

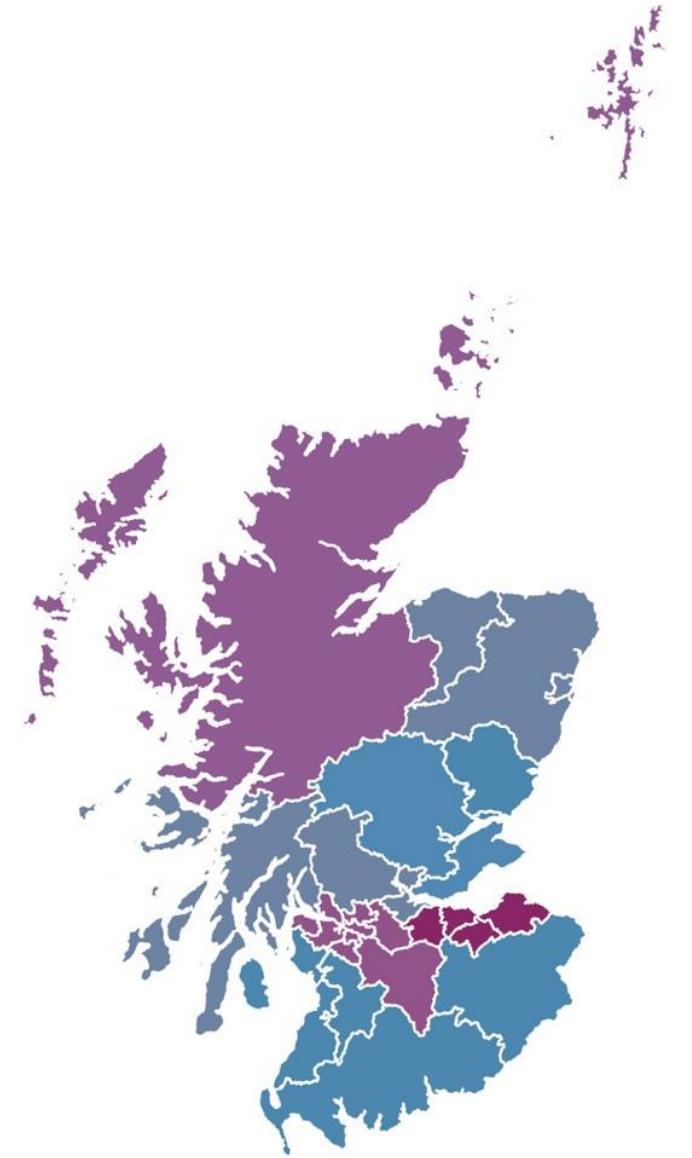
VISITSCOTLAND UPDATE

An aerial photograph of a large, dark blue loch in Scotland. The loch is surrounded by green fields and forests. In the foreground, there are several rectangular fields, some of which are brown, possibly plowed or harvested. A small cluster of buildings is visible on the left side of the loch. The background shows rolling hills and mountains under a clear blue sky.

VENTURE NORTH, MARCH 2023

OVERVIEW

1. Current strategic context
2. Last 2 Years / Next 2 Years
3. Tourism in our communities



NATIONAL STRATEGY FOR ECONOMIC TRANSFORMATION (NSET)

Figure 1: Our Vision, Ambition and Programmes of Action for Scotland's Economy by 2032



CONSUMER DEMAND

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



Travel demand is back

- **Strong pent-up demand** from international markets (exchange rates, returning air routes)
- 1.1m international visitors came to Scotland in H1 2022 (18% down on 2019 but **expenditure +21%**).
- Evidence of slightly **longer stays** and willingness to travel **out of the main season**
- Slight increase in UK households **holidaying at home Jan – March**, Scotland preferred destination after London
- International travellers looking for **added value** / will pay for unique, money can't buy experiences;
- **UK travellers** looking for **cost saving opportunities**

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

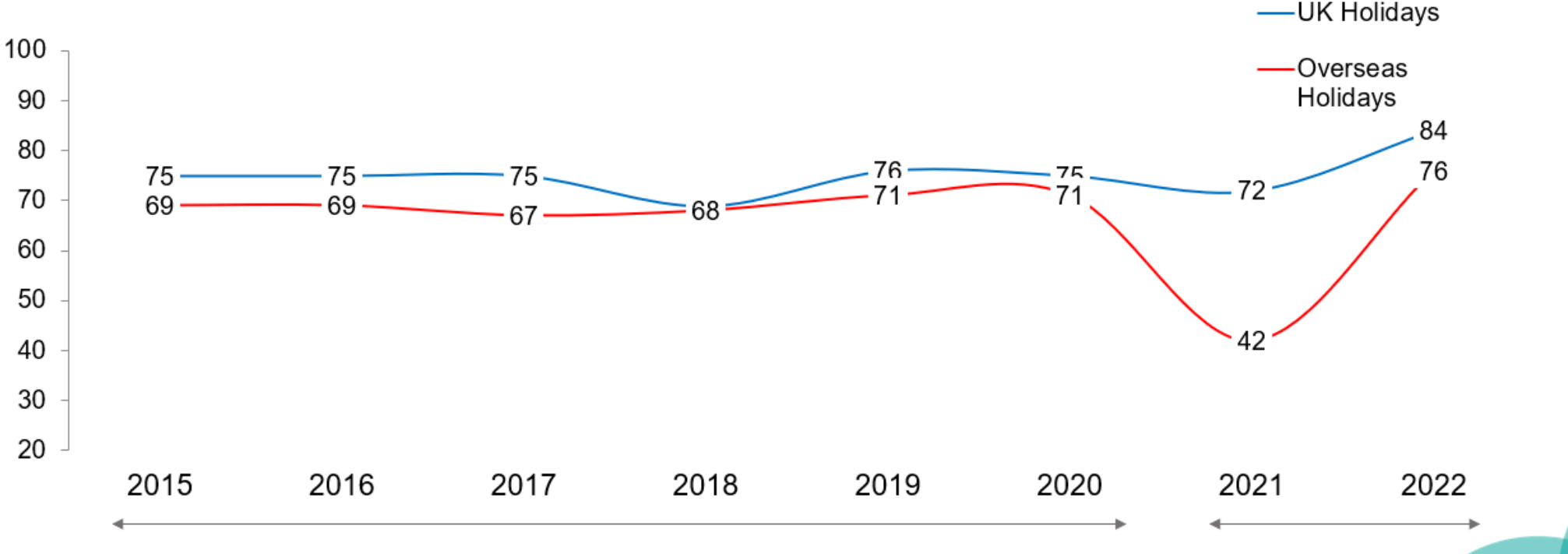
Local satisfaction
Visitor satisfaction
Industry satisfaction
(Fair work; profile of the sector; sustainable growth)

WHERE ARE WE NOW?

OVERSEAS TRIPS GAVE WAY TO DOMESTIC TRIPS

LOOKING AT 8 YEAR TREND

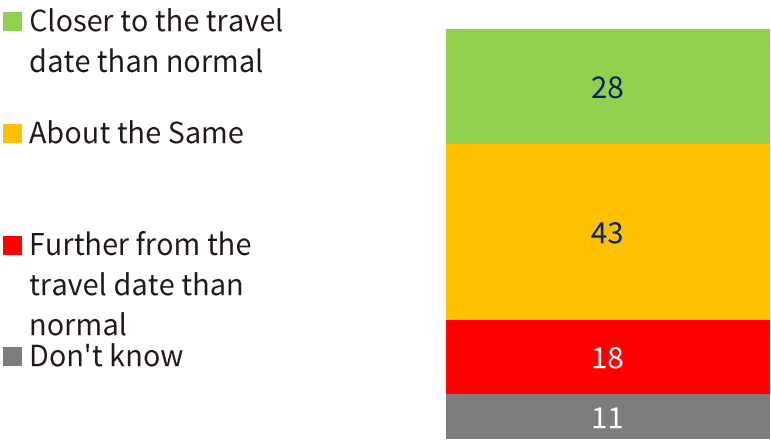
Overnight trip intentions in next 12 months (% of UK population)



SUMMER 2021 – MORE LAST MINUTE BOOKINGS

Uncertainty meant that domestic overnight trips were booked more last-minute than normal

Booking lead times for Scotland Summer trips (%)



BUSY DESTINATIONS LIKE LARGE CITIES WERE AVOIDED

Busy destinations
– such as large
cities – were
avoided.

LOOKING BACK AT AUGUST 2020

Proportion of all domestic trips that are planned
to a city or large town (%)

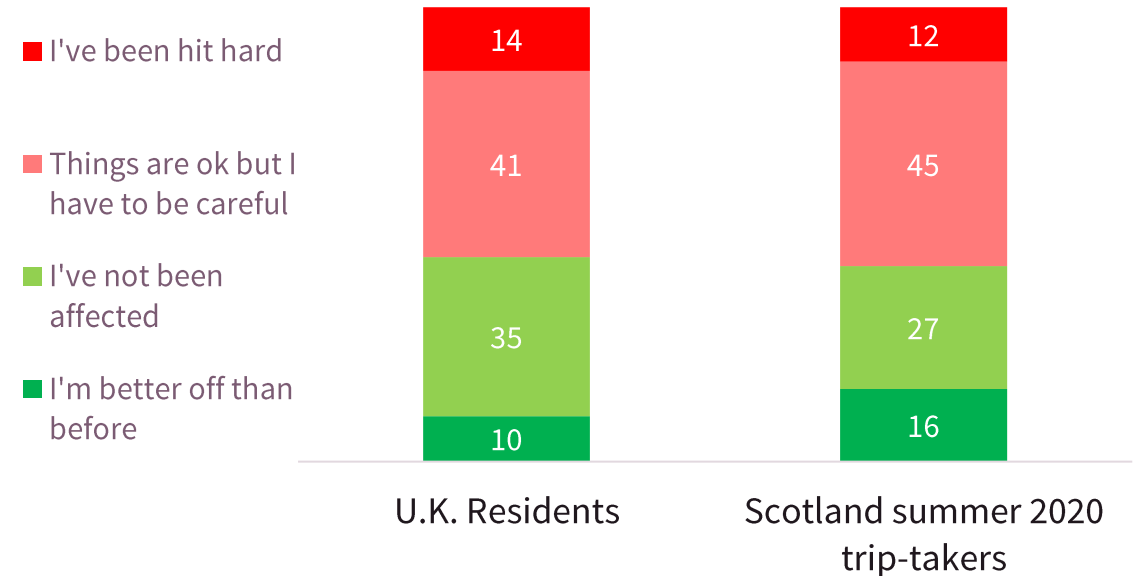


COVID IMPACTS

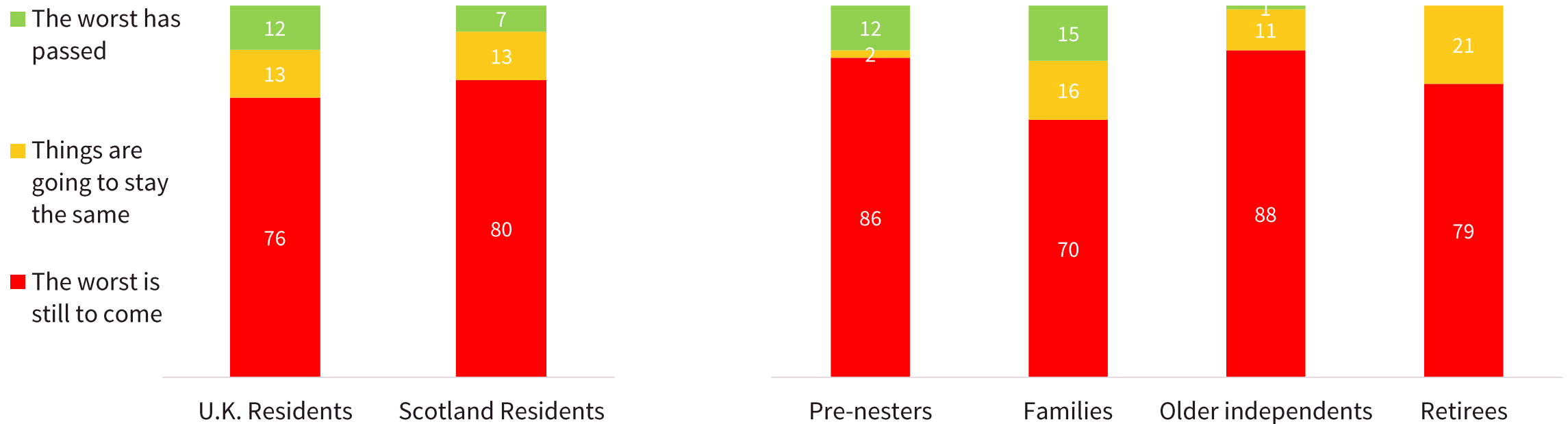
Due to furlough and reduced travel/childcare costs, some people were financially better off during the pandemic

LOOKING BACK AT SUMMER 2020

Breakdown of Scotland summer 2020 trip-takers (%)

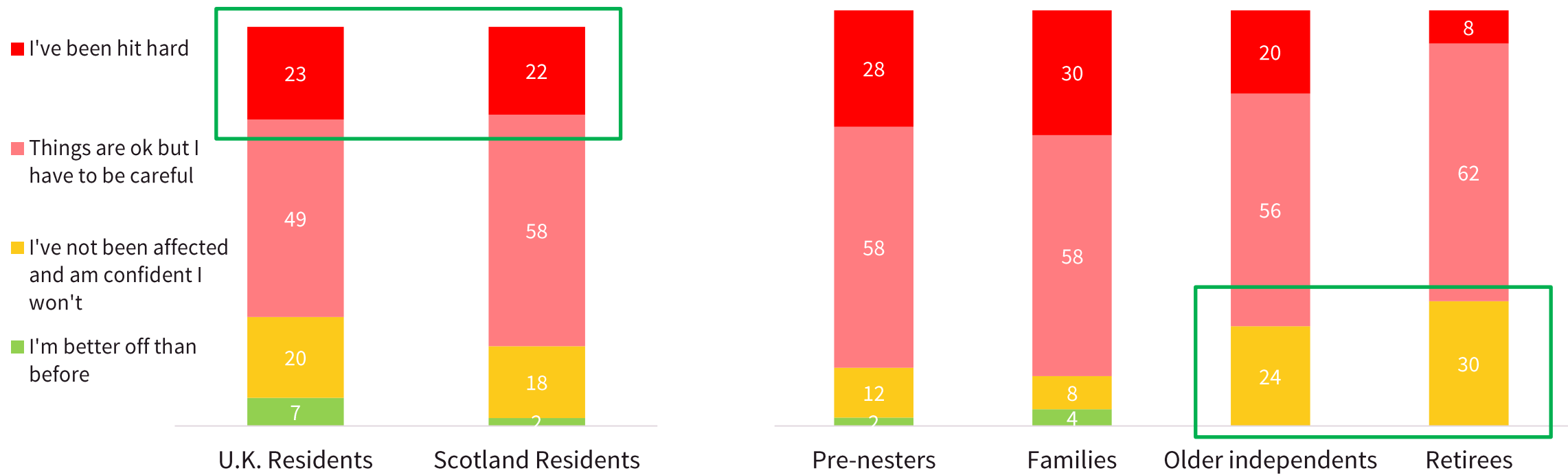


Perceptions of the cost of living crisis



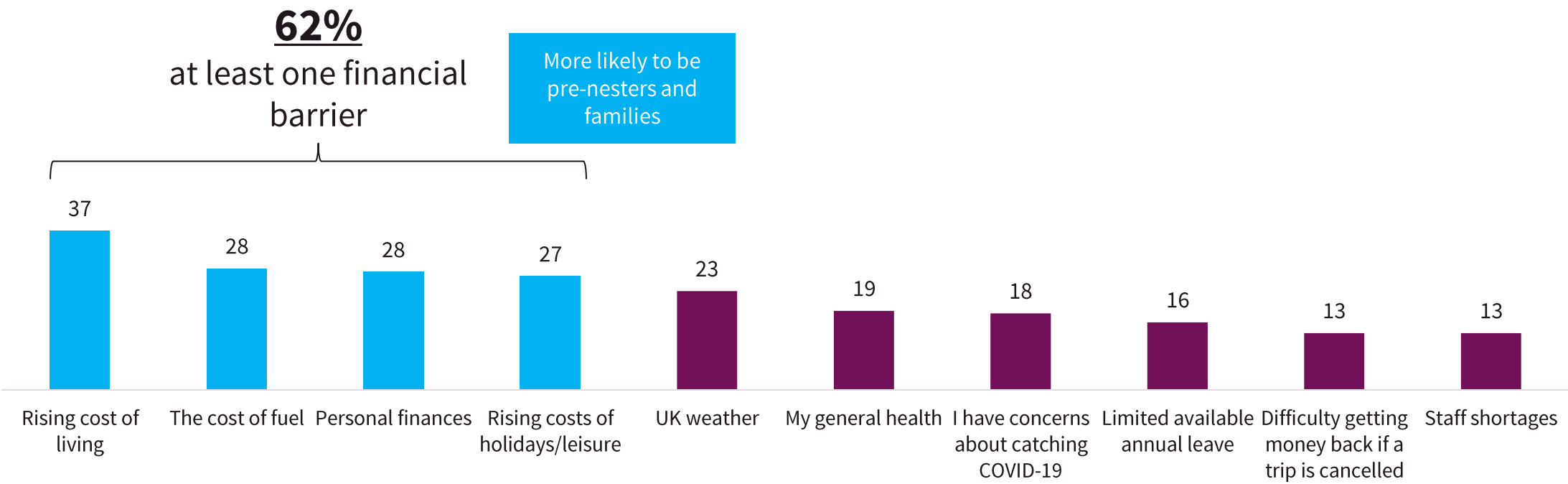
ALREADY IMPACTED 1 IN 4. OLDER LIFE STAGES MOST PROTECTED.

Impact of cost-of-living crisis on personal finances (%)



BARRIERS TO AN OVERNIGHT UK TRIP

Top 10 Barriers to taking an overnight UK trip in next 6 months (%)



WHAT WOULD PROVIDE REASSURANCE?

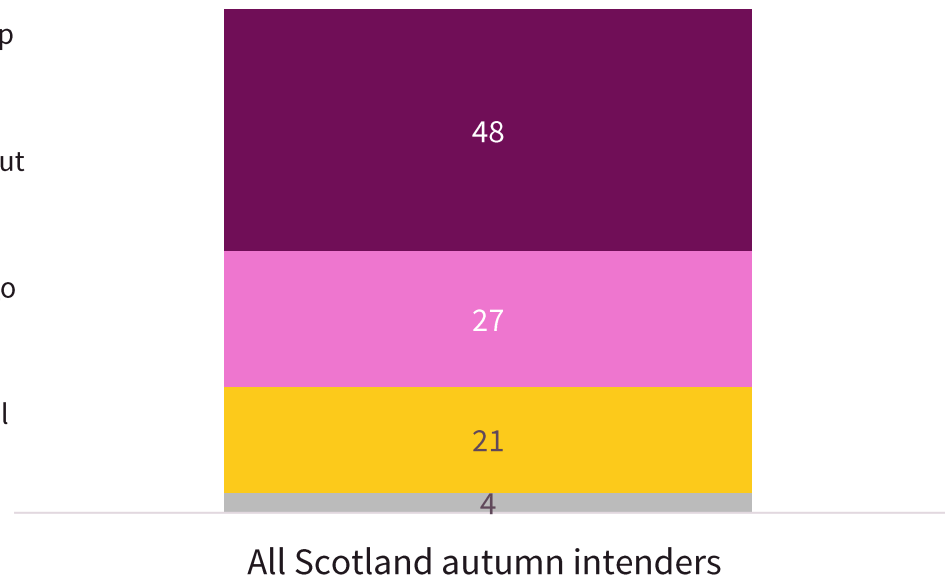
Financial conditions that would incentivise use of tourism providers (%)



NEARLY HALF OF INTENDERS NOT YET BOOKED THEIR TRIP

Booking status of Scotland holiday or short break (%)

- I have already booked the trip
- I have decided where to go but not yet booked
- I am yet to decide where to go
- I am undecided whether I will take this trip at all



Half of Scotland intenders have not yet booked their trip (higher amongst pre-nesters)

Visible, Bookable...

Travel insights



Changed booking patterns

- Booking windows: **37% of UK** still book within 1 week of travel.
- Package bookings 1 in 3 visitors to Scotland. Bookings typically **1.7 x more in value**.
- **50% International** – plan & book through intermediary

Creative must work harder



Short-form content key

- Online video is the **#1 driver**
- **95% of message is retained when customers watch video** / 10% when they read it in text
- **78% of TikTok users found holiday/travel inspiration on the platform.**

Weaving impactful narratives



Story & Values

- **‘Streamer locations’** spark a behind the lens experience
- **Connecting with nature**
- **Your values need to shine through**

SCOTLAND IS CALLING

Our global campaign, positioning Scotland as a Responsible destination, and addressing objectives for forward bookings in the short-term and building awareness for sustainable longer-term growth.

Brand Building



Brand building activity aimed to build demand through inspiration, destination awareness & welcome message

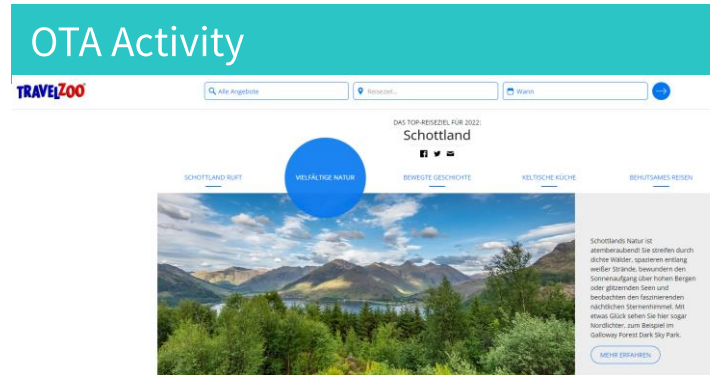
Highlands featured throughout Scotland is Calling [video distribution](#) and digital ads promoted via;

- Paid social channels
- Digital channels
- On demand TV

From Jan – Jun global activity achieved:

- ✓ 100m video views
- ✓ 4.1m clicks to VisitScotland.com

OTA Activity



Activity with online travel agents to inspire and encourage Scotland bookings from audiences actively interested in travel

- **Expedia (Global)** - Highlands featured throughout [campaign landing pages](#), traffic driver ads.
- **TripAdvisor (UK)** - promotion of 3 x themed trips ([food & drink](#), [adventures](#) & [city breaks](#)) featuring 15 points of interest
- **TravelZoo (US & DE)** - Highlands featured on [Scotland content page](#) & [tour offerings](#) ([DE page](#))

Owned Channels



Aligned messaging carried through owned channels, delivering scale and reaching a highly engaged audience.

30m+ Social Reach (monthly)
1.5m Global Database
31m Emails Sent (annual)
20m visitscotland.com sessions (annual)

Activity supplemented with Influencer Marketing activity, aligned to thematic [monthly calendar](#)

SCOTLAND IS CALLING

Publishing Partnerships:

Partnering with key media titles to reach new audiences in trusted travel and lifestyle platforms.

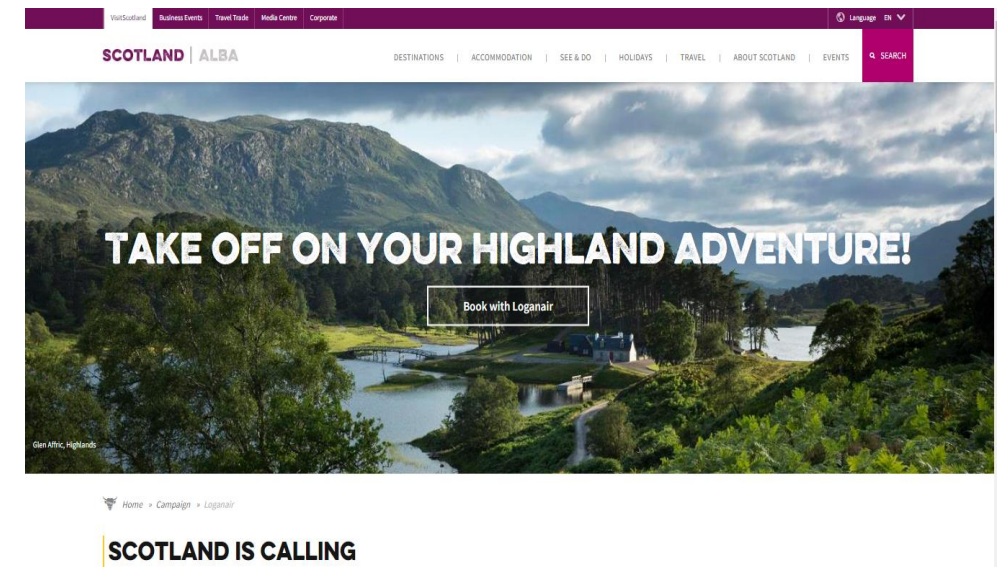
Top 5 Highlands featured throughout partnerships were:

- **National Geographic (Global Activity)** Badenoch Storylands key feature [article](#) & Highlands also featured in the [gallery](#)
- Wanderlust [hub](#), Stylist [article](#) & The Times Travel [dynamic map & article](#) (UK)
- GEO, [Frankfurter Allgemeine](#), [Süddeutsche Zeitung](#) and Couch (DE)
- [GEO](#) and [Neon](#) (FR)
- AFAR online magazine – various [guides and articles](#) (US)

Joint Partnerships & B2B:

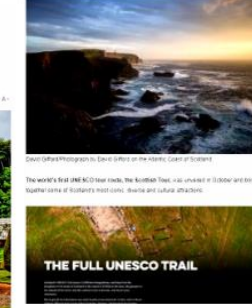
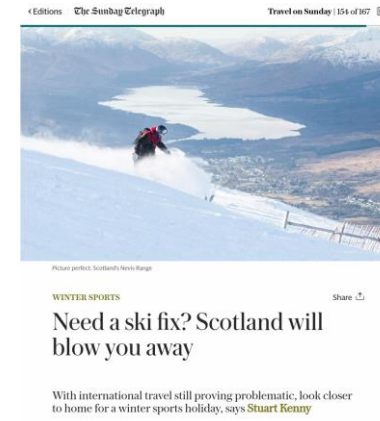
Amplifying Scotland message through key B2C and B2B partners in market to drive demand and conversion. Some highlights include:

- **Loganair partnership**– joint [activity](#) with Loganair promoted routes into Inverness and the wider Highlands region.
- **B2B Activity on LinkedIn** to reach and inspire tourism professionals across Short Haul markets included Highlands imagery in the adverts
- **Virtuoso consortia partnership** – included Highlands pitch, properties and unique experiences



SCOTLAND IS CALLING

- For the launch of **Scotland's UNESCO Trail** in October 21, the Highlands' UNESCO locations were featured in coverage, including **The Guardian**, **Express**, **Mirror**, the 'Hot List' in the **Metro** and **Sunday Mail** in the UK; as well as **Drift** in the US.
- A **stunning 8-page feature** on the **NC500** was published in the high-end lifestyle magazine *Madame*. The writer very much highlights that **the shoulder season is the best time to explore** this route.
- The announcement of **Discover Scotland 2022** was very well received by trade media in **China**. Our press release on this was picked up by seven national travel trade titles including *Travel Weekly* and *TTG China*, both top tier target publications in the travel media sphere in China. Features mentioned the charm of whisky-themed tourism, the lovely highland wildlife and personal recommendations: Loch Lomond, **Glencoe**, **Fort William** and **Skye**.
- The UK's **Telegraph** featured skiing in the **Nevis Range** as the perfect winter activity & **the Guardian** featured the region as a great place to explore via e-bike on the back of a press trip organized by the team.



A SNAPSHOT OF ACTIVITY



11 BEST PLACES TO STAY IN THE HIGHLANDS - THE PERFECT BASE FOR YOUR SCOTTISH HOLIDAY

• **Mairi Scobie** - July 20, 2022
The Scottish Highlands are home to beautiful vast landscapes and a unique culture and history. With hundreds of hidden villages...



7 EPIC TRAIN ACCESSIBLE BIKE-PACKING ROUTES IN SCOTLAND

• **Steve Duncan** - June 9, 2022
One of the best ways to revitalise your senses is on a bike-packing break in Scotland, at a pace where...



17 FAMILY TOURS IN SCOTLAND

• **Sarah Henderson** - May 23, 2022
What better way to experience Scotland than through the eyes of a local? Run by those who know it best...



9 HIDDEN GEMS YOU MUSTN'T MISS AROUND LOCH NESS

• **Anna Kilde** - April 27, 2022
Enjoy the wild, uninterrupted side of Loch Ness with a few of our favourite hidden gems near Inverness... 1. Experience...



10 REASONS TO VISIT THE HIGHLANDS THIS AUTUMN

• **Anna Kilde** - July 18, 2022
Autumn is truly a magical time in the Highlands - as the night draw in and the log fires are...



LUXURY COUNTRY ESCAPES IN SCOTLAND

• **Isla Parsons** - June 1, 2022
Dreaming of a peaceful country escape in luxurious surroundings? Here are some ideas to help plan your escape - whether...



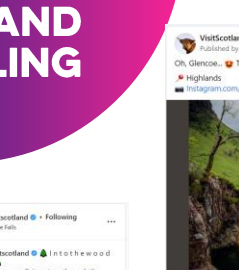
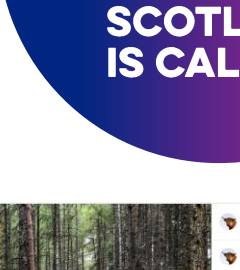
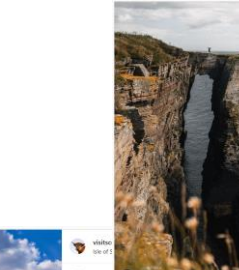
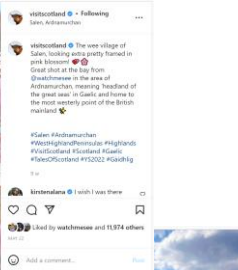
THE CROWN FILM LOCATIONS IN SCOTLAND

• **Shenna Smith** - May 10, 2022
It's no secret that the Royal Family have had a long lasting love affair with Scotland. Follow in the footsteps...



9 SCOTTISH ISLANDS TO VISIT FOR THE DAY

• **Steve Duncan** - March 16, 2022
There's something very special about visiting Scotland's islands, though it's often difficult to explain what this is. Maybe it's the 'ferry-feeling' of adventuring over water to explore secluded places that offer...



VISITSCOTLAND.COM - THE SCOTTISH HIGHLANDS



DESTINATIONS AND MAPS THE HIGHLANDS



The Scottish Highlands is really the Scotland of your imagination. With welcoming people, a unique culture, dramatic landscapes, romantic castles and a fascinating history, this is the perfect backdrop for your next Scottish adventure. So head north for a weekend break or longer holiday in the Highlands!

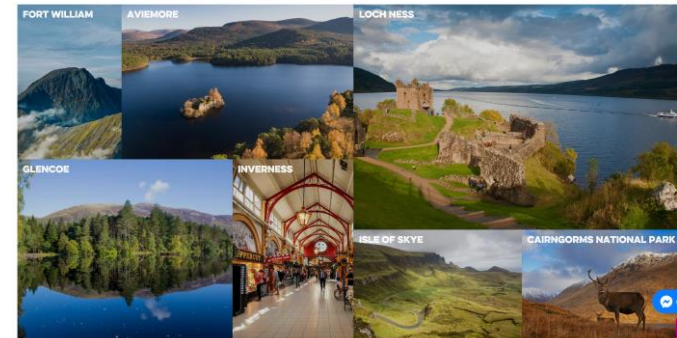
With such a vast area, it's difficult to know where to go in the Scottish Highlands, from its lively capital **Inverness** to its stunning countryside.

There are plenty of things to do in the Highlands. Explore the mysterious **Loch Ness**, pass through the **Cairngorms National Park**, marvel at iconic castles on the **Isle of Skye**, witness dolphins frolicking off the **Moray Speyside** coast, walk up Britain's highest peak, Ben Nevis, in **Lochaber**, or explore the rugged coastline of Caithness.

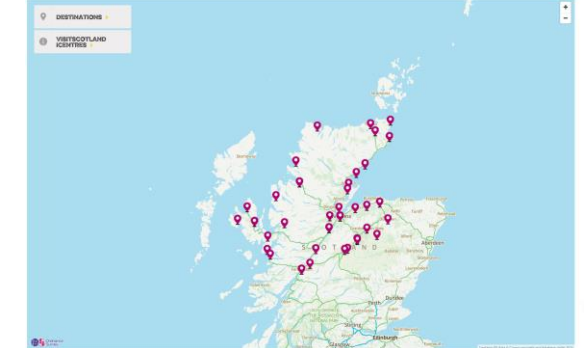
Start planning your perfect Scottish Highlands holidays now!

Please look after the Scottish countryside as you explore and refer to our **Outdoor Access Guidelines**.

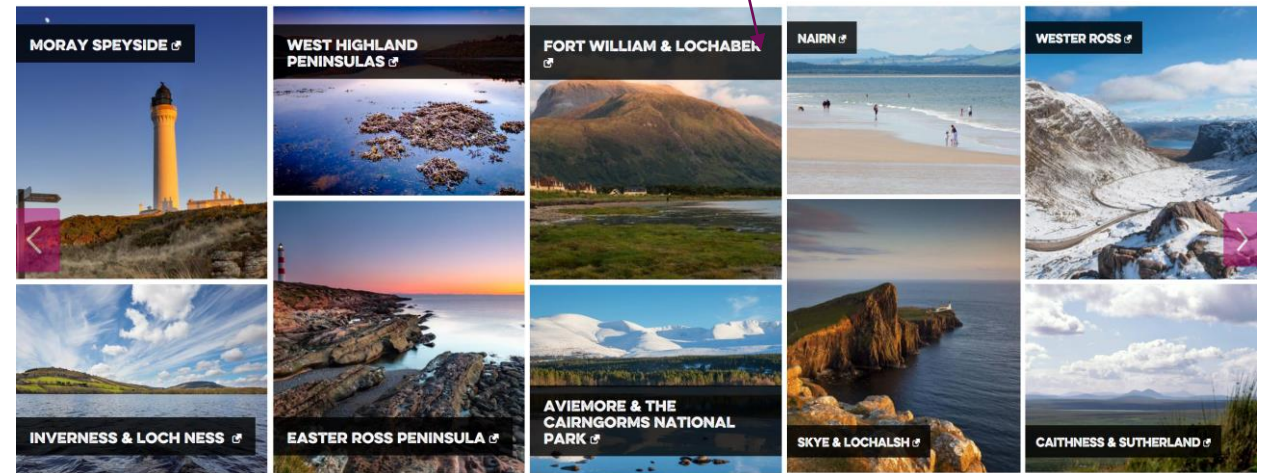
POPULAR DESTINATIONS IN THE HIGHLANDS



SCOTTISH HIGHLANDS MAP



Connecting visitors to local communities



Tourism in our communities



TOURISM IS RECOGNISED AS AN IMPORTANT INDUSTRY

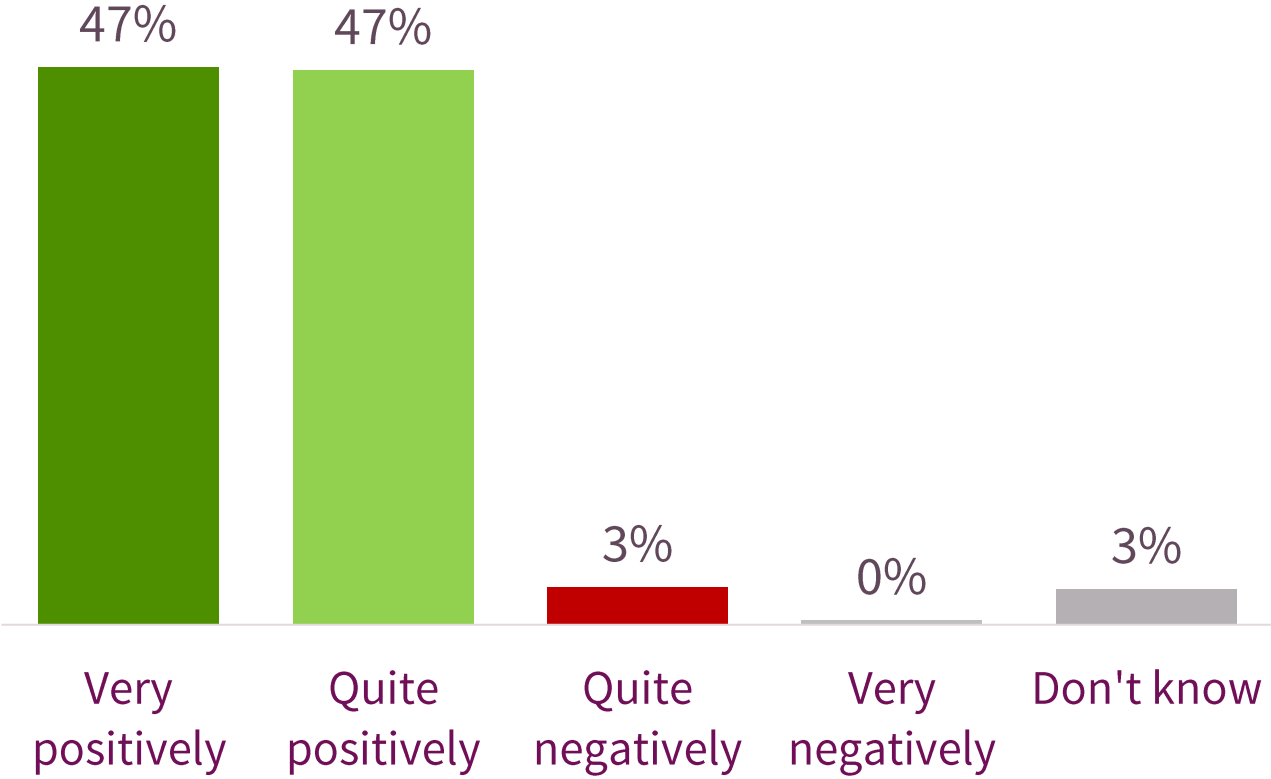
Tourism	87%
Energy (electricity and gas)	82%
Agriculture	82%
Oil and gas	82%
Other hospitality and leisure	81%
Whisky	79%
Public sector	73%
Retail	72%
Fishing	71%
Financial services	69%
Construction	69%
Public transport (including rail)	68%
Manufacturing	68%
Electronics	58%
Textiles	53%

TOURISM IS VIEWED POSITIVELY BY SCOTTISH RESIDENTS

94% *positive sentiment*

Regular Scots holiday takers and those who live in year-round tourism communities are most likely to be very positive

There is slightly higher negativity amongst rejectors of Scots holidays (10%).



POSITIVES ABOUT TOURISM IN SCOTLAND

THE TOP 10 THEMES EMERGING FROM 1,000 VERBATIMS

Economic benefits
(55% of comments)

Showcases the beauty
of Scotland (18%)

Employment
opportunities (15%)

Brings in visitors from
outside Scotland
(12%)

Benefits local
communities (8%)

Showcases Scotland's
top locations &
attractions (8%)

It benefits our
hospitality industry
(7%)

It showcases
Scotland's qualities
(6%)

It showcase Scotland's
history (6%)

It enhances Scotland's
reputation and
influence
internationally (5%)

NEGATIVES ABOUT TOURISM THOUGH THE TOP 10 THEMES WHICH EMERGED FROM 1,000 VERBATIMS

Overcrowding,
too many people
(20% of comments)

Increased litter
(12%)

Negative carbon
footprint / impact on
climate change (10%)

Increased traffic and
congestion (9%)

Local services &
infrastructure can't cope
with influx of visitors
(6%)

Damage to the natural
environment (6%)

17% were unable to
provide any at all.

Reduction in affordable
housing because of 2nd
homes, Airbnb etc. (5%)

Visitors disrespectful /
don't behave responsibly
(5%)

Disruption to local
residents whose needs
are ignored (4%)

THE ROLE OF TOURISM

Tourism in Scotland helps us to develop a positive reputation overseas	87%
Tourism adds to the vitality of Scotland's communities	77%
Tourism helps to protect and conserve Scotland's built heritage	74%
Tourism connects local communities to other cultures	71%
Tourism drives transport infrastructure development around Scotland e.g. train, ferry and bus routes	70%
Tourism protects and enhances the natural environment	44%

BENEFITS FROM TOURISM



Respondents living in tourism areas were presented with 9 potential benefits

• It supports a range of other jobs such as food, retail and other services	84%
• It improves the local economy and helps generate economic growth in the area	81%
• It creates / increases local employment opportunities	79%
• It helps to sustain historic buildings and monuments in the area	76%
• It leads to events being held and other activities that residents can enjoy	71%
• It improves local investment, development, & infrastructure spending in area	69%
• It provides an opportunity to meet visitors spending time in my local area	67%
• It increases the availability of local arts and cultural opportunities	67%
• Because of tourism there are more public transport services available locally	42%

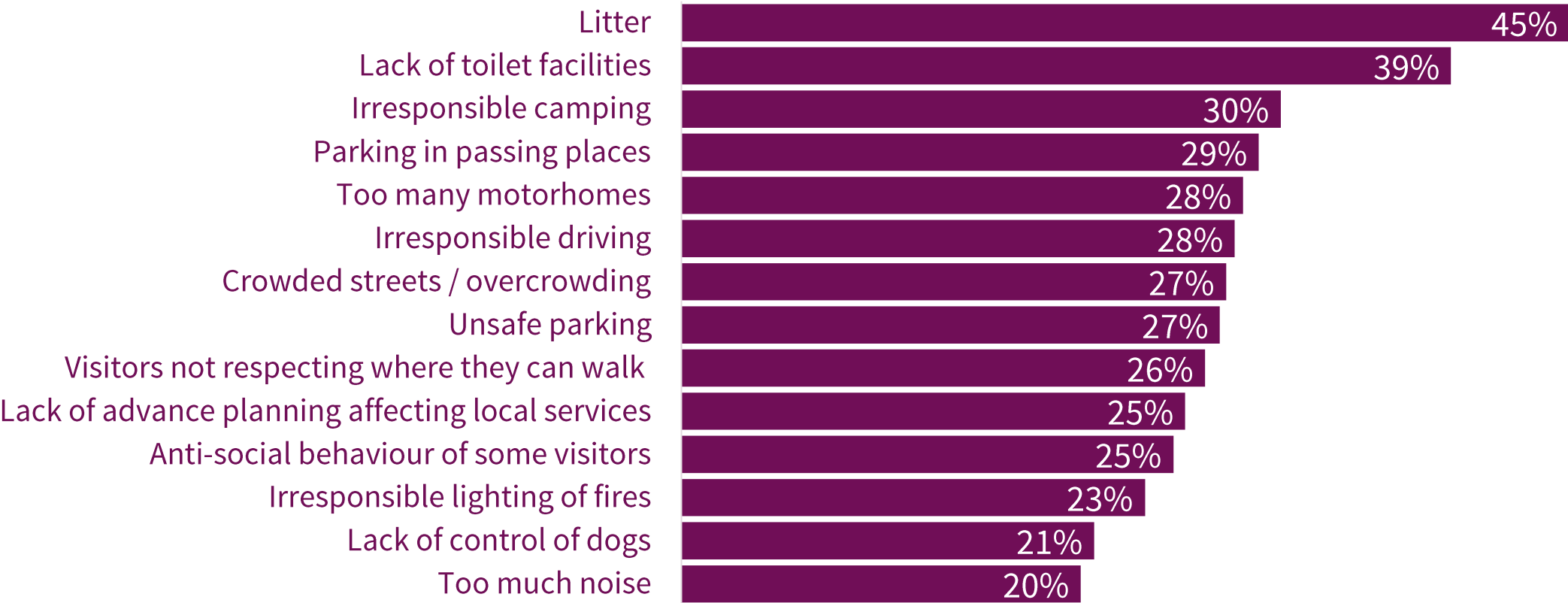
DISADVANTAGE ASSOCIATED WITH TOURISM



Respondents living in what they defined as tourism areas were presented with 7 potential disadvantages

• It adds to the amount of traffic on the roads and results in congestion and delays	51%
• It limits parking spaces available for local people	43%
• It increases prices for many local services and amenities	43%
• It is harmful to the natural environment in parts of my local area	34%
• There are too many visitors in my local area which lead to it being too busy at certain times	33%
• It increases demand for local historical & cultural attractions making them less available for locals	28%
• It reduces the ability of locals to access local services and facilities	28%

MOST FREQUENTLY MENTIONED ISSUES ATTRIBUTED TO VISITORS



MOST FREQUENTLY MENTIONED ISSUES ATTRIBUTED TO LOCAL PEOPLE



Residents views on impacts from visitors and local people.

Problems more attributed to LOCALS:

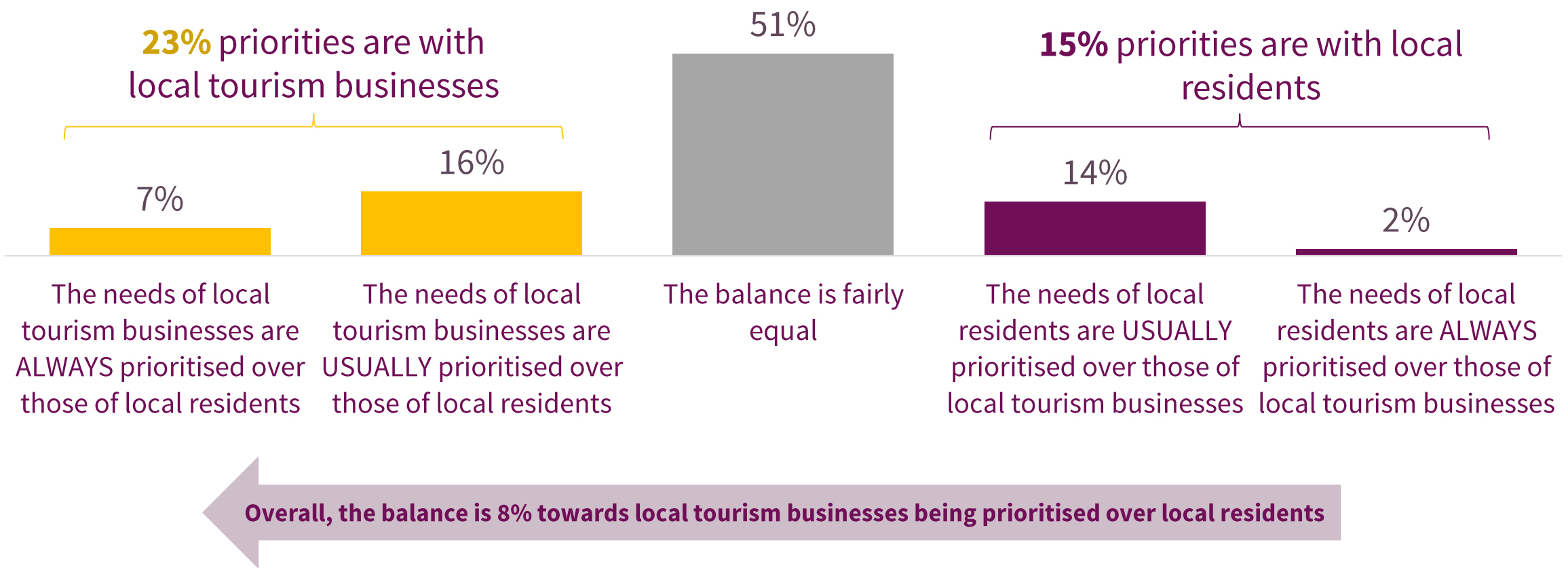
- Anti-social behaviour
- Irresponsible driving
- Lack of dog control
- Unsafe parking
- Too much noise

Problems more attributed to VISITORS:

- Lack of toilet facilities
- Irresponsible camping
- Parking in passing places
- Too many motorhomes
- Crowded streets

THE BALANCE OF PRIORITIES

Some 23% felt it was more skewed towards tourism businesses and 15% felt it was more skewed towards local residents – a net of 8% towards businesses.



THINGS TO THINK ABOUT

Demand for Scottish breaks remains strong – albeit conversion needed

Need to be visible and bookable where visitors are looking.

Work together make limited funds go further, for marketing and investment in product.

Positive positioning of our industry with local people remains important

Thanks

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