

Ayrshire and our Islands Visitor Economy Strategy

Developing a thriving, sustainable
visitor economy in Ayrshire and
our islands towards 2030



Strategic Partners
(Ayrshire and Arran Visitor Economy Leadership Group)





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Images top to bottom: : Ballantrae Bridge & Barassie Beach

Our vision

“Together, we will build a thriving, inclusive visitor economy across Ayrshire and our islands that delivers transformative experiences for our visitors, builds prosperity for our communities and nurtures the natural environment.”



Our Ambition

Our collective ambition is for the visitor economy in Ayrshire and our islands to connect, restore and regenerate. We think these are the drivers to creating memorable and transformative experiences, that improve our environmental assets and infrastructure, including through programmes such as the Ayrshire Growth Deal, and create a platform for community wealth building – so our communities can participate in, own and benefit from the social and economic benefits of a thriving visitor economy. Taking the lead from the national tourism strategy [Scotland Outlook 2030 Responsible Tourism for a Sustainable Future](#), this strategy places the wellbeing of our people and the environment at the heart of everything we do. This ambition is explained in more depth on [page 13](#).

Introduction

A visitor economy that is thriving and well managed in Ayrshire and our islands is in everyone's interest. Prior to the COVID-19 pandemic, in 2019 visitors spent more than £600 million in our region and accounted for nearly 3 million overnight stays. In 2018 the tourism sector across the region employed 13,000 people and accounted for £258.5m gross value added (VisitScotland, 2019).

This strategy was developed based on the findings of an evidence review, analysis of global benchmarks, industry consultations, a youth/student workshop carried out in late 2021, and input from the members of the Ayrshire Visitor Economy Steering Group (now the Ayrshire and Arran Visitor Economy Leadership Group, AAVELG) during the period January-April 2022.

Beyond the obvious benefits of attracting visitors to enjoy time and spend here, a thriving visitor economy can help sustain communities, bring people together, provide a global platform for culture and heritage, support health and wellbeing, attract skilled workers, revitalise high streets and attract inward investment. The pandemic has shown us, in extraordinary ways, what is lost when the visitor economy doesn't get to perform to its full potential. At the same time, trends in visitor behaviour that were accelerated during the pandemic have confirmed that we can offer what so many visitors are looking for - restorative breaks in nature, space to explore on land and sea, and a warm and friendly welcome as a short or long-term member of our communities.

The pandemic has also reminded us that more than being an 'industry' that leverages 'assets' and sells 'products', the success of the visitor economy ultimately depends on both **planet** and **people**; a thriving environment, and thriving communities make great places to live, and great places to visit. While this strategy is designed to support communities in rebuilding livelihoods lost during the pandemic, it also sets out some pioneering ways in which Ayrshire and our islands can become exemplar destinations in Scotland, by making tourism an agent of environmental and social regeneration.

The delivery of this strategy will certainly require us to work in new ways, by collaborating across local authority boundaries to connect businesses and build prosperity across the whole region. However, it will also open the opportunity for us to forge exciting new partnerships - for example with the third sector, wildlife and environmental bodies - ultimately for the benefit of all. By working closer together, we can achieve more for our region than any individual business or organisation could by working alone. Delivering this strategy will also require us to be flexible and adapt our approach as the operating environment for tourism changes.

The sharp rise in energy prices and general operating costs, as well as workforce shortages are just three examples of external challenges to hit the tourism sector - a sector which is only just starting to recover from the impact of the COVID-19 pandemic and public health restrictions. We will also need to remain vigilant and work together to ensure that tourism brings net positive impacts to communities across the region; and that any visitor management issues are addressed promptly in the interest of local residents.

Fundamentally, by balancing the needs of our environment, and delivering benefit for our communities, our strategic approach is one that delivers through a community wealth building lens, ensuring that the economic impact of tourism is retained to the greatest extent possible within Ayrshire.



A regional partnership for a thriving visitor economy across Ayrshire

Research has consistently shown that visitors don't limit their exploration to local authority boundaries - indeed, it's in all our interests to ensure that visitors stay in the region and discover more reasons to visit again and again.

Businesses that are offering services or products visitors are looking for, are easily searchable online and can market themselves and other local enterprises in the region effectively, will encourage visitors to explore the region with more ease and help to increase the length of their stays here. Ultimately, better-connected and well-developed experiences and activities across the region will help convert day visitors to overnight visitors, overnight stays to short breaks and short breaks to longer holidays and build loyalty among our visitors.

This will also help to ensure that the visitor economy is making a strong contribution to Ayrshire's overall prosperity. A thriving visitor economy can, and should, help to shape the region as "a vibrant, outward looking, confident region, attractive to investors and visitors, making

a major contribution to Scotland's growth and local well-being and leading the implementation of digital technologies and the next generation of manufacturing".

The need to take a regional approach to public-private collaboration in the visitor economy is made more urgent by the need to recover from the impact of the COVID-19 pandemic, which has had devastating consequences for our business community. Among other things, the pandemic reduced our opportunities to meet and learn and share insights on our visitors. In the consultations carried out for this strategy, businesses observed that visitor profiles and expectations are changing. New and upgraded facilities create opportunities for businesses to partner and appeal to new audiences. This highlights the compelling need to bring businesses together frequently to understand the changing profile of visitors, and work collaboratively to develop new propositions, products and opportunities.

At the same time, local authorities and other government agencies have a major role to play in supporting the visitor experience by ensuring that key aspects of local infrastructure are fit for purpose and well adapted to the needs of both local residents and visitors. The strategy will also contribute to "Scotland's National Strategy for Economic Transformation" (NSET) with a brave and bold ambition for a thriving wellbeing economy across economic, social and

environmental factors a priority. The key national pillars of entrepreneurial people and culture, new market opportunities, productive business and regions, a skilled workforce and a fairer and more equal society all connect to regional aspirations. The themes and priorities of the national tourism strategy "Scotland Outlook 2030 Responsible Tourism for a Sustainable Future" are also underpinned within the direction of travel across the regional visitor economy.

At certain times and in certain places visitor pressure has the capacity to negatively affect the quality of life of local people. Integrated planning and sharing knowledge on how to deal with these challenging situations can help minimise the negative impact on residents and ensure that Ayrshire and our islands are more attractive places to live and to visit. Our aims and ambitions recognise that we will seek to develop the partnership of Visitor Economy stakeholders and this strategy represents the collective ambition and focus for collaboration across the Ayrshire and Arran Visitor Economy Leadership Group. We will also influence and support the delivery of the Ayrshire Regional Economic Strategy and work across the regional partnership to support our digital, clean growth and skills requirements.

Ayrshire Regional Economic Partnership Overview



Ayrshire Regional Partnership Priority Workstreams:

- Visitor Economy
- Aerospace
- Digital
- Clean Growth
- Food & Drink

Setting the scene

Contributing to Ayrshire's prosperity - the value of the visitor economy to our region



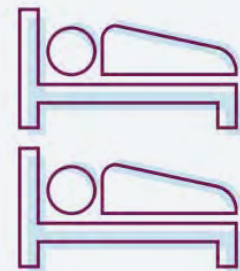
742 thousand

overnight visits



10.4 million

day visits



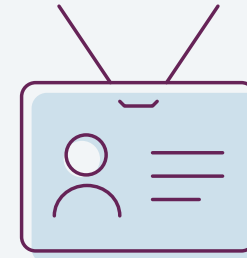
2.98 million

nights



£604 million

spend



13 thousand

jobs (2018)

figures shown are based on 3 year averages (2017-2019)
Source: VisitScotland, Ayrshire & Arran **Fast Facts for 2019**

The strategic priorities and actions in this document consist of areas where there is a strong rationale for regional-level co-operation.

The aim, therefore, is not to duplicate efforts undertaken locally, but rather to mobilise resources around those areas which can be addressed most effectively at regional level, for everyone's benefit, and add value to local and national activities. Actions related to the strategy will complement existing stakeholder activity and partnerships within the region.

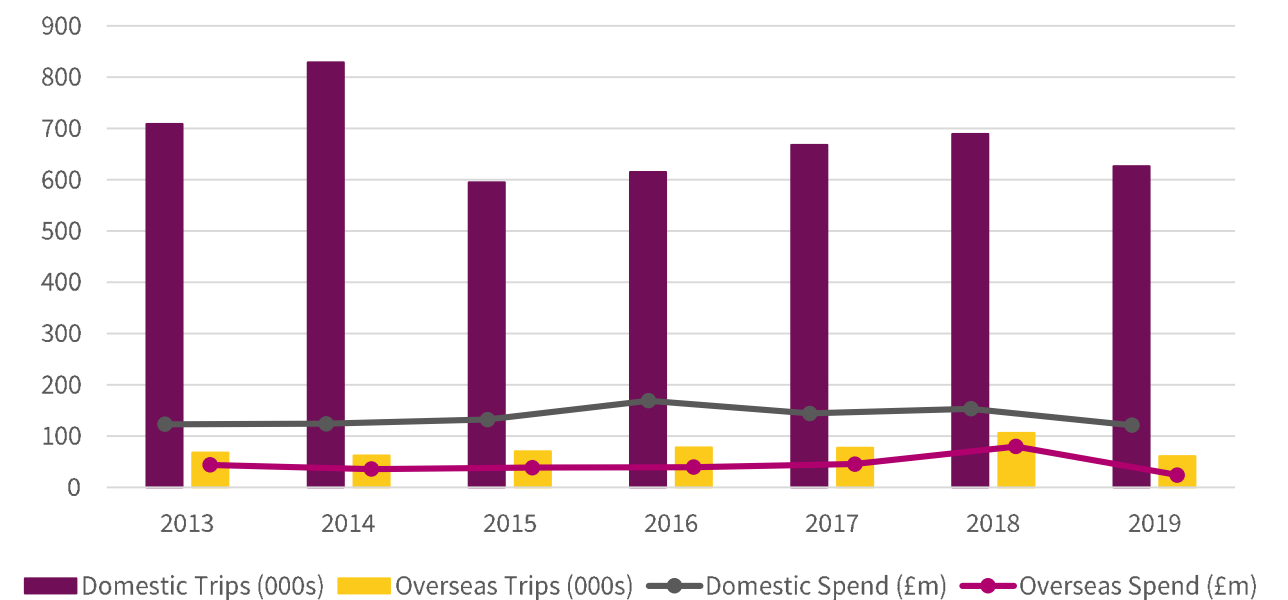
Ayrshire and Arran's tourism performance - the long-term picture

Prior to the emergence of COVID-19 the longer term performance of tourism in Ayrshire and Arran presented a mixed picture.

Referring to the graph shown opposite (VisitScotland, 2019) the number of trips to and within the region was similar to that of 2016, however the total overnight visits to the region were nearly 10% below the annual average for the 2013-2018 period, while total overnight tourism expenditure in the region was the lowest in seven years. In 2019, international visits and expenditure in Ayrshire and Arran were both the lowest in a decade¹. Traditionally, the region has attracted large numbers of day visitors (for example, visitors stopping on their way to/from Scotland from the rest of the UK, or visitors from Scotland's Central Belt), and consequently, faced the challenge of encouraging these visitors to spend more of their time in the region.

Evidence collected from industry consultations during the preparation of this strategy suggests that during 2020-2021, when public health restrictions allowed, the region received an influx of both larger numbers of day visitors than seen pre-pandemic, but also a rise in the number of UK domestic visitors spending more overnight stays in the region. As visitor flows recover and more complete data becomes available, the impact of the pandemic and other external factors on long-term visitor flows will become better understood.

Domestic and International Overnight Tourism, 2013-2019



Sources: GBTS, IPS.

1 Source: VisitScotland, Ayrshire and Arran Factsheet 2019
2 Source: VisitScotland, Ayrshire and Arran Factsheet 2019

Ayrshire and Arran's tourism performance - fast facts²

- Prior to the COVID-19 pandemic, overnight trips and expenditure hit a half-decade record in 2018, before experiencing a decrease in 2019
- In 2019, total overnight tourism expenditure was the lowest in seven years. International visits and spend were the lowest in a decade
- 89% of trips between 2017-2019 were by domestic travellers (Scotland and rest of UK)
- 74% of overnight spend between 2017-19 was by domestic travellers (Scotland and rest of UK)
- Between 2017-2019 international visitors to Ayrshire had a high average length of stay, with three in five overseas residents staying longer than a week. Winter and spring travel also increased in popularity, though summer remained the busiest season
- USA (25%), Germany (13%) and Canada (8%) were the region's top international markets

Looking ahead: competing in a crowded marketplace

Ayrshire and our islands are competing in a complex and highly dynamic marketplace, particularly for visitors from Scotland's Central Belt, Scotland's largest airports and visitors from across England.

As travel patterns return to normal, UK travellers face a wider range of domestic and international destinations to choose from. Amid rising household bills, in the UK and overseas, consumers also face tougher choices about how they will spend their disposable income. Analysis by VisitScotland suggests that we are entering a complex period in terms of the origins of demand, potential for demand and consumer confidence. However:³

- In spite of lingering COVID-19 concerns and rising household bills both in Scotland and overseas, there is strong evidence of pent-up demand in both the UK and international markets
- Domestic tourism (Scotland and rest of UK), both in terms of overnight and day trips will remain the main driver of recovery with 2022 figures expecting to be around 65% to 70% of a 2019 levels and growing over the next two years
- International visitors, particularly from Western Europe and North America are expected to increase in number from 2022 onwards with pre-pandemic levels hopefully reached by 2024 or 2025

³ Source: VisitScotland, April 2022



Measures of success:

The pre-pandemic performance of the visitor economy in the region as well as the broader goals of this strategy suggest that, as a minimum set of indicators, the delivery of this strategy should be judged by:

- An increase in domestic and international overnight stays
- A more even spread of visitor stays throughout the year (i.e. a reduction in seasonal peaks and troughs)
- Increased spend per visitor
- An increase in the number of jobs with Fair Work conditions created in the visitor economy
- Strong, and continually improving visitor satisfaction across a variety of aspects of their stay
- Strong and continually improving resident satisfaction levels with tourism in the region
- The geographic scope of the strategy's implementation; indicating that all parts of Ayrshire and our islands are benefitting from the actions put forward in this strategy
- Further, specific measures of success for each of the four strategic priorities listed in this strategy are to be developed in consultation with the organisations involved in strategy delivery

In the right place at the right time: meeting visitor demand across the region

To stand out and compete in a crowded marketplace, and stimulate domestic visitor demand, businesses across Ayrshire will have to work together, develop strong visitor propositions that are reflective of insights and trends that should be promoted in a responsible way, using targeted campaign activity in the UK and Ireland market. By getting to know our visitors better, we can capitalise on those trends, and compete more strongly with Scotland as a whole. This will also help us to achieve a better balance of domestic versus international visitors once international visitor demand returns.

The following table summarises the key trends that are shaping visitor demand in Ayrshire, and which are expected to endure in the coming year. These trends are shaped by a range of underlying shifts and changes in the social and economic landscape, such as demographic changes, the rising cost of living, the evolution of technology and growing concern around climate change. Many of these trends have been apparent for several years, however they have become accelerated due to the COVID-19 pandemic, and now play an even greater role in consumer decision making.

Trends shaping visitor demand in Ayrshire:	
<p>1. Localism and getting to know a destination’s unique identity.</p> <p>Visitors are keen to experience the unique attributes of a destination with an emphasis on “real” people, places and activities, whilst still getting the buzz and excitement associated with an overseas trip. While the pandemic encouraged visitors to ‘staying local’, this developed into a passion to support both their own communities and businesses, and those of places they visit.</p>	<p>2. Adaptable adventures in the great outdoors</p> <p>The pandemic accelerated an existing hunger for outdoor activities and physical adventures that allow people to reconnect with nature, help them stay fit, and provide them with a sense of freedom. From adrenaline seekers on the hunt for some excitement and risk, to people simply embracing a feeling of achievement after a long day of walking – outdoor adventures will continue to grow as a driver for tourism with their universal appeal and authenticity.</p>
<p>3. Food & drink with local flavour</p> <p>Although clear prior to 2020, the pandemic has driven increased interest in artisanal products, production methods and provenance. Driven by the localism trend described above, as well as an interest in supporting small, local, and green businesses consumers are paying close attention to what they’re eating and also to potentially enjoy sharing their purchases and experiences via social media.</p>	<p>4. Enjoying new-found flexibility</p> <p>Remote working has blurred the lines for consumers when it comes to work, rest and play, allowing many to mix extended breaks and work away from home. Larger numbers of consumers -young and old- are enjoying the flexibility of last-minute bookings and other flexible booking options, to plan while on the road, and break up homeworking monotony with more frequent micro-cations more often.</p>
<p>5. Bargain hunters and thrill seekers</p> <p>After months of shifting restrictions keeping people apart, days out and weekends away doing fun activities are just the tonic for reunions of families, friends and colleagues, helped by a burgeoning culture of experiential gifting with vouchers. Meanwhile, pressure from household bills will mean consumers will become even more value-conscious as they search for a bargain break.</p>	<p>6. Lighter footprints with conscious consumerism</p> <p>Environmental awareness, coupled with renewed concern about energy costs is driving consumers to make more considered decisions about how they use resources, both at home and while away. This, together with a renewed interest in social solidarity and localism, means that consumers are becoming more receptive to embracing responsible practices in different ways during their trip - and they expect to see the companies they buy from act with purpose and sincerity.</p>

Trend analysis compiled with input from VisitScotland

Who are our visitors?

New trends in visitor demand offer a huge range of opportunities for us to achieve one of our core aims; to convert day visits to overnight stays and short breaks into longer holidays.

VisitScotland has identified four UK target audiences developed over the past decade that VisitScotland would continue to identify as being a priority for Ayrshire and our islands in attracting new and repeat visitors. During the past two years there is also evidence of Ayrshire's audiences being a lot younger than has traditionally been the case - highlighting the need to understand the needs and interests of Millennials and Generation Z and overlay them with the following personas. Get to know our target audiences:

Adventure Seekers want an active holiday where they can enjoy both outdoor and cultural activities. They will venture off the beaten track and will be engaged by trying new things and pushing their limits and experiences. Holidays will really energise them.

Curious Travellers like to live life to the full and enjoy travelling as a hobby. They have an overwhelming desire to explore new destinations and discover new things. A holiday will often broaden their minds, educate and revitalise them.

Engaged Sightseers are driven by their love of holidays to plan numerous breaks in a year. They enjoy general sightseeing and touring, taking in historical places as well as scenery and nature. They relish engaging with friendly locals and seeking out an authentic experience.

Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breath-taking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time."

—
VisitScotland provides a range of in-depth resources with further information on these target audiences, and how to engage with them.





Regenerative Tourism – A community wealth building approach

Building place prosperity and supporting regenerative tourism

While the development of experiences is undoubtedly important to strengthen our offer to visitors, the considerable impact that COVID-19 has had on local economies and the need to focus public resources on underpinning the quality of life for local residents has made the case for pursuing a more holistic approach to place management and marketing stronger, and more urgent.

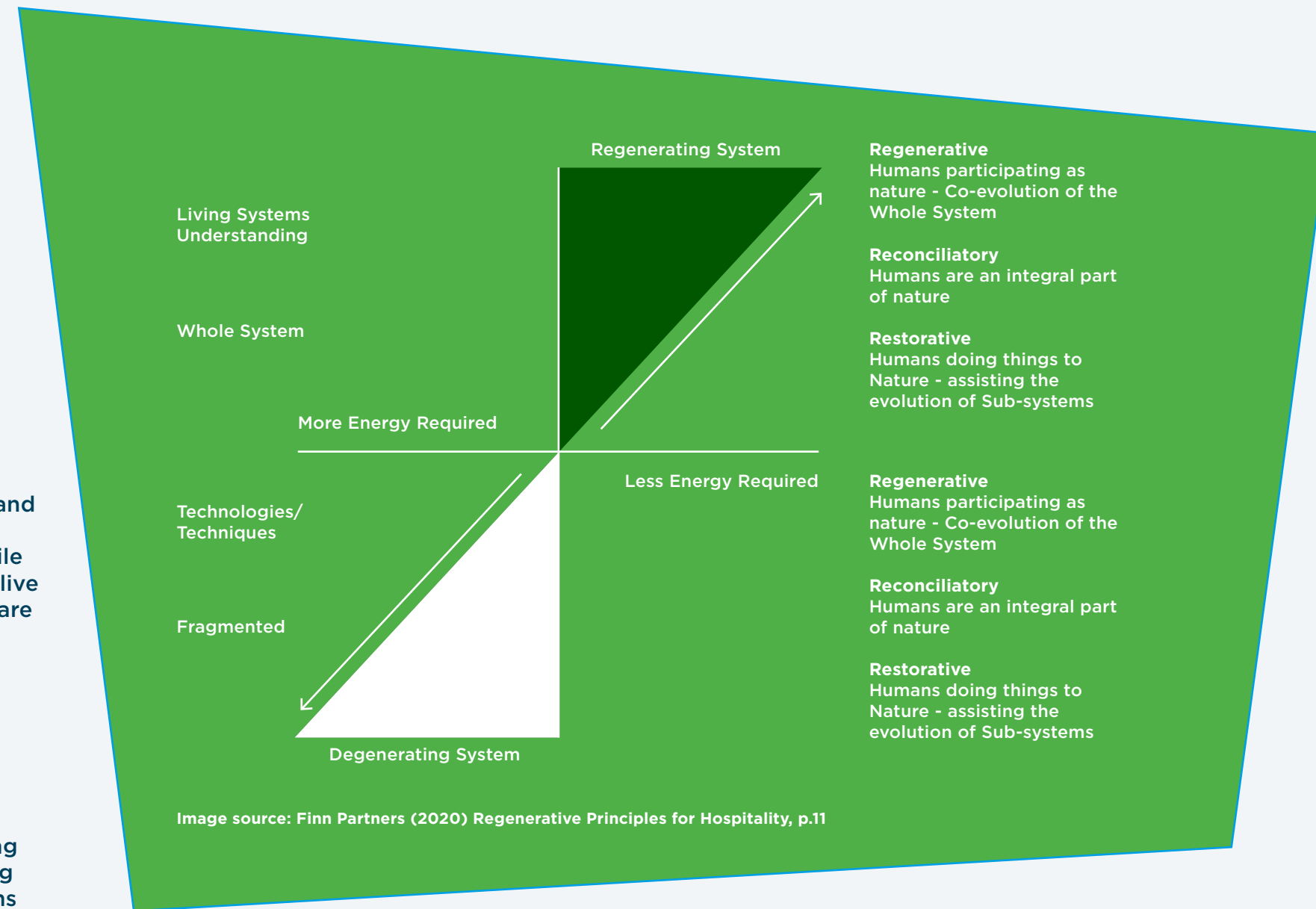
- Making it easy to move around the region, particularly using low-impact transport (walking, cycling, public transport)
- Ensuring that visitors and locals have easy, affordable access to local produce
- Ensuring that tourism contributes to a clean and healthy environment (clean air, no pollution)
- Supporting initiatives that attract visitors while boosting local residents' pride in where they live
- Developing attractions and experiences that are compelling and attractive to residents and visitors alike

The opportunity to make tourism in Ayrshire regenerative

As the adjacent graphic shows, while vitally important, making tourism sustainable is about minimising tourism's negative impacts and doing less harm to a place's people and nature. Making tourism regenerative, however, essentially means leaving the place in a better state than before (by benefitting the destination's people and nature) so the place can thrive and flourish. It requires us to see our region as a 'living system' - that nature, culture and people are alive, changing and interconnected. Pursuing regenerative growth is an approach that is rapidly gathering pace around the world.

Supporting good place management in Ayrshire and our islands - for the benefit of local residents as well as visitors - means focussing on aspects such as:

- Working to ensure that the visitor economy offers good job opportunities, with fair working conditions, as part of a sustainable, balanced economy
- Creating opportunities for both residents and visitors to improve personal wellbeing (e.g. keeping fit and eating well)



Aligning with Community Wealth Building

The regenerative approach to the visitor economy represents an articulation of our ambitions to embed a 'Community Wealth Building' approach to the visitor economy.

Delivering our ambitions through a regenerative tourism model will assist us to deliver our community wealth building aspirations by supporting:

- Plural ownership of the visitor economy - supporting both small businesses and community enterprises
- Making financial power work for local places
- Fair employment and just labour within visitor economy sectors
- Progressive procurement of goods and services
- Socially and environmentally productive use of land and property assets

Our ambition: Harnessing our people and places to deliver transformative visitor experiences

Pursuing regenerative growth is an approach that is rapidly gathering pace around the world, and in Ayrshire we're starting from a position of strength.

Across the region, there are already communities, businesses and organisations that are applying regenerative principles to the way they work - many with connections to the visitor economy. From the employee-owned Auchrannie Resort on Arran to the Coalfield Communities Landscape Partnership, the Ayrshire Food Hub or the Galloway and Southern Ayrshire Biosphere, examples abound of organisations that are acting with purpose for the benefit of local communities and the environment, while providing new inspiring experiences for visitors. By learning from each other, positioning these organisations in a smarter way towards our visitors and integrating these diverse organisations better into the visitor economy, we can position Ayrshire and our islands as a leader in this space, build resilience in our communities and bring net-benefits to the planet too.

Our collective ambition is for the visitor economy in Ayrshire and our islands to connect, restore and regenerate. We think these are the drivers to creating memorable and transformative experiences, that improve our environmental assets and infrastructure, including through programmes such as the Ayrshire Growth Deal, and create a platform for community wealth building - so our communities can participate in, own and benefit from the social and economic benefits of a thriving visitor economy. Taking the lead from the national tourism strategy [Scotland Outlook 2030 Responsible Tourism for a Sustainable Future](#) this strategy places the wellbeing of our people and the environment at the heart of everything we do.

- We will connect businesses in the region, to support strong local supply chains that help to build wealth in our communities. We will also connect local people and visitors with our natural environment, both on the land and sea - through educational, immersive and transformative experiences
- We will restore residents' pride in the places where they live by ensuring that tourism contributes to their local quality of life, and by ensuring their active participation in tourism planning and development.

- We will restore links between the region and its key, pre-pandemic source markets, as well as nurturing those that offer scope for further development
- We will also aim to restore our visitors - through offering memorable experiences that promote health, wellbeing, enjoyment and relaxation
- We will regenerate by delivering our £250m Ayrshire Growth Deal programme that includes our focus on coastal regeneration and marine tourism
- We will also regenerate the regional economy, by using our assets to encourage skilled residents to live here, to support the visitor economy and other key economic sectors

Our collective ambition is for the visitor economy in Ayrshire and our islands to connect, restore and regenerate.



Our vision

“Together, we will build a thriving, inclusive visitor economy across Ayrshire and our islands that delivers transformative experiences for our visitors, builds prosperity for our communities and nurtures the natural environment.”



The sea, the land and the communities that have grown up around them are what make Ayrshire and our islands unique, special places in the hearts of locals and visitors. Over the past two years, as Covid restrictions lifted, successive waves of visitors have confirmed that our beaches, country parks and estates, and walking trails are a major attraction. Mariners from the UK and overseas are attracted by our marine infrastructure (expected to develop further with support from the Ayrshire Growth Deal) and golfers can find some of Scotland’s best golfing facilities within easy reach. Food lovers - a continually growing audience - don’t have to travel far to find fresh produce, given that Ayrshire is one of Scotland’s biggest agricultural producers, and as a result has become a well-established ‘authentic, artisan food and drink haven’.

In a ‘click and go’ world, where consumers are confronted with infinite choices of where to spend their leisure time, it’s more important than ever to ensure that Ayrshire’s proposition is carefully curated, clearly presented and well understood across the region.

In terms of developing products and experiences for both visitors and locals to enjoy, it’s important to recognise that visitors are motivated to visit by different activities, and that each requires a different approach, given that each has a varying impact, level of investment, and involvement of the local community. While different stakeholders take the lead on managing various aspects of the visitor experience, delivering an outstanding visitor experience ‘door-to-door’ depends on consistent public-private co-operation.

What does our future Ayrshire Visitor Economy look like? We aim for a thriving, growing industry that conserves and enhances our natural environment and works to support prosperous and thriving communities.

Our four regional strategic priorities

The four strategic priorities in this strategy are based on those set out in the national tourism strategy Scotland Outlook 2030 Responsible Tourism for a Sustainable Future and are thus oriented to be fully aligned with national priorities, while addressing local needs. These priorities are intended to guide both the public and private sectors on the areas where they should mobilise their resources in order to achieve the vision and ambition described above. As shown opposite, our strategic priorities are the key themes to successfully delivering our vision and ambition.

Our four priorities are to:

- 1** Connect our high quality, memorable experiences
- 2** Connect our diverse businesses to grow and build community prosperity
- 3** Regenerate the region through the talent and creativity of our people
- 4** Harness our natural and place-based assets to enhance our environment for the benefit of visitors and our communities



Strategic Priority 1

We shall work together to connect our high quality, memorable experiences with each other, and with our visitors.

Why is this important?

With an outstanding coastline offering countless opportunities for marine sports, huge open skies to appreciate by day or by night, and thousands of hectares of open countryside to explore, Ayrshire and our islands are perfectly positioned to give local, UK and international visitors the restorative break that they need. In a world where consumers need help selecting from a myriad of choices, then 'click and go', it is essential to ensure that our experiences are properly curated, presented and easily sold online, whether direct to the consumer or via the travel trade.

The 'connection' element is critical here too. It's in everyone's interests to ensure that visitors explore as widely as possible during their visit, to spread the impact of their spending, encourage additional overnight stays, and repeat visits in the future to discover more. When businesses are well-informed about what's on offer across the region, they can build packages with more ease. It is also essential to ensure that the route to market for our products is clear and well understood, by engaging with the UK and international travel trade. Together, we can position Ayrshire and our

islands more effectively in the right market at the right time, in order to ensure that we attract a greater proportion of the international visitors coming to Scotland, and that demand is strong throughout the year. More broadly, this can also help us to position the region as a great place to live, work and invest too.

Approaching this priority in a way that is mindful of a global need to drive towards net zero solutions is also critical.

What strengths can we build upon to deliver this?

During the pandemic, many visitor economy businesses across Ayrshire have invested in developing new products and experiences, upgrading their facilities and attracting new audiences (both online and offline). Meanwhile, ongoing research by VisitScotland, throughout the pandemic on the emotional benefits of tourism has also identified the most popular visitor activities taking place in settings that are rural, coastline/islands, countryside, and mountains/hills. These natural assets are all intrinsically linked to the product make-up across Ayrshire and the islands and can potentially place the region in a strong competitive position. This is why successful tourism recovery for Ayrshire and the islands must include the creation and then the promotion of unique, responsible products and experiences in these environments. The table (page 17) illustrates the relationship between different sets of experiences, and how these can be planned and considered in relation to each other.

Portencross Castle



Primarily we must focus on ensuring that our 'Premium Drivers' offer premium facilities and are complemented by 'Community Wealth Builders' and 'Regional Connectors', since these should encourage visitors to spend more time exploring the region further.

Large and small-scale projects currently underway across the region put us in a strong position to become an exemplar destination in a short space of time. These include Whitelee Wind Farm (the UK's largest onshore wind farm), the Galloway and Southern Ayrshire UNESCO Biosphere, the Centre of Excellence in Energy Systems due to open in Cumnock in 2024, our food and drink sector and Arran Geopark. Sites such as these, and other smaller local projects in the region have a huge relevance to the ongoing need for both the academic and business sector and the public to understand how the transition to net zero will work in practice. Interest in this sector is expected to grow considerably in the coming years and this presents a major opportunity for the region to position itself both in Scotland and the rest of the world.

A significant element of the Ayrshire Growth Deal programme is providing innovation, supporting key sectors such as the blue economy, energy production, food and drink innovation and aerospace and space sector development. All of the innovation activity supports and will unlock productivity capacity, utilising data and digital systems and embedded net zero solutions. These create opportunities to develop new, practically focused experience-based learning and visitor economy opportunities that should be reflected in how we utilise our land, sea and infrastructure assets to create these opportunities.

As a wider Regional Economic Partnership, it is also critical that we ensure that we are utilising the developing regional energy masterplan and transport strategies to address wider net zero and infrastructure challenges that will be vital to achieving our vision.

What can we achieve at regional level?

- Ensure that businesses across the region
- Are well connected to the UK and international travel trade, and using the optimal routes to market their products
- Are well connected to the sources of data and insights that can help improve commercial decision making
- Have the digital skills and tools to engage with visitors before, during and after their visit, to generate loyalty and familiarity with the region's offer
- Are visible online, with good quality content and well-managed reputations
- Ensure visitors have the means to use low-impact transport options to explore and enjoy the region by ensuring that they meet visitor demand, especially at peak periods and that routes are well integrated with the region's main walking and cycling routes
- Ensure coordination between the region's visitor economy businesses, with tourism attractions and local authorities on planning and installing the necessary transport infrastructure (e.g. ensuring that electric vehicle charging points are strategically located in popular locations for visitors)
- Position the region as a leader in environmental education for both professional and leisure audiences, and increase the number of visitors who come to the region for this purpose, including through our innovation-based Ayrshire Growth Deal projects relating to energy, blue economy, aerospace and food and drink

Focus	Experiences	Main Target Audience	Partnership approach to include:
<p>Regional connectors Capitalising on visitors' desire to get outdoors to expand their horizons with outdoor activities to be enjoyed all year round, across the whole region.</p>	<ul style="list-style-type: none"> - Outdoor exploration (walking & cycling) - Shoreline sports - Road trip itineraries - Product packaging - Business-Business connectivity - Communities 	<p>Adventure Seekers Curious Travellers Engaged Sightseers</p>	<p>Support investment in low-impact travel and wayfinding</p> <p>Good maintenance and development of visitor facilities (toilets, parking, litter, access)</p> <p>Ensure businesses along routes are prepared, engaged and promoting routes</p> <p>Supporting good public transport connectivity</p>
<p>Premium drivers Attracting visitors with higher spending power primarily to enjoy sports and wellness activities in locations that offer best-in-class facilities.</p>	<ul style="list-style-type: none"> - Premium golf - Marine tourism - Hard adventure - Wellness and relaxation - Heritage and culture - Landscape/seascape 	<p>Adventure Seekers Natural Advocates</p>	<p>(Site/property based) ensure outstanding facilities available and well positioned to target markets</p> <p>Package products to ensure that these premium activities are closely integrated with experiences defined as 'community wealth builders' and 'regional connectors'</p>
<p>Community wealth builders Developing experiences that have a strong impact on local community pride, identity and prosperity, and sharing these with visitors.</p>	<ul style="list-style-type: none"> - Artisanal food & drink and agri-tourism - Heritage and culture - Festivals and events - Community-led tourism 	<p>Curious Travellers Engaged Sightseers</p>	<p>Build networks to ensure strong demand and participation in delivery by local residents</p> <p>Develop supply chains to draw on skills, talent and raw materials from within Ayrshire</p> <p>Position the strongest/most unique/easily accessible products towards visitor markets</p> <p>Procurement programmes</p>
<p>Long-term USPs Inspiring and educating visitors from around the world as we link current sites and future projects in landscape regeneration, conservation, carbon-free power generation, and aerospace technology.</p>	<ul style="list-style-type: none"> - Environmental research and education - Innovation programmes - Aerospace and space - Blue economy - Energy - Food and drink 	<p>Curious Travellers Natural Advocates</p> <p>Also, progressively: business audience (investors, R&D), academic audience (R&D)</p>	<p>Mapping and developing large and small-scale projects, and timescales</p> <p>Develop visitor economy proposition and specific products based on UK/international benchmarks</p> <p>Ensure wider visitor economy businesses and residents are aware of progress, and opportunities to participate</p> <p>Support surrounding infrastructure and access to specific sites</p>

Strategic Priority 2

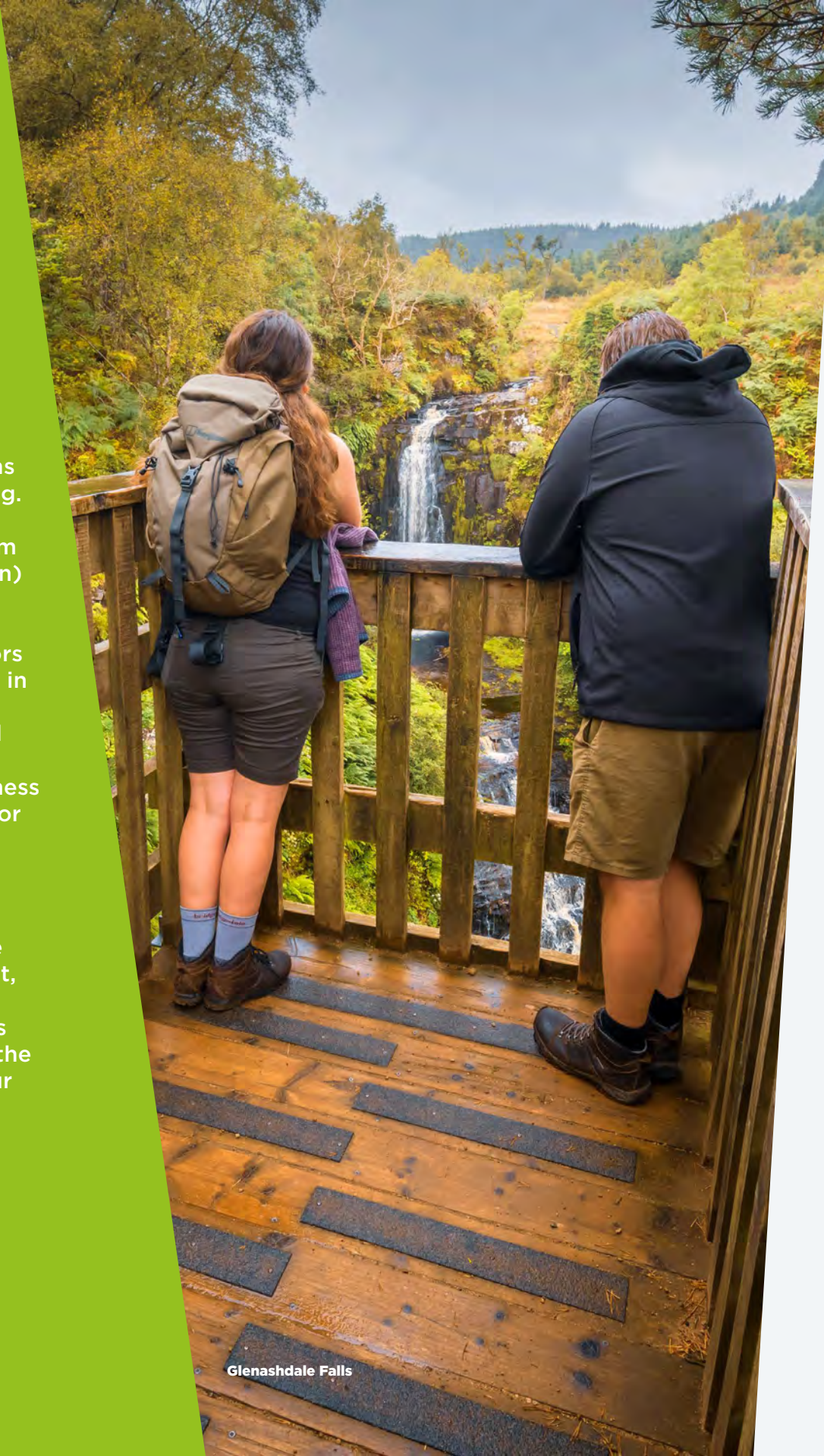
We will work together to connect our diverse businesses to grow and build community prosperity.

Why is this important?

Across our region, hospitality businesses, retailers and attractions help to underpin prosperity in local communities by supporting jobs and providing valued services year-round. However, to ensure that we can capitalise on the consumer trends outlined earlier in this strategy, and build compelling experiences that attract loyal visitors, we need to ensure that businesses are engaged, able to support each other, share their knowledge and position the region with confidence in its key markets. It's also vitally important that this network building is done in an inclusive way; recognising that many types of organisation are responsible for serving visitors; from multinational companies to community trusts,

charitable foundations and of course, local authorities. Building stronger connections between different sectors (e.g. food and drink with heritage and culture, or marine tourism with environmental education) is also vitally important. Our aim through this is to build knowledge about what visitors are looking for, identify gaps in the market, boost innovation in product development, and act as a catalyst for more entrepreneurialism and business start-ups in the region's visitor economy as a whole.

With stronger links between businesses in the region, this should also help us to source more of what we need (talent, skills, raw materials and produce) as close to home as possible - i.e. strengthening the supply chains that service our visitor economy, particularly in areas such as food and drink, and contribute to our Community Wealth Building efforts.



Glenashdale Falls

What strengths can we build upon to deliver this?

Preparatory work for this strategy highlighted business' willingness to build partnerships in the region, become more involved in decision-making around destination marketing and management, and ensure that the region is better positioned towards its target markets. During 2020-2021 the Ayrshire and Arran Destination Alliance was established, with work underway to address the areas described above. However, much more can be done to increase the number of organisations participating, expand participation from across Ayrshire and the islands, and develop a programme of work that helps to support the delivery of this strategy.

Across the network of partners supporting the visitor economy each of the local authorities have business support services and agencies provide visitor economy business support as well. It is important to support our businesses as the recovery from Covid continues and moves towards renewal. It will be important to collaborate across partners to ensure we optimise how we deliver support to businesses in a range of complementary ways.

What can we achieve at regional level?

- Ensure that businesses have opportunities to participate and shape decision making in product areas that are relevant to their business (e.g. developments in marine tourism, food and drink, outdoor activities or environmental projects that have a regional impact)
- Ensure that businesses are aware of and know how to participate in Community Wealth Building projects
- Ensure that our businesses have access to information on the right digital and data capabilities to connect across Ayrshire and the islands
- Ensure our approach to marketing is integrated and promotes the opportunities available on a regional scale
- Ensure we have the transport capability to allow our businesses to connect products and for people to access our assets in a sustainable manner

Strategic Priority 3

We will work together to regenerate the region through the talent and creativity of our people.

Why is this important?

A decline in the working age population is forecast in the coming decades, while the disruptive effect of the COVID-19 pandemic has also caused skilled professionals, both young and old, to leave the workforce or change career paths, sometimes at the expense of the hospitality sector. One of the region's key destinations - the Isle of Arran - is particularly vulnerable to depopulation and, as the island's Local Island Plan sets out, urgent steps are required to address this, and encourage young people to stay⁴. Hospitality and Tourism students at Ayrshire college, interviewed as part of the research for this strategy, highlighted their pride in the region, but cited concerns around the stability of jobs in the

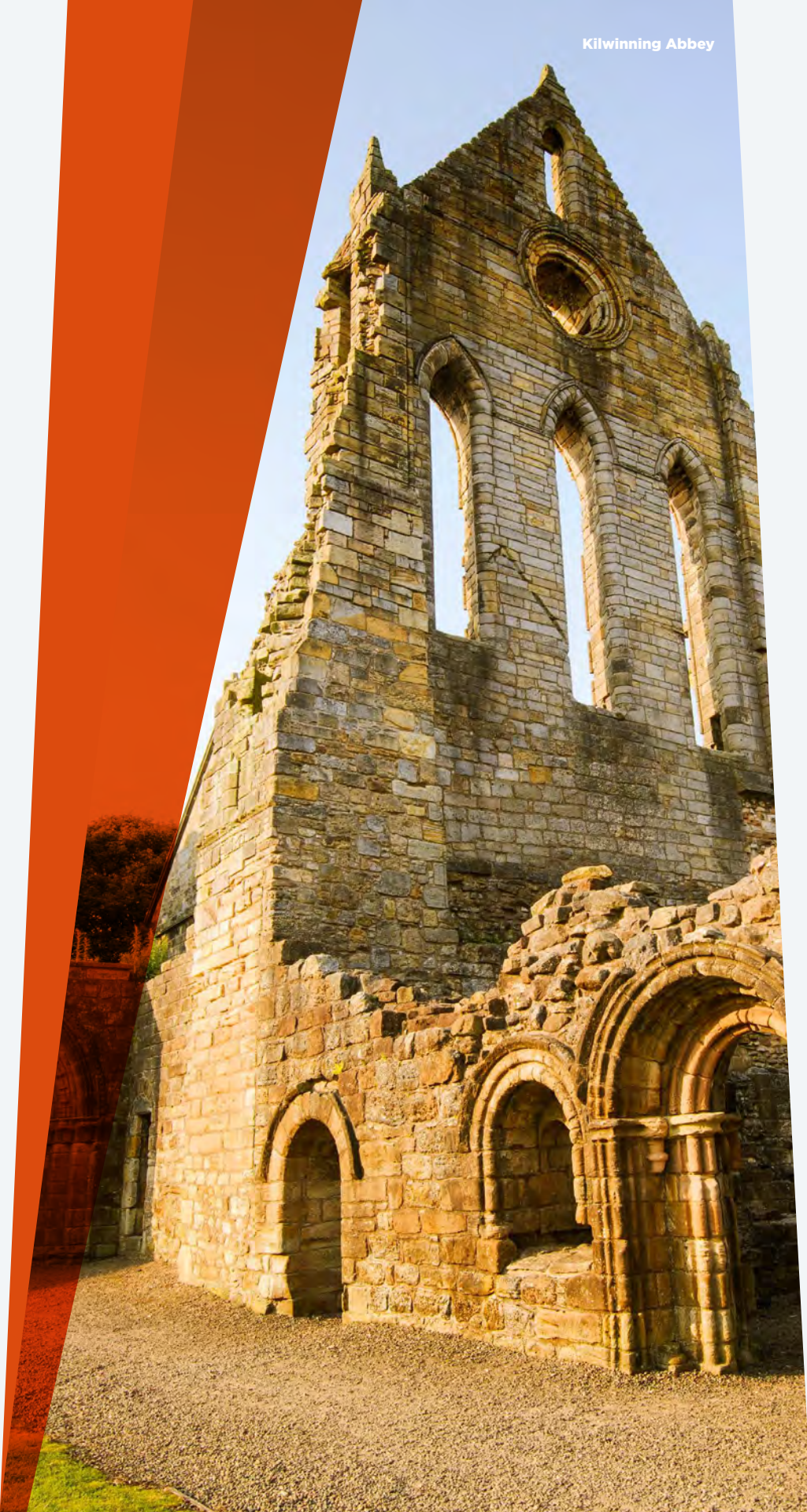
visitor economy, and fair working conditions too.

These challenges certainly aren't unique to Ayrshire and our islands, but they do underline the structural, deep-rooted nature of the relationship between local people and the visitor economy. They also underline the importance of attracting and retaining a healthy, balanced population in order for places to thrive, and the wider economy to function properly. For this reason, one of the key aims of this strategy is to position the visitor economy as a key agent of change in the region's wider economy.

What strengths can we build upon to deliver this?

The success of the visitor economy depends on a skilled, valued and committed workforce. As a region which has suffered from depopulation, it is even more important that we work to encourage young people to stay in the region and develop successful, rewarding careers here, and that pathways are developed for those in the most

Kilwinning Abbey



One of the key aims of this strategy is to position the visitor economy as a key agent of change in the region's wider economy.

economically disadvantaged communities to be able to benefit from visitor spending; either by benefiting from Community Wealth Building initiatives in which the visitor economy plays a part, or directly through employment. More broadly, the visitor economy has a role in building partnerships with other sectors to encourage skilled workers to move here, young people to study here, and for businesses to invest in the region.

This will help to underpin the region's long term economic development, and to provide a thriving year-round local market for our hospitality businesses. While we will individually address workforce challenges, we will ensure that the regional skills plan reflects the wider sectoral needs in order to enable a wider network of partners to act collaboratively to unlock the skills potential of the region and create fair work opportunities for Ayrshire.

What can we achieve at regional level?

- Develop ways for young people across the region to become familiar with the diversity of the visitor economy from a young age
- Develop support schemes that prioritise recruitment from low-income areas and prioritise entry level and apprenticeship positions
- Ensure there is affordable accommodation supply for the visitor economy workforce (e.g. in addressing holiday lets)
- Leverage the attractiveness of the region as a rewarding place to live and work through place marketing initiatives, in order to attract a skilled workforce
- Facilitate the workforce's access to training and personal development opportunities by increasing engagement in national training schemes

Strategic Priority 4

We will harness our natural and place-based assets to enhance our environment for the benefit of visitors and our communities.

Why is this important?

As stated earlier in this Strategy, regenerative tourism means leaving the place in a better state than before (by benefitting the destination's people and nature) so the place can thrive. This approach is not anti-growth; but it is about achieving more equal, fairer benefits from that growth. It is very important that Ayrshire and our islands' future visitor economy development and growth does not happen at the expense of its residents and its natural environment, but provides them with more and more opportunities to strengthen, enrich, improve and, importantly, capitalise on such growth. Pursuing a regenerating growth is the only

way to achieve this, linking all four priorities together and contributing to their success.

What strengths can we build upon to deliver this?

The research, discussions and various consultations for this project have confirmed local people's pride of living in, and their willingness to preserve, its natural beauty, see benefits from tourism for the wider community, as well as provide inspiring and memorable experiences to visitors. This suggests that there is a solid basis to introduce regenerative approaches to tourism development in Ayrshire and the islands.

The collaborative and inclusive work on the Plan will not only create a stronger and more engaged community, help build new partnerships (for example between the tourism, educational and environmental organisations) and provide additional financial and non-financial benefits but will also position the region as a leader in regenerative tourism in Scotland and beyond.

Ayrshire Growth Deal

The Ayrshire Growth Deal is a partnership being driven forward by the Scottish Government, the UK Government and East, North and South Ayrshire Councils. The Deal presents a major opportunity to strengthen the Ayrshire, Scottish and UK economies. Targeted co-ordinated investment throughout the region will act as a powerful catalyst to stimulate growth, resulting in increased job opportunities and prosperity for Ayrshire, for Scotland and for the UK as a whole. Our aim is to marry business growth opportunities to employment progression, developing the future workforce and community development, ensuring all communities benefit from economic growth.

Our programme is based on the achievement of economic growth and inclusive growth, with a clear focus on addressing the issues of innovation, productivity, and inequality across the regional economy.

Maidens Harbour



In particular, our tourism programme has secured place-based investment in Irvine, Ardrossan, Arran and Cumbrae to create nationally significant regeneration and destination development programmes and enhance our competitive advantage in marine tourism through our assets within the Firth of Clyde.

What can we achieve at regional level?

- Position Ayrshire and our islands as leaders in applying regenerative tourism practices
- Ensure participation and inclusion of local tourism businesses and residents - including young people and disadvantaged groups - in discussions on how tourism can be leveraged for their benefit and wellbeing
- Ensure participation of local people in our regenerative tourism approach to ensure our visitor economy delivers our community wealth building ambitions
- Ensure our Ayrshire Growth Deal programme and other key investments stimulate and support wider socio economic and environmental benefit across the region



**Find out more on the 'Information & Resources'
section of the Regional Industry Website**

ayrshireandarran.org >

Regional Economic Partnership Visitor Economy Workstream Ayrshire & Our Islands - Draft Action Plan

Priority 1: Memorable Experiences - Promoting Region-wide Themes, Trails & Events	
Action	
Ongoing	
1.1 Agree approach to delivery model for the action plan and future partnership governance.	
1.2 Deliver Ayrshire & Arran Tourism Conference	
1.3 Identify new opportunities for future investment in the visitor economy across the region and work with partner organisations to exploit these	
1.4 Signpost visitor economy businesses to appropriate business support available through all partner agencies	
Year 1 (Apr 23-May 24)	
2.1 Develop an innovation approach for the region which will help develop the regional proposition	
2.2 Identify signature events that merit pan-Ayrshire profile and promotion	
2.3 Develop Regional Digital Presence and deliver regional audience marketing campaign	
Years 2-3 (Apr 24-Mar 26)	
3.1 Undertake primary research into the attitudes and behaviours of Ayrshire visitors (demographics, psychographics, segmentation, needs, attitudes to Ayrshire, competitors, options for positioning)	
3.2 Select regional positioning, develop regional brand and communication strategy based on new positioning	
3.3 Develop promotional programme to re-engage visitors with Ayrshire and encourage them to consider a visit	
3.4 Work with major development projects (including Growth Deal projects and workstreams) across the region to identify opportunities of scale	
3.5 Establish data feeds to monitor strategy, including investigating region-wide feedback scheme	

Priority 2: Connected Businesses - Collaboration, Communication, Circular Economy	
Action	
Ongoing	
1.1 Agree description of target visitor - visitor demographic and psychographic profile, core geographical segments, growth geographical segments and drivers for visiting Ayrshire	
1.2 Agree key themes that will anchor the region's profile and link the various localities together (e.g., Golf, Food & Drink, Marine, Soft Adventure, Golf, Burns, Heritage)	
1.3 Present findings at conference	
CONFERENCE: Describe business engagement plan for 2023	
Year 1 (Apr 23-May 24)	
2.1 Develop an engagement plan which demonstrates the region's commitment to supporting a fair and just transition to net zero	
2.2 Digital Business Presence	
2.3 Strengthen Ayrshire's reputation with the travel trade	
Years 2-3 (Apr 24-Mar 26)	
3.1 Examine potential for "member services" for Destination Management & Marketing Organisation	
3.2 Examine current digital booking space and evaluate options for the Destination Management & Marketing Organisation to participate in this space	

Priority 3: Talent & Creativity - Increase uptake of existing talent support and connect with education sector	
Action	
Ongoing	
1.1 Consider the future of AAVELG and confirm partner participation which will include identification of new partner organisations aligning with delivery of strategic ambitions. (eg SDS, College, BG)	
1.2 Investigate and collate existing talent support that is available to tourism businesses	
1.3 Deliver activity which will position Ayrshire as region which promotes Fair Work, inclusion and diversity	
1.4 CONFERENCE: Holistic overview of talent support available across Visitor Economy	
Year 1 (Apr 23-May 24)	
2.1 Increased uptake of talent support regionally	
2.2 Connect with education sector; schools, colleges, UWS, other training providers	
Year 1 (Apr 23-May 24)	
3.1 TBC	

Priority 4: Communities & Environment - Linking VE into Community Development and Promoting Sustainable Transport	
Action	
Ongoing	
1.1 Agree description of target visitor segments, core geographical markets and drivers for visiting Ayrshire	
1.2 Develop networking programme across region to help communities share tasks and knowledge and to engage with tourism businesses to get sector input into their plans	
1.3 CONFERENCE: Select communities describe the role of VE in their community plans. Launch community Visitor Economy network	
Year 1 (Apr 23-May 24)	
2.1 Deliver Community Engagement Plan with the VE	
2.2 Improve awareness and uptake of sustainable travel and highlight priorities for improvement	
2.3 Examine opportunities for visitors to give back to Ayrshire & Arran, in particular moving to a visitor giving scheme across the region	
Years 2-3 (Apr 24-Mar 26)	
3.1 Highlight opportunities for regenerative tourism in Ayrshire and make funding case in partnership with SG	
3.2 Build community approach to tourism as part of the marketing campaign for the region, highlighting the character of the region, its heritage and its people (e.g., Yarn with a Local)	
3.3 Use community network to develop environmental plan that reduces destination towards net-zero in line with Glasgow Declaration	