Traveltech for Tay Cities: Evaluation Report

March 2025

Executive Summary

The Traveltech for Tay Cities programme was established as a testbed to explore how technology could address operational challenges within the region's diverse tourism and hospitality sector. Initial engagement was high, with 55 businesses expressing interest. Reflecting the experimental nature of the programme and the practical realities faced by SMEs (including early programme delays and inherent capacity constraints), 15 progressed to structured technology trials and advice, with three more companies benefiting from workshops. This highlights the gap between digital ambition and the practical readiness for change. Common needs identified revolved around streamlining operations, enhancing customer experience, and boosting digital presence.

The 15 initiated trials and consultations spanned a wide range of technologies, including AI, automation, booking/management systems, data tools, and EPOS. Detailed evaluation of eight completed trials yielded a rich mix of outcomes, valuable precisely because this was a trial phase designed for learning.

Clear successes demonstrated technology's transformative potential when alignment and implementation were effective. Fisher & Donaldson's EPoS system, Dook Cafe's automation, Murton Trust's CRM, and Turin Castle's AI tools all delivered significant benefits, validating the potential in specific contexts.

Equally importantly, trials encountering hurdles provided crucial insights into adoption barriers. The experience at Dundee Science Centre underscored the non-negotiable need for technology reliability. The Forbes of Kingennie chatbot trial

revealed the complexities of user behaviour and adoption, demonstrating that technically sound solutions don't always meet user preferences. Stay in Cupar's AI assistant trial highlighted challenges around SME control, process integration, and reaching the end-user. These were valuable learnings about the practical application of these technologies in real-world SME environments.

Common hurdles identified across multiple trials included implementation friction (data migration, technical glitches) and critical human factors (staff adoption, user behaviour divergence, staff churn). Barriers to adopting more advanced tech like robotics (cost, skills) were also illuminated. This evaluation points to core tensions between technology capability vs. user reality, the importance of reliability, the need for business control, and optimising the trial support process itself. The complementary AI and Automation workshop, focusing on accessible tools (Gen AI, Make, Zapier), represented a pragmatic step towards addressing the identified skills gap.

Key recommendations, informed by both successes and challenges, focus on designing future initiatives that acknowledge the realities of SME operations (capacity, timelines), prioritise technology reliability, provide robust hands-on support, ensure clear communication and processes, empower businesses with control, potentially explore comparative trials, and champion accessible, user-centric solutions. The mix of outcomes is characteristic of an effective testbed, providing essential lessons for driving meaningful digital adoption in the sector.

Introduction:
Ambition, Engagement, and Needs

Our ambition with the Traveltech for Tay Cities programme was clear: could we meaningfully connect tourism and hospitality businesses across the region with technology that solves genuine, pressing problems? We aimed to move beyond talk, facilitating trials, evaluations, and providing support to see if tech could make a tangible difference on the ground.

The Engagement Reality: Bridging Ambition and Capacity

We cast a wide net, initially engaging with 55 businesses spanning seven distinct tourism sectors, from local cafes and historic castles to accommodation providers and visitor attractions. Our idea was to guide businesses through a structured process, from identifying needs to potentially trialling and implementing a solution.

The headline numbers, however, tell a more complex story. While 55 businesses initially raised their hands, the striking reality is that a significant majority, 37, didn't progress past the early stages. Only 15 moved forward into a more defined project phase (trials, evaluations).

- Initial Engagement: 55 Businesses
- Progressed to Project Phase: 15 Businesses
- Dropped Out / Did Not Progress: 37 Businesses
- Deemed Ineligible: 3 Businesses

Reflecting on Engagement Drop-off: This significant attrition rate itself is a key finding, demanding explanation. While initial enthusiasm was clear, translating interest into active participation proved challenging. Several factors seem to have contributed:

1. ***Early Programme Dynamics***: The initial rollout phase encountered some unavoidable factors that led to delays in matching businesses with tech solutions and confirming project pathways. While these early hurdles were navigated, they inevitably created a period of uncertainty, Murton Trust noted the lack of clarity around funding confirmation made it hard to commit, and possibly impacted momentum for some businesses eager to get started.
2. ***The Reality of SME Capacity***: This remains, perhaps, the most significant factor. Businesses in tourism and hospitality run on tight margins of time and resources. Owners and managers are deeply involved in daily operations.

Finding the consistent bandwidth to engage with a structured programme – providing detailed information often needed in specific, unfamiliar formats, attending meetings, troubleshooting – is a substantial demand amidst daily operational pressures. Slow responses often signal operational overload, not disinterest. Crucially, SMEs often require longer lead times to evaluate options and make strategic decisions; enforcing haste, particularly after initial programme delays, can be counterproductive and may have contributed to businesses disengaging. The programme's demands, especially if perceived as bureaucratic or poorly timed (like during peak seasons, as Stay in Cupar experienced), likely exceeded the practical capacity of many.

3. ***The Readiness Spectrum***: Digital confidence and capacity vary widely. While many businesses were *curious* about tech, the leap to actively trialling a new system requires a certain level of readiness – be it technical confidence, staff capacity for change, or strategic clarity. It's plausible that for a portion of the initial 55, the exploratory phase revealed they weren't quite at the point of making that leap.
4. ***Justifying the Commitment***: Linked to capacity, the perceived value proposition needed to be immediately compelling to justify the time investment. If the potential benefits felt abstract, uncertain, or too far in the future, particularly amidst operational pressures or initial programme delays, dedicating scarce time to the trial might have seemed impractical.

This journey from 55 interested businesses to 15 active projects highlights a complex interplay between programme dynamics, the inherent capacity challenges of SMEs, and varying levels of digital readiness.

Expressed Needs vs. Actionable Steps: What Problems Were Businesses Trying to Solve?

Our conversations revealed consistent themes regarding digital needs. Needs clustered around streamlining operations (escaping the grind of paper forms or clunky systems like Fisher & Donaldson's old EPoS requiring staff to scroll through hundreds of icons), improving the customer experience (avoiding repetitive basic questions like Stay in Cupar's "how do light switches work?"), and boosting digital presence.

When asked about specific technologies, the most frequent mentions included: Digital Marketing Tools (18), Smart Booking Systems (15), Virtual Tours (13), Data Analysis Tools (13), and Mobile Apps (10). These interests were rooted in palpable business pressures – lack of online visibility, inefficient processes, missed customer insights. Yet, the hurdle to implementation often proved too high, blocked by resources, timing, or uncertainty about ROI.

Scope of Technology Trials Explored

So, what happened with the 15 businesses that *did* navigate the initial hurdles? This group engaged with a genuinely diverse range of technology solutions:

- ***AI and Automation***: Including AI for guest communications (chatbots like Konversable at Forbes of Kingennie; voice AI ANNA via Kalab at Stay in Cupar; InChat tools at Fox Taverns), AI reputation management (Triend at Dook Cafe, Newton Farm, Perthshire Wildlife), bespoke itinerary generation (Custom GPT at Turin Castle), workflow automation (Aphy at Arbikie Distillery and Newton Farm), and robotics (Ubemilk coffee tech at Dook Cafe; consultancy from National Robotarium at Wasted Degrees Brewing).
- ***Booking and Management Systems***: Covering tour platforms (Beyonk/Inspire.scot at Do It Outdoors; Checkfront OTA integration via Jigsaw Media at Perthshire Wildlife), property management systems (Outdore at Scottish Canoe Association), table booking (TableSense at The Bein Inn), and related marketing support (Tourpreneur at Do It Outdoors).
- ***Data, E-commerce, and Point of Sale***: Including footfall counters (Nex Count at Dundee Science Centre), CRM systems (Beacon at Murton Trust), and specialised EPOS (C2epos at Fisher & Donaldson).

This range demonstrates a willingness among businesses to engage with potentially transformative technologies across different facets of their operations.

Organisation	Continued Use Post-Trial?	Technology / Provider
Dook Cafe	Still using	Robotic milk solution (Ubemilk), AI Reputation (Triend)
Dundee Science Centre	No longer using	Footfall / visitor counters (Nex Count)
Fisher and Donaldson	Still using	Bakery-specific EPOS (C2epos)
Forbes Of Kingennie	No longer using	AI chatbot (Konversable)
Murton Trust for Education	Still using	CRM / Volunteering management (Beacon CRM)
Stay in Cupar	No longer using	AI guest concierge (Kalab - ANNA AI)
Turin Castle	Still using	AI custom GPT development (Digital Strategy Consultants)
Arbikie Distillery	Still using	Bespoke small scale automation (Aphy)
Do It Outdoors	Still using	Activities booking system (Beyonk, Inspire.scot), Marketing (Tourpreneur)
Fox Taverns	Still using	AI chatbot & process automation (InChat), AI Reputation (Triend)
Newton Farm Holidays & Tours	One-off consultancy (Process automation)	AI Reputation (Triend), Process automation consultancy (Aphy)
Perthshire Wildlife	Still using	OTA integration (Jigsaw Media, Checkfront), AI Reputation (Triend)
Scottish Canoe Association	No longer using (Staff change cited)	Campsite booking system (Outdore)
The Bein Inn	Still using	Table booking system (TableSense)
Wasted Degrees Brewing	One-off consultancy (Robotics)	Robotics consultancy (National Robotarium)

Evaluation Methodology

The core of this evaluation rests on qualitative insights from in-depth interviews (typically 20-40 minutes) with the eight businesses completing the full trial and evaluation process. Semi-structured interviews explored: business context and motivation; implementation experiences (technical issues, support); operational impact (efficiency, customer feedback, quantifiable changes, shortcomings); broader learnings (adoption ease, cost/benefit, training); future intentions; and overall reflections on the technology and trial process. Assurances regarding confidentiality were provided. This approach allowed for rich, contextualised feedback.

Detailed Evaluation Findings: Successes, Failures, and Hurdles

Our ambition was to see tech solve real problems. The outcomes, derived from the detailed evaluations, were decidedly mixed.

The Clear Successes - When Tech Landed Right

Where technology aligned well with a defined need and was implemented effectively, the impact was often profound:

- ***Fisher & Donaldson (C2epos EPoS)***: A standout success. Replacing an old system where staff scrolled endlessly through icons, the new bakery-specific EPoS transformed operations. Faster transactions, easier training – remarkably, it was "the only change we've ever put in place that staff have thanked us for". Better stock control demonstrably reduced wastage, data insights empowered managers, and cost savings via lower card fees offset the subscription. Now rolled out across all stores.
- ***Dook Cafe (Ubemilk Automated Milk)***: Directly addressed a service bottleneck. Despite initial barista resistance to tech seen as "taking away our skill", the system delivered an estimated 25% speed increase during busy times and reduced waste without compromising quality. Tangible ROI on a specific pain point.
- ***Murton Trust (Beacon CRM)***: Effectively tackled complex admin across diverse charity operations. Automating Gift Aid claims became "almost laughable at how little we have to do now" compared to the previous burden. Streamlining bookings (avoiding issues like adding £1 fees to £2.50 tickets), memberships, and accounting integration saved significant time. Increased donations and visitor willingness to cover fees were welcome surprises. The trial funding was crucial.
- ***Turin Castle (Custom GPT Itinerary Builder)***: Using AI proved highly efficient for rapidly generating complex, bespoke itineraries, enhancing responsiveness to high-value, time-sensitive client requests.

Sticking Points & Failures - Where Things Went Awry

However, not all trials succeeded:

- ***Dundee Science Centre (Nex Count Footfall Counters):*** A significant letdown due to persistent unreliability. Setup faced technical hurdles, but the core issue was inaccurate data – often wildly off – especially on the busy days when needed most. This rendered the tool useless, a stark contrast to the high staff enthusiasm for the *concept*. Lack of on-site support may have been critical.
- ***Forbes of Kingennie (Konversable Chatbot):*** Failed its core mission. Despite easy setup, it bluntly "didn't stop people phoning". User behaviour defied expectations: simple queries still came via phone, complex ones used the bot then required a call anyway. Staff struggled with responsiveness to the live chat component. A perplexing failure, though the business is now exploring WhatsApp via the same provider.
- ***Stay Cupar (ANNA AI via Kalab):*** Encountered multiple hurdles. The trial process itself was problematic. The tech didn't reach the intended less tech-savvy users, faced barriers like guest reluctance ("how do I do that?") or inability to use QR codes (e.g., on work phones), offered the host insufficient control over content, and risked creating *more* work, failing to replace preferred direct communication (text/WhatsApp).

Common Hurdles Across Trials

Recurring challenges emerged:

- ***Implementation Friction:*** Issues including burdensome data migration, technical glitches requiring troubleshooting, and frustrations with programme processes (timelines, funding clarity).
- ***The Human Factor:*** Staff adoption required persistence in some cases (Dook Cafe), but more fundamentally, actual *user* behaviour often diverged from assumptions (Forbes, Stay Cupar), with users sticking to familiar methods. Furthermore, the inherent reality of staff churn within the sector poses another significant human barrier. Key personnel changes mid-project, as impacted the Scottish Canoe Association trial for instance, can disrupt implementation momentum or even lead to a complete shift in technology use, regardless of the initial potential. This highlights the need for implementation plans that build broader team knowledge and aren't solely reliant on one or two key individuals.
- ***Barriers to Advanced Technology Adoption:*** Beyond general implementation friction, specific hurdles exist for more advanced or capital-intensive technologies. The robotics consultancy provided to Wasted Degrees Brewing, for example, while valuable in itself, clearly illuminated the significant barriers for SMEs in this area – namely the high capital outlay required and the substantial skills gap needed to operate and maintain such systems, making widespread adoption currently challenging.

Core Tensions & Unanswered Questions

Distilling these experiences leaves several core tensions:

1. ***Tech Capability vs. User Reality***: Why do technically sound solutions sometimes fail to gain traction (e.g., the Forbes chatbot)? How significant is user preference for established methods like phone or text (Stay Cupar)?
2. ***Reliability as the Foundation:*** The Dundee Science Centre experience is stark: potential is irrelevant without dependable core function. What ensures robustness?
3. ***Control, Customisation, and Trust:*** Businesses need agency over information and process (Stay Cupar). How to balance standardisation with bespoke needs?
4. ***Optimising the Trial Process Itself:*** Feedback highlighted issues with communication (Murton/Stay in Cupar), timing, support models (Dundee Science), and process management. Is comparative trialling (Forbes suggestion) a better approach?

AI & Automation Workshop

Beyond the intensive, one-to-one technology trials, the programme also sought to address the identified skills gaps and build confidence more broadly across the sector. A key element of this was the "***Transform Your Tourism Business: AI and Tech Solutions for Tay Cities***" workshop held at the A K Bell Library in Perth on March 11th, 2025.

This wasn't intended as a high-level overview, but rather a practical, hands-on session designed for busy tourism and hospitality operators in the region. The goal was to demystify AI and automation, demonstrating how accessible tools could tackle those recurring pain points, automating routine tasks to free up time for genuine guest interaction and creating more personalised experiences. It directly responded to the needs articulated early in the programme around enhancing efficiency and digital capability.

Addressing the Process Automation Gap for SMEs:

One area where we observed a distinct challenge is process automation. While many businesses could benefit from automating workflows (connecting booking systems to calendars, streamlining follow-up emails, etc.), traditional enterprise-level automation solutions often prove unviable for SMEs. These complex systems typically require significant investment, dedicated technical staff within the business to manage implementation and integration, and ongoing maintenance, resources simply unavailable to most smaller operators. Our engagement suggested that specialist process automation companies often struggle to serve this segment effectively for precisely these reasons.

However, many of the automation needs identified by SMEs *can* often be addressed through more accessible, user-friendly 'no-code' or 'low-code' platforms. This understanding directly shaped the workshop's content.

Workshop Content and Value:

The morning included interactive sessions focused explicitly on practical application. I led the AI segment, drawing on experience delivering similar training internationally for major travel and tourism organisations, covering readily available generative AI tools like ChatGPT, Claude, Perplexity, and organisational tools like Google NotebookLM. The aim was to equip businesses with techniques for content creation, customer communication, and information synthesis. Complementing

this, and addressing the automation gap, Pedro Moreira from Aphy provided detailed, hands-on training specifically focused on accessible process automation tools like Make and Zapier. This showed businesses how they could start connecting different software applications and automating tasks *without* needing specialist coding skills or large budgets. Input from Boris Borisov of TableSense also grounded the discussion in practical implementation within the hospitality context.

Crucially, the workshop attracted significant interest, with representatives from over 20 businesses across the Tay Cities region attending, including participants from our technology trials such as Murton Trust, Fisher & Donaldson, Perthshire Wildlife, Stay in Cupar, Turin Castle, and a representative from Forbes of Kingennie. It also included new businesses like Lindores. This mix fostered valuable peer-to-peer discussion alongside the formal sessions.

The value, as I see it, wasn't just in presenting possibilities but in providing practical takeaways tailored to the SME reality. It aimed to bridge that gap identified earlier between *interest* in technology and the *confidence* or *know-how* to actually start implementing it. By focusing on accessible tools like no-code automation platforms alongside generative AI, the workshop served as a pragmatic intervention geared towards building foundational skills and encouraging that first step.

Recommendations for Future Programmes

Based on these findings, future programmes should consider:

Improving Tech Testbed Delivery & Structure:

- Prioritise vetting core technology reliability (avoiding issues seen at Dundee Science).
- Facilitate more hands-on/on-site implementation support (potentially mitigating issues like Dundee Science's).
- Explore comparative trials allowing businesses to test multiple solutions (as suggested by Forbes).
- Incorporate enhanced support for change management and user adoption (addressing staff/user behaviour seen at Dook Cafe, Forbes, Stay Cupar).
- Focus resources on demonstrably engaged participants, while also considering strategies for building resilience against key staff changes during implementation.

Refining Programme Processes:

- Provide clear upfront requirements regarding information/data needed from businesses (addressing Stay Cupar feedback).
- Establish realistic, mutually agreed timelines with built-in flexibility, recognising that SMEs often need longer decision-making periods and avoiding enforced haste.
- Empower businesses with mechanisms for direct input and control over tech configuration/content.
- Streamline funding and administrative processes for clarity and speed (learning from Murton Trust's experience).

Enhancing Communications:

- Maintain proactive, transparent updates on timelines, funding, and next steps.
- Manage expectations realistically regarding tech capabilities and implementation challenges.
- Ensure clear, responsive communication channels for both technical and programme support.

Technology Focus Areas:

- Prioritise:
    - Industry-specific EPoS/Ops systems
    - Targeted process automation,
    - CRM/data consolidation,
- Provide additional support for:
    - AI for efficiency (ensure ease of updating),
    - customer-facing chatbots/AI assistants (verify user alignment, address issues seen at Forbes/Stay Cupar),
    - hardware solutions (ensure reliability/support, learning from Dundee Science).
    - Exercise caution with highly capital-intensive or complex technologies like robotics, where consultancy might be valuable but implementation faces significant cost and skills barriers for many SMEs.

Conclusion

These technology trials show potential but underscore complexity. Success hinges not just on the tech, but on implementation, user behaviour, reliability, and the support process itself. The wins (Fisher & Donaldson, Dook Cafe, Murton Trust, Turin Castle) are encouraging, but the failures and frictions (Dundee Science, Forbes, Stay Cupar) offer crucial lessons. Context and execution are key, and future support must be designed with these realities in mind.