff and in welcome literature, menus etc are needed, to help

improve the experience of international visitors. All these problems are exacerbated by the fact that people can enter the industry with little or no qualifications or experience.

#### Strategic Objective

To increase the numbers of appropriately skilled and experienced staff working in the tourism industry in North East Scotland.

#### Priorities

Improve uptake of available staff training and development programmes.

Increase levels of recruitment and retention of staff with a positive attitude, enthusiasm for, and knowledge of the local area.

Improve the level of affordable housing available to purchase or rent by workers in the tourism industry.

Improve level of vocational training in tourism, starting in schools

Establish and promote training courses to improve standards of visitor services jobs associated with the natural heritage e.g. wildlife guides, rangers etc.

#### Key Targets

Encourage the provision and take up of industry skills training, so that by 2009, 90% of all tourism businesses in the area participate in some form of available training.

By 2015, 80% of managers in the North East will have achieved level 3 recognition and 80% of front facing staff and chefs will have achieved level 2 recognition (as per the Tourism Skills Action Plan).

Seek (through ACSEF, Moray LEF and CNPA) a commitment from the Scottish Executive to the provision of additional social rented and low cost homes in the area.

### **9.2.3. Innovation and Product Development**

The area is well served by strong products, such as walking, food and drink, culture and heritage, golf and outdoor activities. Similarly, there is scope to more fully exploit some product opportunities, such as the area's cultural richness and diversity, the unique Doric language, coastline and beaches, country sports, genealogy and high octane sports such as surfing and windsurfing. There is also potential for more product development around Aberdeen's rich cultural and social life and its position as the third largest city in Scotland. It is crucial that the range of products is co-ordinated to present a coherent package to visitors, that focuses on the whole holiday experience. Visitors increasingly want new experiences and we need to cater for both the committed enthusiasts and the people wanting taster sessions; these choices can be offered across all sectors – wildlife/eco-tourism, sports and outdoor activities, arts and culture and so on.

Many of the product offerings are traditional - and appreciated by existing customers. However, there is a real need to encourage further innovation within the industry to develop new products and services; and to update existing offerings in line with market expectations. Many ideas are being generated by the Tourism Innovation Group and new innovations are being encouraged by the Enterprise Networks and through Award Schemes.

### Strategic Objectives

To encourage the development of new and innovative tourism products that reflect market demands and enable the area to grow as a high quality year round destination.

To make it easier for visitors to assemble a "package" of experiences during their holiday i.e. further trails development, joint ticketing, dine around initiatives, travel and accommodation, golf pass etc

### Priorities

Encourage joint working and a co-ordinated approach to product development and marketing.

Encourage business entrepreneurs to develop new products and experience in line with emerging consumer trends

Develop and co-ordinate a network of themed product trails throughout the area.

Examine the potential for industry led "Destination Management" initiatives

### Key Targets

Increase the level of membership within the Tourism Innovation Group from North East tourism businesses and encourage businesses to come forward with new ideas for various Innovation Awards.

Develop and promote a range of mechanisms, which will enable visitors to easily assemble a package of experiences into a tailor-made break, by December 2006.

### **9.2.4. Culture and Events**

Cultural and arts events and facilities can make an important contribution to year-round tourism and can draw people into an area to participate in specific activities or events. Traditional music has a particularly strong role to play in this, including both the large scale events and the more informal performances held in local venues, and we need to provide support to musicians and venues so that they can provide year-round entertainment in all suitable locations. The Cairngorms National Park Authority has done a great deal of work in this respect and Aberdeen University's Elphinstone Institute is a tremendous resource for provision of year round events. Much can be done to build on the programmes being developed for the Scottish Year of Highland Culture in 2007 and key bodies are already collaborating on this. A community events programme is being developed for Moray, which will incorporate an events calendar, and will be available by December 2006.

However, further work is required to improve information and access to these activities. Arts and cultural programmes could be presented better to visitors through VisitScotland marketing activities but many local events may be organised with a short lead-in time, making it difficult to maximise their economic benefit through advance promotion. A comprehensive and complete events diary for the year should be produced and sent out proactively to businesses to allow update and addition. This can then be promoted as a "What's On" guide for guests.

Many opportunities exist to develop genealogy and ancestral tourism markets and there is potential to build on the interest being generated by Homecoming Scotland in 2009. This is a national initiative focused on the Diaspora and should be a central driver for tourism related activity in the lead up to and during the year. Aberdeen and North East Family History Society are an essential resource and should be central to developing the genealogy and Ancestral Tourism product. Again, there is scope to deliver a more holistic holiday experience, with a range of operators working together to provide a package of experiences, including taster sessions. Innovative approaches should be explored, including the option to produce menus of activities and experiences for people to choose from throughout the year and providing linkages to events and attractions in other parts of the country.

### Strategic Objectives

To enhance the experience of visitors to North East Scotland by ensuring that they have easy access to a wide range of culture, arts and genealogy events, facilities and experiences.

#### Priorities

Build on existing Event and Culture Strategies to improve the promotion of arts, music and other cultural events to visitors

Develop and promote heritage and genealogy facilities and services throughout the area

Encourage uptake of Ancestral Tourism Workshops offered through VisitScotland training

Ensure co-ordination of activity to improve integrated programmes across the region and with the rest of Scotland.

#### Key targets

Produce a Culture/Arts Events Strategy by 2008.

Put in place a programme to promote participation in genealogy activities 2008.

Produce a comprehensive and inspiring events diary for the whole year (first deadline March 2007) and proactively seek input from businesses on a regular basis.

### **9.2.5. Sport and Outdoor Activities**

Sporting events and outdoor activities also draw significant numbers of people into the area and winter sports in particular can make a significant contribution to extending the tourist season, particularly in the Cairngorms National Park area. There is great potential to develop and market a broad range of outdoor activities, particularly walking (including low level routes and local walks), cycling, mountain biking, game fishing, surfing, wind surfing and kite surfing and work can be done with the governing bodies of key sports to ensure quality and safety standards are met. Forestry Commission Scotland have made great progress in making provisions for mountain biking in their forests and the further development and promotion of core path networks will support walking.

We need to develop comprehensive product portfolios that link the varied opportunities for adventure and outdoor activities and encourage the development of other niche activities. There is potential to develop themed product trails (as mentioned in section 9.2.3.), which focus on key activities, such as cycling and mountain biking, horse riding, fishing, country sports, wildlife, water sports etc. As mentioned previously, there are opportunities to develop further the multi-activities market, including the provision of more taster sessions, for people who want to try a range of new experiences during their stay. There are many opportunities to promote local Highland Games, both as an authentic experience for those who want to watch a traditional event, and as a sport/outdoor activity that offers the chance of participation.

#### Strategic Objectives

To enhance the experience of visitors, by ensuring that they have easy access to a wide range of sporting and outdoor activities, events and facilities

#### Priorities

Further develop and promote outdoor/sport niches, including audience participation in key sporting events.

Ensure that requirements for improved access, infrastructure and visitor management are taken into account in the development of all products, for example, making sure that onshore amenities are available to sailors.

#### Key Targets

Develop a sport/outdoor activity section within the events calendar by end 2007.

Increase visitor participation in new and existing outdoor activities and facilities by 20%, by 2015.

### **9.2.6. E-business**

Technology is transforming the way we all do business, allowing operators to gather and use information more efficiently and to reach their markets more effectively – vastly improving the speed and efficiency of transactions for businesses. We need to constantly update our knowledge and make use of new technologies, in order to use the most appropriate media to access new markets and to project an image of a modern and vibrant destination. Visitors should be able to access information and make a booking on a 24-hour basis, (although we should not overlook the need for personal contact and the importance of retaining and improving on the personal touch in order to have an edge over other destinations). Existing gaps in the required infrastructure and skills base are being addressed but we must ensure that this is done comprehensively. Improved speed and efficiency of services will broaden E business opportunities but more must be done to promote uptake, particularly by small businesses and this may require initial funding support.

#### Strategic Objectives

To help tourism businesses to be more competitive, accessible and better at marketing and communication, and to assist them to maximise their development opportunities based on the latest tourism trends.

#### Priorities

Ensure that all tourism operators in the North East are able to use appropriate technology to gather and process information in the most effective way.

Encourage event, entertainment and travel providers to participate in on-line booking and ticketing services.

#### Key Targets

By 2010, all tourism businesses in North East Scotland to be using e-technology to maximise sales and improve the visitor experience (from internet booking to e-marketing to hand-held e-guides).

### **9.2.7. Access and Transport**

Transport into and within the North East is a key issue for all visitors to the area. We need to address the perceptions (real or otherwise) of distances from key markets, improve the experience on all types of journey, and promote the journey as part of the holiday experience, by improving infrastructure and signage and by highlighting things to see and do along the way. We need to increase visitors' use of public transport and alternative methods of travel, by promoting integrated services and ticketing and ensuring that there is comprehensive, accurate and up-to-date information available at all points of travel and a high standard of welcome and service at arrival points.

However, many visitors will continue to travel by car and we must ensure that their journey is of the highest quality and that opportunities to enhance their experience are taken. Roads maintenance and upgrades, well signposted facilities and services for cars and coaches, including plenty of opportunities to stop and enjoy the views should all be priorities. The National Tourist Routes that run through the area (Deeside, Highland and Coastal) should continue to be promoted as signposted alternatives to the trunk road network. Opportunities to increase and improve air and ferry access to the Northern Isles should be taken, improving ease of access and value for money. Rail links into and within the area need improvement. Alternative modes of transport such as walking and cycling should also be promoted; this will require further development of infrastructure and associated facilities and provision of appropriate information and signage. It will also require careful planning, in order to minimise potential conflicts, for example walkers and

country sports; canoeists and anglers etc. We also need to identify ways of providing support for key/lifeline rural shops and filling stations, particularly in the Shire and Moray, to sustain essential local services for both visitors and locals.

### Strategic Objectives

To ensure that the North East of Scotland is easily accessible from the rest of Scotland and from other countries, and is easy to travel around.

### Priorities

Ensure that the needs of tourism are recognised in the Highland and North East Regional Transport Strategies and Plans.

Improve the road journey experience.

Respond to the outcomes of the Scottish Executive's "Transport Review" by researching into visitor's travel behaviour; and encouraging provision of suitable facilities by transport providers

Enhance the visitor experience by improving information provision and by integration of services and information on local facilities, for example, community transport and post buses.

Improve existing services into and around the area, including air and ferry routes into and between Aberdeen and Inverness and the Northern Isles, rail links to the Central Belt and beyond and road/rail links with Inverness and to both the airports.

Promote and support access networks for walkers and cyclists.

Improve Tourist Signposting of attractions and features, linked to the trails and national tourist routes.

### Key Targets

A Plan for improving access into and within the area and service information for visitors will be prepared by 2008.

At least 4 new air routes into Aberdeen and Inverness per annum.

### **9.2.8. Natural Environment**

There are particular opportunities to promote the outstanding scenery and natural heritage of the Cairngorms National Park and the Moray Firth area, as well as the coastal scenery of the eastern seaboard and that of Speyside, Deeside and Donside. There is scope to develop a co-ordinated programme of events, facilities and interpretation focusing on the natural heritage across the area, and to further develop heritage networks and local walks. Every opportunity should be taken to protect and enhance the high quality of the natural heritage, through integrated planning and management of natural resources, sensitive siting and design of new developments and through ensuring that the value of the natural heritage is recognised by everyone living and working in the area. The potential to promote the North East as a Green Destination should also be investigated, developing improved partnerships to emphasise and enhance the high quality of the environment.

### Strategic Objectives

To promote the natural heritage as a key part of the area's product portfolio that underpins the visitor experience.

### Priorities

Raise awareness in residents of the natural environment as a key part of the North East "product" and its importance in underpinning the visitor experience.

Promote the quality and diversity of the natural heritage, particularly within the Cairngorms National Park area and along the coast.

Ensure that the high quality of the natural heritage, landscapes and environment of the area are maintained as a priority.

### Key Targets

A programme of activities for raising awareness, delivering environmental improvements and developing heritage trails will be developed by 2009.

## **9.3. Marketing Our Product**

The low awareness of the area can be attributed to a lack of identity, no strong and singular proposition, and inconsistent brand positioning, as well as a distinct lack of resources to provide enough "share of voice" in key markets. Although we have any number of excellent sub-brands and potentially unifying brand initiatives, the focus in part of this strategy has to be agreement on how to address this endemic weakness in the area's market position. There is a clear need to develop and present the area's Brandscape in a more co-ordinated way and this may require the development of some clear guidelines in order to ensure consistency of approach.

### Strategic Objectives

To support and develop further the area's regional identity and brandscapes: Aberdeen and Grampian Highlands; Aberdeen City and Shire; Cairngorms National Park; Moray/Speyside.

### Priorities

Ensure that the area is marketed effectively, through: exposure in national marketing initiatives; maximising the life-time value of existing customers; targeting niche sectors in specific geographic markets; supporting new route developments into the area and designing promotions aimed at non-discretionary business visitors.

Encourage the involvement of tourism businesses in the national and area promotions of VisitScotland; and ensure that North East products are well represented within VisitScotland's product portfolio of marketing activity.

Agree a roadmap for Branding the area, through the development of guidelines on the use of agreed Brands.

Encourage area Tourism Forums and other tourism groups and consortia to develop well researched and targeted "Challenge Fund" proposals.

Ensure that visitors are able to easily access appropriate information about the area.

### Key Targets

Develop a collaborative Marketing Plan to deliver all agreed actions identified in the ATP Plan by 2007

## 9.4. Being Sustainable

Safeguarding the environment, whilst growing a successful tourism industry, is central to North East Scotland's contribution to the national goal of being the most sustainable destination in Europe by 2015. The principles and practice of sustainability should therefore underpin all the objectives, priorities and actions being delivered by this Strategy. Many key sustainability principles are taken into account by the various priorities outlined in previous sections of the Strategy and can be delivered by many of the actions in the attached Action Plan. However, there is a real need to maintain sustainability as a specific and intrinsic goal, which has its own action plan and monitoring framework.

- The key aims for sustainable tourism in Scotland are:
- A more even spread of visitors throughout the year
- More tourism businesses actively enhancing and protecting the environment, e.g. by joining the Green Tourism Business Scheme or similar
- Greater investment in tourism people and skills
- A better integrated quality tourism product that meet visitors' demands and expectations and encourages them to stay longer and spend more
- A clearer understanding of tourism's impacts
- Greater involvement of communities in tourism planning, development and marketing
- Greater use by visitors of Scotland's public transport system

This Strategy and Action Plan should aim to deliver these nationally agreed aims but also to ensure that the specific needs of businesses in the North East are met to support a sustainable industry in the area. In particular, reducing visitor pressure at vulnerable sites (both natural and built) may be necessary in order to prevent disturbance or damage caused by increasing visitor numbers. This may be done by controlling access, for example by timed ticketing; changing visitor routes or by encouraging visitors to disperse to other areas. The Cairngorms National Park Authority have already addressed this issue through a visitor management strategy and other organisations have introduced measures at individual properties (The National Trust for Scotland at Craigievar Castle, for example) but this issue also needs to be considered on an area-wide basis.

### Strategic Objectives

To promote the values and key messages from the Sustainable Tourism Partnership to the tourism industry and other stakeholders in the area.

To ensure that tourism in the North East is sustainable and that all activities aimed at growing tourism also protect the high natural heritage and environmental qualities of the area.

### Priorities

Build on the area's environmental credentials and encourage the adoption of sustainable tourism practices.

Use sound environmental, economic and socially sustainable principles to underpin the planning, development and delivery of all tourism activities.

Increase participation in the Green Tourism Business Scheme, including public sector organisations.

Develop and support promotional schemes, which extend the season and lead to a more even spread of visitors throughout the year.

Introduce measures to reduce visitor pressure on vulnerable natural and built heritage sites

Promote the use of locally produced and sustainable products and goods by all tourism operators.

#### Key Targets

Encourage tourism businesses to join the Green Tourism Business Scheme and seek to increase membership in the area by 30%, by 2009.

### 9.5. Status of the Industry

The status of the tourism industry is fundamental to its success, as this will help determine the numbers and calibre of people attracted to tourism as their first career choice. It will also inform investment decisions and influence development opportunities. An ongoing priority is to raise the profile and status of the industry on par with other sectors in Scotland.

Although it is the industry which will be required to deliver many aspects of this strategy, it is vitally important that all the support agencies recognise the importance of tourism to the regional economy and act together in Partnership to help realise many of the objectives. In this respect the issue of providing and pooling resources in the most effective manner is crucial.

#### Strategic Objectives

Foster a positive attitude about the area as a tourism destination in all sectors of the community, starting with those directly involved in tourism and inject enthusiasm through the Pride and Passion initiative.

#### Priorities

Raise awareness in communities, public and private sector organisations, of the tourism sector as an important contributor to the current and future economic well-being of the area; and the scope that tourism provides to diversify the region's economy.

Identify the resources required to deliver the Strategy and this Action Plan.

#### Key Targets

Prepare a Communications Plan for raising the profile of the industry by 2007.

Identify lead partners for each element of the Action Plan by 2007; and undertake a comprehensive priority setting exercise on the actions.

## 10. MONITORING, EVALUATION AND REVIEW

Monitoring the implementation of the Plan is a further task for NESTOUR to ensure that progress is being made and that all partners are moving forward with a common purpose. Key activities and outputs will be monitored regularly by each lead body; the methodology and frequency of information collection and collation will be determined separately for each agreed action. NESTOUR will conduct a full annual review of both the delivery and impact of the Plan. It will focus on key outcomes, and this information will form the basis of any reporting to the Scottish Executive and to key stakeholders. The Strategy and Plan will also be reviewed for their continuing relevance, although the broad aims and objectives are not expected to change significantly over the period. Trade Associations and public sector partners will also be invited to provide more detailed presentations to NESTOUR on occasion, on specific projects. Progress on the delivery of any local plans or programmes will be monitored separately and local partners will be encouraged to report back to NESTOUR on a regular basis.

The Strategy will be updated in 2015, and the Action Plan in 2009. A broad monitoring framework has been produced but detailed work programmes and monitoring plans will be prepared as required.