

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**
- **Examples showcasing South of Scotland**





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 2022 (18% down on Qtr 1 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 behaviour

- **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 & Flexcation** – new types of holidays
- 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

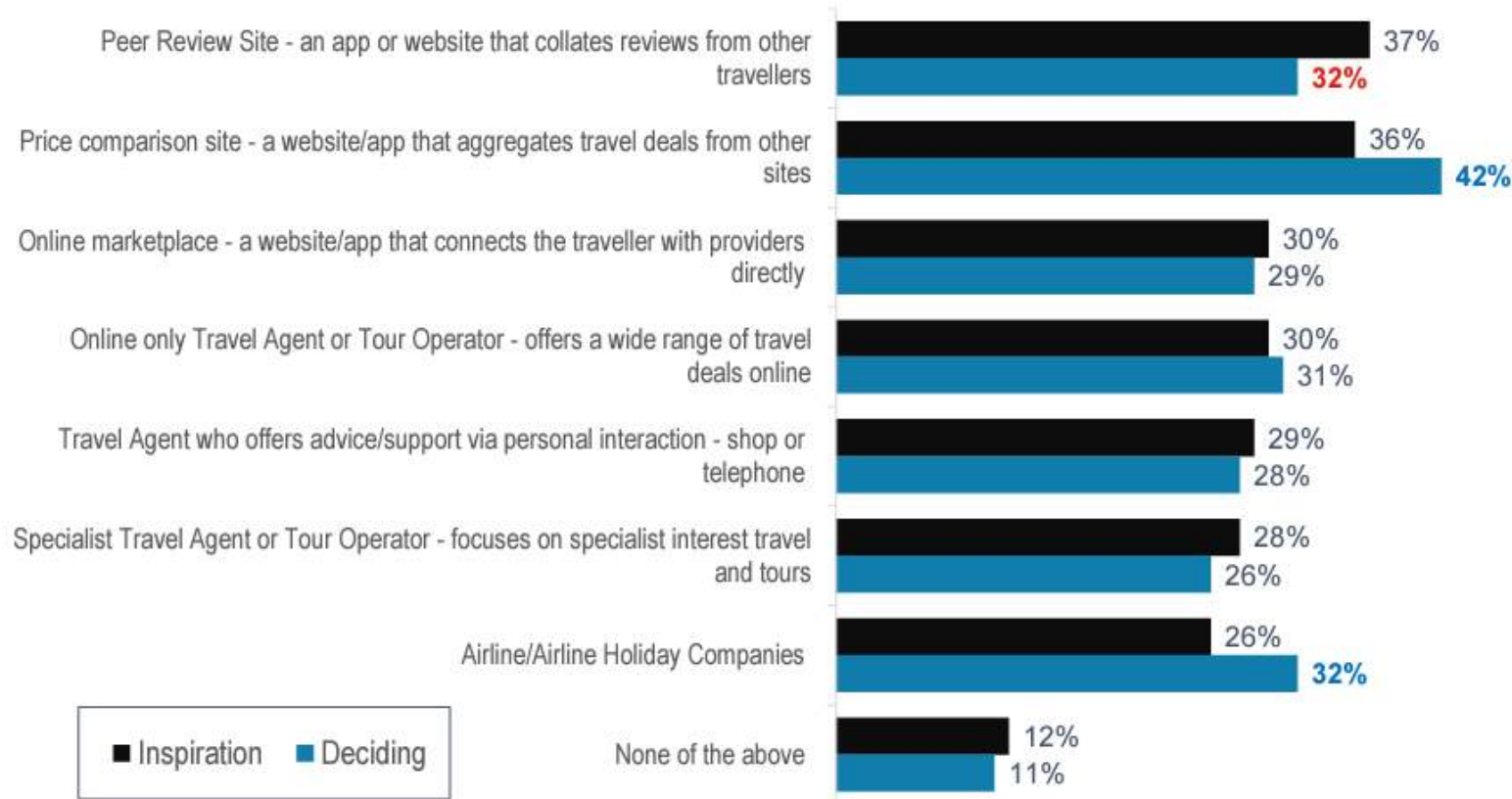


Changed booking habits

- **Word of mouth & social media are the two main sources of travel inspiration**
- **Booking windows:** 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.**
- Its 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**

When it comes to the deciding phase, at a global level, we see the role of price comparison sites and airlines significantly increase, whilst the relevance of peer review sites diminishes somewhat

Comparing Use From Inspiration to Deciding Phases of the Customer Journey



Blue numbers in the table reflect a significant increase vs the previous Inspiration phase; red a decrease

The role of each intermediary drops back down again in the planning phases (see full report), but booking behaviours become more interesting

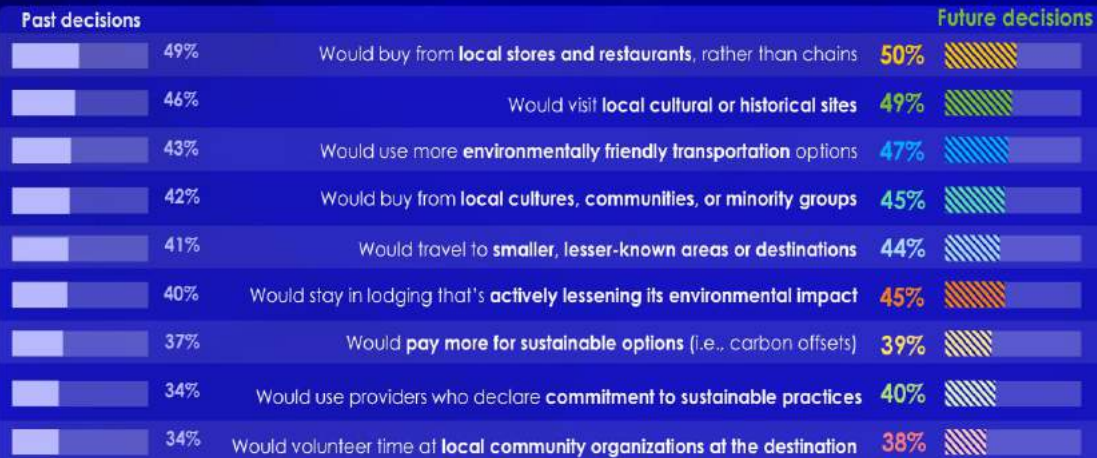
I2: Thinking about what you would do at each stage, which of the following applies to the inspiration, deciding and planning stages? Multiple Response.
Base: Total Global N=22,840 Buzzseekers N=6, 677 Weighted.
Blue numbers are significantly higher than comparative base @ 95% confidence

EXPEDIA SUSTAINABILITY INSIGHT

POSITIVE BEHAVIOUR CHANGE – REINFORCES OUR RESPONSIBLE TOURISM APPROACH



And more want to make **meaningful decisions** when traveling in the future



expedia group
media solutions

Q4. Which of the following, if any, would you want to do the next time you travel, for either leisure or business?



74% of consumers
would choose a
destination, lodging,
or transportation
option

that is **committed to supporting the local community and culture**, even if it was more expensive

Q22. If a travel destination, accommodation, or transportation option was more committed to supporting the local community and culture than other options, would you choose that option even if it was more expensive?

expedia group
media solutions

HOW HAVE THINGS CHANGED?

You must be **seen**...

Viewability and watch time matters as length of exposure matters

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

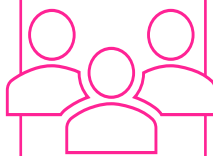
- **'Streamer locations'** spark a behind the lens experience
- Culture shocks and **connecting with nature**
- Mix of traditional and modern unique experiences
- **Values marketing is key.** Personal values become a bigger part of the story - 72% of brand values matching consumers personal values is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



WHAT DOES IT MEAN?

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**

- 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

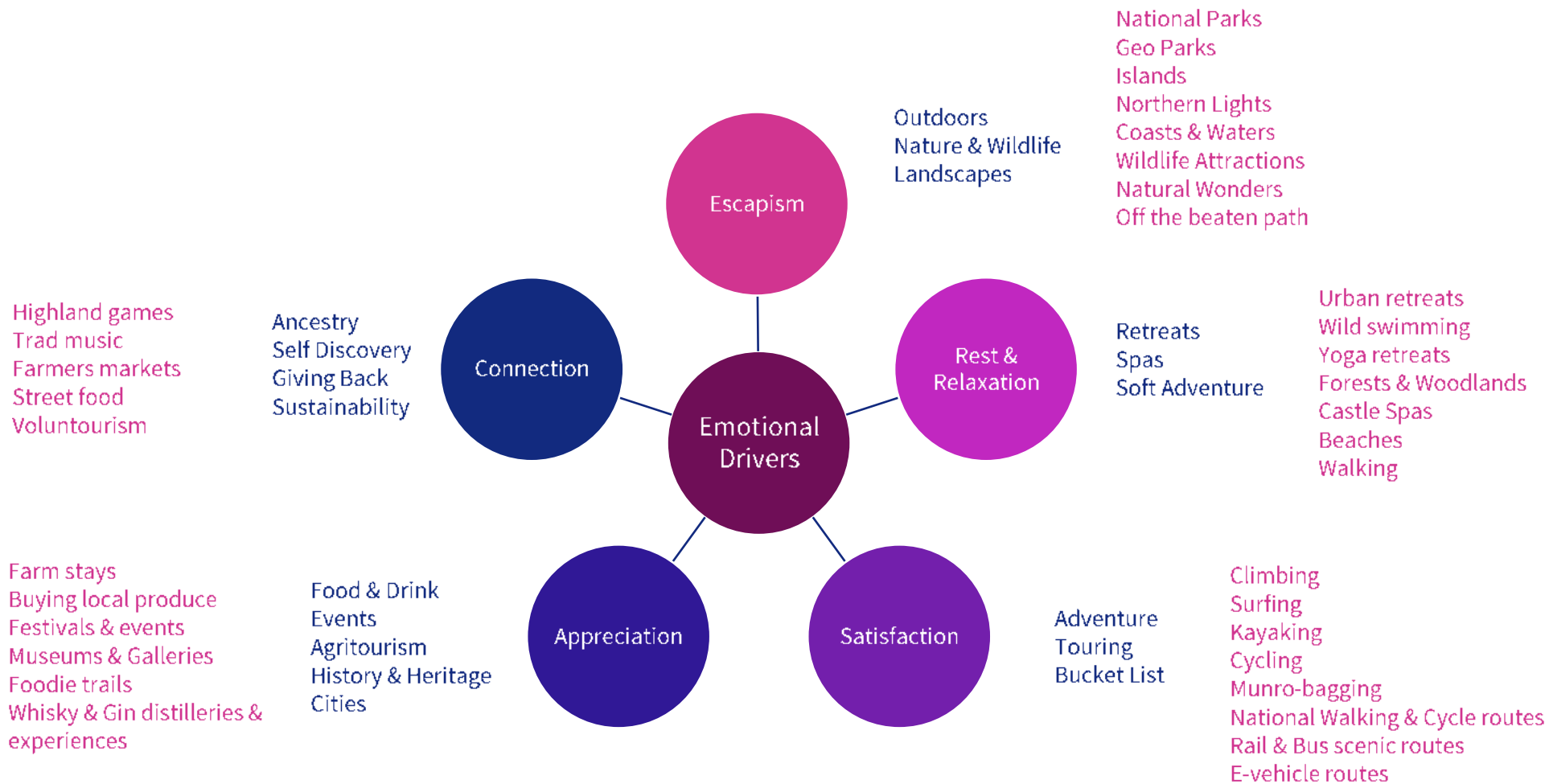
Authentic
Storytelling

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.

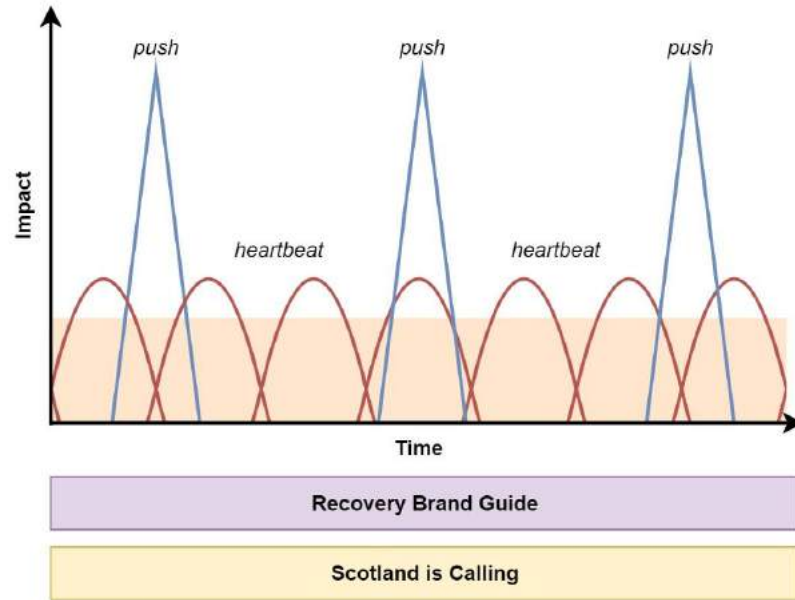
You know where to find us.

Scotland is calling.

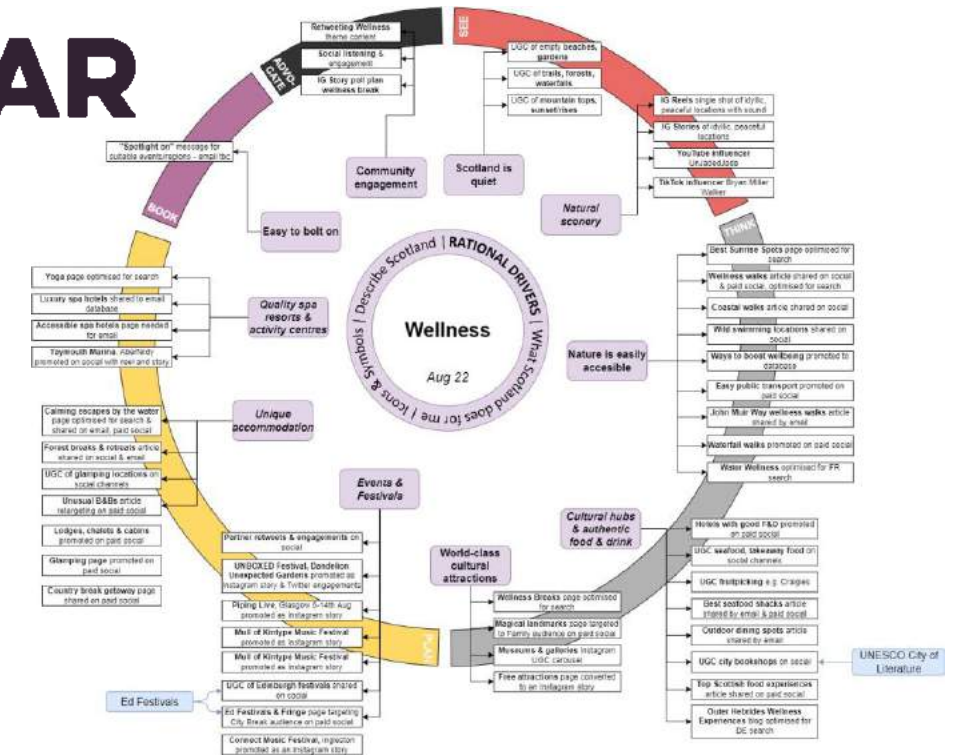


The world needs Scotland like never before – telling our story, sharing our values

STORY TELLING 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

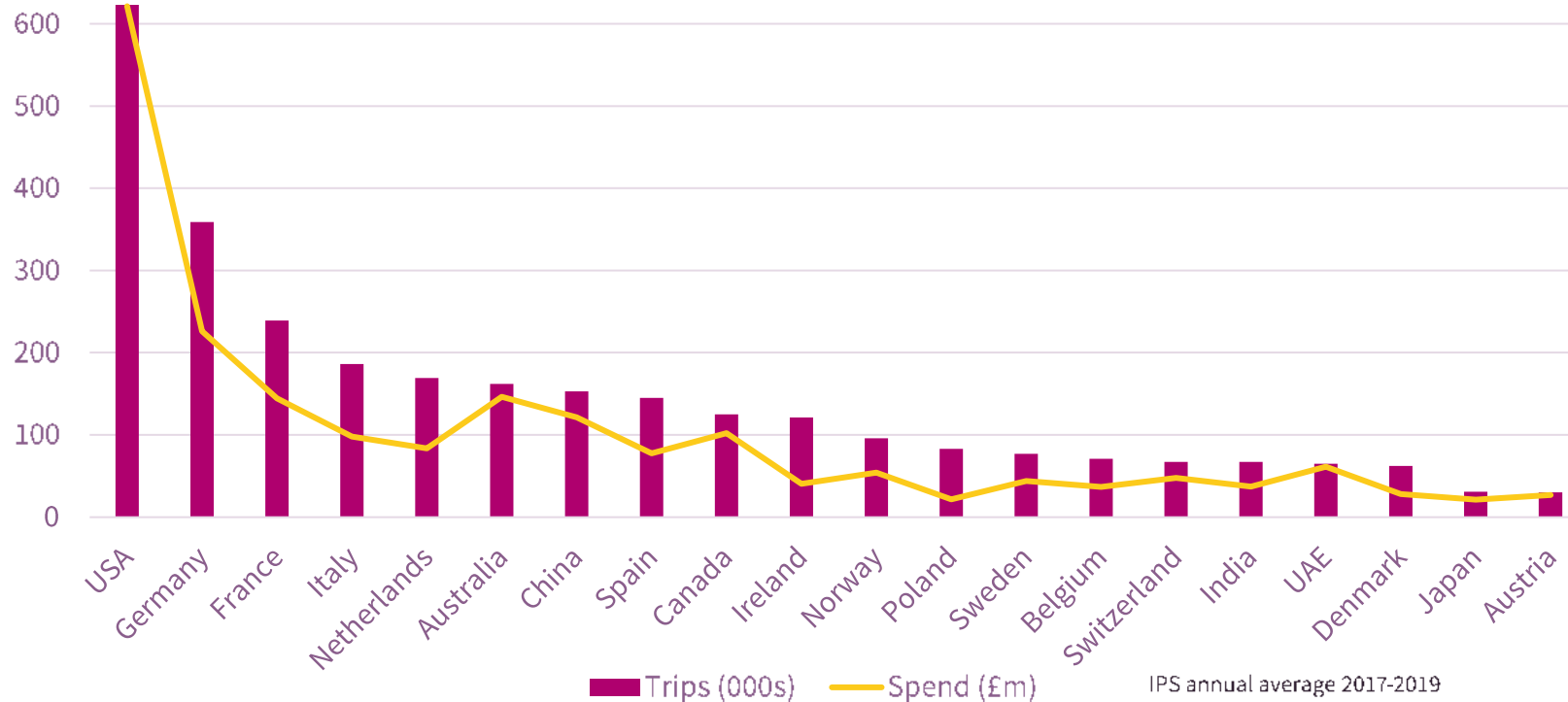
Feb: Outdoor Adventures

- 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

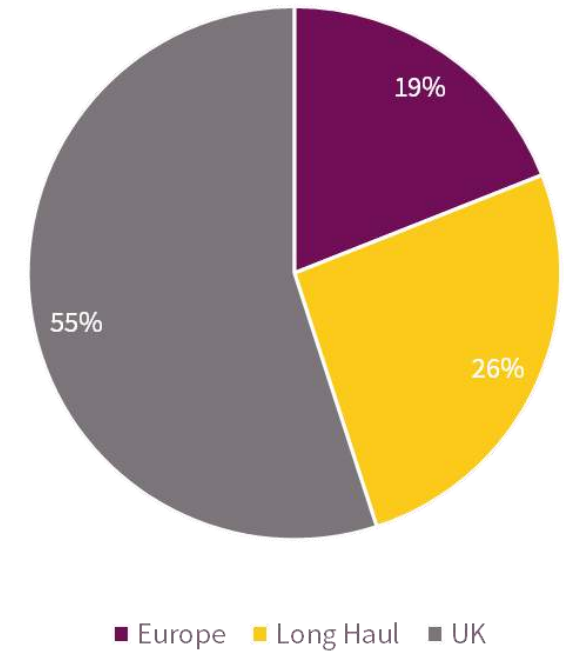
Mar: Family Breaks

- 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.

MARKET PRIORITIES



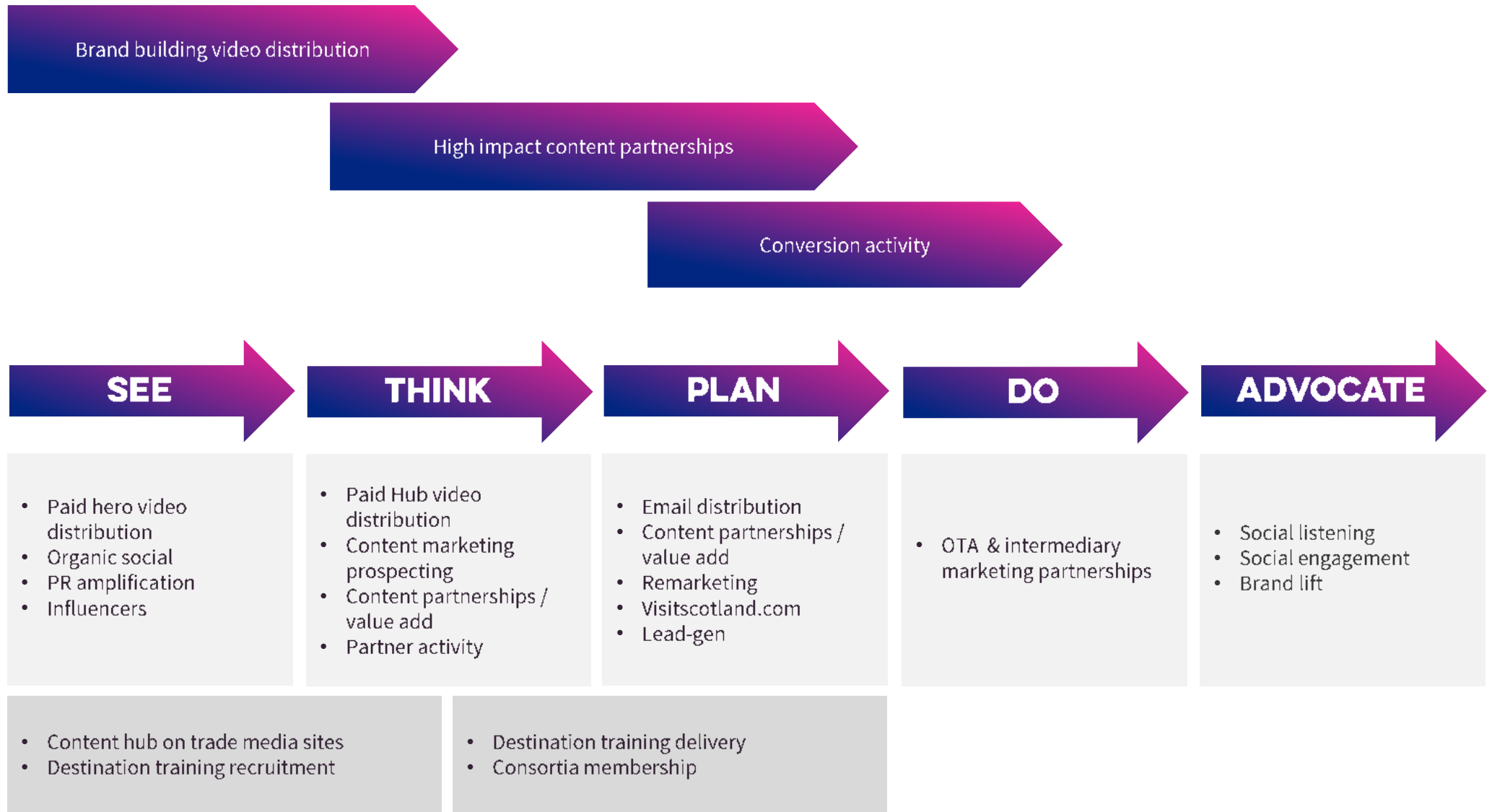
Spend



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

Tour
Operators

Travel
Advisors

DMCS
Wholesalers

OTAs

Airlines &
Vacation
Arms

STRATEGIC PARTNERSHIPS

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
VISITSCOTLAND CONNECT – APRIL 2023

REFRAMING SUCCESS



Spread

Regional spread
Seasonal spread
Industry (benefit)
spread



Spend

Quality over quantity
Value over volume
Elongating visits
Shop local



Sustainability

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



Satisfaction

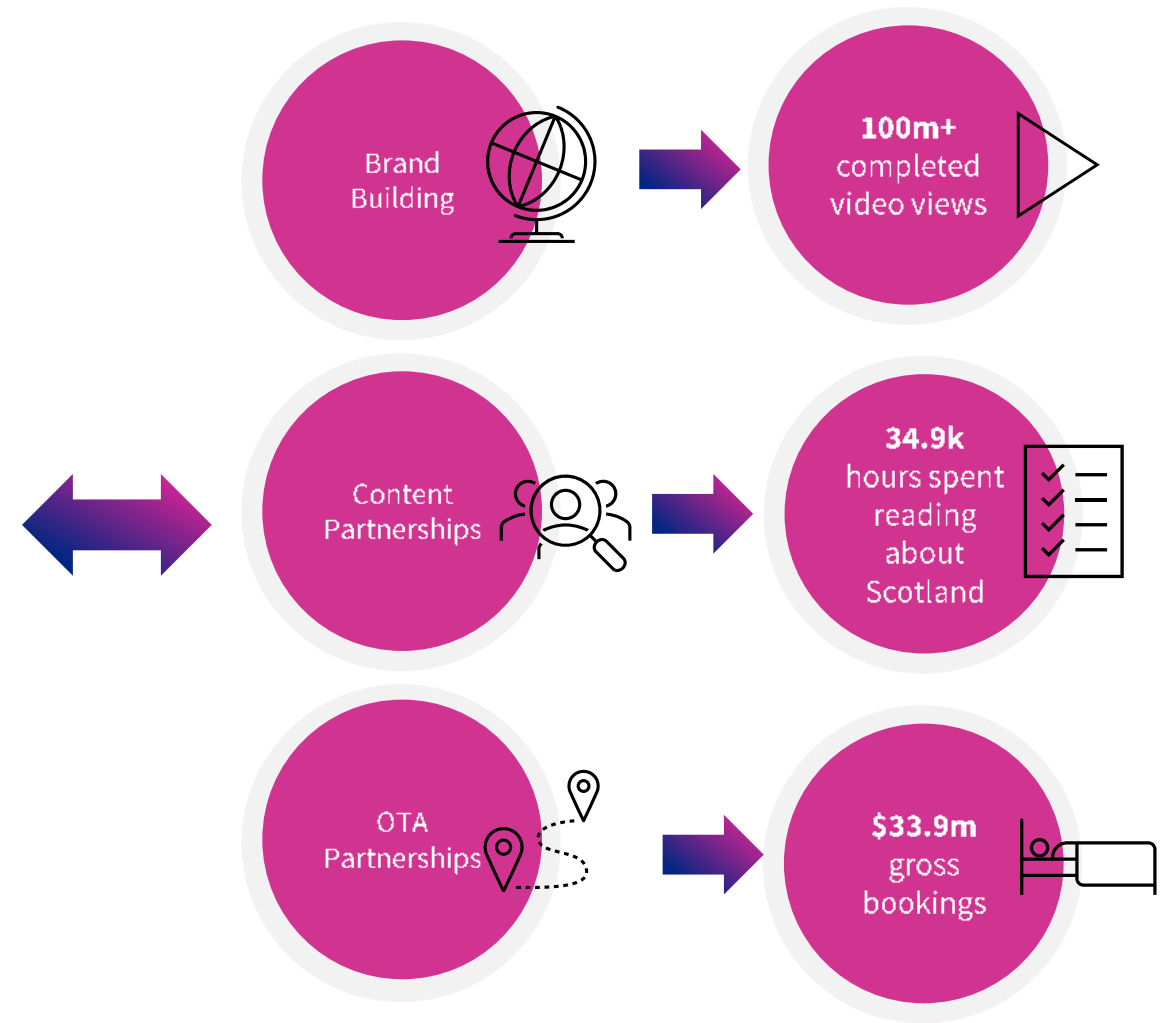
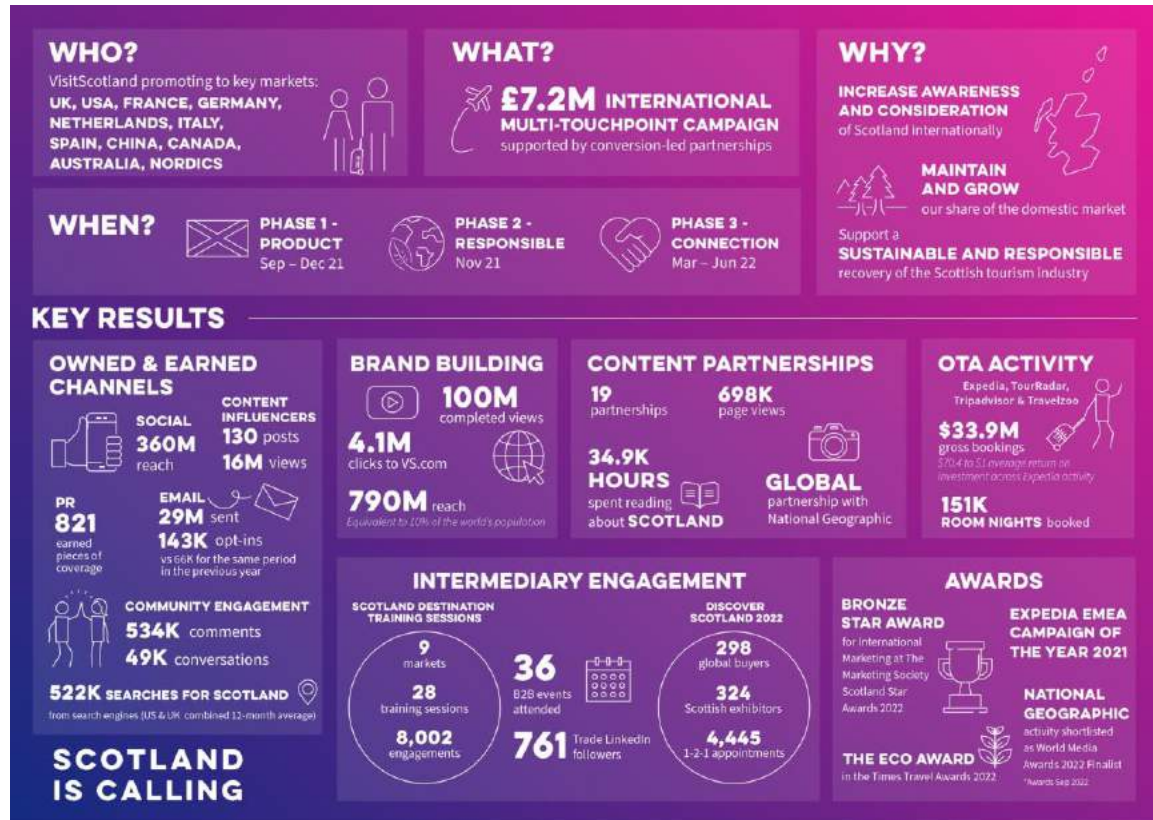
Local satisfaction
Visitor satisfaction
Industry satisfaction
(Fair work; profile of the
sector; sustainable
growth)



ACTIVITY OVERVIEW

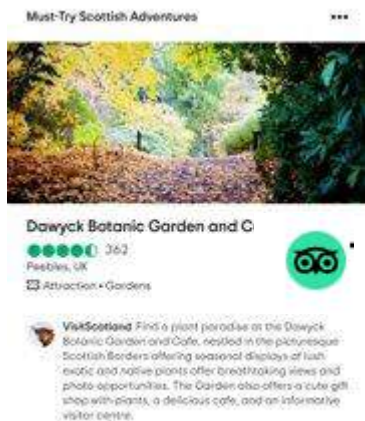
Harnessing the power of social advocacy and media partnerships

OUR MARKETING IN 2022/23



Scotland is Calling: results so far

A CREATIVE SNAPSHOT...



The world
needs Scotland
like never
before...

SCOTLAND IS CALLING



Dumfries

You're a sucker for a good book and a bit of history and culture, which makes the southern Scottish town of Dumfries, nicknamed the Queen of the South, your ideal getaway spot. The town is home to a handful of interesting historic gems, including one of Scotland's oldest bridges, Devergil's bridge or the Old Bridge and is named after Devergil, Lady of Galloway, the mother of King James Balliol. Then there's Greyfriars Church, the site of the monastery where Robert the Bruce participated in the infamous murder of John III Comyn, Lord of Badenoch. Dumfries also has a rich literary history to get stuck into, calling itself home to the likes of Peter Pan author JM Barrie and iconic poet Robert Burns. Find out more and plan your trip with VisitScotland here.

South of Scotland: creative examples

VISITSCOTLAND EMAIL SUPPORT

The South of Scotland has featured in a multitude of emails across the year.

Focus - Family / Outdoor Activities / Eco & Responsible / Spring & Summer Breaks / Autumn Escapes / Landscapes & Nature / Winter Breaks / Days Out

Recent emails;

- 11 places you must visit
- This season's greatest travel experiences
- Castles, a love story and smugglers
- Summer holidays with your kids
- 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 14 million consumers**



The Green House, Selkirk

ECO FRIENDLY ACCOMMODATION

Make your trip more sustainable by choosing an environmentally friendly green hotel or rustic eco cabin.



The Green House, Selkirk

ALOJAMIENTO ECOLÓGICO

Haz que tu viaje a Escocia sea más sostenible eligiendo un hotel ecológico o una cabaña ecológica rústica.

BUSCA AQUÍ



FAMILY FRIENDLY REGIONS

MIDLOTHIAN AND THE SCOTTISH BORDERS

Log off from work and enjoy quality time with your kids. Enjoy family days out, lifting the secrets of these hidden gems.

EXPLORE

SOUTH WEST SCOTLAND

Discover Dumfries & Galloway and Ayrshire. Spot red deer, wild goats, historical castles and tie in action packed outdoor adventures.

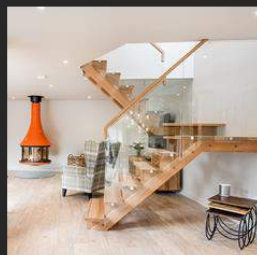
EXPLORE



Floors Castle, Kelso



Galloway Activity Centre, Loch Ken



Coledale Stables, Kelso © Crabtree & Crabtree

COSY PLACES TO STAY

Find that perfect somewhere to rest your head and recharge ready for tomorrow.

FIND A BED

SCOTLAND | ALBA

View online



Hermitage Castle, Newcastleton

STORIES OF SOUTHERN SCOTLAND

Indulge your curious side and venture into the south. Create your very own tale to tell and head off the beaten track, where dramatic castles set in lush greenery will take your breath away and ancient accommodation will make you feel like a million dollars!

DISCOVER




Ancient sleeps

OLDEST ACCOMMODATION IN SCOTLAND

Feel like an A-lister and rest easy in some of our ancient yet modern stays. Find towering castles, luxurious B&Bs, and grand hotels which retain their historic features.

BE OUR GUEST

EMAIL INSPO




Galloway Activity Centre, Loch Ken

FOR OUTDOOR ENTHUSIASTS

We'll let you in on one of our best kept secrets - filled with exciting activities, forests, coasts and mountains, the Galloway and Southern Ayrshire UNESCO biosphere is an outdoor haven.

SEE ITINERARY



The Brig o' Doon, Alloway

#TALESOFSCOTLAND


Experience the real-life locations from your favourite films, books and songs. Come and discover your own tale of Scotland.

FIND OUT MORE

8 STORYTELLING ATTRACTIONS

It's lovely to get lost in a book so why not capture that feeling on your days out? We've pulled together our favourite storytelling attractions.

SEE HERE



Moat Brae, Dumfries



Coldingham Bay

SOUTHERNLY SCENIC WALKS

Explore on foot, across coastal gems, family-friendly forest trails and hill climber's routes to suit everyone.

WALK ON

SCOTLAND | ALBA

Ver en línea



Caerlaverock Castle, Dumfries © Damian Shields

LOS MEJORES LUGARES PARA FOTOGRAFIAR EN OTOÑO

Descubre los mejores lugares para visitar en Escocia dignos de una fotografía: ¡perfecto para planear un viaje de vacaciones de otoño ahora o en 2023!

VER ESTOS 14 SITIOS

VIAJAR

ALOJAMIENTO

REGIONES





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VisitScotland, 94 Ocean Drive, Edinburgh EH6 6JH
VisitScotland Communications VAT No. 945 662106



Floors Castle, Kelso

EASTER GETAWAYS IN SCOTLAND

Get stuck into plenty of family activities this Easter! From short walks that are ideal for everyone to top attractions that kids will love too. It's the perfect time of year to enjoy a spring break.

DISCOVER



Kitchen Coos and Ewes, Newton Stewart

10 OF THE BEST TOURS

Not sure where to start with a touring holiday in Scotland? We're here to help with our handy guide.

EXPLORE TOURS



Sweetheart Abbey, New Abbey

SOUTH SCOTLAND SPOTLIGHT

Be fascinated by tales of romance and magical legends, ghosts and smugglers.

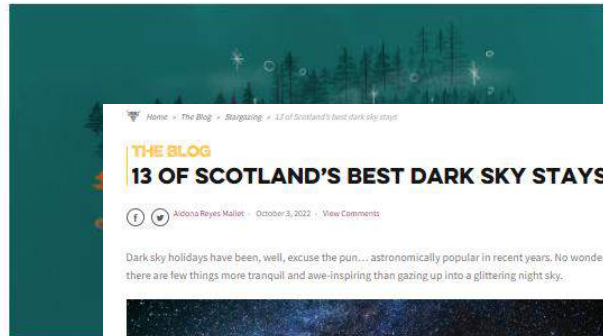
DISCOVER

VISITSCOTLAND.COM CONTENT



THE BLOG UNCOVER SCOTLAND'S WITCH TRAIL THIS HALLOWEEN SEASON

📅 📍 Main Scoble · September 29, 2022 · View Comments



THE BLOG 13 OF SCOTLAND'S BEST DARK SKY STAYS

📅 📍 Aidona Reyes Mallat · October 3, 2022 · View Comments

Dark sky holidays have been, well, excuse the pun...astronomically popular in recent years. No wonder, as there are few things more tranquil and awe-inspiring than gazing up into a glittering night sky.



THE BLOG 14 PLACES IN SCOTLAND YOU MUST VISIT IN 2023

📅 📍 Annaliese Knox · November 9, 2022 · View Comments



Are you planning your next Scottish adventure and need a bit of inspiration to plan your next Scottish adventure? Have a look where best to see planets from the comfort of your holiday accommodation.

THE BLOG HOW TO ENJOY A LOCAL COMMUNITY EXPERIENCE IN SCOTLAND

📅 📍 Nikki Stewart · November 4, 2022 · View Comments

How can you support local communities in Scotland? Whether you're out for the day or staying for a week, we'll show you how to best support local communities.

We've put together a list of community experiences and events where you can learn about the local culture. There are also community-owned businesses, and charity experiences where the money supports local individuals.

See local community experiences in the:

Dumfries & Galloway and the Scottish Borders features regularly in our content across vs.com and the blog



Jedburgh Abbey

★★★★★ | Jedburgh | Churches & ...

One of the four border abbeys, Jedburgh Abbey is a magnificent ruin.



New Abbey Corn Mill

★★★★★ | New Abbey | Historic Buildings & ...

The fully restored water-powered New Abbey Cornmill offers visitors a wonderful insight into Scottish rural life in years gone by.



Abbotsford

★★★★★ | Melrose | Historic Buildings & ...

Abbotsford is the ancestral home of Sir Walter Scott, the 19th century novelist and poet of "Waverley", "Ivanhoe", and "Lady of the Lake". Join Abbotsford...



Price from:
£2.75

Visit:
[WEBSITE](#)



Visit:
[WEBSITE](#)



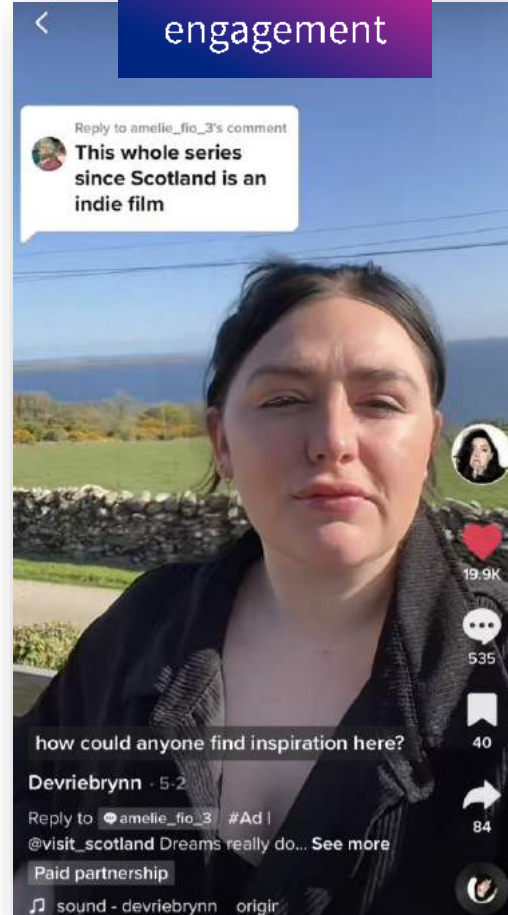
Several businesses across the South are participating in the Great Days Out campaign, which runs until March 2023 and has included press and digital articles across Daily Record, The Sun and regional titles

INFLUENCER ACTIVITY

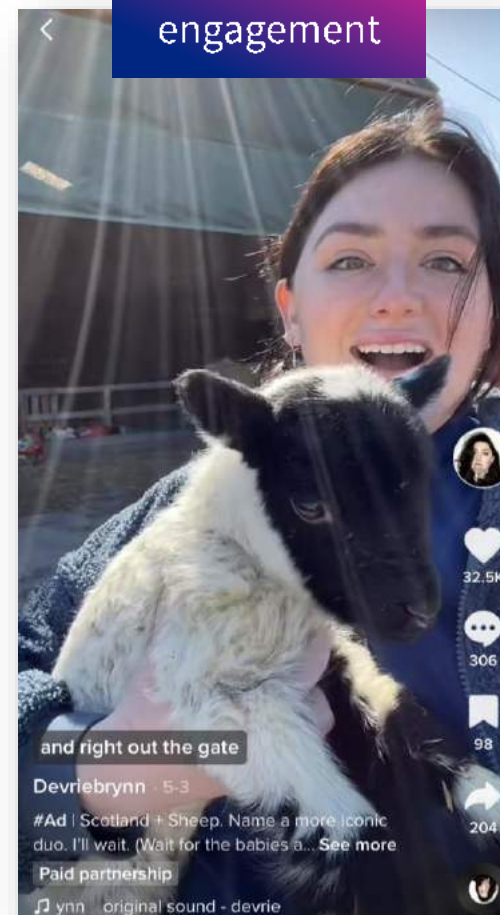
Collaboration with Tiktoker Devrie Donalson

- Created X3 Tiktok videos in the South of Scotland, with “off the beaten track” messaging
- X2 videos out performed our 2022 influencer engagement rate average of 15.65%
- Top X2 performing were re-purposed on Instagram, achieving 14.11% and 13.94% engagement
- Combined 280K views across platforms
- Combined 259K reach across platforms
- Highest average engagement rate for any influencer activity in 2022

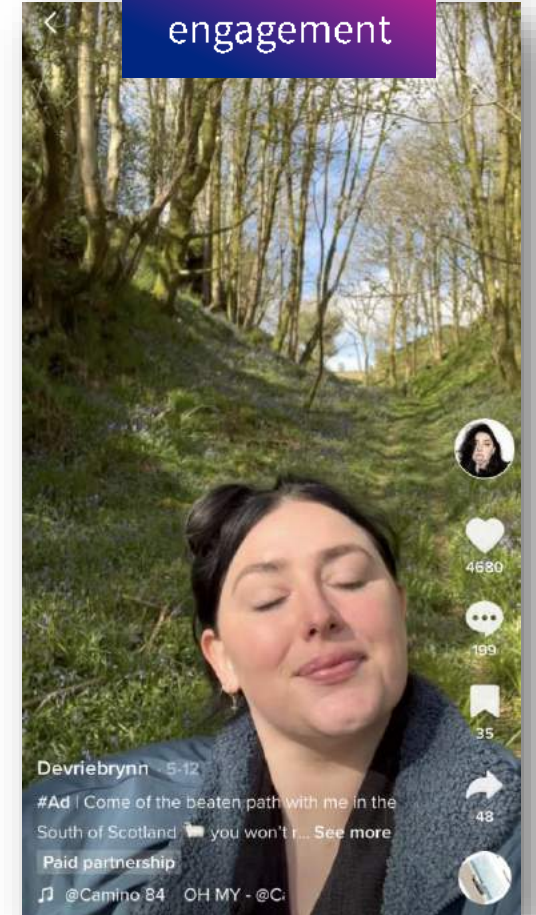
24.49%
engagement



26.26%
engagement



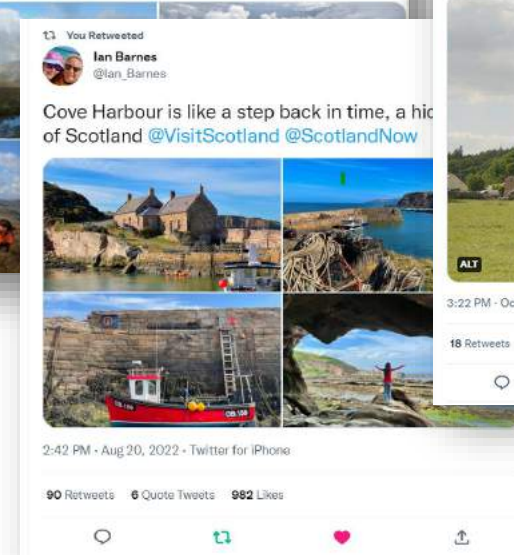
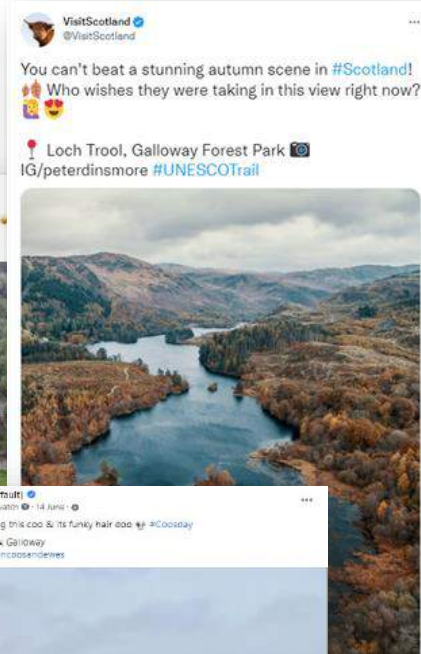
13.94%
engagement



CONSUMER SOCIAL ACTIVITY

Social listening & engagement

Sharing UGC from across South Scotland



YEAR OF STORIES ACTIVITY

Scotland's Year of Stories has celebrated events, visitor experiences and community tales from across the country. Content on VisitScotland.com, paid social media and publishing partnerships highlighted the South of Scotland



Home » The Blog » 8 Stories About South Scotland

THE BLOG 8 STORIES ABOUT SOUTH SCOTLAND

Santh Clark - January 11, 2022 - View Comments

THE BLOG 15 SCOTTISH TOUR IDEAS FOR BOOK LOVERS

Alexandra Hughes - November 11, 2021 - View Comments

5. BARRIE BURNS TOUR BY ALLOWAY



The great Robert Burns is often described as the Bard of Scotland. The richness of his work, and that of his contemporaries, adds to the richness of Scotland's literary heritage. Burns is a national treasure, and his work is celebrated in many ways. This tour explores the life and work of Burns, from his early years in Alloway to his final days in Edinburgh.

Take the Burns tour

6. TRAVEL TO THE SCOTTISH BORDERS IN SEARCH OF WALTER SCOTT



Walter Scott is one of the most famous Scottish writers. His novels, such as 'Rob Roy' and 'The Lady of the Lake', are still read today. This tour explores the life and work of Scott, from his early years in Edinburgh to his final days in Scotland.

Discover literary locations in south Scotland

One of the best performing Facebook posts featured Borders Book Festival

VisitScotland (Default) Sponsored

Be inspired at fantastic events and festivals bursting with creativity and stories - of all kinds!

#TalesOfScotland #YS2022

Borders Book Festival, Melrose



VISTISCOTLAND.COM/STORIES
Must see events in the Year of Stories 2022

LEARN MORE

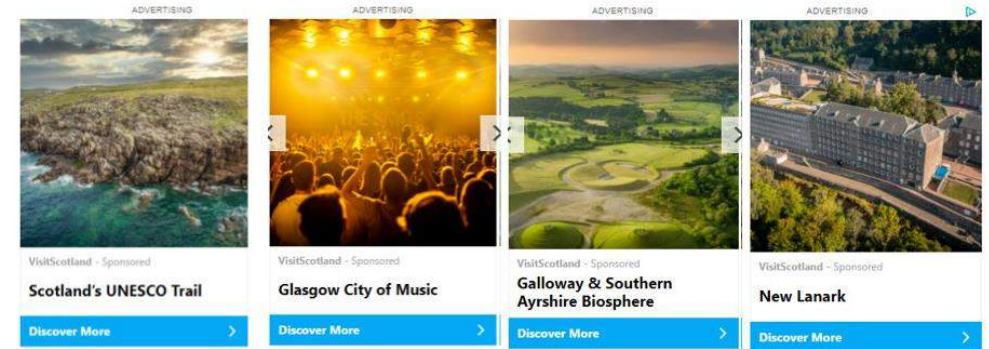
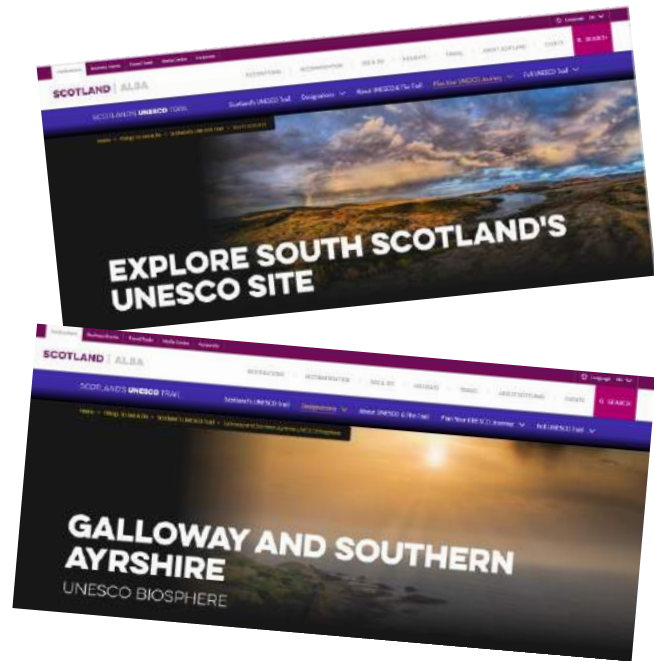
Like Comment Share

YEAR OF
STORIES
— 2022 —



Year of Stories partnership with The Guardian featured a number of articles referencing South of Scotland's literary connections, including Sir Walter Scott, John Buchan and Robert Burns

SCOTLAND'S UNESCO TRAIL



Scotland's UNESCO Trail features the Galloway and South Ayrshire Biosphere

Paid media promotion is running across UK/DE/FR



CONCLUSION

Key take-outs:

- Today's traveller increasingly wants to understand the impact of their actions on the people around them and the wider world
- Together we can leverage that to create a better place for people to live and visit
- You need to be seen in the platforms consumers are using for looking and booking – be discoverable
- Visitscotland.org and your Industry Relationship Manager are two key sources of advice

What could you do to attract a higher value experiential visitor and play your part in Responsible Tourism?

Tell your story :

- What you are doing to reduce your carbon footprint
- Your commitment to your local community & supporting local – local produce etc.
- Share your tips on local sustainable travel & experiences
- Guide your visitors to enjoy the outdoors responsibly

THANK YOU

