

North East 250 Vision and Planning Event Tuesday 28 October 2025, 10.00am



- Arrival and coffee The Museum of Scottish Lighthouses, Fraserburgh
- Welcome in-person and online, from 10.30am
 - Guy Macpherson-Grant, NE250
 - Lynda McGuigan, The Museum
- Key note David Jackson, VisitScotland
- Moray Chamber of Commerce the 2025 season
- Supporters
 - Mark Stevenson, Shirlaws
 - Magnus Dixon, Northlink Ferries
- North East 250 The Vision and The Plan
 - Anne Ashworth
 - Guy Macpherson-Grant
- Q&A



Guy Macpherson-Grant

THE MUSEUM OF SCOTTSH LIGHTHOUSES

THE SITE







THE IMAGE



THE MEANING



THE OBJECTS







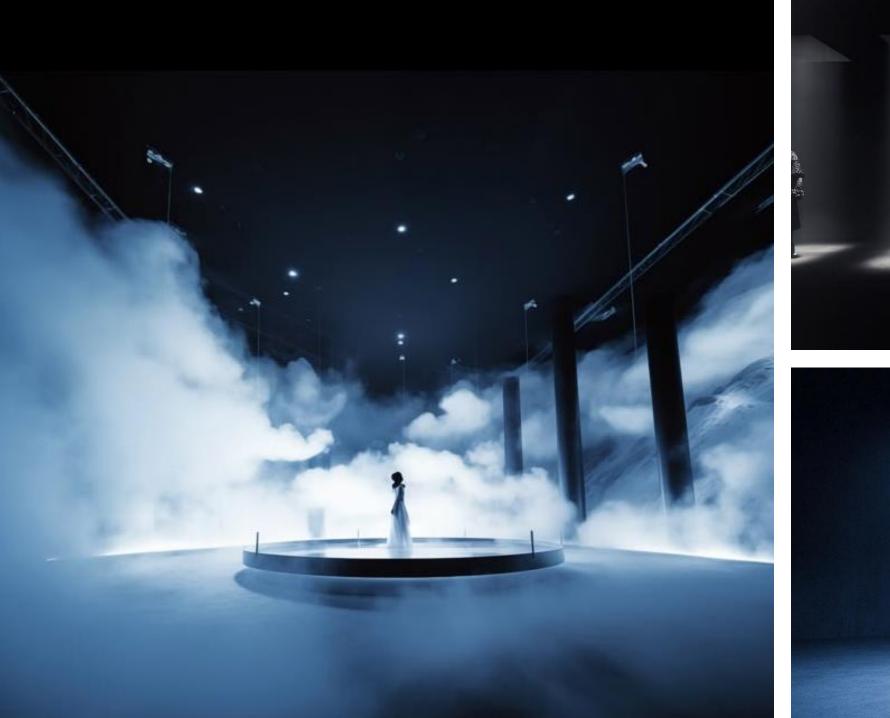
THE TALES





THE CONCEPT



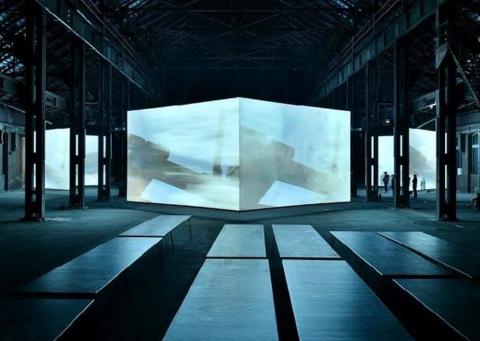




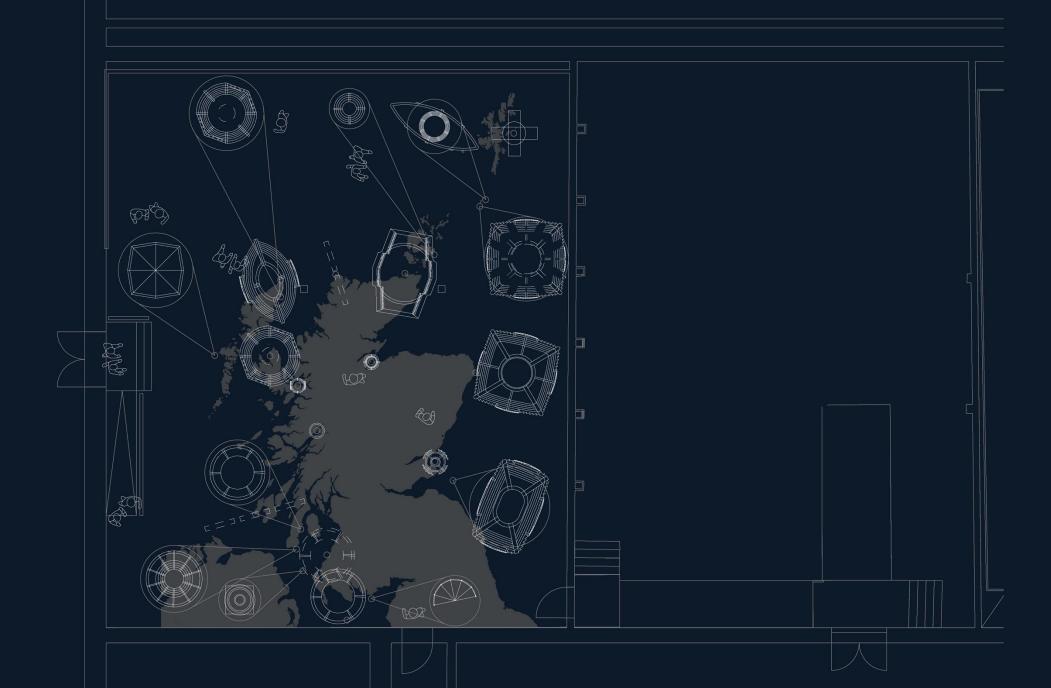








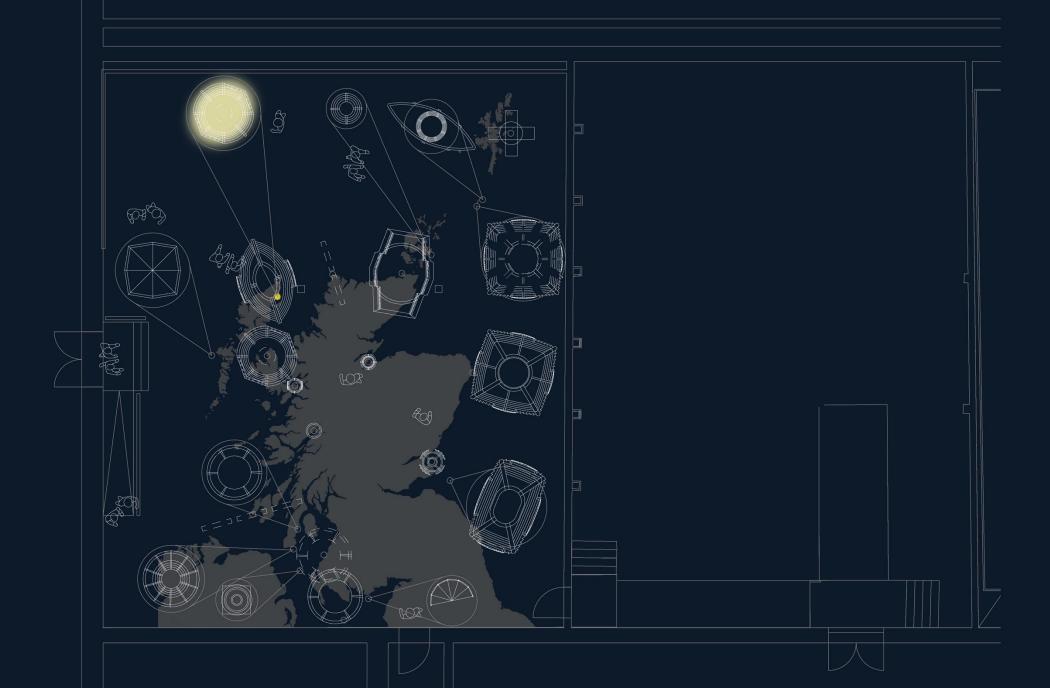
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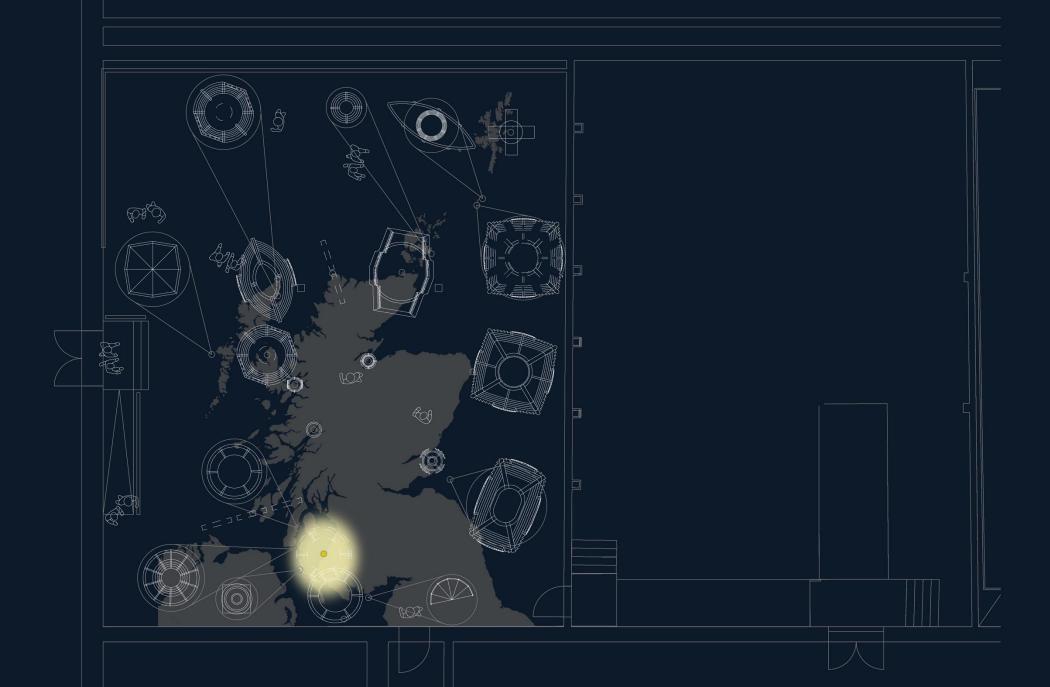














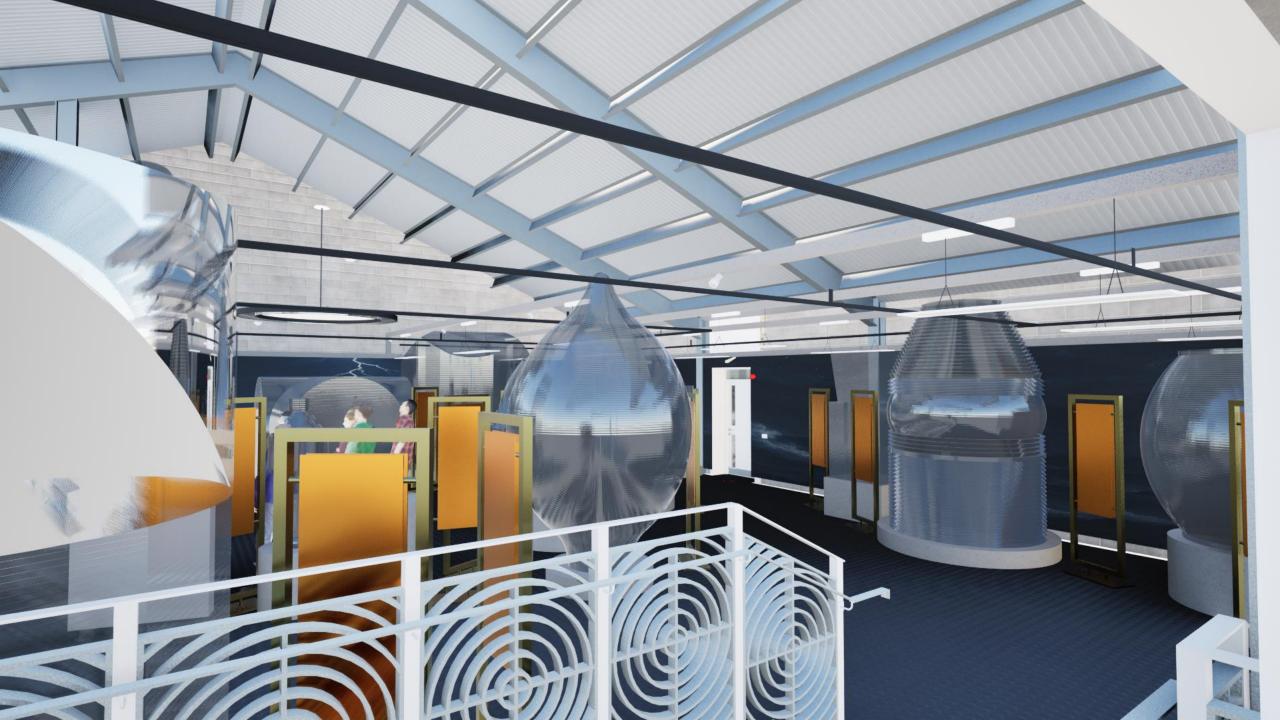
























THE MUSEUM OF SCOTTSH LIGHTHOUSES





$S_{cotland}^{Visit} | Alba^{\scriptscriptstyle{\mathsf{TM}}}$

VISITSCOTLAND UPDATE

North East 250 Event 28 October 2025
David Jackson, Regional Director

STRATEGIC APPROACH

An economic growth agency growing the visitor economy through

- Business & Experience Development
- Market Development
- Place & Destination Development

Enabled by

Organisation Development

This work ensures we're reaching the right audiences, offering the right support to businesses and prioritising the markets where we see growth and potential.





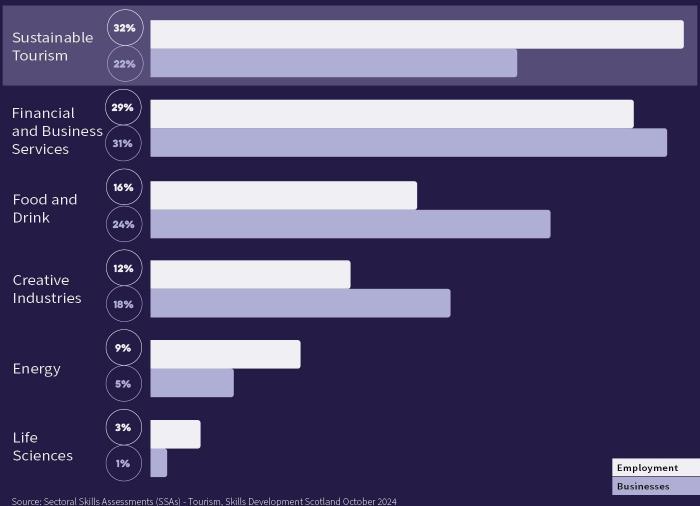
Scotland's Visitor Economy – a key growth sector







Sector percentage of total employment and businesses in 2024



Visitor data 2024

Who came to Scotland?

- In 2024, there was a total of 92 million tourism visits to Scotland, including domestic and international overnight trips and day visits
- Visitors from the UK accounted for 71% of visits and 46% of spend
- International tourism accounts for 29% of total overnight tourism visits and 54% of spend
- UK number of trips down but spend up
- International number of trips and spend both up

10.6M UK overnight trips

4.4M

£3.3BN

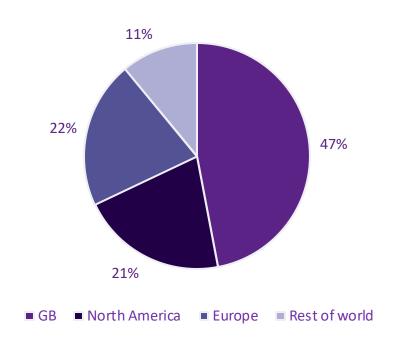
UK overnight spend

£4BN

International spend

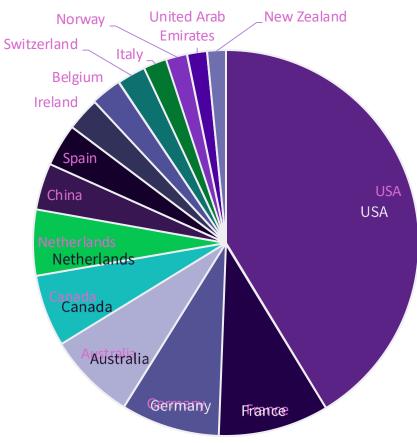
Spend

Where is our visitor spend coming from?



In 2024, spend by international visitors overtook total domestic spend for the first time.

Spend by top 15 countries (83% of all international spend)



When are visitors spending in Scotland?

Seasonality of Spend



Cumulative Tourism Performance (2024)

Aberdeen, Aberdeenshire and Moray Speyside

1.36
million

4.17 million

£395
million



Total overnight visits by international and domestic visitors

Total nights spent in accommodations by international and domestic visitors

Total overnight spend by international and domestic visitors

Average overnight visitor spend



Global drivers of change A shifting landscape driving our strategic focus

Scottish Government priorities	Climate emergency	International competition
Geopolitics	Connectivity	Consumer behaviours
Technology	Cost-of-doing-business & Cost-of-living	Regulation

LATEST TRENDS & INSIGHTS

Market Insights

- Continued strong demand from international markets, however domestic market remains challenging and unpredictable
- Strong aspirations amongst UK public to take a UK domestic trip over A/W, but intention doesn't always convert to an actual trip
- Families largest proportion of Scotland intenders. Retirees smaller in number but twice as likely to convert to book
- The majority of October to March trips are likely to be short breaks
- The cost-of-living crisis remains at the forefront of people's minds and value remains a key concern for any travel decisions. Opportunity to drive visits through offers & promoting the non-monetary value of experiences

Trip drivers

 "Spending time with others" and "getting away from it all" remain lead motivations. Nature and heritage dominate planned activities

A push to book

Intention for Scotland breaks in A/W is high, but actual bookings are low.
 Presents a tactical, late-stage opportunity to nudge consumers to commit



MARKET PRIORITISATION

Focussing on growth and core markets

High Growth

Core

Opportunity

USA

UK, Germany, France

Canada, Australia, China, UAE, India, South Europe, Netherlands, Nordics

Growth potential and strong connectivity.

Established markets with room for growth. Will repeat visit and regionally.

Long-term growth potential with evidence of growing Scotland interest.



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Continue to build awareness and propensity to visit.

Maximise conversion and promote longer stays and visits and dispersion.

Build support framework that will drive visitors of the future.

Direct to consumer: Destination brand building; paid media campaign delivery.

Direct to consumer: Always-on storytelling connecting narrative to industry product. Amplification via PR & social led strategy.

Working with intermediaries: Increase Scotland programmes offered by tour operators, travel advisors and airline / ferry vacation arms.



Connectivity: Influence airlines to increase direct connectivity/frequency to Scotland – extend season. Influence train / ferry offering for Europe / UK visitors.

AUDIENCE SEGMENTS



Look for an active holiday where they will be energised by trying new things and pushing their limits. They'll enjoy holidays both off-the-beaten-track and in urban settings and are typically energetic, sociable, career-minded individuals.



Like to live life to the full and enjoy traveling 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. They are typically free spirits who enjoy living life to the full.



Enjoy general sightseeing and touring, taking in historical places as well as scenery and nature. They relish engaging with friendly locals and seeking out authentic experiences. They are typically down to earth individuals who may be quite "traditional" in their outlook and fairly settled in their lifestyles.



Will seek out a relaxing holiday experience where they can enjoy engaging in cultural experiences accompanied by great food and drink. They enjoy short breaks in the UK and will recommend quality experiences when their host has gone the "extra mile". They like to be seen to be influential amongst their friends and are typically professional, career-minded, and discerning individuals.



Passionate about Scotland as it offers everything they want – scenery, connecting with nature and the chance to get away from it all. A holiday in Scotland will help them to unwind, recharge and enjoy quiet time. Natural advocates are typically more introverted individuals who value peace and quiet.

TARGET AUDIENCE BREAKDOWN

UK	US	France	Germany
Geo Targets: London, South-East, North-East, North-West, Yorkshire & the Humber, Scotland.	Geo Targets: New York tri state, Boston/Mass, California. Secondary: Florida, Washington DC, Chicago, Atlanta.	Geo Targets: Living in/near key city and transport hubs in Paris-IDF, Lyon, South-West (Toulouse), North-West (Normandy, proximity with Paris region).	Geo Targets: Key city and transport hubs in North Rhine Westphalia, Bavaria, Lower Saxony, Baden Wuerttemberg, Hesse, Berlin & Hamburg.
Audience Targeting	Audience Targeting:	Audience Targeting:	Audience Targeting:
Adventure Seekers and Food Loving Culturalists.	 Experience Seekers / Explorers - broader scope to include focus on audiences who bring most value. 	 Experience Seekers Key motivators/ drivers: scenery and landscapes, culture and heritage, film & TV, Scotland's people, cities. 	 Experience Seekers Key motivators / drivers: landscapes, history & culture, Scotland's people/warm welcome, outdoor activities, film & TV, touring.
UK retirees / smarties (less affected by cost- of-living crisis / more disposable income / time rich / luxury travel / focus on value for money experiences etc).			
Families (to address industry challenges like attraction footfall, mid-week capacity, self-catering bookings, etc), including multigenerational family groups.			
Key motivators/drivers:	Key motivators/drivers:	Key motivators/drivers:	Key motivators/drivers:
Re-visiting somewhere they had a good experience, connect with nature/be outdoors, escapism/get away from it all, connect with family/friends, food and drink.	Landscapes, History & Culture, Film & TV, Ancestry, Scotland's reputation for friendly and welcoming people.	Scenery and landscapes, history and culture, Scotland's people and outdoor activities. Scotland's legends and stories.	Landscapes, history & culture, Scotland's welcoming people and outdoor activities including hillwalking.

CREATIVE PROPOSITION

Visiting Scotland can have a profound effect on your well-being.

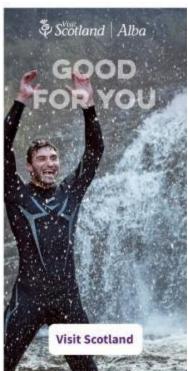
Its natural surroundings provide a **calming** and rejuvenating effect for both mind and body.

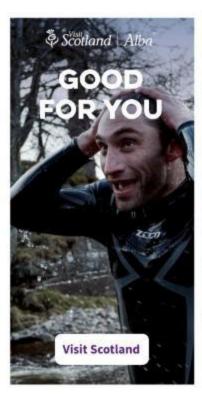
While immersing yourself in its rich heritage helps connect you with the past and fosters a deeper sense of belonging and of responsibility.

We need to communicate the mutual benefit and impact that a visit to Scotland has on the visitor and the place.

Matching consumer needs to product strengths



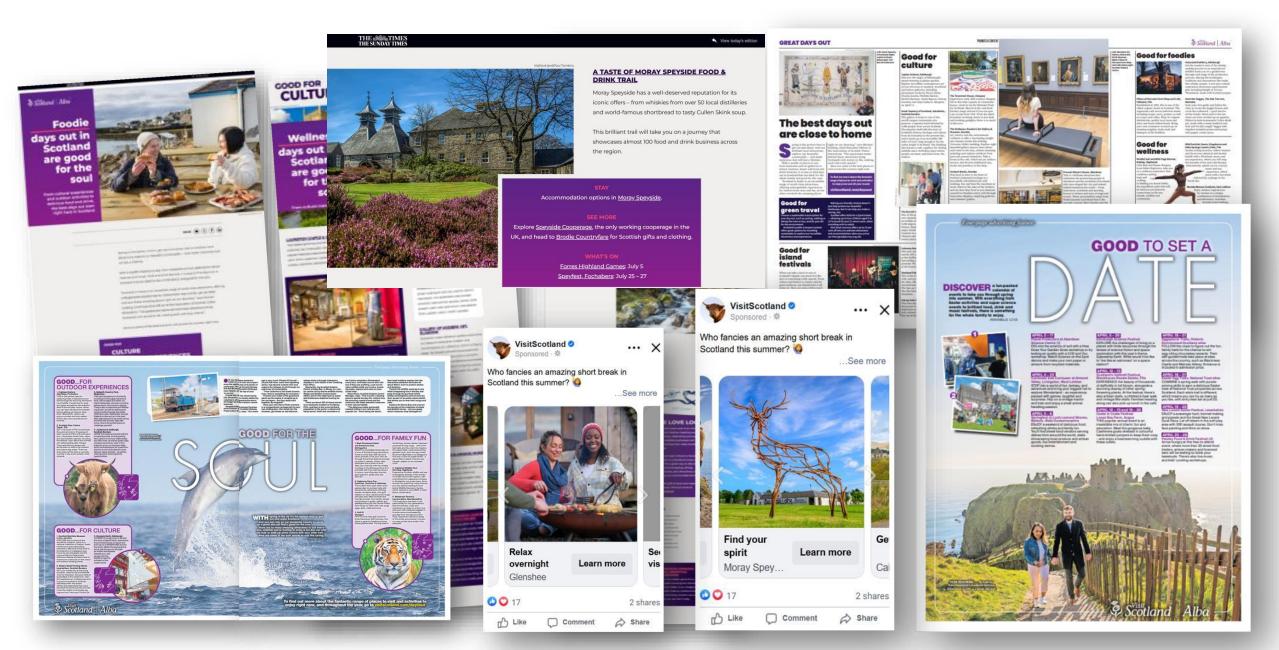






IN SCOTLAND, WELLBEING COMES NATURALLY

SPRING/SUMMER ACTIVITY

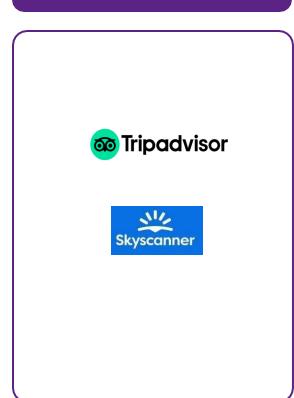


CORE MEDIA SUMMARY – September 2025 – March 2026

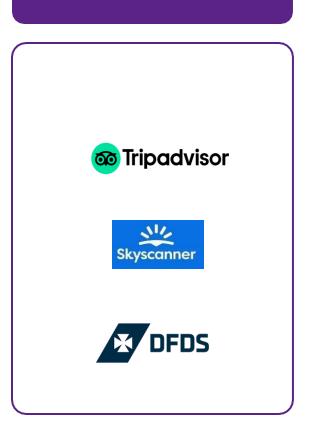
UK

US Expedia **NBC** LONDON CALEDONIAN & PARTNERS





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DE

Business Support Programme

visitscotland.org

Go to our Business Support Hub 🗦

- Practical advice available in multiple formats on topics we know are important to businesses
- Up to date and relevant content specific to the tourism & events sector
- The option to sign up to our business support email programme and receive the latest advice to your inbox
- Up-to-date calendar of events, training and development opportunities
- The ability to submit an enquiry to the business support team

Other Opportunities

- VisitScotland Connect 2026 (Glasgow, 15-16 Apr) Registration open
- National Events Funding Programme x2 rounds for events taking place in Apr-Dec 2026, now open (Deadlines 22 Oct / 14 Jan)

 Scotland | Alba

VISITSCOTLAND BUSINESS SUPPORT HUB

Get personalised tourism and events advice with case studies in the Business Support Hub.



- Brightsonland / Astron Lin

Advice and Support

All the latest support and personalised recommendations for your industry.



Start your business -

Supertial tools, legal guidance and staff support to surch successfuls.



mprove your business +

talion quality experiences with customer insights consultably and service excellence.



Grow your business >

Develop new products, secure funding and expenwith export advice.



Promote your business ->

Doost violbility through engaging content, social media and marketing permembles.



Responsible Tourism

Sustainably grow your tourism or event business with extraorble grown strategies.



Support by sector

Find tellared advice and case studies for accommodation, active and outdoor, events and features, food and drink and visitor attractions.

What's New

Read our latest case studies, follow any legislation changes and any new business support advice.



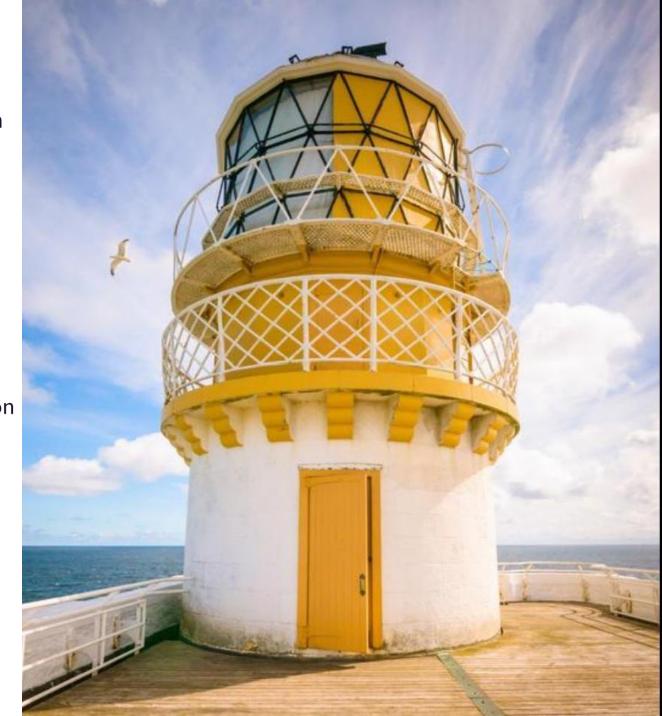
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AMERICAN STREET

NE250 OPPORTUNITIES...

- World class attractions and experiences (it's far more than just the journey)
- **Significant and ongoing investment** in the tourism offer throughout the route
- **Multiple 'anchor points'** from which to build itinerary
- Touring remains popular amongst international visitors (esp Europeans)
- **Tourism recognized as a strategic priority** across the region and fits well with regional spread and longer stay objectives
- **New Moray Tourism Strategy** opportunity to galvanise industry behind a shared direction and to realise Moray's undoubted tourism potential
- **Sustainability** challenge/opportunity to address more sustainable transport options...





Moray Tourism Strategy



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THANK YOU

David Jackson david.jackson@visitscotland.com





UPDATE ON 2025 & EMERGING TRENDS FOR 2026

Business Confidence & Economic Outlook

Overall business confidence across Scotland remains fragile. Inflationary pressures have eased slightly, but energy and labour costs continue to impact margins.

The tourism and hospitality sector reported mixed performance in 2025. Strong domestic travel offset by weaker international visitor numbers, with shorter stays and cautious consumer spending remaining trends.

In Moray, members highlighted similar pressures: 52% cited rising costs and inflation, and 52% identified skills shortages as their main challenges.

Businesses remain resilient but cautious, with the main areas of concern being:

52%



Rising costs and inflation

52%



Lack of skilled workforce

41%



Political uncertainty

28%



Succession and ageing workforce



Talent & Labour

62%

of businesses say this is their top area of required support.

Highlighting the need for workforce attraction, training and housing solutions.

Digital Marketing

34%

of members want to strengthen their online presence.

A strong indicator of businesses adapting to changing consumer behaviour.





Access to Funding & Green Growth

2**4% & 21%**

Showing growing interest in sustainable business practices and energy efficiency investment



Tourism & Visitor-Related Insights

Moray's Leisure, Hospitality & Tourism Members (15%)

Report steady but cost-sensitive trade, with visitor spend constrained by inflation and accommodation costs.

Businesses note increased interest in local and experience-based tourism; Food, drink, outdoor activities and cultural experiences

 aligning with NE250's drive for authentic, slow tourism.

There's a clear call for **collaboration and advocacy** to support the visitor economy, especially around **infrastructure**, **workforce** and **visibility of the region as a destination**.

























Advocacy and engagement:

55%

of members want stronger policy representation and local business voice.

Infrastructure and connectivity

24%

cited transport and broadband as key growth enablers.





24%



Workforce development

10%

underlining a shared focus on competitiveness and skills.

Priorities for the Year Ahead





MORAY CHAMBER OF COMMERCE IS MORAY'S LEADING BUSINESS ORGANISATION REPRESENTING, GALVANISING AND SUPPORTING BUSINESSES OF ALL SIZES.

MORAY CHAMBER'S MEMBERSHIP, WHICH INCLUDES OVER 250 BUSINESSES, IS SUPPORT WHICH IS FOCUSED ON THREE PILLARS -

REPRESENTING YOUR INTERESTS, RAISING YOUR PROFILE & SAVING YOU MONEY.

For further information, contact Sarah Medcraf – smedcraf@moraychamber.co.uk / 01343 543344



Shirlaws Motorcycles & NE250

Partnering for growth on Scotland's epic biking route







Introduction

Mark Stevenson

- Group General Manager, Shirlaws Motorcycles

Rory McRae

- Marketing lead, Shirlaws Motorcycles

Shirlaws. Run by bikers, for bikers, since 1928.





Why the NE250?

- The North East 250 runs through the north-east of Scotland. It covers Aberdeenshire and Moray, from mountains to coastline, whisky country to Royal Deeside. It's our home market.
- It's a natural fit for motorcycle touring scenic, adventurous, and free of motorways.
- 1 day route. "A road less travelled"
- Collaboration.
- New rental business.





Why the NE250?

- Brand alignment adventure & premium experiences
- Wider audience reach through collaborative promotion
 - significant web traffic growth
- Differentiation unique regional association
- Growth potential service, gear, rentals
- Active engagement via Supporter status and account manager





Why Shirlaws?

- Established local brand
- Significant web and social presence in market
- Diverse audience
- Existing strong partnerships with Police, Fire, Ambulance, RAF, IAM
- Not Just Bikers





What are we doing in 2026?

- Co-branded marketing (website, social media, newsletters)
 - Growing bike themed message on NE250 site
- Host NE250 route events & ride-outs
- Produce collaborative content (photos/videos)
- In-store route promotion with NE250 materials





What are we doing in 2026?

- Develop 'NE250 Pre-Ride Prep' packages
- Launch rental brand with guided tour option and airport shuttle
- Host co-branded ride outs & open days
- Position Shirlaws as the Aberdeen hub for NE250 riders
- Implement route partnerships for accommodation, food and attractions.





Early Benefits

Financial:

- Increased workshop traffic
- Boost in parts and clothing sales
- New customers from NE250 exposure

Reputational:

- Stronger visibility in touring community
- Enhanced brand as part of Scottish riding culture
- In 2025 we have helped more than 20 stranded international riders





The Role of the Account Manager

- Dedicated contact who understands our business
- Joint idea development involving route partners
- Flexible, test-and-learn approach
- Clear communication & measurable visibility





Key Take-aways

- NE250 partnership aligns perfectly with our brand
- Active collaboration delivers real value
- Tangible financial & reputational benefits
- Mutual success through continued investment





Questions?

Thank you for listening.









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Impact future

Shetland

LERWICK

Orkney

STROMNESS

KIRKWALL

SCRABSTER

ABERDEEN

NorthLink Ferries – an intro

- Sails from Aberdeen to Lerwick / Lerwick to Aberdeen nightly.
- One ferry sails directly.
- The other sails indirectly, calling into Kirkwall in Orkney.
- Also up to six sailings a day between Scrabster and Stromness.
- 400,000 passengers per year, with 200,000 of those directly routing through Aberdeen.



NorthLink

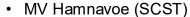
Our ships and our passengers



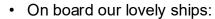




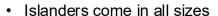




- MV Hjaltland (ABKILE)
- MV Hrossey (ABKILE)



- Locally sourced food and drink
- Shops
- Pet friendly facilities
- Cabins / Sleeping pods
- The Magnus Lounge
- Shops
- Cinema
- · All fully accessible



- Visitors tend to be affluent, aged 40+, 50/50 split between male and female, have an interest in history, birdwatching, outdoor experiences.
- Also tend to come from Scotland, or South East of England.





















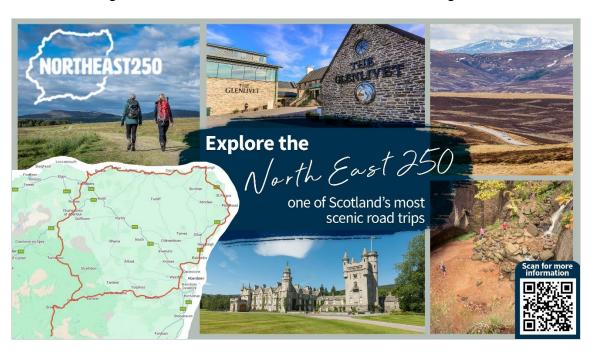
The benefits of supporting the NE250

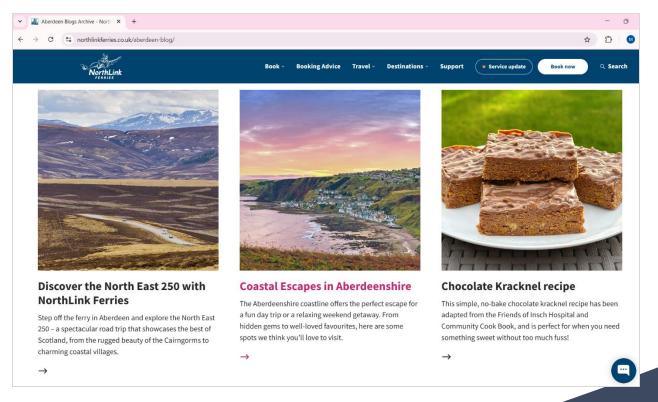
The decision:

- Since the introduction of the NC500, NorthLink Ferries have carried 400% more motorhomes.
- · Orkney and Shetland can also be an add on to the NE250 route.
- Part of NorthLink's remit with Transport Scotland is to support and draw attention to small businesses and communities in Shetland, Orkney, Caithness and Aberdeen.
- By doing so, you highlight how unique and special these places are.
- A halo effect of quality in ships, experiences, food and drink and more.
- The NE250 also serves as inspiration for Islanders looking for a unique thing to do / a challenge!
- Offers more to do for repeat visitors to the area.
- Were approached by Anne Ashworth, and following a meeting and lots of ideas! the partnership was formed.
- It has been fabulous to have an enthusiastic NE250 Account Manager, and the relationship has been very positive for both parties.

Partnership working so far

- NorthLink Ferries was added as a partner and as a business onto www.northeast250.com
- A blog about how a trip to Shetland and Orkney with NorthLink Ferries could be an add on to the NE250 was written and also added to www.northeast250.com
- NorthLink
- NorthLink wrote a blog called 'Discover the North East 250 with NorthLink Ferries' which was added to the Aberdeen section of the website at https://www.northlinkferries.co.uk/ne250/
- The article featured in the September newsletter, which was sent out to 40,687subscribers.
- It will also feature in Northern Lights Issue 19 our on board magazine which will be published in November / December 2025 with 10,000 copies being printed.
- There are information screens on board the ships and in our ports an advertising screen has been created for these, showcasing the NE250 route.





Partnership ideas for the future

Resource Sharing:

• We have a ferry docked in Aberdeen harbour from 7am to 3pm every day with a good meeting room on board - The Magnus Lounge.

Referral Partnership:

• Free coffee on board if you quote a NE250 code.

Content Partnership:

- Continue to share social media posts.
- NLF social post request 'best places to see on the NE250' suggestions.

Win a return trip

on any NorthLink Ferries route

for 4 passengers, with a car and a cabi

- Show a NE250 video on the port and ship info screens.
- Display leaflets about the NE250 in ports and on ships.
- Competition offer a free ferry trip as a prize (best NE250 photo?)
- Reconfigure our 'Onward Voyager' tagline for the NE250.

Influencer Marketing:

 Have an Islander influencer travel on the ships and write a piece about travelling on NorthLink to undertake the NE250.

• Event Sponsorship:

- · NorthLink Ferries could sponsor events or even attend an event in collaboration with the NE250.
- Charity event NLF staff undertaking the route to fund-raise for charity.

NorthLink plans for 2026

- Continue Find your campaign
- Countryfile advertising
- Social media advertising



















Serco Impact future



Vision and Planning for 2026
Guy Macpherson-Grant and Anne Ashworth

The Ultimate Road Trip to the Heart of Scotland

- A little background
- What is it...
- ...what it has shown that it can do
- Support past and present
- Profile from 2019 to 2025
- The Vision for 2026 and beyond...
- Plans for 2026







Background 1

- Macpherson-Grants and Ballindalloch Highland Estate diversification...
- ...this has included thinking about how people come to visit us, for whatever reason.
- NE250 launched in November 2017, the initiative is a unique collaborative effort between a number of those involved with the visitor economy of the North East
- The Website with its interactive map has been central to the proposition from the start,
 with marketing and promotion revolving around this accessible and flexible platform
- A Map was produced, sold to Visitor Members, and given to Business Members
- General acclaim and positive comparisons with the North Coast 500: Passport and Business Member concepts were established amongst businesses around the route
- Covid meant a mothballing of the concept, and then emergence strongly <u>online</u> with funds from VS and Ballindalloch as part of support for the sector in 2021-23



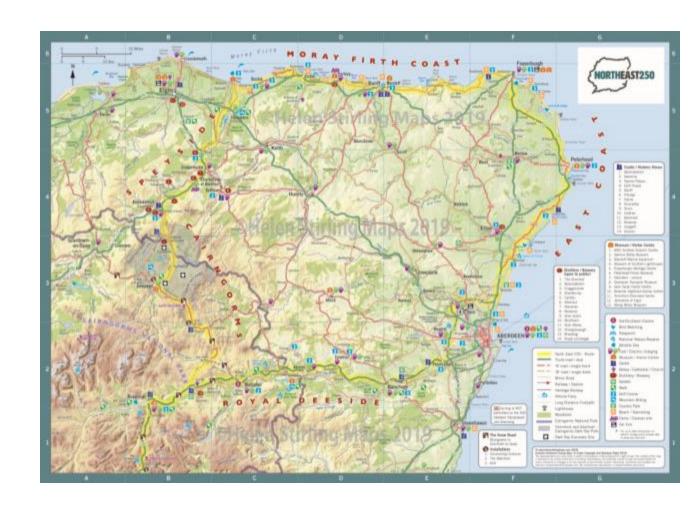
Background 2

- 2024 saw an on-going trickle of Visitor Members, Business Membership in suspension but...
- …a powerful on-going recognition of the route and the concept
- 2025, with the arrival of Anne Ashworth, we have conducted a full spring-clean of the website to ensure that all businesses on it are active and up to date
- We have established personal relationships as part of a new Account Management approach
- We have seen two new Supporter relationships created with further planned
- We have established a regular newsletter, blog and social media presence

The Ultimate Road Trip to the Heart of Scotland

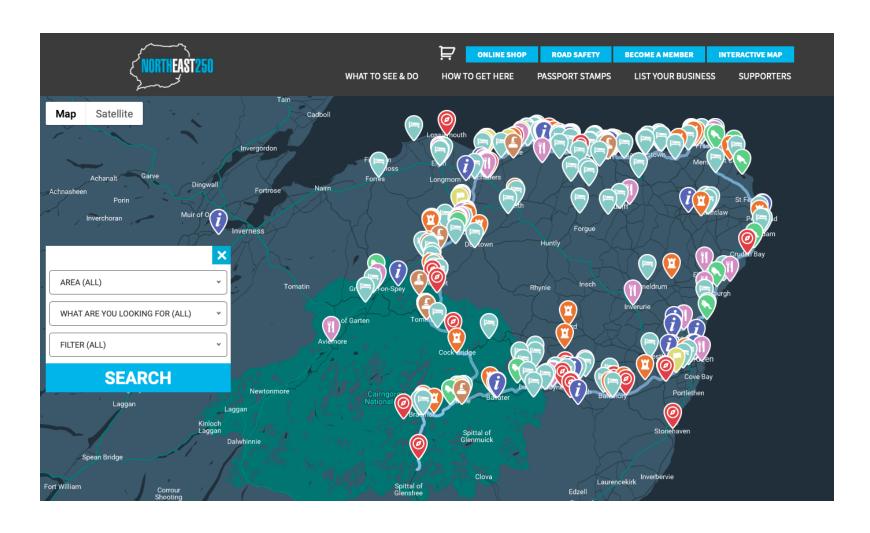
- A 250 mile driving route around the North East of Scotland
- Using public roads, the route serves as a 'destination' for those looking for a unique and different experience
- The route offers visitors an authentic adventure that journeys through some of Scotland's finest landscapes, best-known heritage sites and most famous distilleries
- A fun marketing concept attractive to a wide variety of visitors...





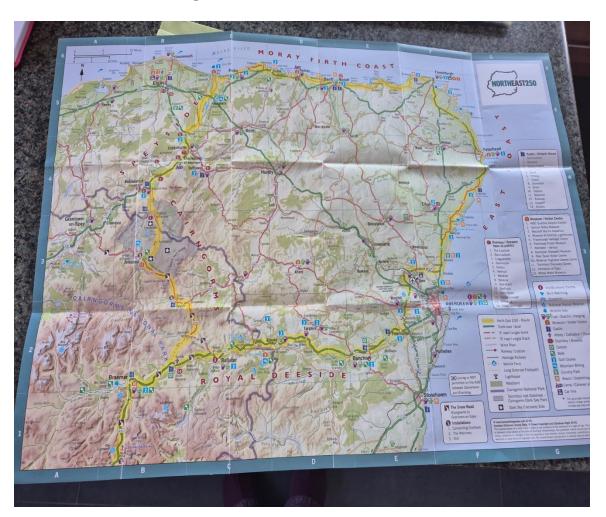


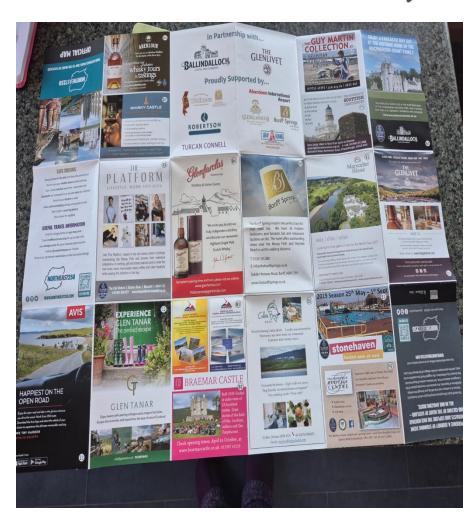
Website with its interactive map



NORTHEAST250

The Map







Progress to date

- Coverage of the route continues to be overwhelmingly positive and numbers of people reached rising steadily
- A hard copy Map (20,000 copies) was designed and printed in 2018
- Regular Newsletters have been sent out to Business Members
- As at 2025, there are over 250 Business Members active on the website
- Website is focussed on three themes:
 - History and Heritage
 - Outdoor and Adventure
 - Food and Drink
- There were (and still are) Supporters who paid to have a logo and profile on the Home Page of the website, as well as all the benefits of being a Business Member
- There were two key initial Partners Chivas Brothers and Ballindalloch Castle









Aberdeen International





























PETERHEAD



















NATIONAL TRUST for **SCOTLAND**

Airport







Profile in 2019 and still active in 2025

- A key win for 2019 was the inclusion of the North East 250 in the Lonely Planet as a destination trend – after only one season
- Numerous profiles and mentions in the press and online, all positive and driving people to the North East
- Key partnerships are established with: [Moray Speyside Tourism] Visit Aberdeenshire, the Cairngorms Business Partnership, VisitScotland, VisitBritain and The Energy Savings Trust, as well as local councils







did a quick mental sum. "I've beaten my personal best by 93 shots," I laughed to my father, "Has the sport of golf ever witnessed such a remarkable improvement?"

must confess, my last round at Cullen had been when I was only five years old. This, my second lap of the "world's shortest true links" came 32 years and several thousand rounds of golf later. Still, if Norris McWhirter were alive. I might have bee











Imagery

A key element in the profile-raising of the route is the supply of images both for social media as well as for standard PR...NE250 has a substantial database at VisitScotland













The Vision for 2026 and beyond...

- Now we want to use the winter period to really build for 2026, adding to the NE250 profile and creating another reason for people to visit the area
- To develop our Supporter relationships to generate further collaborative projects
- To develop Itineraries that encourage visitors to explore all areas of the North East, using the driving route as their access point
- A regular social media presence through 2026 on Facebook, Instagram and the website
- Supporter campaigns that raise the profile of the North East 250 as a gateway into and around the area, aligned to ongoing travel through Scotland and the UK
- Stronger personalized account management to strengthen relationships and collaboration with Supporters, Partners and Business Members
- Stronger relationships and collaboration with strategic partners



Plans for 2026

- A new hard copy Map that is provided free to our Business members to give out to visitors
- A more tailored offer to Visitor Members inclusive of a Newsletter and updates from our Business Members
- ...partnering with VisitScotland
- Itineraries have been produced to lay out more clearly visitors' options on the route, including in relation to EVs, with a focus on Scottish and rest of UK visitors
- Engagement is on-going with numerous Business Members as the opportunities arise to involve the North East 250, including events and tours



- ...online, and then offline in the Museum
- Led by Guy and Anne



