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Aberdeen & Grampian
Chamber of Commerce

TRANSPORT network

North-east Transport Survey 2012

Destination Travel
Transport Network
North-east



Aberdeen & Grampian
Chamber of Commerce



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ACSEF
Aberdeen Centre for Strategic Enterprise Focus

Technology Strategy Board
Driving Innovation



*Robert Collier
Chief Executive, AGCC*

Foreword

Member's needs are at the heart of the work of the Aberdeen and Grampian Chamber of Commerce and, as a result, we have formed a range of sector-interest groups from within our membership of more than 1,200 organisations allowing us to target specific needs with increasingly tailored services and benefits.

As part of these services, the Chamber is pleased to publish a series of surveys to provide sector specific research on businesses in North-east Scotland; the fifth of which covers transport.

The aim of this survey is to highlight the importance of transport and deliver a general overview of the services provided.

Our conclusion is that transport providers in North-east Scotland are generally positive and satisfied with their current business performance. In the past 12 months, the sector has witnessed an increase in productivity and reported turnover, and this has led to net positive increase in profitability. However, the level of profit increase that may have been possible was negatively affected by costs. Not surprisingly, the main cost component affecting transport providers has been fuel. As a result, the pressure on profitability arising from costs appears to be the underlying theme of this report.

There is a high level of satisfaction with the local business environment and it's clear that providers find a highly conducive environment for doing business in the North-east and consider this the most satisfying factor. However this level of satisfaction is countered by the high dissatisfaction expressed in the local infrastructure. It would appear that while the North-east may provide an enabling environment in many forms, such as business opportunities, wealth and skills, the same can't be said about the level of infrastructural availability and quality but providers expect a significant improvement in infrastructure in the next three years. They also expect significant improvements in technology and further improvements in the local environment.

We conclude that transport in North-east Scotland, in terms of providers, is stable and continues to show signs of growth in spite of tough times in the wider economy.

Bob Collier
Chief Executive



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Your Network.
Your Opportunities.



North-east Transport Survey

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North-east Transport Survey

EXECUTIVE SUMMARY

Profile

- There is a large proportion of self-employed providers (21%), but the largest proportion of businesses fall within the small business category, employing between 10 and 49 people (27%).
- The highest percentage of businesses (22%) operate within a turnover of between £251,000 and £500,000; there is also a large proportion of organisations (21%) operating with a turnover of below £50,000.

Performance change over past 12 months

- Most businesses have witnessed increases in productivity and turnover, but the potential impact of this on profitability has been counteracted by substantial increases in costs, which have been witnessed by the majority of organisations. The cost that has increased the most is fuel.

Shape of expected change (internal) in next 12 months

- In the next 12 months, the majority of organisations anticipate that overall costs will continue to increase, with fuel costs increasing the most. Nevertheless, organisations expect that benefits arising from increased productivity and improvements in other factors will outweigh the cost increases.

(Dis)Satisfaction with impacting factors

- The local business environment is rated the most highly for satisfaction. However, this satisfaction appears to be mainly related to commercial opportunities and the non-physical environment, as more organisations are dissatisfied, than are satisfied, with the current state of infrastructure in the region. However, most organisations expect an improvement in infrastructure in the next three years.

Strategic inclination - next three years

- Overall, there is positive outlook in the sector, and as much as 47% of organisations expect growth and expansion, while 41% expect to consolidate and stabilise. Consequently, most organisations expect to increase their marketing activities and to employ more staff.
- Nevertheless, there is a general feeling of cautious optimism in the sector that reflects the general state of the economy.

Priorities

- The priority for most businesses remains costs, rated as the most important factor in ensuring that their business achieves its objectives in the near future. Next to costs, improvements in the local infrastructure also appear to be of major concern and priority to many organisations.



Employment

- 58% of respondents stated that they had increased the number of employees, as opposed to 11% who stated that they had reduced their staff numbers. The main reason for increasing staff was for growth and expansion of business.

Marketing and strategy

- More than half of respondents utilise less than 5% of their turnover on formal marketing activity, with the most frequently utilised means of marketing being email and website. However, the use of social media is set to outgrow other tools for marketing in the future.

Conclusion

- The sector is upbeat and generally positive about present performance. There is also a reasonable amount of optimism going forward, both in terms of within-sector performance and improvements in enabling factors such as the quality of local infrastructure.

North-east Transport Survey

Introduction

Background and objectives for the survey

The North-east of Scotland, with its core city of Aberdeen, has been acknowledged as a key driver of the Scottish economy. In recent reports, the city of Aberdeen has been identified as one of the main cities expected to drive the recovery of the UK economy, highlighting the importance of the region not only to the Scottish economy, but to the UK as a whole (Cities Outlook, 2012). However, due to its geographic location in relation to the rest of Scotland and the UK, the availability of adequate and suitable transport links is a crucial factor in the North-east's continuing economic success and viability. According to a publication by Public Service Review (PSB, 2005), the regions' other sectors (for example energy, agriculture and food & drink) depend on good transport links to access markets and suppliers, and this has made both the quality of internal transport and external connectivity crucial factors in the ability of the region to achieve its evaluated economic potential.

The region's location also means that the provision of adequate transport for the North-east faces many challenges, and as far back as 2005, deficiencies in the infrastructure, inadequate integration of the transport system and connectivity were highlighted (Public Service Review, 2005). For this reason, transport infrastructure and network has been one of the most debated and discussed issues in the region. "Aberdeen City and Shire is one of the most economically productive regions in Europe with an enviable quality of life, but faces major transport challenges due to its geography, rapid growth and distance from markets," (NESTRANS, 2008). Although improvements have continuously been made by government and allied agencies, transport infrastructure, network and connectivity continue to be perceived as areas of challenge, warranting priority attention.

While there are several initiatives that aim to address the obvious issues, it would appear that there is a gap in the understanding of the business

profile of transport providers in the region in terms of their overall performance, concerns and optimism. Although there is anecdotal information about the issues affecting the sector's businesses, there does not currently exist, a comprehensive report that provides a single reference point on the questions: "how is business", "what are the issues", "what should be the priorities," and "what is the level of optimism for positive outcomes"? However, in order to address the challenges that face transportation in the North-east, it is important that efforts are made to understand these challenges from the perspective of providers, whose contribution is essential to the realisation of any meaningful transport strategy. It is for this reason that the Aberdeen & Grampian Chamber of Commerce (AGCC)'s first report on transport in North-east Scotland is aimed at identifying and documenting performance, issues and expectations among providers.

The AGCC transport providers' survey was carried out as part of a suite of surveys developed by the Chamber to support its Chamber Networks.



However the research is aimed at benefitting the whole transport sector in North-east Scotland and was undertaken with support from the Technology Transfer Board and ACSEF, utilising databases operated by AGCC and NESTRANS. Although the Transport Network constitutes of a variety of organisations which include public and private sector agents, the current survey focused primarily on transport-providing businesses operating in the North-east of Scotland, with the following general objectives:

- Provide an updated snapshot profile of businesses in the transport sector.
- Provide information on current business performance in the sector.
- Document evidence about practices, issues and concerns within the transport provider network.
- Provide insights into the level of optimism and general expectations for the future.

It is hoped that by meeting the above objectives, this report can satisfy the overall research aim of providing useful and up to date information

about the sector's performance, concerns and expectations, and that this information can in turn serve as an additional source of evidence and knowledge to help stakeholders understand better the demands and needs of the transport sector businesses.

This report summarises the findings of the initial survey which was designed to be exploratory and provide the basis for further in-depth study and research where appropriate. Future research may be enhanced by including in-depth interviews, case studies and other methods of enquiry that may add substance and scope to the report. Furthermore, it will be insightful to provide some intra-sector comparisons between the various business types that constitute this sector, where a larger sample size is accessible.

This survey was sent out to 212 eligible contacts in the Transport Network as maintained by databases at the Chamber and NESTRANS, from which 59 useful responses were obtained through the completion of an online questionnaire. This represents a response rate of 28%, which is typical of surveys of this nature and provides an acceptable size to draw meaningful and generalised conclusions about the known population.



Profile of transport providers

In this section, a general profile of the transport businesses sector in North-east Scotland is provided. The profile is based on the responses received and may not necessarily represent the actual makeup of the industry, given that the sampling method employed was non-random, and only about 20% of all potential respondents returned their responses.

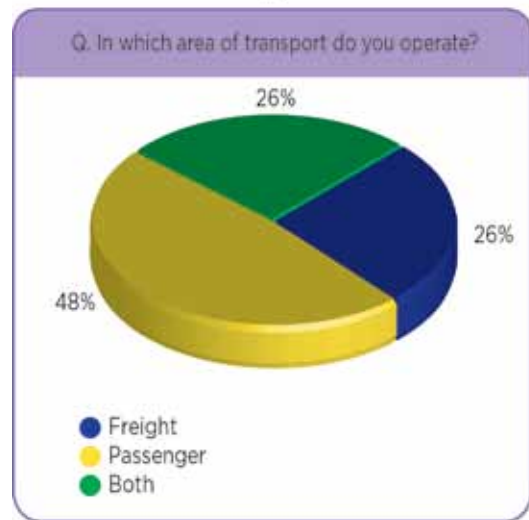
Based on the responses received, the majority of transport companies in North-east Scotland (i.e. 48%) operate in the area of passenger transport while 26% operate freight and an equal 26% operate both passenger and freight transport (F1).

This is reflected in the breakdown of responses by type of transportation offered. F2 shows that 24% of operators offer taxi/minibus services and 17% operate bus or coach services. 21% of operators offer standard goods vehicles, while the smallest offering is in the category of sea vessel (freight), where only 2% of respondents stated that they offer this form of transport. It should be noted that given the non-predetermined nature of the sample, respondents in all categories may also include providers of services for transportation (for example freight handlers), but who are not direct transport providers themselves.

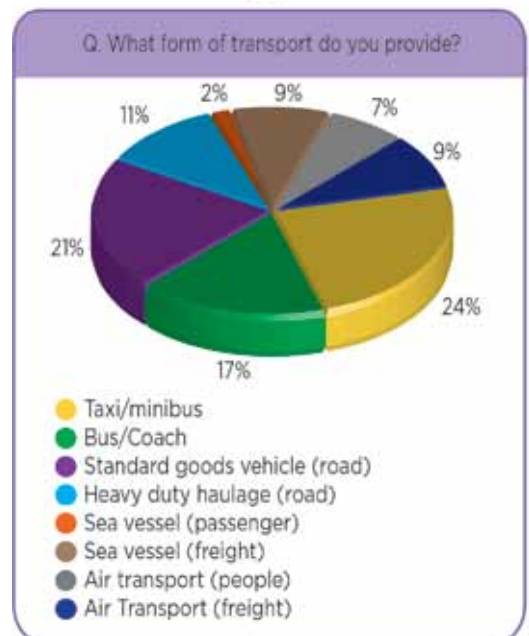
The industry is dominated by providers who are local to the region and have their main operations in Aberdeen city (35%), Aberdeenshire (19%) or all of North-east Scotland (38%). Only a small percentage of respondents (8%) have their main operations outside of the North-east.

F3 shows the geographic concentration of transport providers in North-east Scotland. The industry is dominated by providers who are local to the region and have their main operations in Aberdeen city (35%), Aberdeenshire (19%) or all of North-east Scotland (38%). Only a small percentage of respondents (8%) have their main operations outside of the North-east.

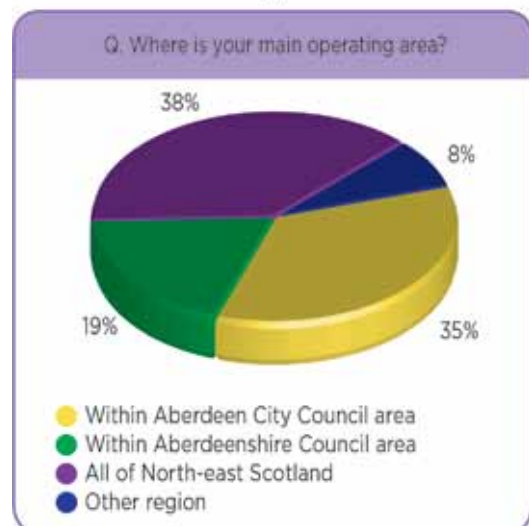
F1.



F2.



F3.

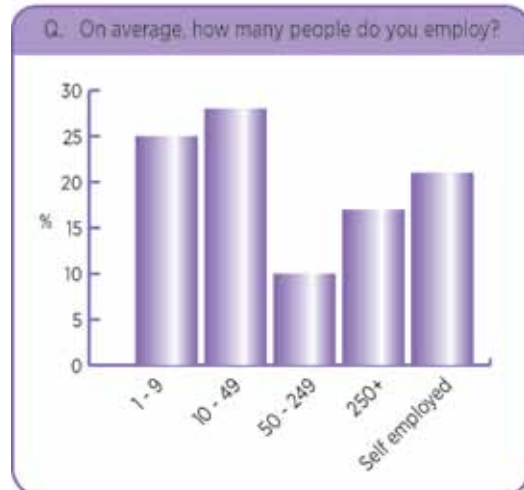


The employment profile in F4 shows that the main employee size clusters are for between 10 and 49 employees (28%), 1 and 9 employees (25%) and self-employed (21%). However, providers who employ over 50 people account for 27% of the overall operator base.

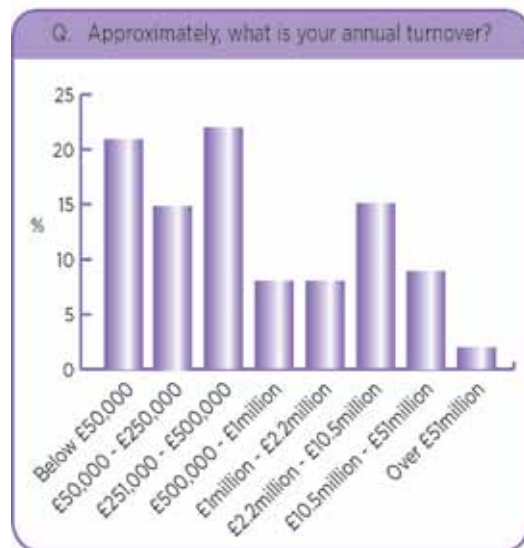
The breakdown of respondents by turnover shows that most businesses in the sector (22%) generate a turnover of between £251,000-£500,000, followed by businesses that generate a smaller turnover of less than £50,000 (21%); however there appears to be a generally even distribution of businesses at the medium to high range of turnover, although those making a turnover of between £2.2 million and £10.5 million account for the highest percentage (15%), while those making over £51 million account for the smallest percentage (2%) within this range.

“ Providers who employ over 50 people account for 27% of the overall operator base. ”

F4.



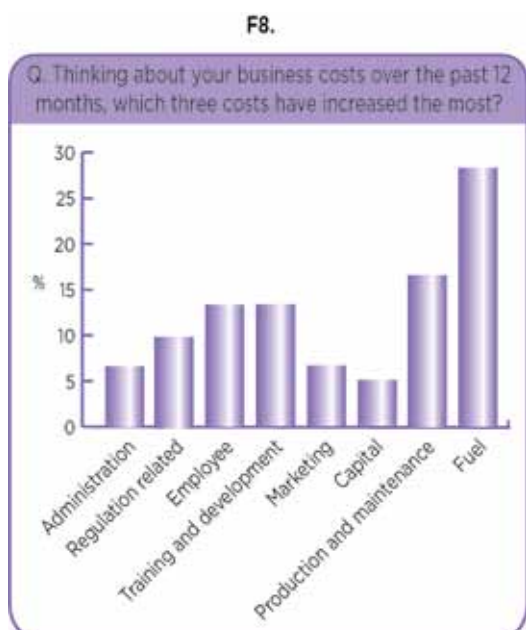
F5.



How is business?

In this section, current business performance and evaluation is presented, based on the responding businesses' understanding and evaluation of their business circumstances, compared to a previous period reference. The results presented here are aggregate opinions of the respondents on pre-identified areas of performance. In addition, respondents were given the opportunity to include additional items and factors relating to performance, where these were not already identified.

Respondents were asked to evaluate their performance on a number of criteria in terms of changes witnessed over the preceding 12 months. As F6 shows, there was an aggregate increase change in the criteria evaluated. On the downside, the highest percentage of respondents (70%) witnessed an increase in overall costs of doing business, compared to those who witnessed no change and a decrease (about 10% respectively). However, nearly 60% of respondents witnessed a corresponding increase in turnover and productivity, resulting in a net increase in profitability for about 12% (i.e. 41% increased less 29% decreased). The market appears to be saturated, with neither the share of market nor the number of competitors witnessing any major change. In fact over 60% of respondents state that their market share had remained the same, and similarly, that the number of competitors has remained unchanged.



The highest percentage of respondents (70%) witnessed an increase in overall costs of doing business, compared to those who witnessed no change and a decrease (about 10% respectively).

To provide a better perspective and comparison on the overall change impact for the above factors, an adjusted net weighting is calculated. In F7, it is clear to see that all measured factors have witnessed an increase (net positive balance), but that the most increased factor is the overall cost of doing business, with an average score of over 20 points out of the factor group's possible 25. Compared to this, profitability, another key factor, has increased by less than 5 basis points, in spite

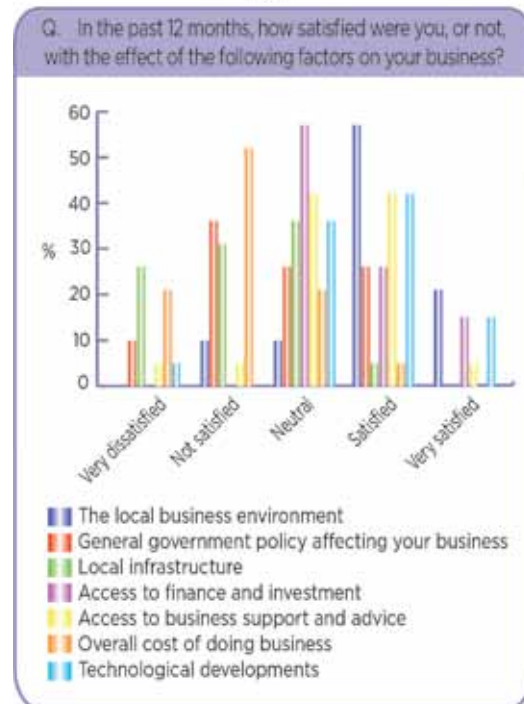
of significant increases of more than 10 basis points for both productivity and turnover.

As costs have been a recurrent theme during the course of this research, a specific questionnaire item assessing a breakdown of cost components was utilised. Transport businesses were asked to indicate the increases witnessed in specific costs, in order to identify the main costs components and factors. The results in F8 show that for most organisations (30%), the single cost which increased most over the past 12 months was attributable to fuel, representing nearly double the volume of organisations reporting an increase in the other cost components.

Respondents were asked to rate the level of satisfaction with pre-identified factors affecting or influencing their performance as reported in F6. As may be expected, the results in F9 show that fuel costs are the main source of dissatisfaction for most business, followed by government policy affecting the sector and the quality of local infrastructure required by the sector. On the other hand, most businesses appear to be satisfied, or very satisfied with the local business environment. This is in spite of the apparently high dissatisfaction with the infrastructural aspects of the environment. Businesses are also generally satisfied with the level of technological development and availability of support and advice, but are mainly neutral (neither satisfied nor dissatisfied) about the availability of finance in the sector.

The adjusted net weights provide a clearly illustration of the level of satisfaction in the sector with key issues and factors. It also enables easy comparison and comprehension of differences in the overall ratings for factors. As can be seen in F10 net rating for costs is negative, reflecting the change reported in F9. It becomes more obvious too that the overall rating for local infrastructure is highly negative, while there is some concern about the direction of government policy toward the sector, as reflected in the relative negative score. Nevertheless, the local business environment is the highest rated positive factor for satisfaction, followed by satisfaction with technological development and access to finance.

F9.



F10.



For most organisations (30%), the single cost which increased most over the past 12 months was attributable to fuel, representing nearly double the volume of organisations reporting an increase in the other cost components.

The Future

“More than half of respondents expect to see improvements in local infrastructure within the next three years.”

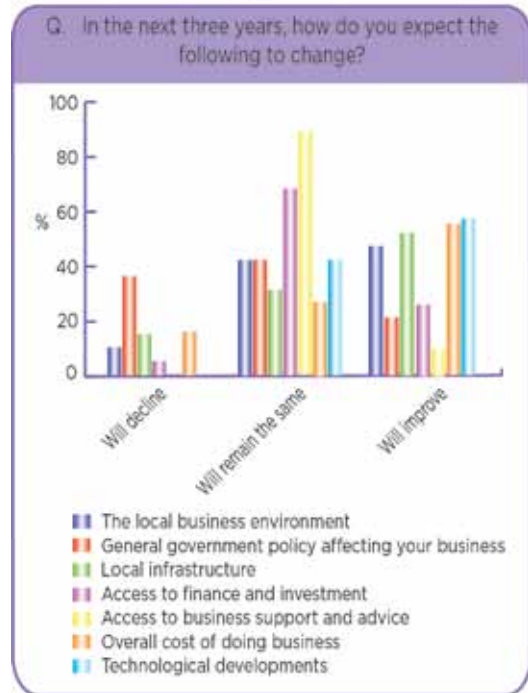
In this section, industry expectations and optimism about the key factors identified and highlighted previously are evaluated. In addition to factors that were identified a priori, respondents were given the opportunity to indicate what other factors had a potential impact on their future business viability and for the overall transport sector.

In F11, it can be seen that in general, most businesses expect influencing factors to remain the same or to improve. Specifically, the support and advice available to businesses is not expected to alter significantly, as nearly 90% of respondents expect that it will not change. Similarly, current level of access to finance is not expected by many to witness any change in the coming year. However, 55% of respondents expect that the overall cost of doing business will improve relative to benefits derived, 57% expect more technological improvements and 52% anticipate an improvement in the local infrastructure. However, there appears to be a large number of organisations expecting a decline in positive government policy toward the industry (36%).

“Most organisations expect that mainly fuel costs and other costs will rise in the next 12 months, but that these will be offset somewhat by a positive net balance of change in the key areas of productivity,”

To provide a clearer picture of the findings above, it is useful to utilise the adjusted weighted scores as presented in F12. This shows clearly that the main area of positive change (that is, improvements) expected in the sector are technological developments. Significantly however, the sector also anticipates an overall improvement in the ratio of costs to benefits, an improvement in the local infrastructure and further improvements in

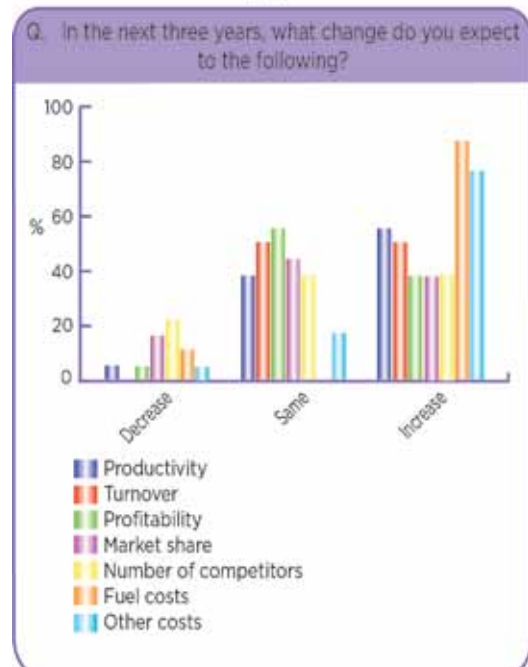
F11.



F12.



F13.

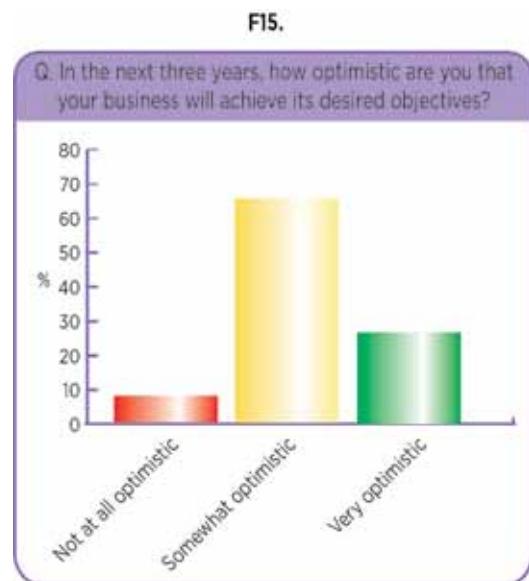


the local business environment. However, there appears to be an expectation of no improvement in favourable government policy toward the sector. In F13, the emphasis is on the expected change in the business performance of organisations, and in line with the above, most organisations expect that mainly fuel costs and other costs will rise in the next 12 months, but that these will be offset somewhat by a positive net balance of change in the key areas of productivity, turnover, market share and profitability. However, the number of organisations expecting profits to also rise is lower than the number expecting profits to remain at the same levels; furthermore, a slightly higher number (39%) expect an increase in competition than expect that this would remain the same (38%). Again it is helpful to compare the net weightings for expected change as presented in F14. It becomes more apparent that changes relating to costs have the highest weighting and demonstrate the concern in this direction. While productivity and turnover are also highly weighted, the positive net weight in profitability still trails significantly.

“The majority of respondents (66%) indicated that they were somewhat optimistic about this, whereas only 27% were very positive.”

F15 presents a cautious picture of optimism within the sector. Asked to indicate their level of optimism about achieving desired objectives for the next three years, the majority of respondents (66%) indicated that they were somewhat optimistic about this, whereas only 27% were very optimistic. A smaller percentage of respondents (about 8%) stated that they were not optimistic about achieving desired objectives in the next 12 months.

Asked to rate the level of importance for factors that had the potential to affect their ability to achieve desired business objectives (F16), the majority of respondents (89%) again considered the overall costs of doing business as the most important factor to consider. This is followed by the state of the local infrastructure which is rated as “of greatest importance” by 78% of respondents, and general government policy affecting the



sector which is rated by 68% of respondents as “of greatest importance.” On the other hand, only a few businesses (10%) rated “business advice and support” and “technological developments” as greatly important in achieving their medium term objectives.

“Costs of improvements to local infrastructure are the most important issues to the majority of respondents.”

Figure 17 represents the net weightings attached to each importance criteria and shows that clearly, the most important weighted variable for the sector’s future is cost and organisations’ ability to control it, scoring a weighting of nearly 30 out of a possible 35 basis points. Another significant and highly weighted factor is the local infrastructure, scoring a weighting of nearly 25 points.

F17.



Employment and Training

In this section, employment and training in the transport sector was assessed, based on the preceding 12 months. Businesses were asked to indicate whether they had employed more people or reduced their number of employees; they were also asked to indicate their expectations toward staff numbers for the following year. Finally, businesses were asked to indicate the approximate percentage of their budget that was spent on staff training and development, and to state any barriers that they encountered in training and developing their staff.

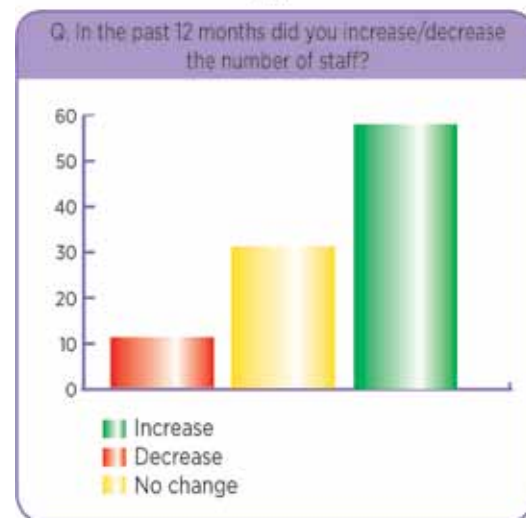
As F18 shows, 58% of respondents said that they had increased the number of staff while 42% said they did not. However, 11% of respondents reduced the number of staff, resulting in a net increase in the sector of 47%. There was no change for 31% of respondents. The three most common reasons for increasing the number of staff are expansion/growth of the business, new contracts, and to improve productivity. The three most common reasons for reducing staff numbers are efficiency, natural wastage, and downsizing.

F19 shows the future expectations for employment by transport providers in North-east Scotland. Half of all respondents (50%) expect to see no change in their employee numbers, and up to 11% expect to reduce the number of employees. However, as much as 39% of respondents expect to increase the number of employees in the following 12 months.

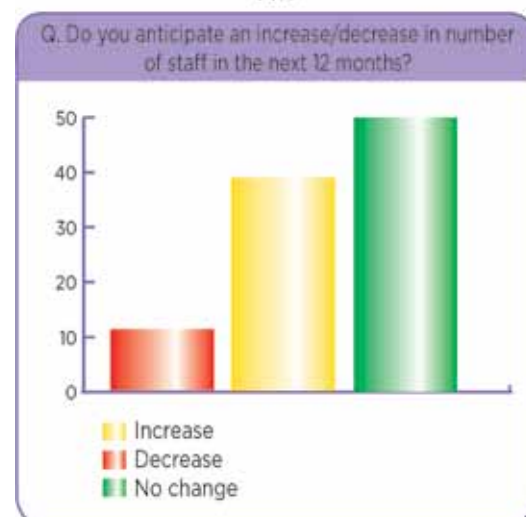
F20 asks what percentage of turnover businesses estimate that they spent on training and developing their staff in the past 12 months. For most companies (49%), between 5% and 10% of their income was spent on staff training and development for the period. However, up to 36% of businesses spent less than 5% of their turnover for staff training/development, while only 15% of businesses spent more than 10% of turnover for the same purpose.

The three most commonly mentioned barriers to staff development and training are: lack of funds, lack of cover for absent employees, and lack of time.

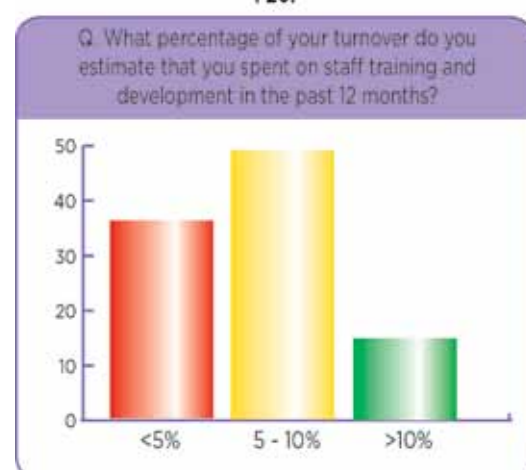
F18.



F19.



F20.



Marketing and future strategy

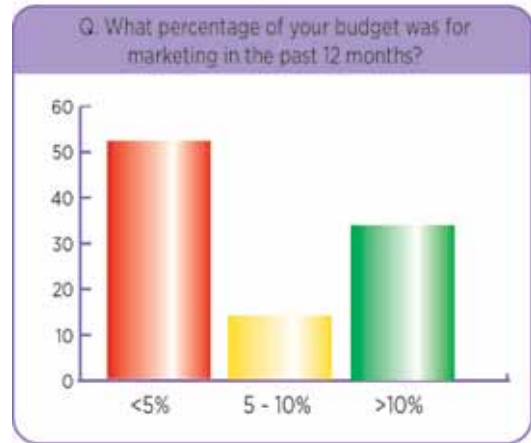
Businesses were asked about their marketing budget and marketing practices in terms of communication media and avenues utilised. F21 shows that the majority of respondents (52%) utilise less than 5% of their budget on marketing, followed by 34% who utilise more than 10% of their budget on marketing and 14% who spend between 5% and 10% of their budget on marketing.

The most frequently used means of marketing to current and potential customers is the use of email and website, as 44% of organisations state that they always utilise this means (F22). This is followed by the number of companies that always utilise in-house publications (33%), networking (27%) and social media (22%). The shape of the distribution shows that advertising and exhibitions are popular for occasional usage, as several companies stated that they sometimes or often use these means, but not always. The net weightings in F23 present a clearer picture of the use of marketing media. The most important points to draw attention to here are the high weighting for the use of email and website for marketing, but the comparatively insignificant weighting for the use of social networking.

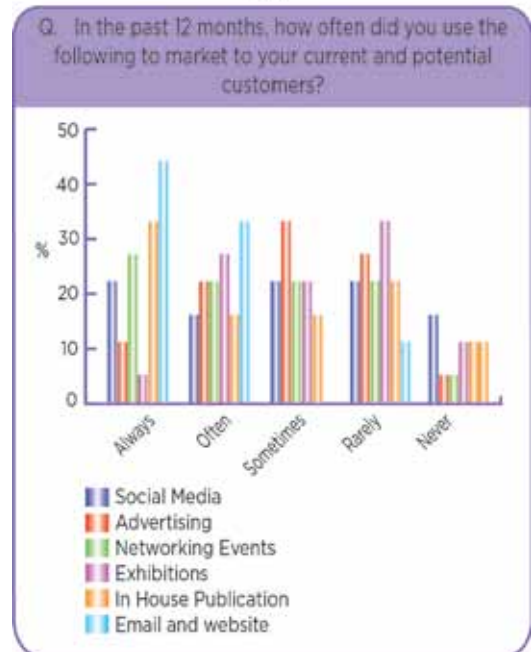
The popularity of email and website marketing is poised to increase, with similar trends expected for networking, social media and to some extent, exhibitions. However, the biggest positive swing from rare usage to frequent usage will be witnessed in the use of social media and networking.

In F24, the shape of future usage intentions appears to be similar to current usage: the popularity of email and website marketing is poised to increase, with similar trends expected for networking, social media and to some extent, exhibitions. However, the biggest positive swing from rare usage to frequent usage will be witnessed in the use of social media and networking. The different between current and future use becomes more obvious when the net weightings are compared (as in F25) as these now

F21.



F22.



F23.



F24.

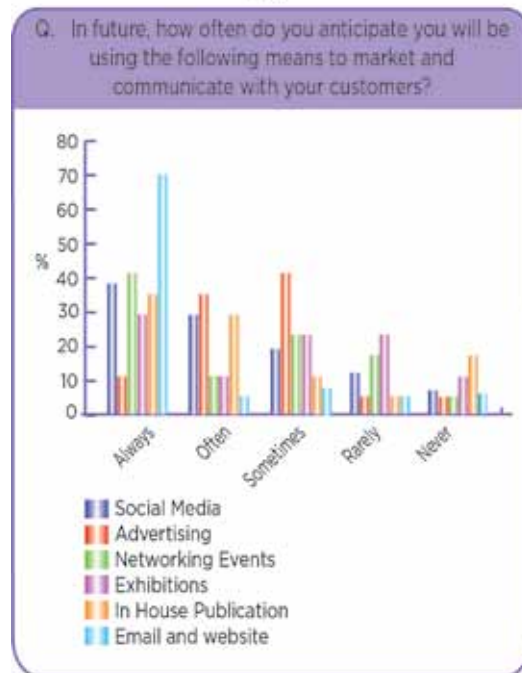


show that the use of social media is anticipated to witness a huge rate of growth, compared to the other media. To illustrate this further, F26 presents a change analysis in which it can be seen that overall, the transport sector expects to market more in the next 12 months by increasing their use of all measured media; however, the only line creating bisections in the graph is the linear growth line for social media, indicating that this medium of marketing will outgrow all others except the use of websites and email.

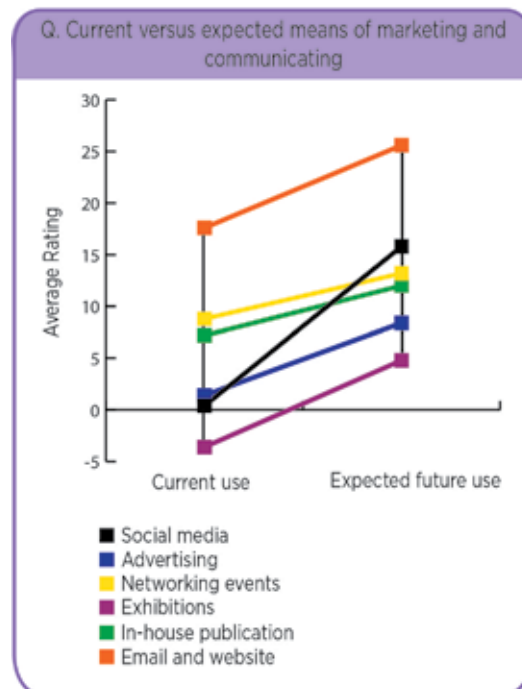
Asked to indicate in what strategic direction they expected their business to follow in the next three years (F27), 47% of respondents stated that they expected to follow a strategy of growth, and 41% that they expected to follow a strategy of consolidation and stabilisation. However, a small number of businesses stated that they either expected to downsize the business (5.9%) or to divest from the business (5.8%).

“47% of respondents stated that they expected to follow a strategy of growth, and 41% that they expected to follow a strategy of consolidation and stabilisation.”

F25.



F26.



F27.



Conclusions

This report has presented the results from the survey of transport providers in North-east Scotland. The survey was exploratory in nature and aimed at taking a measure of current business circumstances, identifying impacting factors and issues, estimating the level of optimism and establishing priorities for the sector as identified by its businesses.

From the analysis undertaken above, the following conclusions may be reached.

Transport providers in North-east Scotland are generally positive and satisfied with their current business performance. In the past 12 months, the sector has witnessed an increase in productivity and the reported turnover, and this has also led to net positive increase in profitability. However, the level of profit increase that may have been possible was negatively affected by costs, which affected the largest number of businesses. Not surprisingly, the main cost component affecting transport providers has been fuel. As a result, the pressure on profitability arising from costs appears to be the underlying theme of this report, and one of its most important conclusion.

Nevertheless, considering the wider economy, it would appear that transport businesses in the North-east have managed to generally retain profitability by becoming more efficient and increasing productivity (for example through the use of cheaper alternatives to traditional marketing, in the form of electronic enable marketing formats like email and website, and an increasing use of social media), as well as business activity.

There are more people doing better than doing worse, and several businesses have management to increase their size in terms of number of employees, with more organisations expecting to increase staff numbers in the near future than are planning to decrease or retain the current number of staff. Furthermore, providers expect that for the three years business benefits will improve relative to costs.



In general, businesses are more satisfied than dissatisfied with their performance and the factors impacting on this. Specifically, there is a high level of satisfaction with the local business environment. It is clear that providers find a highly conducive environment for doing business in the North-east and consider this the most satisfying factor. However this level of satisfaction is countered by the high dissatisfaction expressed in the local infrastructure.

It would appear that while the North-east may provide an enabling environment in many forms, such as business opportunities, wealth and skills, the same cannot be said about the level of infrastructural availability and quality. Nevertheless, providers expect a significant improvement in infrastructure in the next three years. They also expect significant improvements in technology and further improvements in the local environment, perhaps resulting from the expected improvements in infrastructure. Surprisingly, providers expect less support through government policy, which may be as a result of anticipated cuts to subsidies and more stringent environmental policies.

The net effect of the above is that while costs will continue to be the major constraint to better performance for the next three years, transport

business nonetheless expect that they can continue to become more efficient and increase productivity, and that they can grow their turnover, thereby increasing profitability. However, the overall picture is of cautious optimism rather than outright enthusiasm, which may be attributable to the general state of uncertainty and caution in the wider economy. Nevertheless, for most businesses, a strategy of growth and expansion is expected for the next three years, although a significant proportion of businesses also anticipate a strategy of consolidation and stabilisation.

In summary, the transport sector in North-east Scotland, in terms of providers, is stable and continues to show signs of growth in spite of tough times in the wider economy. The sector is highly impacted by costs, with the highest level of dissatisfaction arising from this, but providers expect that the combination of improvements in infrastructure, technology and the local business environment will lead to a greater rise benefits relative to costs. Organisations expect to do things more efficiently using emerging alternatives like social media marketing, and this should free up resources for anticipated increases in staff numbers as well as achieving the objectives of business growth or stabilisation. Evidently, there is caution, but on balance there is more optimism than there is pessimism.

Recommendations

The following recommendations are made to relevant stakeholders in the transport sector and it is anticipated that they will be most relevant at the local level where direct action can be taken to ensure that the sector achieves suitable growth and viability for the benefit of the over community.

- Opportunities should be identified and exploited to help businesses cope with rising costs, especially the costs associated with fuel, as this is a fuel-intensive sector.
- Too few organisations are taking advantage of social media in this sector, and more should be done to create awareness and knowledge of this technology, to help organisations further reduce their communication and marketing costs.
- While it has been acknowledged that the local infrastructure has undergone improvements in recent years, the emphasis must continue to be placed on achieving a long term solution to the region's infrastructure, especially in terms of internal integration and external connectivity.
- The transport sector is a major employer in North-east Scotland, and although skills did not feature as a major issue in the present research, it is important to define and implement a clear strategy for skills in this sector in order to meet the anticipated increase in employment.
- Oil and gas drives the highly satisfying environment in which to do business in terms of opportunities, networks and local support. Organisations in the sector expect that the environment will continue to improve along with improvements in other key areas. These expectations should be matched with more certainty in government policy at the local and relevant national levels, whether this is in terms subsidies, environmental policy reduced or smarter regulation, and other issues.





Further Reading:

- Cities Outlook, 2012. Report published by Centre for Cities (www.centreforcities.org) accessed on 01/05/2012 at www.ibm.com/smarterplanet/global/files/uk__en_uk__cities__outlook_2012_final.pdf
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Research & Project Manager:
Peter Atorough MSc, PGCert. Research methods, Prince2
p.t.atorough@rgu.ac.uk
peter.atorough@agcc.co.uk

Project Lead:
Seona Shand
seona.shand@agcc.co.uk

Production:
Stacey Ashworth
stacey.ashworth@agcc.co.uk

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Technology Strategy Board
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**Aberdeen & Grampian
Chamber of Commerce**
The Ultimate Business Network

The Hub, Exploration Drive
Aberdeen Energy Park, Bridge of Don
Aberdeen, AB23 8GX

01224 343900
info@agcc.co.uk