



VISITSCOTLAND **ONLY IN SCOTLAND** 2021 PLANS

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#SCOTLAND|SNOW

TODAY

- 2021 strategic approach
- A few insights
- Domestic activity
- International activity
 - - Europe
 - - North America
 - - Emerging
- What next
- STERG, Industry recovery strategy, business support

OBJECTIVES

Tourism Task Force paper sets out 4 key aims:

- Secure our assets (businesses, cultural attractions, events, talent)
- Maintain/increase our domestic market share
- Bring back international visitor value within 2 years
- Create the conditions for longer term resilience

MARKET PRIORITISATION 2021

OBJ. & DIRECTION	Short term focus on which markets will deliver speedy recovery for tourism economy whilst supporting medium term growth from key markets		
	Keep Scotland top of mind for all markets, and deliver conversion as soon as safe to do so		
	<u>Responsible</u> Travel		
VISIT POTENTIAL	Immediate: April/May onwards	SHORT: Late <u>summer</u> onwards	MED: <u>Autumn</u> onwards
	Scotland, rest of UK	ROI, Germany, France, Netherlands, UAE, Italy, Spain	USA, Canada, China
WHY	First to be able to travel	Travel corridors / agile response	Early returners / pent up demand
	Proactive planning and booking from March / April	Awareness / consideration from Feb. Planning from March onwards / Booking CTA when appropriate	Awareness / consideration from March onwards. Reassure autumn is the perfect season to visit Scotland

CRITICAL INDICATORS TO FACILITATE MARKET PRIORITISATION

Likelihood of markets returning to Scotland in 2021/2022

Legal
Travel regulations

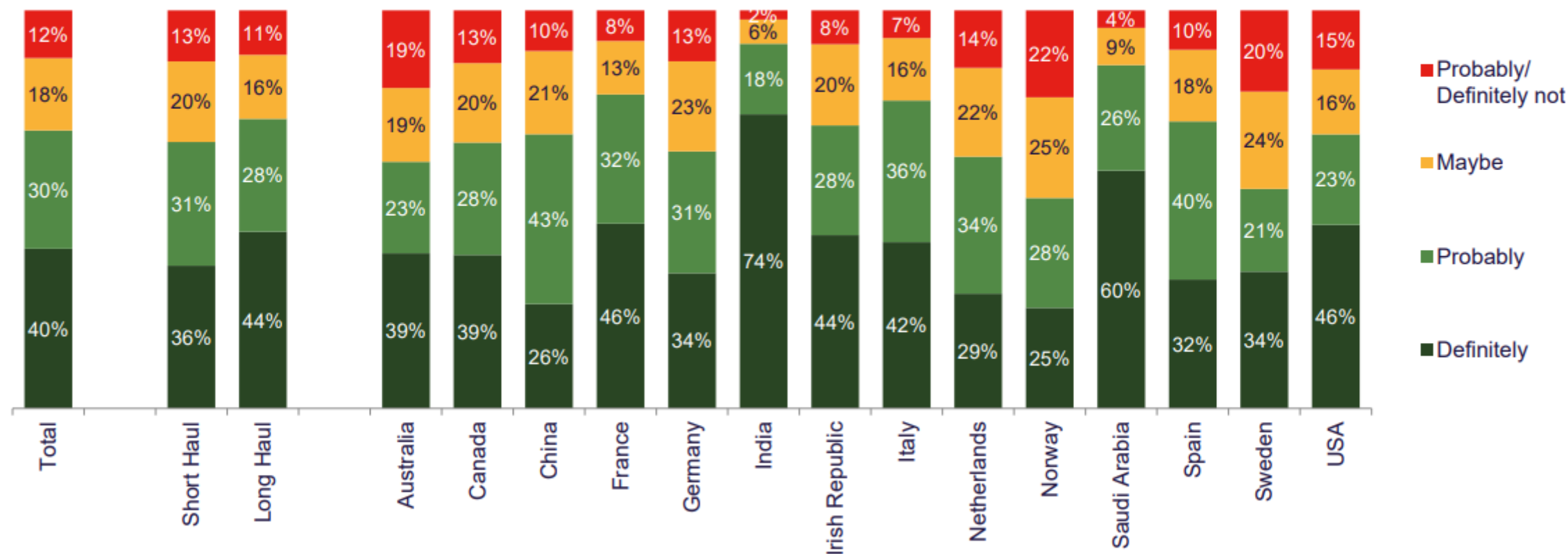
Propensity to Travel
Vaccination Programme
Travel sentiment*

Economic & Financial
Affordability

**Competitor
Set**
Visitor Preferences

Travel consideration for an international leisure trip

Overall, 7 in 10 respondents would consider an international leisure trip in 2021, showing a resilient desire to travel despite pandemic uncertainties. While Nordic markets express a more reserved attitude, France, Italy, India and Saudi Arabia show the most positive sentiment towards travelling abroad.



Q5: How likely would you consider an international leisure trip for more than one night in the next 12 months?
Base: All respondents (n = 8245)

Scotland Intenders – Travel Horizons

Summer at large (including shoulder season June/September) is the most anticipated window for a trip to Scotland for European markets, while interesting opportunities to promote the destination at any season exist for attracting long-haul markets, including in the short term when travel conditions are possible again. *(NB this research was conducted before the new variants were widely reported so reflects intentions in that previous context.)*

Scotland Intenders	Short Haul (n = 179)	Long Haul (n = 334)	Total (n = 513)
Dec 2020-March 2021	14%	33%	26%
Later in 2021	64%	55%	58%
Later in 2022 and beyond	7%	6%	7%



Base: Respondents who plan on taking a leisure trip in Scotland (n = 513)

SENTIMENT & TRAVEL INTENTIONS UK – 19 FEB

Sentiment & National Mood

Proportion of the UK population feeling 'The worst has passed' has increased significantly

6.5 out of 10

Travel Intention

1/3 anticipate same or more domestic overnight short & longer breaks by end of June

Confidence in ability to take domestic trips rising
32% - confident for June trip
63% confident for October onwards

Destination Consideration

1. SW England
2. Scotland

Coastal/Seaside Town
Countryside/Village

Accommodation Preference

- Camping/caravan (37%)
- Hotel/motel/inn (36%)
- Commercial rentals e.g. holiday cottages (33%)

Sources: [Covid-19 Consumer Tracking VB tracker](#) (8th – 12th February 2021)

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COVID SEGMENTATION



Cautious but Content

13% of UK population



Currently Constrained

18% of UK population



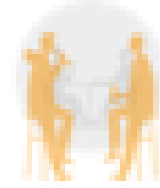
Struggling

26% of UK population



Protective but Pragmatic

10% of UK population



Less to Lose

26% of UK population



Life Goes On

7% of UK population

COVID Cautious

- ✓ Middle aged, large portion 45-55
- ✓ Most concerned about catching Covid
- ✓ Won't travel until absolutely safe

- ✓ Consistent age with population
- ✓ Financial confident early adopters
- ✓ Love to travel but not now

- ✓ Older - more than 1/2 65+
- ✓ Hard hit by Covid. No available funds for luxuries
- ✓ Above average concern about catching Covid

COVID Confident

- ✓ Majority 55+
- ✓ Confident but cautious of broader economic challenge
- ✓ Will travel if responsible to do so

- ✓ Young – mostly under 35
- ✓ Spontaneous optimists with limited funds
- ✓ Fewer barriers to domestic travel

- ✓ Over 25 years old
- ✓ Shrewd and economically savvy
- ✓ Will travel if there are things to do

Full details available [here](#) on VisitScotland.org

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DOMESTIC ACTIVITY

As a nation we need to consider two key opportunity areas:

1. Within Scotland the growing interest in outdoor activities from new to the countryside local audiences who are less familiar with the countryside code and responsible countryside behaviours. We therefore need to look at behaviour change communications that will raise awareness, educate and inspire people to enjoy the beauty and wellbeing of the countryside in a more responsible way.
2. To maintain and grow Scotland's share of the domestic market in order to ensure the economic survival of the many businesses right across Scotland and the supply chain that make up the visitor economy. We believe that this is a **high opportunity year where targeted, relevant messaging, invested to capture the 'undecideds' will help assist with Scotland's claim to holidays not only now, but in years to come.**

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WHAT WE MUST LOOK TO PREVENT



Visitor management challenges

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SCOTS – RESPONSIBLE TRAVEL

SUMMARY

Objective	<ul style="list-style-type: none">Inspire Scots to travel responsibly, once current restrictions ease
Activity	<p>Aspirational ‘Let’s keep Scotland special’</p> <ul style="list-style-type: none">Digital activity: <u>Teads</u>, YouTube, FacebookRadio adverts: Bauer, Global, digitalInfluencers <p>Tactical messaging</p> <ul style="list-style-type: none">regionalised Bauer radio partnership readsout of home (billboards)Facebook content re-engagement activityOwned channels – email to 120k Scots audience; 5.2k dedicated family tailored emails will integrate messaging.
Timings	Launch 19 March – 4 week initial phase

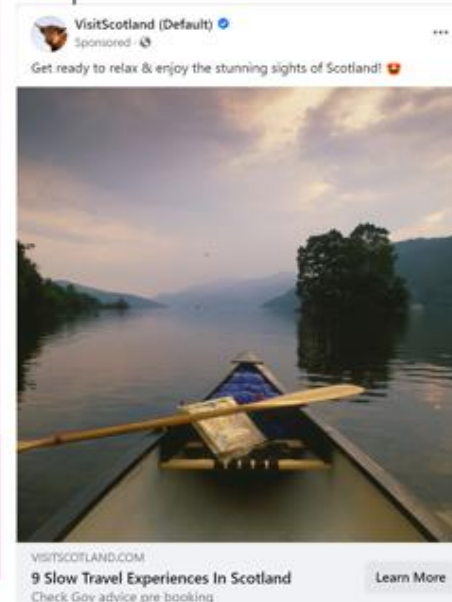
Out of Home (billboards)



Tactical messaging:

- Bin it or take it home with you
- Move on if busy
- Keep dogs on lead near livestock

Facebook Content marketing activity
Responsible travel ad



30" radio script

'Let's keep Scotland special,
Now and for generations to come.
It's all of ours to care for.
Our wildlife need their space, and our respect
Our communities need our time and our support
Buy local, eat local...and move on if things are busy.
Take only pictures.
And leave only footprints;
So we can leave these special places as we find them
Scotland, yours to enjoy responsibly
Find out more at [visitscotland.com / enjoy](https://visitscotland.com/enjoy)'

UK – PREPARE



SUMMARY

Objective	<ul style="list-style-type: none">• Inspire Covid Confident segments to research Scotland holidays, ready to book once restrictions ease• Steer prospective visitors towards areas ready to welcome visitors; encourage Responsible Travel
Activity	<ul style="list-style-type: none">• Digital activity: Bliss, Metro, Teads & YouTube: Prepare hero video + sequential ads featuring rural/cities edits• Paid Social: Prepare hero video + sequential rural/cities ads. Plus remarketing previous website visitors on FB to increase engagement with our content• SkyAdsmart: Targeted TV ads (Prepare)• Publishing partnerships: Hearst & Immediate Media• TripAdvisor & Expedia activity• Owned channels – email to 324k restUK audiences;
Timings	15 March – mid April 2021 (initial burst)



YouTube Brand Lift Study questions:
Ad recall:
Which of these travel destinations have you seen online video advertising for recently?
Consideration:
Which of these travel destinations would you consider visiting?
Competitors: England, Wales & Ireland

SCRIPT – 30"

Soon the time will come to stop dreaming, so why not start planning...

Prepare to finally get a change of scenery

and to just go with the flow.

Let us prepare our fresh, local ingredients...

...for you to sit back and enjoy.

Prepare to discover new cities...

hear new stories

and make memories you'll never forget.

We're already preparing to welcome you back... when the time is right

to those magical moments you'll find...

Only in Scotland.

(final few frames carry 'Guidance message')

30" rural - <https://www.youtube.com/watch?v=S8zhPlsWYd4>

30" cities - <https://www.youtube.com/watch?v=FnemjrJ7wYY>



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EXPEDIA 21 CAMPAIGN SUMMARY

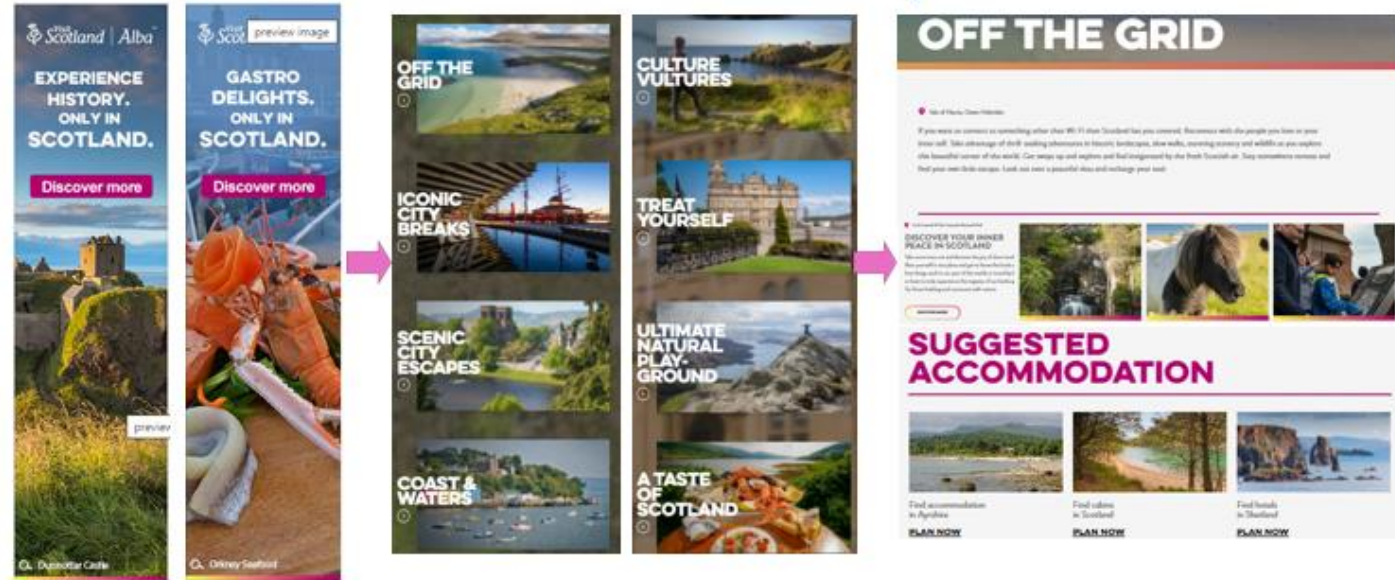
SUMMARY

- Objective**
- Continue to broaden awareness of what a holiday in Scotland offers
 - Drive conversion to bookings for Scottish businesses

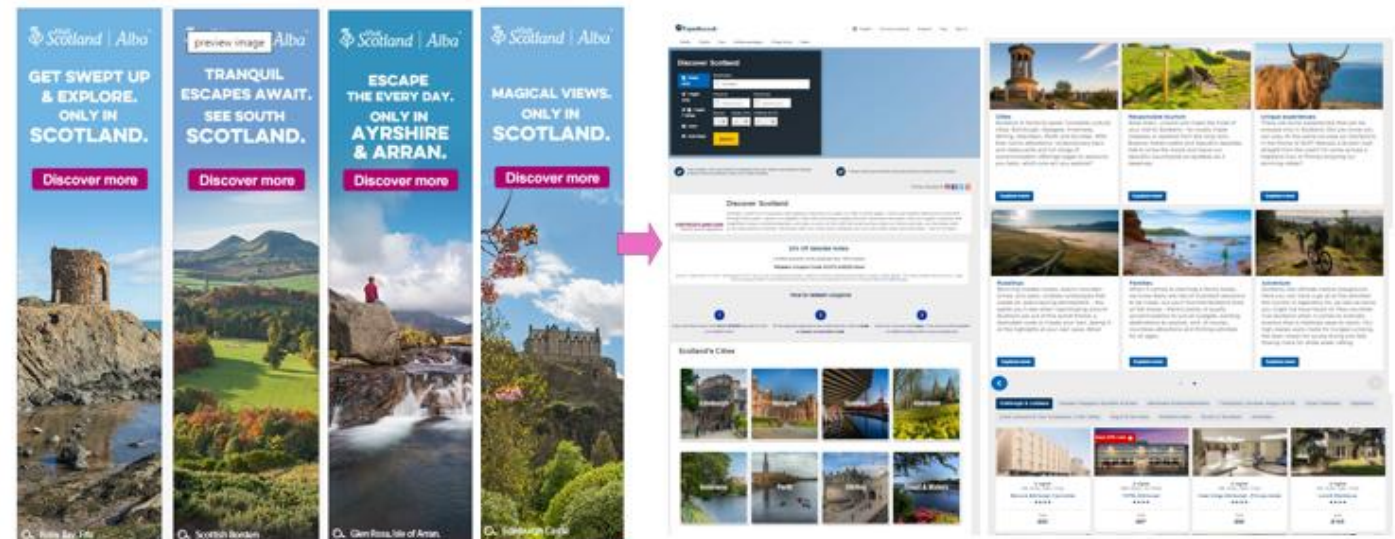
- Activity**
- Broaden awareness
 - 'Scotland hub'
 - Drive conversion
 - Scotland 'flex' page
 - Promotion
 - Adverts on Expedia targeting people searching for UK breaks from 30 April 2021
 - Offsite adverts, social posts and emails targeting people searching for UK breaks from 30 April 2021
 - Partner upweights for South Scotland and Ayrshire & Arran

- Timings**
- Spring refresh from 1 March – running to mid April
- Insights**
- Search and bookings significantly increased after UK lockdown easing announcement on 22 Feb
 - 51% searches are for 91+ days
 - 50% bookings are for 91+ day

Awareness: Scotland hub – www.visitscotland.expedia.co.uk



Conversion: [Scotland flex](#) page

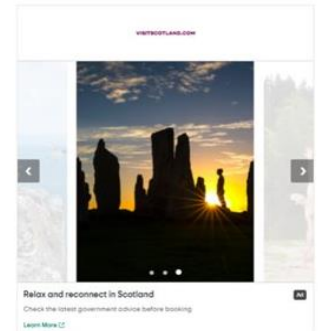
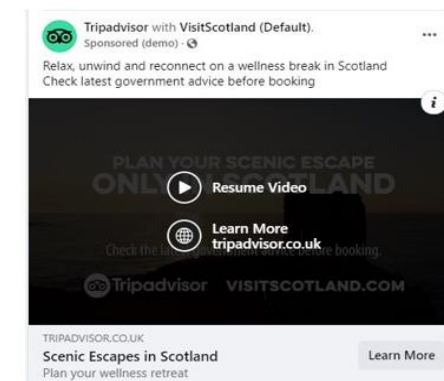


TRIP ADVISOR



SUMMARY

Objective	Raise awareness of what a holiday in Scotland offers
Activity	3 x themed content hubs on Trip Advisor (wellness, outdoor, city breaks) incorporating links to business listings on TA. Promotion <ul style="list-style-type: none"> Social Video Ads on Trip Advisor, Carousel Ads, Outstream Video Ads Partner upweights for VisitAbedeenshire
Timings	Spring refresh from 10 March – running to mid April
Results	tbc



Landing Page	Facebook Video Ad
WELLBEING	https://fb.me/2Uixzh7VevdHLP3
OUTDOOR	https://fb.me/1FSWGQjJstgc22L
CITY Breaks	https://fb.me/biguHoXQbpT2F6

EU PREPARE FOR SCOTLAND VIDEO CAMPAIGN



SUMMARY

Objectives

- Capitalise on the Brand Scotland EU Exit activity to retarget audience in the EU markets
- Raise brand awareness for Scotland through video distribution by inspiring our EU audiences to think about Scotland for future travels (when time is right)
- Measure uplift in ad recall through Brand Lift study on YouTube

Activity

- Distribution of the 2 hero videos in Germany, France, Netherlands, Italy & Spain: [Hero 1](#) and [Hero 2](#) driving traffic to VS.com home page in each language
- YouTube for first 2 weeks incl. Brand Lift study to help understand the impact of the campaign
 - Teads (premium video channel) for 2 weeks
 - Facebook & Instagram for 4 weeks incl. sequential retargeting hub videos (rural and cities focus)

Timings

1st – 28th March



YouTube Brand Lift Study question:
Which of these travel destinations have you seen online video advertising for recently?

- Scotland,
- Ireland,
- Iceland,
- England,
- None of the above

Teads YouTube



OWN CHANNELS INTEGRATED SUPPORT

SCOTLAND | ALBA

Ver en linea

El Lago Lomond

PREPÁRATE PARA ESCOCIA

Pronto llegará el momento de dejar de soñar, así que ¿por qué no empiezas a planificar? Estaremos preparados para hacer que tu viaje sea aún más memorable.

VER EL VIDEO

20 VISTAS ESTACIONALES

Escocia es mágica durante todo el año. Hemos reunido algunas fotos espectaculares que lo demuestran.

DESCOBRIRLAS

10 DATOS INTERESANTES

Sorpréndete y descubre algunas cosas que no sabías sobre Escocia.

LEE MÁS

TU GUÍA DE VIAJES

Encuentra información práctica sobre cómo viajar a Escocia, para cuando llegue el momento de planificar tu próxima escapada.

AVANZAR MÁS

ALOJAMIENTO FUERA DE LO COMÚN

Disfruta de una experiencia única y extraordinaria.

ENCUENTRA IDEAS

BEREID JE VOOR OP SCHOTLAND

Bereid je voor op de uitdaging van het ontdekken van het land van de keltische druiden.

BEKIJKEN

PREPARE FOR SCOTLAND

Soon the time will come to stop dreaming, so why not start planning? We will be ready to make your trip even more memorable.

WATCH VIDEO

20 SEASONAL VIEWS

Scotland is magical all year round. We've compiled some great pictures to prove it.

DISCOVER

10 INTERESTING FACTS

Surprise yourself and find out something you didn't know about Scotland.

READ MORE

YOUR TRAVEL GUIDE

Find practical information on travelling to Scotland, for when the time is right to plan your future getaway.

FIND HERE

Integrated into EU emails:

- DE
- FR
- NL
- IT
- ES
- Nordics

EUROPE INTERMEDIARY ACTIVITY



SUMMARY

Objectives

- Reassure our EU travel trade by raising awareness of Scotland as a welcoming and easy-to-sell destination.
- Inspire travel trade professionals in-market to offer and ultimately convert Scotland in 2021/22.

Activity

- Campaign delivery through various touchpoints
- Content partnerships with key travel trade publications in-market (FVW, L'Echo Touristique, TourMag and TravelPro)
 - Social media – LinkedIn
 - Emailing – FVW, Reise vor9 and TourMag
 - Display advertising – Manageo, FVW and TravelPro

Target audience

Tour operators and tourism professionals in Germany, France and Netherlands

Timings

Phase 1 – November to December 2020
Phase 2 – January to March 2021

Key results

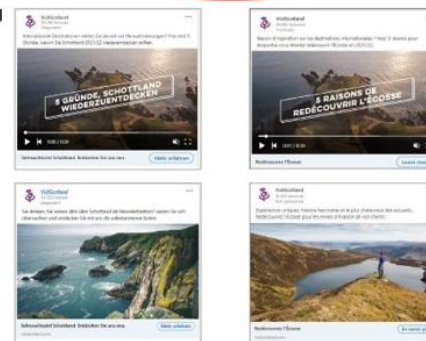
TBC – undergoing reporting

Content Partnerships



TravelPro - NL

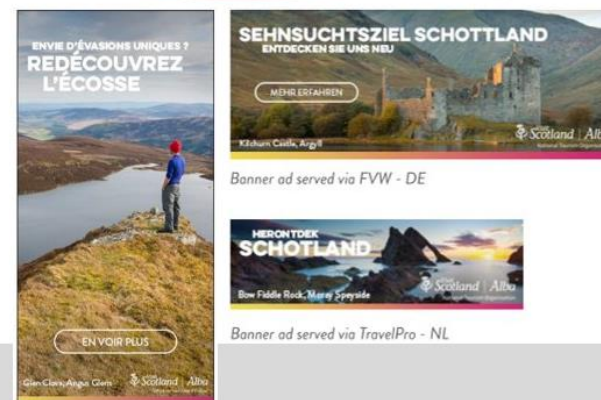
Social



LinkedIn Ads - DE

LinkedIn Ads - FR

Display

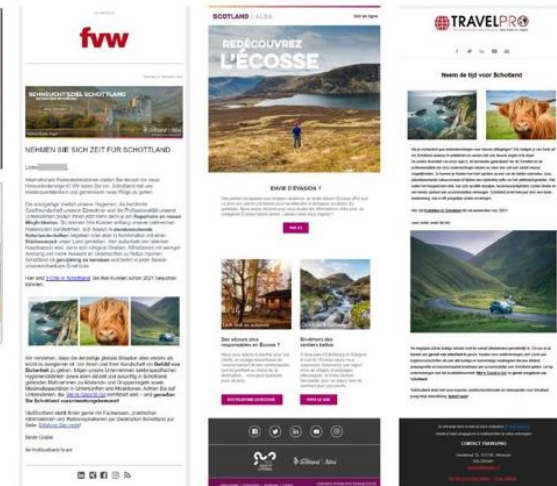


Banner ad served via FVW - DE

Banner ad served via TravelPro - NL

Banner ad served via Manageo

E-mailing



Bespoke Scotland newsletters – DE, FR & NL

Bespoke B2B video to reassure and inspire travel trade to rediscover Scotland:

- EN: <https://www.youtube.com/watch?v=pA-Uu8XSGTU>
- DE: <https://www.youtube.com/watch?v=QVqcgbp-ADk>
- FR: <https://www.youtube.com/watch?v=spCseAbja2w>
- NL: <https://www.youtube.com/watch?v=oCtY61nfsn8>
- ES: <https://www.youtube.com/watch?v=J090aI-GjIU>
- IT: <https://www.youtube.com/watch?v=-8A151-vYV>

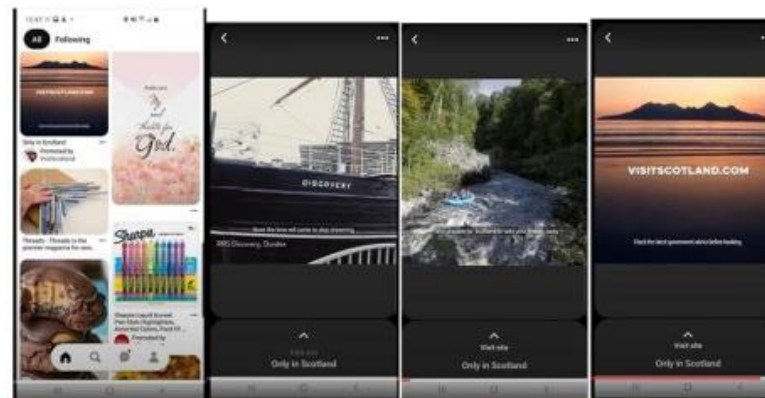
NORTH AMERICA CONSUMER ACTIVITY – (MARCH – JUNE)



SUMMARY

- Objective**
- Keep Scotland top of mind when considering first vacation overseas
- Activity**
- Digital video activity (YouTube + Brand uplift study & Pinterest); sequential messaging: Prepare video, cities, rural – portion of the budget going to upweight during Men In Kilts programming in US
 - Added value: free re-airing of NBC 1st Look half hour Scotland special with Johnny Bananas (filmed 2019) + social amplification for Scotland content across NBC channels

Timings March 2021 (live)



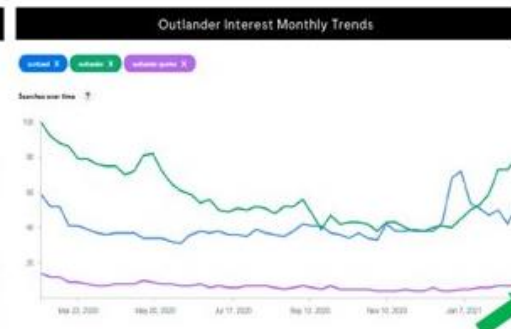
AUDIENCES ACROSS YOUTUBE + PINTEREST

Eager Traveler | Ages 25-50

Traditional Scotland Tourist | Ages 50+

Outlander ENTHUSIAST | Ages All

Pinterest trends indicate that users in the United States are searching for keywords around travel to Scotland and Outlander



NORTH AMERICA INTERMEDIARY ACTIVITY

SUMMARY

Objective	<ul style="list-style-type: none">Broaden knowledge of Scotland to travel agents and Travelzoo database of customers to understand what different seasons (Fall, Spring and Summer) offer on a vacation to ScotlandSupporting Tour Operator product promotionAgent data acquisition
Activity	<ol style="list-style-type: none">TravelZoo digital and email campaign, featuring 8 tour operators selling 7+ night tours in Scotland from Autumn 2021 – May 2022TravelWeekly webinar – 1 hour destination training plus data acquisition
Timings	<ul style="list-style-type: none">March to April, with added value activity extended into May
Key results	<ul style="list-style-type: none">1,664 agents signed up to webinar (forecast 1,000)Travelzoo TBC (live w/c 5th March)

LIVE WEBINAR

your

Scotland

TRAVEL GUIDE

JANUARY 14, 2021 AT 2:00PM EASTERN

Join Travel Weekly and VisitScotland for your clients' 2021 and Beyond Scotland Travel Guide. The VisitScotland North America team will share the key motivators for North American clients and share key themes and itineraries.

Discover why your clients should choose Scotland and gain access to all the travel trade resources and content available for you to share to motivate your customers.

And, to share some of the true "spirit" of Scotland, one very lucky live attendee will win a whisky gift bottle from Johnnie Walker.

REGISTER NOW

SPONSORED BY

PRODUCED BY

VisitScotland

Alba

National Tourism Organisation

TRAVEL WEEKLY



TRAVELZOO

Q Air Deals

Anywhere...

All Dates

SEARCH

FEATURED DESTINATION: Scotland

UNIQUE EXPERIENCES

FALL & WINTER

HISTORY & HERITAGE

TASTES OF SCOTLAND

BEAUTIFUL SCENERY

Some experiences you can only enjoy by visiting Scotland. Play on the same courses as champions in the home of golf. Sample a Scotch malt straight from the cask. Sleep inside an ancient castle. Join a Highland Coo staring across stunning vistas. Ride the Jacobite steam train made famous by the Harry Potter movies.

LEARN MORE

Top Deals Handpicked by Travelzoo

*Some taxes, fees extra. Vacation prices are per person, based on double occupancy, unless noted.

FLEXIBLE DEAL

NO CHANGE FEE

LEADING TO VICTORIA STREET AND WEST BOW

\$1349 Guided Tour of Scotland for 6 Nights incl. Air ESCAPES BY GLOBUS - NO CHANGE FEES - GLASGOW: INVERNESS: EDINBURGH DECEMBER 2021 - FEB 10 NOVEMBER 2022 (FROM 33 CITIES)

FLEXIBLE DEAL

NO CHANGE FEE

6 Nights in Edinburgh, Inverness & Glasgow incl. Car & Air GREAT VALUE VACATIONS - NO CHANGE FEES - SCOTLAND SELECT DATES NOVEMBER-DECEMBER

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DEFRA WHISKY & SEAFOOD CAMPAIGN: USA & CHINA



SUMMARY	
Objective	<ul style="list-style-type: none">• Increase awareness and consideration of Scottish food and drink experiences to a US tourist audience. Inspire tourists to consider Scotland as a ‘must visit’ destination once Covid-19 travel restrictions are lifted and integrate Scotch Whisky distilleries into planned travel itineraries.• Objective 1: whisky tourism• Objective 2: supported by other food and drink experiences US consumers can have when visiting Scotland
Activity	Video asset distribution X 5 new Scotland food and drink videos have been created for this campaign
Timings	Originally March 2021, delayed to May 2021



CHINA & EMERGING MARKETS: MARCH-JUNE

KEY PRIORITIES

- Keep Scotland top of mind when considering first overseas vacation
- Work with airlines to support Scotland positioning in network connectivity
- Provide timely information, reassurance and inspiration to intermediaries
- Work with strategic partners (VB, SDI, SAO, TI) to maximise opportunities

MULTI-MARKET

- Aligned Emirates Airline content creation
- Focus on VFR extension (Emerging)

CHINA

- Travel trade campaign for acquisition of newly launched WeChat travel trade followers
- Consumer campaign for acquisition of subscribers on WeChat consumer channel
- DEFRA campaign – focus on World Whisky Day
- Content creation for social channels in alignment with Team Scotland channels

AUSTRALIA

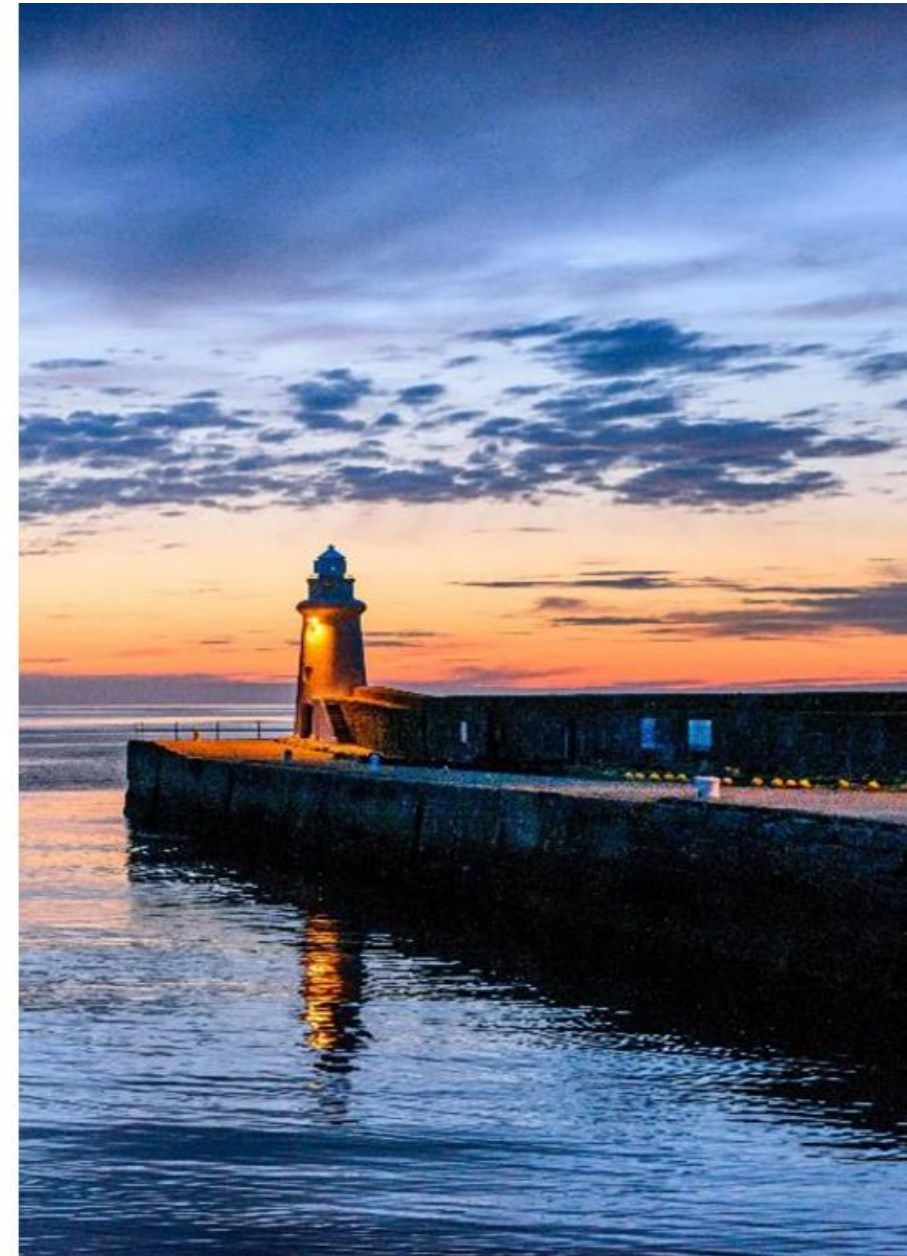
- Travel trade campaign for travel agent data acquisition + roll out of travel agent engagement plan

UAE

- Virtual B2B Roadshow (UAE) in partnership with VisitBritain, Tourism Ireland, VisitWales
- Virtual local Scottish stakeholder engagement with SDI
- Destination training with Emirates Holidays

India

- Collaboration with VisitBritain Travel Trade Campaign



WHAT NEXT

- Promoting local stays & trips when travel opens up
- Phase 2 of Responsible & Domestic Campaigns
- Virtual Scotland Week
- Scotland Re-Connects 27-29 April
- Scale international activity from summer onwards

HOW CAN INDUSTRY GET INVOLVED

VisitScotland Assets



THE BLOG 14 MOTORHOME SPOTS WITH STUNNING VIEWS

1 2 3 4 5 6 7 8 9 10 11 12 13 14
Wendy Smith - February 17, 2021 - View Comments

One way to explore Scotland's incredible seascapes, towering mountains and vast landscapes is to hit the **open road** and tour the country at your own pace. Travelling around Scotland in a motorhome is a great way to uncover hidden gems, holiday on a budget, and explore a variety of locations in a short amount of time.

Across Scotland there are many **caravan sites and holiday parks** who welcome motorhome vehicles, featuring a range of facilities, amenities and services to make your stay all the more comfortable. It is important to plan ahead if you're touring around Scotland - make sure you book in advance at a caravan site to ensure there is room for you. Don't set up camp outside a caravan site or designated overnight parking areas. This will help preserve Scotland's natural landscape and reduce as much disruption to local resident areas as possible.

Here are some scenic spots to stay at on your **motorhome holiday in Scotland**.

CORONAVIRUS RESTRICTIONS

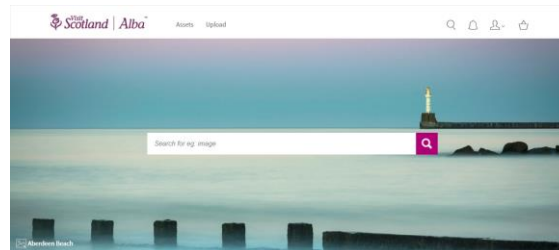
The majority of Scotland is now under a temporary lockdown, though some island communities are under level 3 restrictions. Please follow any current restrictions - you might need to save these ideas to try later on a future trip.

Find out what level each area is under and read more about the **5-level Covid-19 restrictions** to plan and book ahead when considering a future trip. You can search for **businesses that are open, and Good to Go**, where they have a Covid-19 risk assessment.

1. LINNHE LOCHSIDE HOLIDAYS, FORT WILLIAM

Digital Media Library

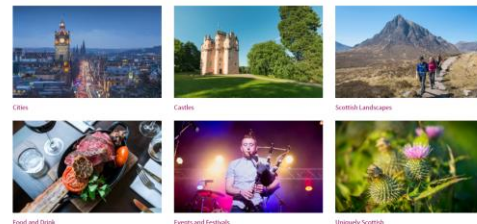
Assets.VisitScotland.com



VISITSCOTLAND DIGITAL MEDIA LIBRARY

Welcome to the VisitScotland Digital Media Library - a store of thousands of pictures of Scotland, as well as videos and infographics, which you can download and use free of charge.
Use the search box to look for what you need. You'll find high-quality images of Scotland's cities, towns, countryside, wildlife, people and much more. You're welcome to use these resources, provided you abide by our terms of use.
If you have any questions - please contact us.

Popular themes



Campaign collections



VisitScotland Business Listing



Drumroamin Farm Camping And Caravan Site

Garlieston | Camping Park

Friendly, privately owned, family run site. Benefiting from an open, level and well drained field, with fine views. The site has a modern, heated, sho...



Price from:
£ 320
PER UNIT PER WEEK

Visit:
WEBSITE

Reassurance



#SCOTLAND|SNOW

INDUSTRY SUPPORT

1. STERG update including sector funds
2. Tourism recovery plan
3. SG strategic framework/roadmap
4. Industry survey results

MARKET PRIORITISATION Q4 / 2022 – POST COVID

OBJ. & DIRECTION

Support medium term growth from key markets that to aid Scottish Tourism recovery

Drive value, seasonal and geographic spread with relevant messaging to warm prospective visitors

Responsible Travel

STRATEGIC PRIORITY

GROWTH

USA

CORE

UK, Germany, France

DEVELOPMENT

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

WHY

Growth potential & strong connectivity

Established markets with room for growth. Will come more than once & will travel

Long term growth potential / evidence of growing demand for Scotland

FOCUS

Continue to build awareness and propensity to visit; support & grow direct access

Maximise conversion and promote longer stays and repeat visits

Continue to build a marketing framework that will deliver visitors of future will travel direct/stay longer

ACTIVITIES

PR
integration
across

Always-on programme of marketing/
story-telling connecting narrative to industry product.
Amplification via social-led strategy, media and industry partnerships

Conversion/booking activity working with OTA's, Travel Trade & DMCs capitalising on their channels as routes to market

markets
&
activities