

A man with a backpack stands on a sandy beach, looking out at the sea. The beach is covered with seaweed and wooden posts. In the background, there are hills and a cloudy sky. The text "NEW HORIZONS..." is overlaid in large white letters.

# NEW HORIZONS...

# VISITSCOTLAND

- **New world – what do we know?** trends and insights
- **What does it mean?** strategic approach & our new responsibilities
- **Activity Overview** – where have we been & where are we going?
- **In action** – examples showcasing Argyll & The Isles







# NEW WORLD

Insights driving our strategic approach



# WHAT DO WE KNOW?

Tourism has never been so competitive - Travel spend is coming back faster than the # of travellers

## Travel demand is back

- **Strong pent-up demand** from international markets (favourable exchange rates especially USD, returning airline connectivity)
- **1.1M** international visitors came to Scotland in Q1 & Q2 2022 (18% down on 2019 but expenditure up +21%)
- International trips in 2022 evidenced slightly **longer stays** and **willingness to travel out of the main season**
- The '**wealth effect**' of affluent travellers
- Slight **increase** in propensity for UK households to **holiday at home** (easier to plan). Jan – March, Scotland preferred destination after London.
- **Cost of living impact – value for money** is a key driver for destination selection. Two dimensions – International travellers looking for added value will pay for unique money can't buy experiences; **UK travellers** looking for **cost saving opportunities**.

# WHAT DO WE KNOW?

The rise of a more mindful and discerning traveller – personal **values** drive purchasing decisions

## Changed consumer behaviours

- **Sustainability, wellbeing, inclusivity** and **personalisation** are emerging drivers of importance
- 2/ 3 of **Gen Z** travellers planning “**revenge travel**” to make up for lost trips during the COVID 19
- **Holidays off-the-grid**: travellers are eager to disconnect
- **YOLO / GOAT / Bucket-list travel – distance is not a barrier**
- International travellers are adding in **multiple destinations** - not just travelling to one place at a time. **64% long haul; 32 % short haul**
- **Bleisure** and **Flexcations** – new types of holidays, merging travel for business and leisure
- Emergence of **new audiences** – **solo travel** is on the rise esp in 65+, **gen Z/millennials** avg 2.2 more international trips 21/22 than 65+ ; while couples dominate re-connecting has been important - **friendship groups** & **multigenerational** family holidays

# WHAT DO WE KNOW?

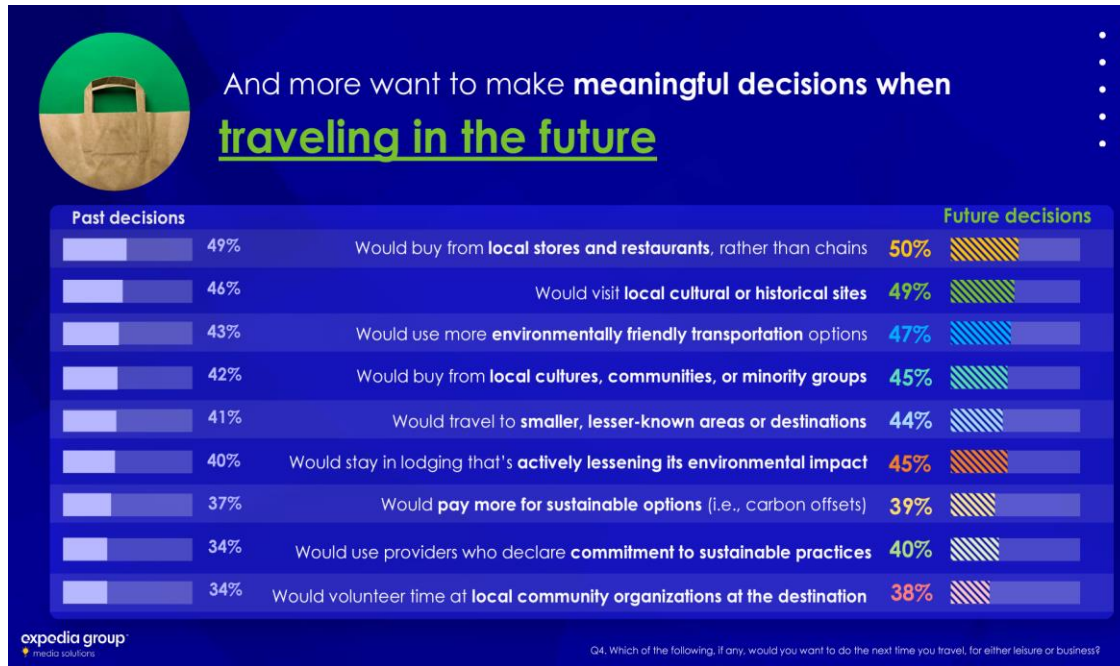
Being discoverable is even more important if you want to get to the lookers and bookers

## Changed booking habits

- **Word of mouth** and **social media** are the two main sources of travel inspiration
- **Booking windows changing:** 37% UK book within 1 week of travel. 29% US book 90+ days in advance – opportunity with short window too with 22% booking within a week of travel
- **Over 50% of international travellers use intermediaries** such as Travel Agents, Tour Operators and online travel sites to plan & book their travel
- **Package bookings** (1 in 3 visitors) remain strong for some of our largest inbound markets. Bookings typically **1.7 x more in value**.
- It's **all generations of travellers using intermediaries**. The Virtuoso network, a global experiential travel network are reporting that 1 in 4 bookings are new customers who used to book direct
- 90% of Expedia travellers are searching for **sustainable booking options**. While 7 in 10 consumers **will pay more** when making a travel choice that is more **inclusive to all types of travellers**

# EXPEDIA SUSTAINABILITY INSIGHT

Positive behaviour changes – reinforce our responsible tourism approach



# HOW HAVE THINGS CHANGED?

You must be **seen**...

Viewability and watch time matters as much as length of exposure matters ; importance of video based bingeable content

## Media insights



### Greater fragmentation of the media landscape

- Online video is the **#1 driver** of 'commercial triumphs'
- **87% of millennial travellers consult social media** as one of the first steps for travel inspiration
- **78% of TikTok users found holiday/travel inspiration on the platform.** TikTok is becoming THE destination for travel content - with over 2.7 Billion video views on #travel in the UK
- **3M+ Pinners** in the UK engage with travel content on a monthly basis
- **YouTube garners 1.8X more attention** from consumers vs ads on Social platforms

## Creative must work harder



### Short-form content is having more than a moment

- Formats for all the stages of the funnel are important. **Long and short videos** serve different purposes for viewers
- Drive awareness through **creative distinctiveness**
- **14.5% increase in consideration on ad recall** when ads are viewable with sound on
- **95% of the creative message is retained when customers watch video** compared to 10% when they read it in text

## Weaving impactful narratives



### Hook and sustain attention with an immersive story

- **'Streamer locations'** spark a behind the lens experience
- Culture shocks and **connecting with nature**
- Mix of traditional and modern unique experiences
- **Values marketing is key.** Personal values become a bigger part of the story - 72% of brand values matching consumers personal values is deciding factor when buying
- 67% of Gen Z think being true to their **values and beliefs** makes a person cool





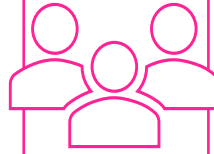
# WHAT DOES IT MEAN?

VisitScotland strategic context & our new responsibilities



# VALUES DRIVEN APPROACH

Consumers increasingly want to understand the **impact** of their actions - on the people around them and the wider world



Consumers want businesses to help adapt products and communicate how they will work with them for a **better future**

- Responsible tourism is our new business as usual – drives everything we do
- We **cannot unload the responsibility** for change on the visitor.
- We want visitors to **feel good** exploring Scotland, knowing the steps we're taking to deliver a sustainable experience.
- We can **educate in an inspiring way** to show visitors how travelling better will deliver a better, richer, feel-good experience meeting their needs for connection, wellbeing and unique experiences.

## STANDING OUT TO MEET THE EMOTIONAL NEEDS OF VISITORS

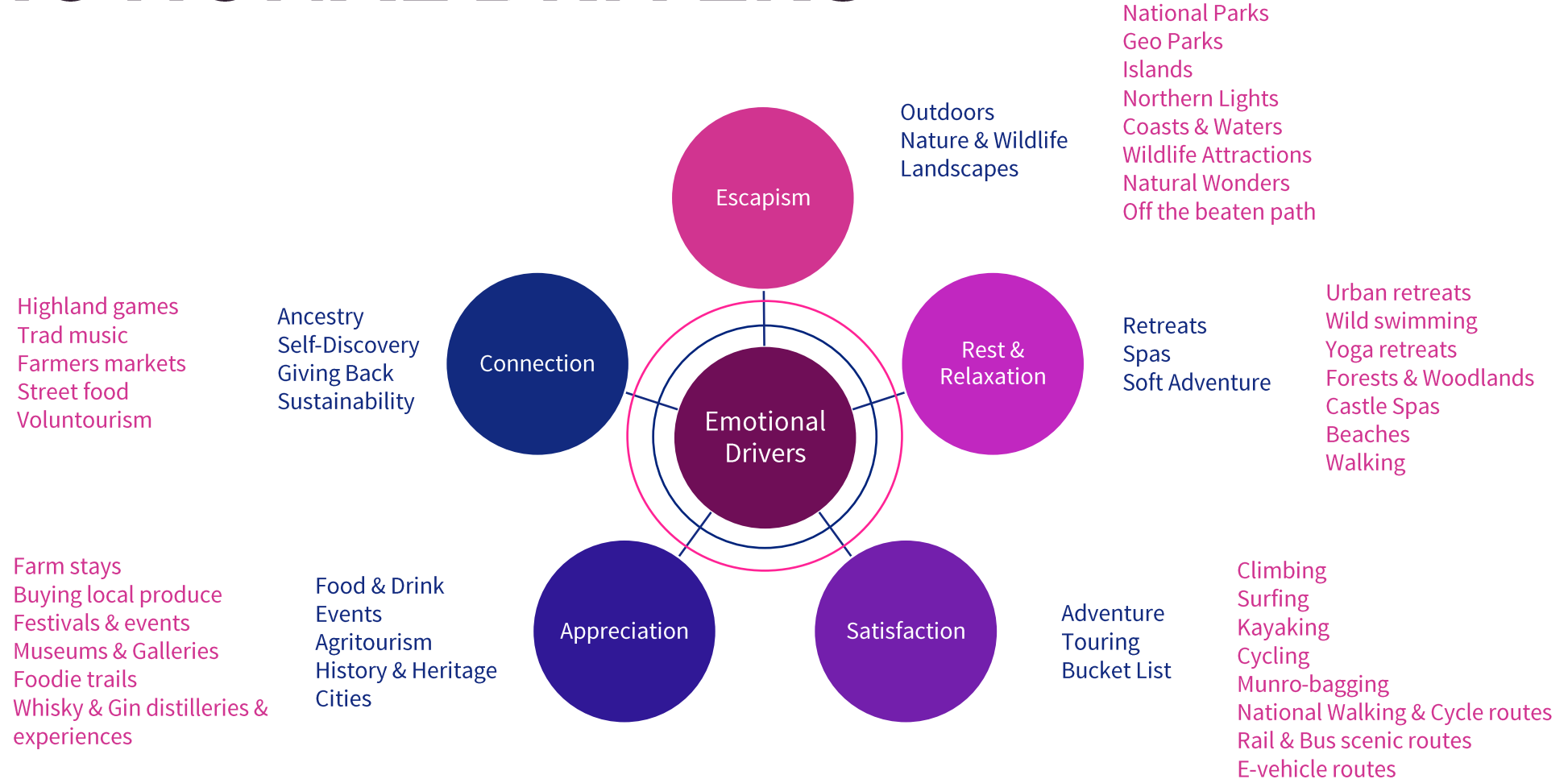
Authentic  
Storytelling

Social Proof

Sustainable  
& Inclusive  
Choices

Bookable  
Experiences

# EMOTIONAL DRIVERS





# OUR CAMPAIGN

Our internal manifesto is a declaration of the intentions, motives and views of how the consumer should see Scotland through our marketing efforts.

## **The world needs Scotland like never before.**

Why?

Because life is too short for ordinary.

And Scotland is very far from that.

It's the place you'll travel hundreds,  
if not thousands of miles to find.

To discover what it unlocks in you.

A place that bids the whole world welcome,  
While letting you escape from it.

Where the pace of life is an adrenaline rush.  
Some of the time.

Where you can taste the rain and feel the sun.

But the warmth, well it comes from our people.

So breathe it in. Soak it up. Stir those senses.

Feel the goosebumps.

Be lost... for words.

Here you can paint a thousand new memories.

Ones that change the way you view the world.

And maybe yourself.

Those are the moments you feel alive.

Heart-pumping, pulse-racing,

You-have-got-to-be-kidding moments.

The ones that move you in ways you never thought possible.

That bury themselves deep inside and never let go.

Step closer to nature. To humanity. To the planet.

And play your part in protecting it. By treading lightly.

So, what are you waiting for?

Come and give yourself new stories to tell.

Adventures to share. People to meet.

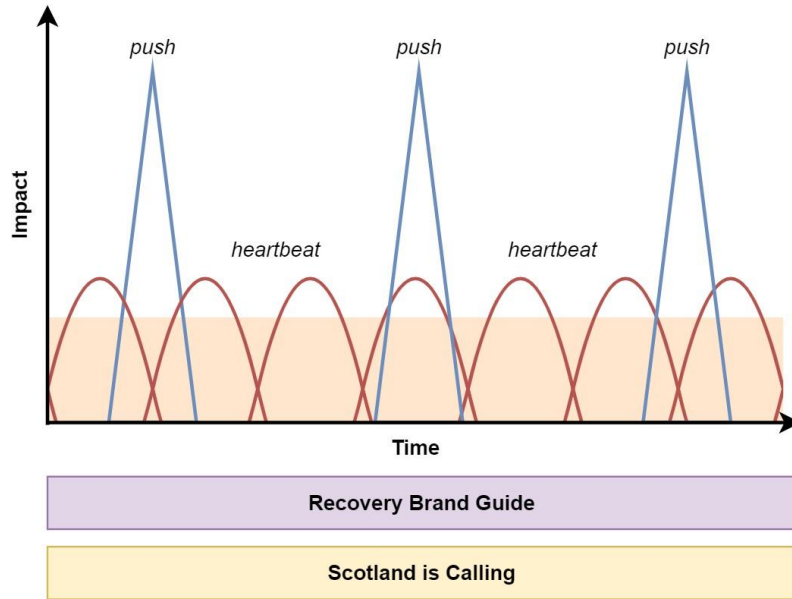
We're waiting to say hello.

You know where to find us.

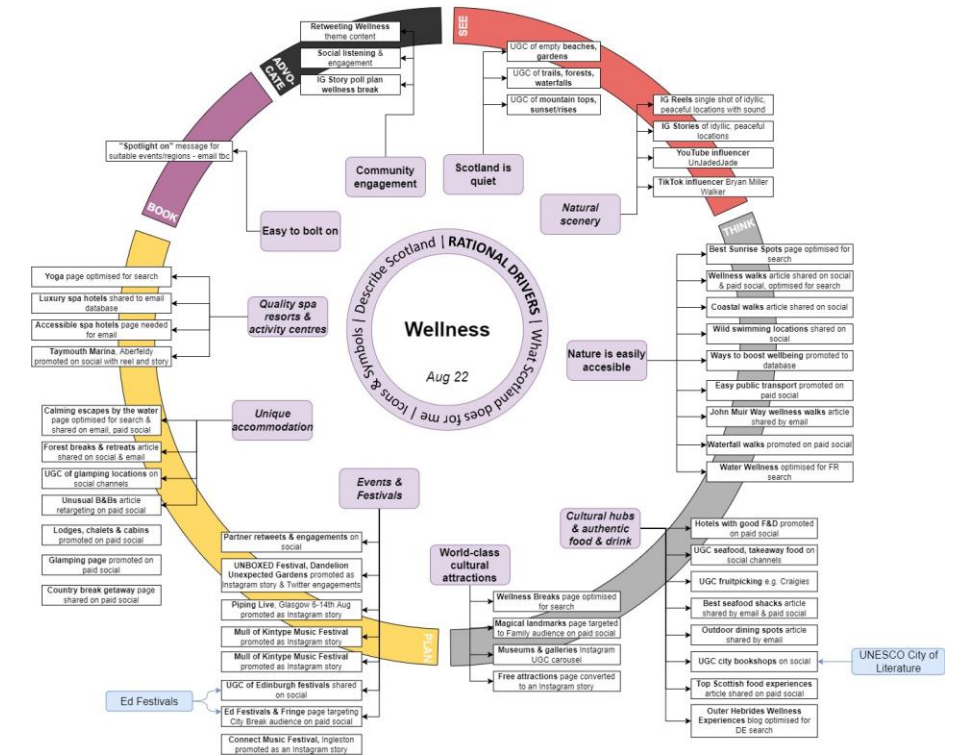
**Scotland is calling.**

The world needs Scotland like never before – telling our story, sharing our values

# MARKETING CALENDAR



- ✓ More planning time to align & collaborate with partners
- ✓ Consistent experience across channels
- ✓ Efficiencies when creating content



**Oct:**  
Landscapes

- Our landscapes are unique and breathtaking
- Our cities have beautiful green spaces
- We want to help protect and restore Scotland's landscapes and nature for future generations

**Nov:** Winter Breaks

- Perfect place for a cosy winter break
- Unique range of outdoor activities and snowsports
- Winter is a great time for a city break in Scotland

**Dec:** Short Breaks

- Easy to get to and get around
- Amazing luxury experiences
- Perfect destination for foodie explorers

**Jan:** Touring

- Touring responsibly protects our environment & support local communities
- Our tours help people discover rich history & culture
- A great way to explore Scotland's stunning landscapes and nature

**Feb:** Outdoor Adventures

- Wide range of outdoor activities for all ages and abilities.
- Spending time outdoors & reconnecting with nature supports wellbeing.
- Participating in outdoor activities is a great way to explore new places

**Mar:** Family Breaks

- Scotland offers a variety of activities for families.
- Places to stay are family-friendly & affordable.
- Scotland is the perfect place for children to explore the outdoors and be active.

Thematic calendar to guide our storytelling

# AGILITY & LEARNING



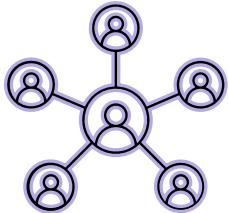
Insight & data led  
approach



Clear target audiences



Ever present in the  
customer journey  
(see, think, plan, do and advocate)



Channel strategy  
tailored to audience



Prioritise Markets  
(B2C & B2B)

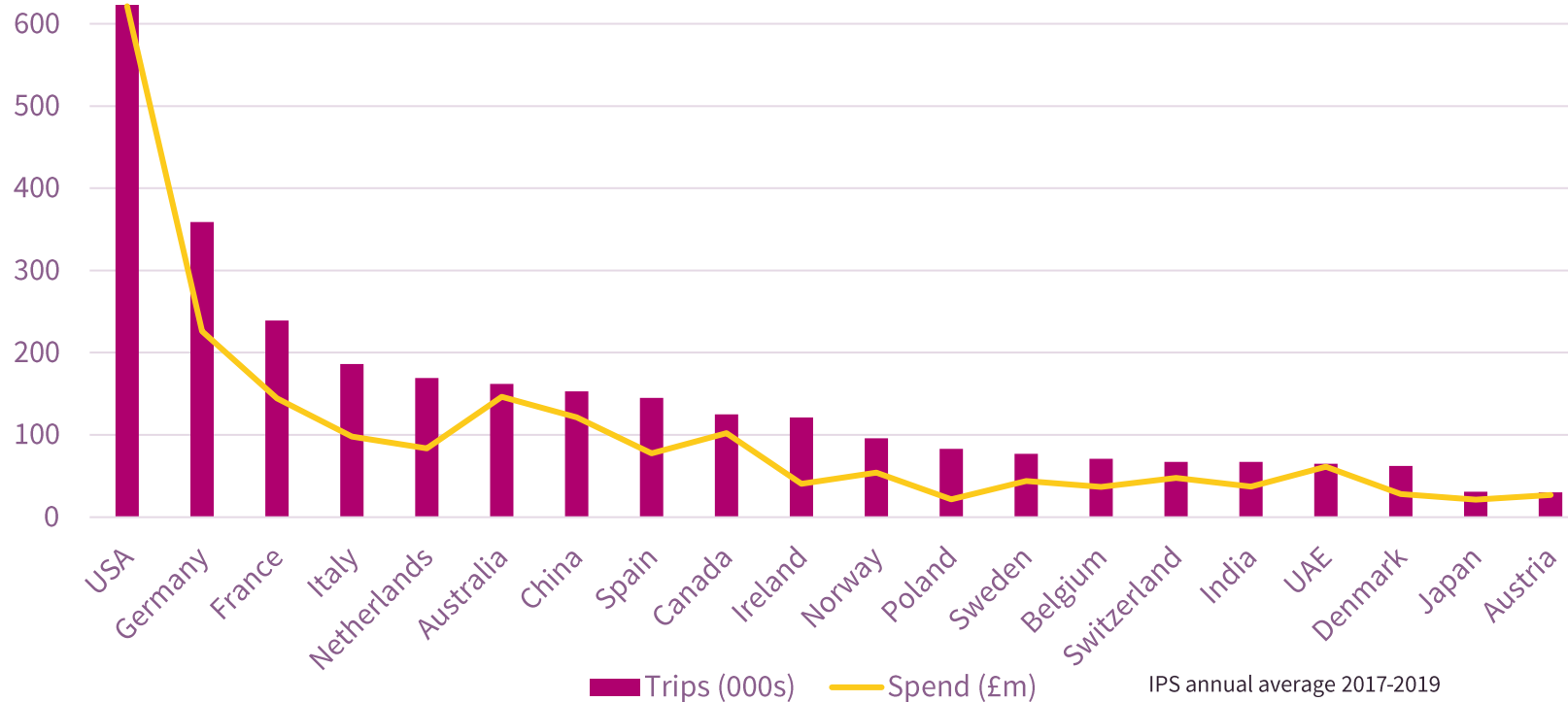


Key principles  
(Always on; social 1<sup>st</sup> approach,  
collaboration, partnerships; -  
B2C & B2B)

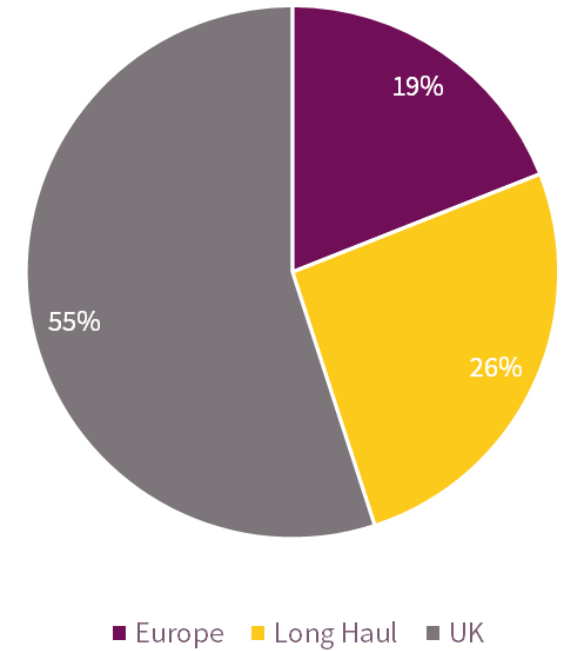
We know the opportunity is great, so we must drive for results – audience driven approach



# MARKET PRIORITIES



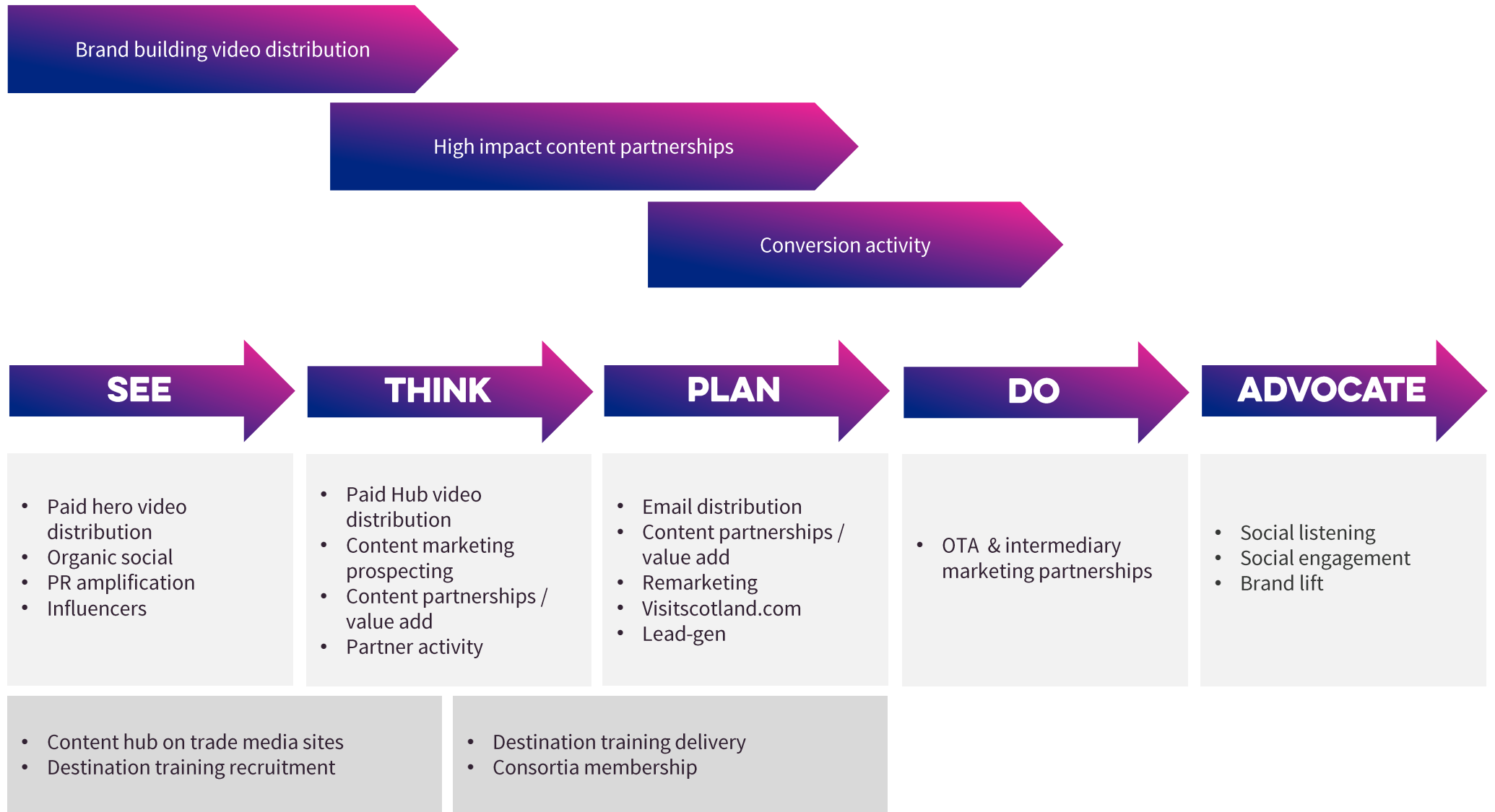
## Spend



Agility – short term (recovery) and medium to long term (sustainable growth) approach required

Important considerations in our targeting – propensity, sentiment, connectivity, affordability

Success will require the right mix of visitors to drive sustainable growth



## INTERMEDIARIES

## STRATEGIC PARTNERSHIPS

Tour  
Operators

Travel  
Advisors

DMCS  
Wholesalers

OTAs

Airlines &  
Vacation  
Arms

SG & SDI

VisitBritain

Tourism &  
Cultural  
Partners

### STRATEGIC FOCUS

- Grow their understanding of Scotland product and promote regional, seasonal and responsible opportunities
- Enhance their ability to promote and sell Scotland as a destination
- Create opportunities for Scottish businesses to connect with Scotland buyers
- Targeted key account management

### STRATEGIC FOCUS

- Raise profile of tourism as a key economic driver
- Partnering on green energy agenda / responsible tourism and food & drink / textile sectors
- Promotion of strategic priorities
- Understanding of shared agenda and positioning of Scotland as a dynamic & progressive destination

Industry development: create the right product offering and help businesses internationalise growing Scottish tourism overall

**TRADE EVENTS & BUSINESS DEVELOPMENT MISSIONS** – year round  
**CONNECT SCOTLAND – APRIL 2023**

Maximising partnerships with travel intermediaries



# REFRAMING SUCCESS



Spread

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Regional spread  
Seasonal spread  
Industry (benefit) spread



Spend

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Quality over quantity  
Value over volume  
Elongating visits  
Shop local



Sustainability

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Net zero (Energy Mgt,  
Waste Mgt, Climate action)  
Natural & cultural heritage  
Responsible, inclusive &  
regenerative experiences  
Transport options



Satisfaction

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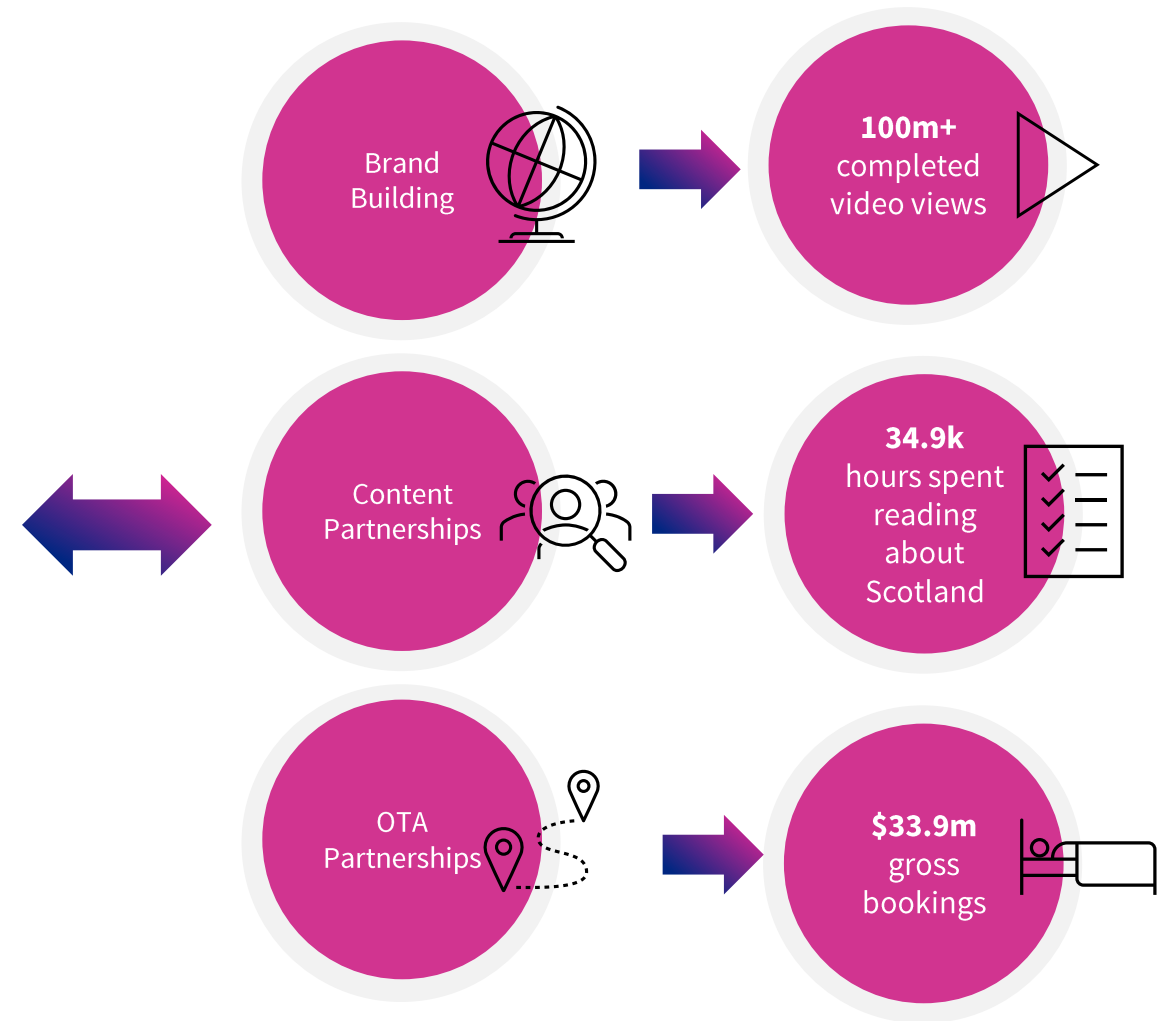
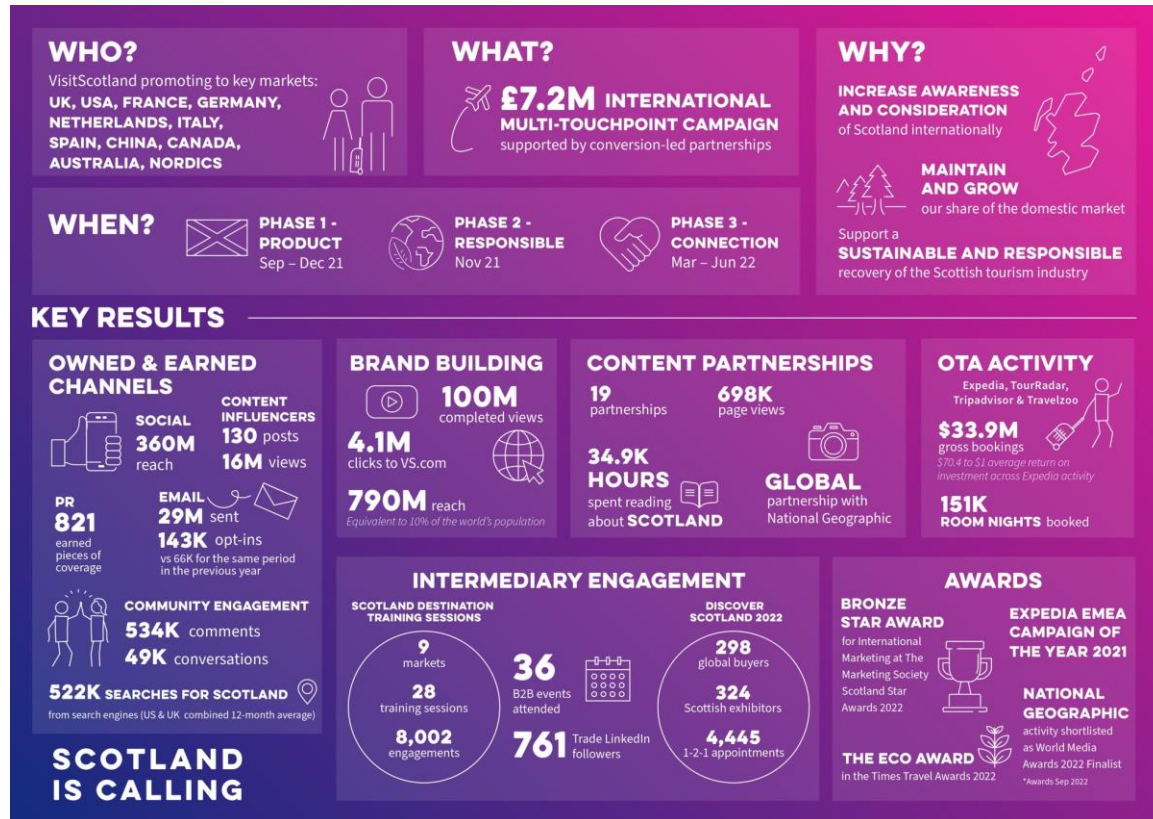
Local satisfaction  
Visitor satisfaction  
Industry satisfaction  
(Fair work; profile of the  
sector; sustainable growth)

A wide-angle aerial photograph of a Scottish loch. In the background, a large blue ship with the name 'Laidson MacGregor' is visible. The water is a deep blue-green, and the surrounding landscape features rolling hills and rocky shorelines. In the foreground, several people are on paddleboards, and the water is shallow enough to reveal green seaweed and rocks.

# ACTIVITY OVERVIEW



# WHERE HAVE WE BEEN?



Scotland is Calling: Results so far



# AND...WHERE ARE WE GOING?

## Inspiration



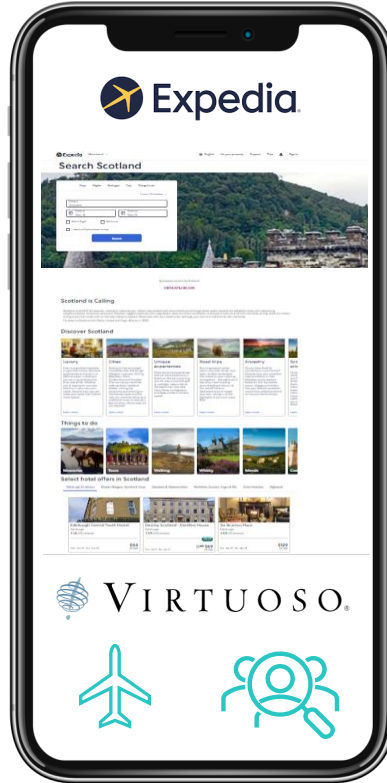
Target younger audience on social platforms where they are being travel inspired

## Collaboration



Collaborate and leverage partnerships to meet audiences in their preferred environment

## Conversion



Present Scotland as a must-travel destination where consumers are looking / booking trips

Rolling out the welcome mat



Regional / seasonal  
New audiences

The 'reel' side of Scotland



Values driven  
New channels and formats

Making measurable impact



Leveraging partnerships  
Intermediaries to drive value/ conversion

# MEDIA APPROACH: UK

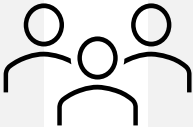


Objective	Raise <b>awareness</b> and <b>consideration</b> of Scotland for an autumn/winter break, creating a buzz and driving <b>conversion</b>					
Audience	Younger audiences – Millennials & Gen Z; food loving culturalists, adventurers		London, SE, North West/East , Yorkshire & the Humber			
Activity	<b>Social &amp; Display</b>  Continue to raise awareness with content led activity in social and display channels <i>( Instagram, Pinterest, TikTok, Teads)</i>	<b>OTA Partnerships</b>  Build on successful partnership with Expedia to extend reach with destination bookable landing page on expedia.co.uk & Hotels.com	<b>Influencers</b>  Building on the emotional pull of Scotland is Calling, the creation of influencer backed content to inspire	Owned channel promotion	Earned activity inc PR	Regional and partner activity

Leveraging paid, owned and earned channels

# HERO MEDIA APPROACH: USA



Objective	Raise <b>awareness</b> and <b>consideration</b> of Scotland, creating a buzz and driving <b>conversion</b>					
Audience	Younger audience, Millenials & Gen Z, Experience seekers		 New York Tri State, Boston Mass, California, Florida, Washington DC			
Hero Activity	<b>Social &amp; Display</b>  Continue to raise awareness with content led activity in social channels and connected TV <i>(Insta, Snapchat, TikTok, ConnectedTV)</i>	<b>OTA Partnerships</b>  Build on the successful partnership with Expedia to extend reach with dedicated content led Spotlight page followed by bookable landing page	<b>Publishing Partnership &amp; Influencers</b>  Content partnership with Matador Network/TikTok and GoPro content creator partnership in October/November	Owned channel promotion & remarketing	Earned activity inc PR	Regional and partner activity  B2B/B2B2C market activity

Leveraging paid, owned and earned channels



# A CREATIVE SNAPSHOT...



**Inveraray Castle**  
 2,478  
 Inveraray, UK  
 Attraction • Castles, Gardens

VisitScotland Discover one of Scotland's homes at the romantic and iconic Inver on the majestic shores of Loch Fyne, visit magnificent French tapestries, priceless  
 Read more

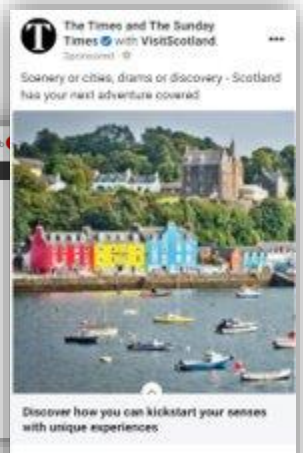
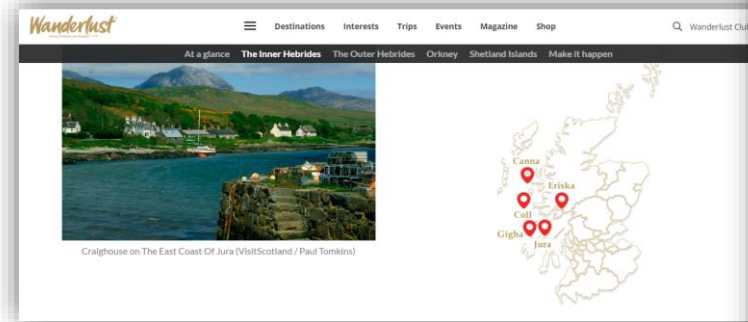
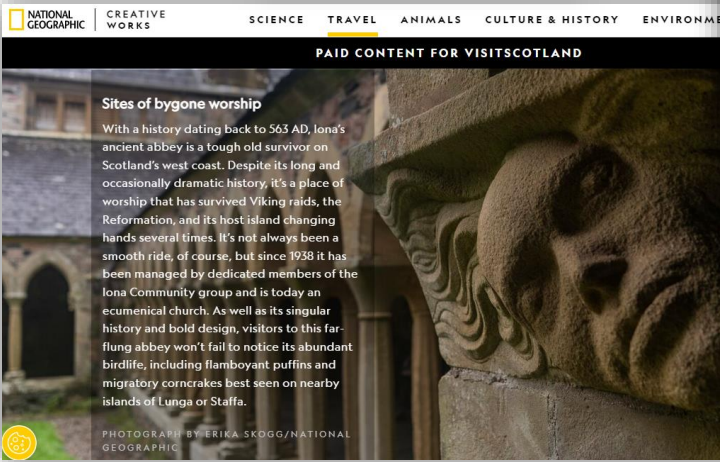
Helpful Save Share



**Inverawe Smokehouse**  
 128  
 Taynuite, UK  
 Restaurant • \$\$, Cafe, British, Scottish

VisitScotland Inverawe Smokehouse is a family-run smokehouse specialising in tasty salmon and trout delicacies. The visitor centre includes a walk-through exhibit, as well as lochs for fly fishing, angling  
 Read more

Helpful Save Share







# SPIRIT JOURNEYS

**Spirit of the Highlands and Islands**







Paid for by

 **Spirit Spiorad**  
of the Highlands and Islands  
no Goidhealach is nan Eilean

 **Visit Scotland** | **Alba**

From secluded beaches to romantic lighthouse stays: find winter gems in the Highlands and islands

Escape the crowds on a true Scottish adventure as Helen Ochyra, author of Scotland Beyond the Bagpipes, takes you through her pick of some lesser-known highlights of winter



Distilleries, golden eagles ... and Macbeth: seven slow

Red deer, winter walks and malt whisky: the Scottish

Selkies, kelpies and Whisky Galore! Hunker down for

'Sighting an orca is unforgettable': where to

10 beautiful autumn and winter views in the Scottish Highlands and islands - in pictures

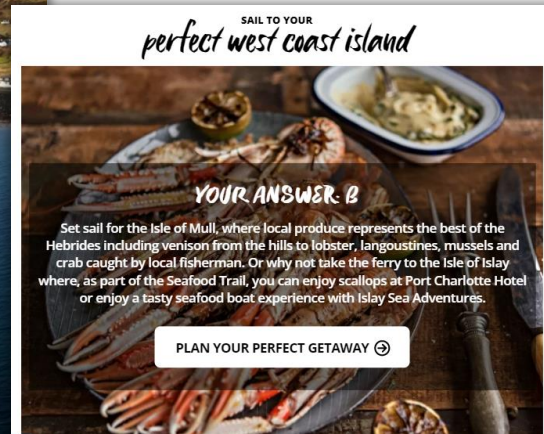
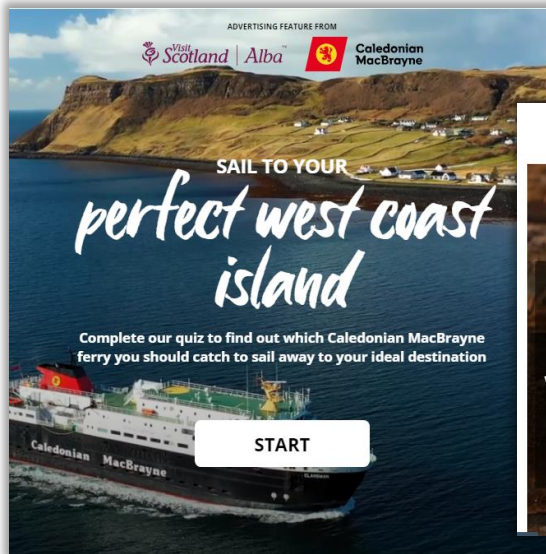


A 4-day influencer trip with [foraged.by.fern](https://foraged.by.fern) was focussed on mid-argyll with a **video** and **blog** created.



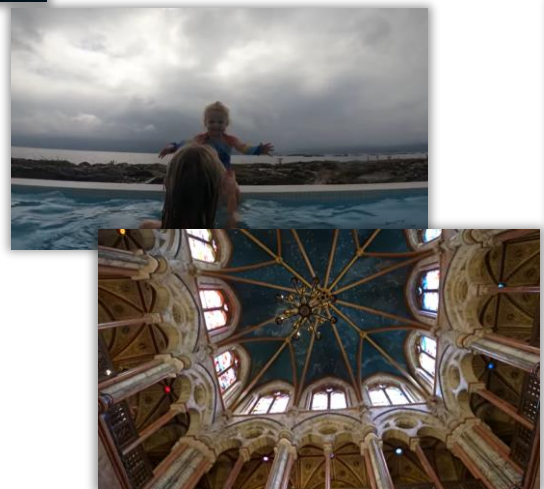


# VS X CALMAC PARTNERSHIP CAMPAIGN



Can't believe this is Scotland  
(Island hopping through the...)

100K views • 3 days ago

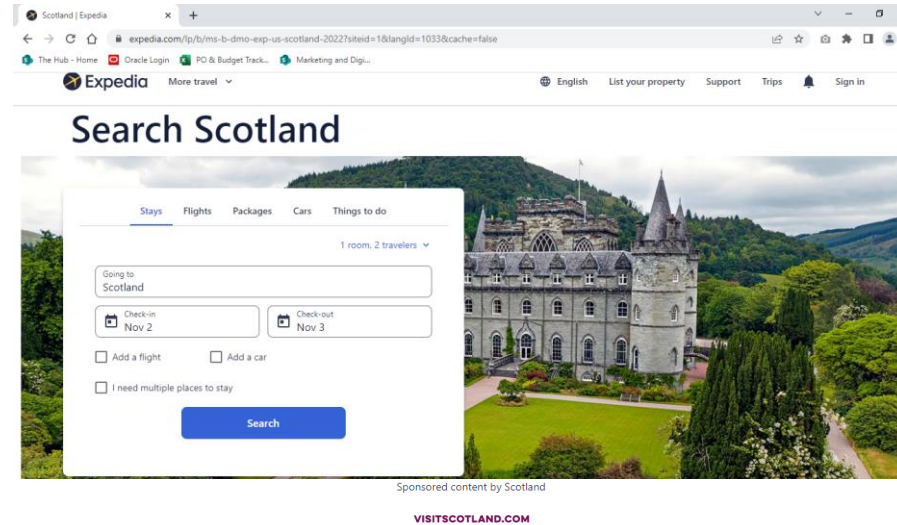


**VisitScotland / CalMac** partnership campaign encouraging ferry travel through the autumn. Activity included **Reach** partnership with **interactive quiz**, **articles** and **digital adverts**, as well as **paid social media**, **display advertising** and a high value **influencers** **Flying the Nest** with **1.2m YouTube** subscribers, who visited Tarbert, Portavadie and Isle of Bute. Added value PR also achieved via Metro, Sunday Post and the i.





# EXPEDIA INSIGHTS

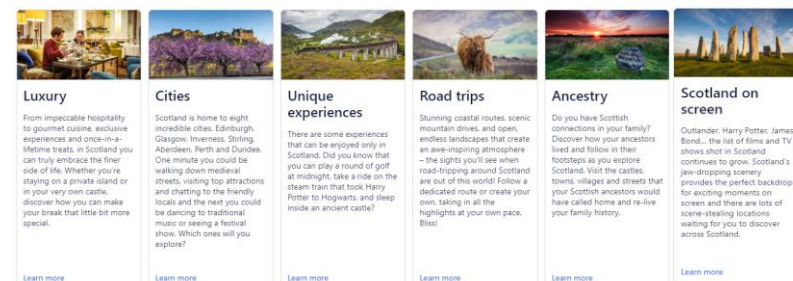


## Scotland is Calling

Scotland, a land full of treasures, waiting to welcome you. Follow waymarked trails around lochs and through forest parks; explore our delightful cities with welcoming neighbourhoods, attractions and parks; discover rugged coastlines with magnificent views or historic landmarks; and enjoy a story (or five) with the locals as they share our history and give you the inside track on the best places to explore. Reconnect with your loved ones, recharge your soul and make some new memories.

Fly direct to Scotland with Delta, United and Virgin Atlantic in 2023.

## Discover Scotland



- Argyll and the Isles have recently seen **room night volumes exceed 2019 levels** (largely driven by the Isles performance over Argyll)
- Argyll & Isles Last 28 days trends – different picture to mainland Scotland with **longer lead times, summer months seeing high share** of search and transactions
- Heavy **emphasis on international**, specifically US demand
- Domestic trends** last 28 days – **marginally higher** propensity for domestic travellers to book in **December/November**.
- Highest demand/booking share for **2 x adults**

# VISITSCOTLAND EMAIL SUPPORT

Argyll and the Isles have featured in a multitude of emails across the year.

Q3 focus - Ferry Trips / Island Hopping / Autumn Escapes / Landscapes & Nature / Winter Breaks / Days Out

## Recent Q3 emails;

- Ferry Good Autumn Breaks
- Scotland's Best Autumn Photography Spots
- Introducing: Graham!
- Spook-able Tours & Accommodation (new Witch trail)
- Scotland After Hours
- Scotland's Winter Wonderland
- Winter City Breaks

Emails sent to **all markets** with **EU** versions displayed in native language thanks to our inhouse translation team.

These emails had a collective reach of **over 7.4 million consumers**



Tobermory, Isle of Mull

## 5 AUTUMN ISLAND BREAK IDEAS

Excited about the new season? Book a coastal short break to recharge those batteries and let the wonderment of Scotland bring some colour to your life. Soak up the landscape's natural splendour, with unmissable events, hearty food and drink that's sure to leave a warm autumn glow.

BE INSPIRED



## FERRY GOOD DEALS



Scapa Beach



Port Charlotte, Isle of Islay

### ORKNEY AWAITS

Pentland Ferries to Orkney is an hour's sail across the Pentland Firth on a luxurious eco ship.

BOOK HERE

### FREE TICKETS

Until 29 Sep join the Discover Ferries ballot to win free ferry tickets to the islands of Scotland.

APPLY HERE

### ISLAND SAILINGS

From the Isle of Arran to tranquil Lewis, Mull and Uist. Get away this autumn with these most scenic Calmac crossings.

SET SAIL



Oban

## AVVENTURE SOTTO LE STELLE

Meravigliose aurore boreali, brillanti stelle cadenti e scintillanti costellazioni: osserva i cieli notturni della Scozia prendere vita.

GUARDA VERSO L'ALTO



Brodie Illuminated, Forres © Marc Hindley, Visit Forres

## SPEGNI LE LUCI - ACCENDI IL DIVERTIMENTO

Illumina i mesi più bui con queste illuminazioni e suoni sensoriali.

EVENTI SPETTACOLARI



## LUOGHI DI SOGGIORNO ACCOGLIENTI

Trova il posto perfetto per riposare la testa e ricaricarti per il giorno successivo.

TROVA UN LETTO



Edinburgh

## UNCOVER CHRISTMAS MAGIC

It's the most wonderful time of the year, and where better to experience the enchanting festive feeling than in one of Scotland's eight cities. From Scotland's newest, Dumfries, to Inverness and Aberdeen, discover how you can have a Christmas cracker of a time.

EXPLORE



V&A Dundee



Clava Cairns, Inverness

## A HIGHLAND WINTER

Named as one of National Geographic's 'Best of the World' destinations for 2023, explore the scenic Highland city of Inverness and its truly spectacular surroundings.

PLAN YOUR TRIP



Kelvinside Art Gallery and Museum, Glasgow



Stirling

## INDOOR ATTRACTIONS

Head inside to top up your creativity or indulge in a spicy apple this winter.

LEARN MORE

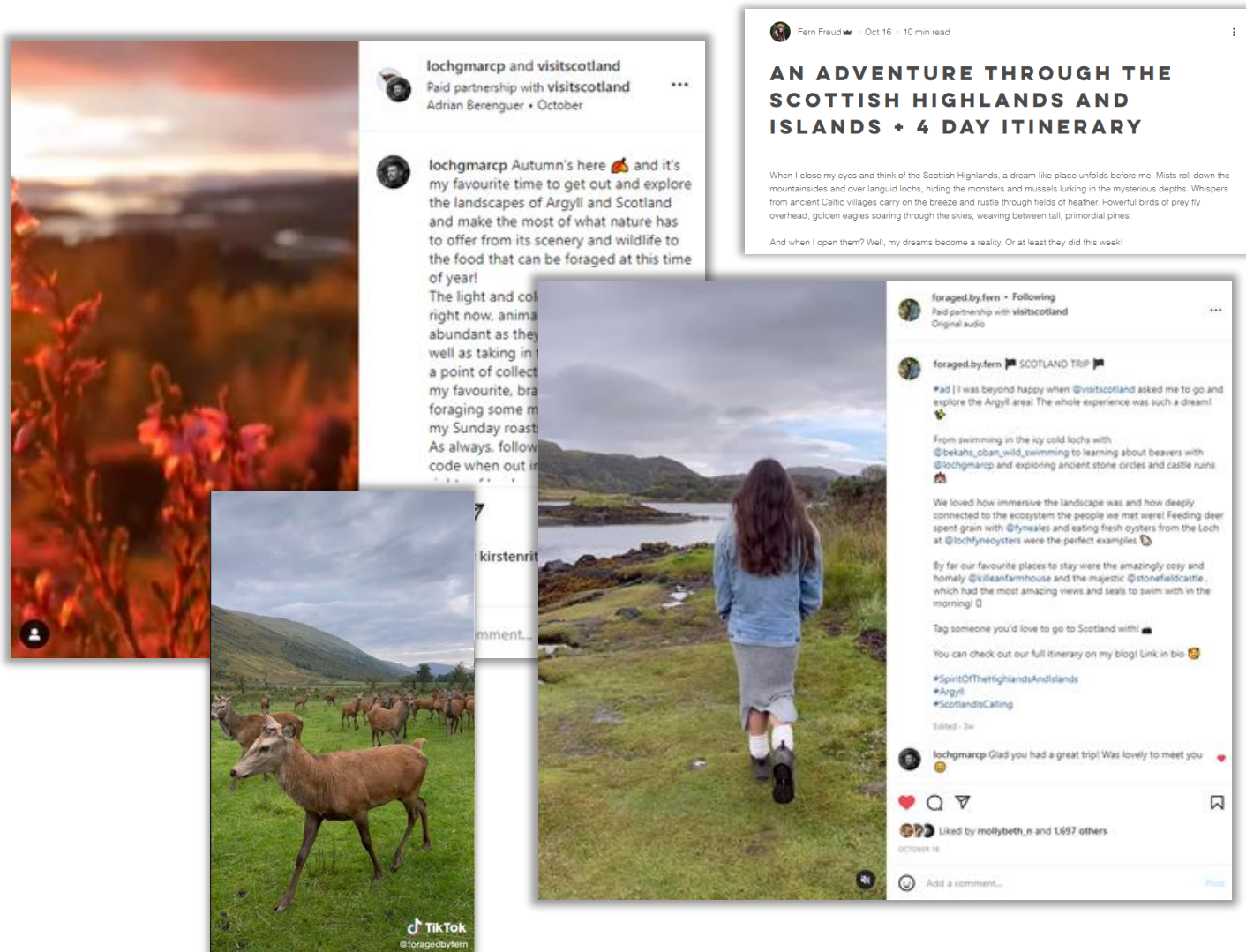
## WINTER FESTIVALS

'Tis the season to enjoy the festive fun across our cities, as the lights turn on and excitement levels begin to rise.

DISCOVER



# VISITSCOTLAND INFLUENCER ACTIVITY



Promotion of the natural and cultural heritage of Argyll, including:

- Natural flora and fauna
- Natural larder
- Community & people
- Responsible tourism
- Landscapes

## Fern Freud

Blog post

## Instagram Reel

29,800 views

1590 likes

99 comments

21,752 reach

107 saves

7.76% engagement

## Tiktok Video

1970 views

183 likes

9 comments

## Marc Pickering

## Instagram Reel

110,628 views

3563 likes

68 comments

97,305 reach

78 Saves

3.73% engagement



THANK YOU

