

A large, stylized purple flower graphic is positioned on the left side of the slide. It features a central circular element with a three-petaled flower inside, surrounded by several curved, petal-like shapes that radiate outwards. The entire graphic is rendered in a solid purple color.

*Visit
Scotland* | *Alba*[™]

Sharing Scotland's stories

Keeping Scotland front of mind

Cat Leaver, Promoting Perthshire, 31 January 2024

Hello

Who am I?

Mum

Marketer

Strategic advisor

Passionate traveller





Tourism is a
force for good
Better places to live, work and visit

VisitScotland

Marketing Objectives



Context

What does success look like?

Success will be in delivering against these 4S outcomes for:

- Our visitors
- Our industry
- Our communities

Spread

Spread of customers through the year and across Scotland

spend

Increased yield from each visit

Sustainability

Improved environmental footprint and conservation of natural and cultural heritage

Satisfaction

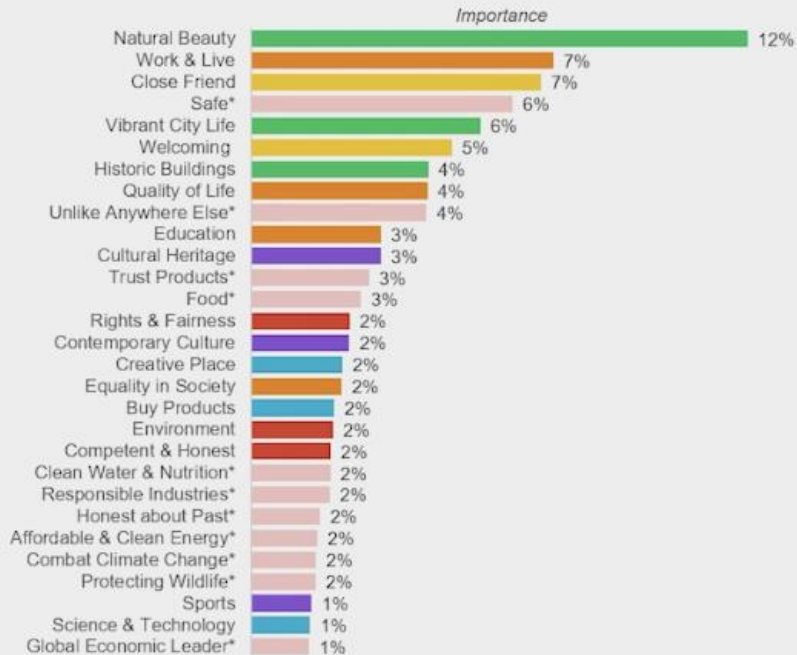
Improved end-to-end stakeholder experience

Responsible tourism

Whose responsibility is it anyway?

Global Desire to Visit Drivers

Desire to visit has reached an all-time high – and sustainability metrics are not key drivers of it.



*new common interest attributes added in 2023



Sustainability is not an explicit driver to visit.

However, **natural beauty** is the top driver.

To maintain our competitive edge, we must preserve our natural heritage.

Tourism has never been more competitive

In 2022, there was **£132M spent in the UK** across various tourist bodies, and **\$832M in the US**.

Top Advertisers	Spend (£)
Qatar National Tourism Council (Qatar)	14,665,684
Republic Of Turkey Ministry Of Cult	11,657,710
Republic Of Turkey Ministry/Turkish Airlines	9,731,370
Visit Greece	7,226,827
Israel Government Tourist Office	6,982,179
Republic Of Turkey Ministry/jet2holidays	6,977,690
Dubai Corporation Of Tourism	6,730,213
Visit California	6,287,810
Tourism Ireland (Gb)	6,114,471
Tourism Australia	5,086,477
Brand USA	4,788,719
Spanish National Tourist Office	3,199,041
Visit Orlando	2,734,431
Moroccan National Tourist Office	2,383,681

In the UK, hot weather destinations are spending the most.
And then there's Ireland, who is spending £6M.

Top Advertisers	Spend (\$)
Canadian Tourism Commission	\$67,432,673
California Travel & Tourism	\$28,885,628
New York Dept Eco Dev	\$24,165,115
Qatar Natl Tourism Council	\$23,841,832
Orlando/Orange County	\$22,089,375
Charleston Area	\$20,625,654
Monroe County Tourist	\$14,897,904
Tourism Ireland	\$14,694,809
Las Vegas Convention	\$14,030,822
Nyc & Co Inc	\$13,558,347
San Diego Convention & Visitors Bur	\$11,901,107
Alabama Tourism Dept	\$9,358,513
Puerto Rico Tourism Co	\$8,064,120
West Virginia Division Of Tourism	\$7,772,494

Top spenders in the US are North American, with Qatar and Ireland investing similarly heavily as into UK market.

Who comes to Scotland?

Visitor data



Who came to Scotland in 2022? International Spend and Visit



* Doesn't include China due to travel restrictions

Visitor data 2022

Who came to Scotland?

- GB accounted for 81% visits and 52% spend (down from 55% pre Covid)
- International spend was up 24% on 2019
- US was the largest international market contributing 21% of total spend

13.5m

GB overnight trips

3.2m

International visits

£3.4bn

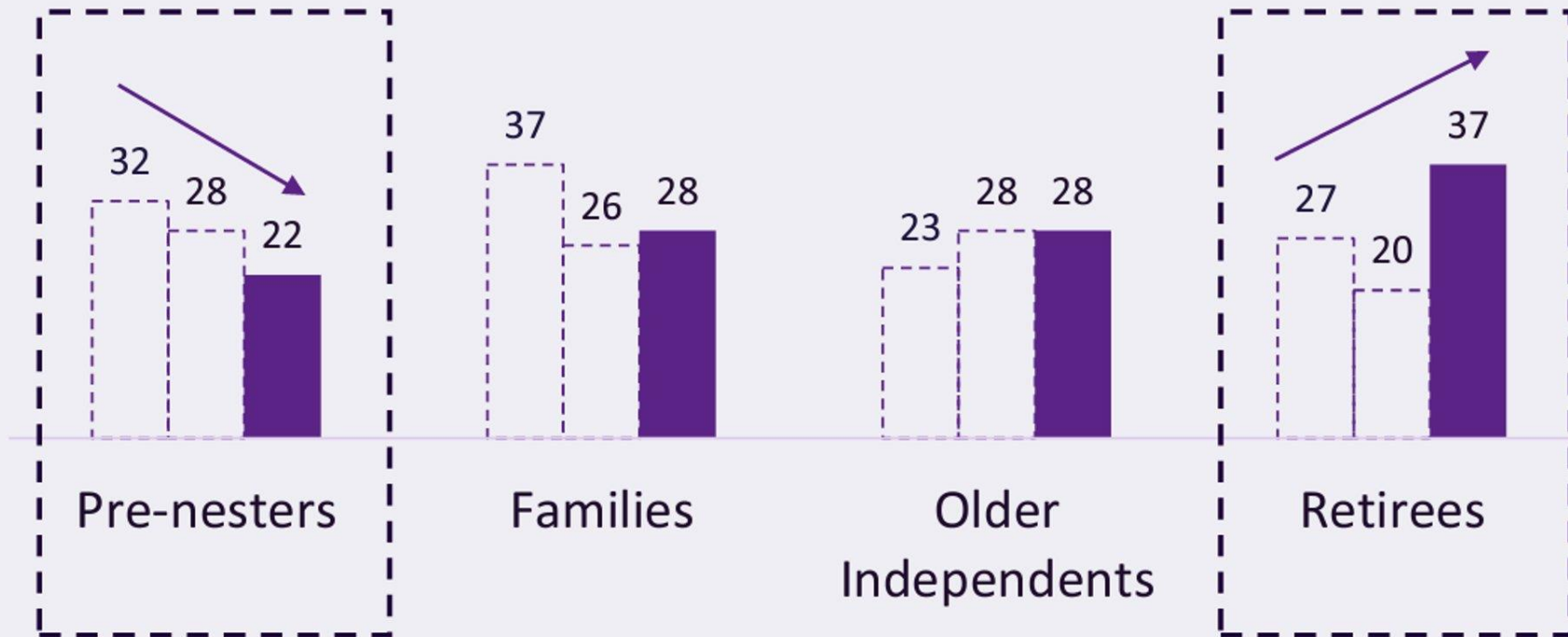
GB overnight spend

£3.2bn

International spend

Proportion taken a UK overnight trip by life stage (%)

2021 2022 2023



Travel looks different in 2024

Visitor trends



Cost of living impact on UK holidays and short breaks (%)



Visitor trends

Physical, mental and spiritual wellbeing

42%

The top motivation for intended Autumn and Winter 2023 trips in Scotland by UK residents was 'to get away from it all and have a rest' *

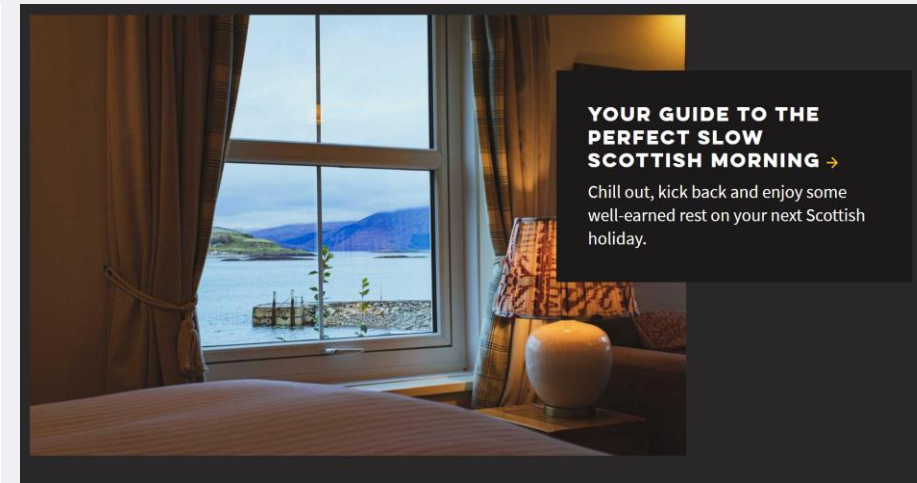
45%

of UK and **60% of US** travellers plan to add leisure days to future business trips **



Opportunities Enriching experiences

- Offer immersive experiences with connection to outdoors and nature
- Opportunities to relax and recharge
- Promote facilities that support wellness and responsible travel
- Develop wellbeing experiences
- Enable personalisation
- Promote local quality cuisine
- Showcase sustainability creds



The world is slowly moving away from hustle culture, which promotes overworking, multitasking and having an endless to-do list. As a reaction to that, there's been a new trend that's emerged – quiet living.

Visitor trends

Solo travel

59%

looking to venture **alone** *

23%

Almost a quarter of domestic visitors to Scotland by British residents were **solo** travellers. **

Group and multi-gen travel

79%

of respondents indicated they are planning a trip with their **grandchildren** this year ***

79%

of US travelers have taken a **group** trip to celebrate a birthday or anniversary ****

Visitor trends

Travel is serious business in 2024

24%

of global business travelers plan to take a friend or family member with them on a business trip next year *

45%

of UK and **60% of US** travellers plan to add leisure days to future business trips **



Visitor trends

Visitors want a taste of their destination

61%

are prioritising learning about the origins of a destination's iconic dish *

27%

US travellers prioritise eating local cuisine and authentic food amongst holiday activities **



Visitor trends

Luxury isn't just 5*

73%

are willing to **spend more** for the travel itinerary that they want *

54%

over half would pay for hotel upgrades, and 47% are willing to invest in travel upgrades **



Visitor trends

Cultural phenomenon influence travel

50%

more than half of US travellers say they've researched or booked a trip to a destination after seeing it on a **TV show** or **movie** *

24%

of global travellers planning getaways for one-of-a-kind experiences, **like concerts** and **sporting events** **



Opportunities Develop enriching and memorable experiences

The desire to travel has not waned but visitors expect more from their travel experiences.

- Encourage and provide inspiration for longer stays and value add experiences
- Provide authentic & immersive experiences, as focus shifts focus from consumption to purposefulness
- Develop and promote facilities that accommodate different visitor needs: solo travellers; families; business travellers **and** their companions
- Promote local locations, tours and 'behind the scenes' experiences, related to well-known TV & Films, concerts and tours
- Upsell private tours and leverage exclusive local experiences
- Develop local network - recommend local places to stay & eat, how to get around, co-working spaces, coffee shops with great wi-fi, creative isolation and quiet workspaces
- People want luxury for less, so consider personalisation, 'exclusive' offers and 'wow' moments
- Demonstrate green tourism credentials to help frequent travellers make sustainable choices

How we find & book holidays is changing

Behaviour and tech trends



Booking trends

The path to purchase is complex and not linear

141

On average, travellers view
141 pages of travel content
in the 45 days prior to booking

Technology trends

Social media is a key part of the search journey

87%

... of millennial travellers consult **social media** for inspiration. *

40% of young users used TikTok or Instagram, to find a place for lunch. **

Opportunities
**Be discoverable
and bookable**

Social media is a key part of today's **search journey**.

- The power of social as a search tool is immediacy, relevance and curation
- Tailor content by platform and to your audience to maximise performance
- Focus your energy where your audience is
- Make sure you optimise content to be found in relation to search queries (like SEO), i.e. hashtags, location tags, keywords and descriptions
- Create content that can be saved and returned to, using social as a platform for discovery & information
- And remember to **be social** – every piece of communication is valuable data you can act on

Technology trends

Video is dominating consumer media

> 2.6 BN

YouTube is the second most popular search network,
with >2.6 billion monthly active users



Opportunities

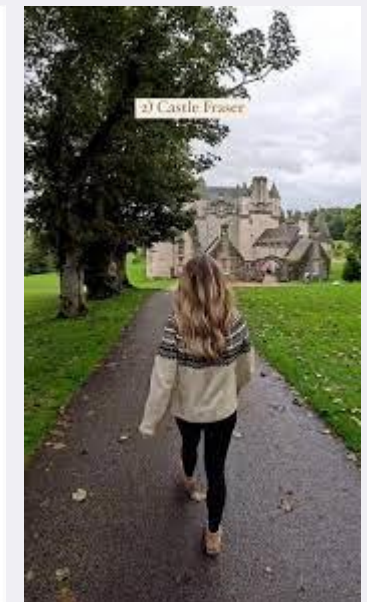
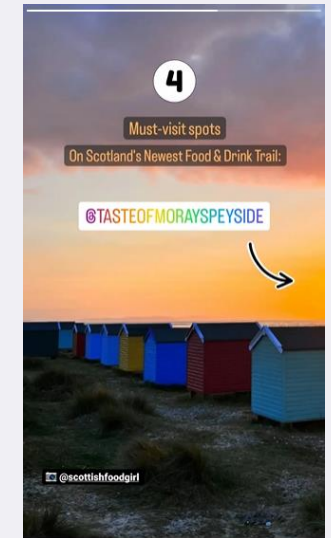
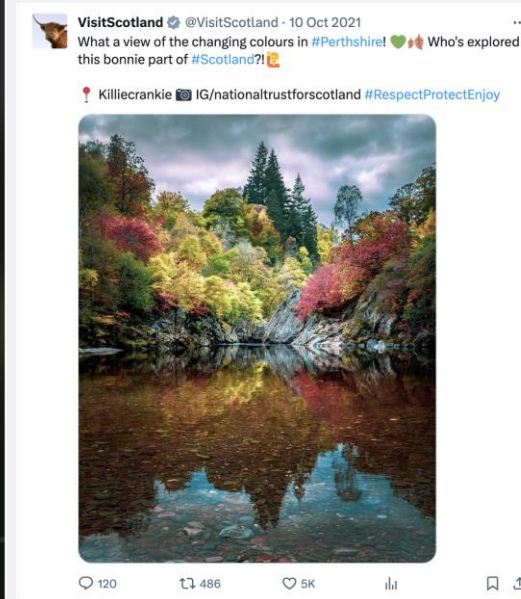
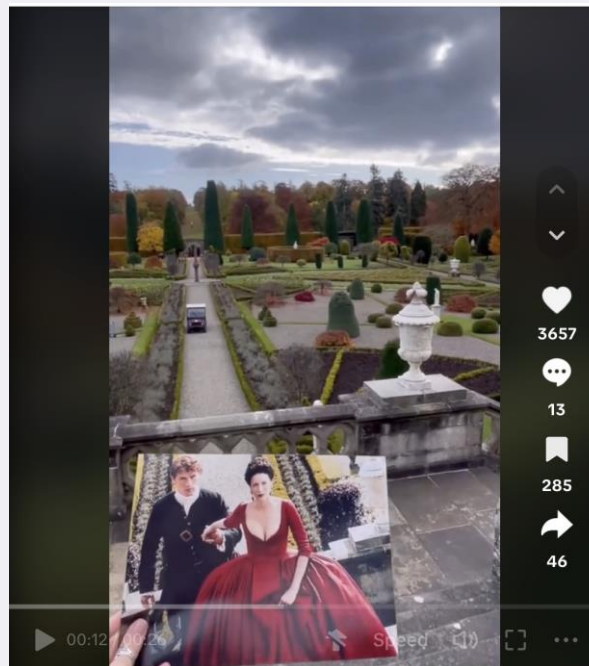
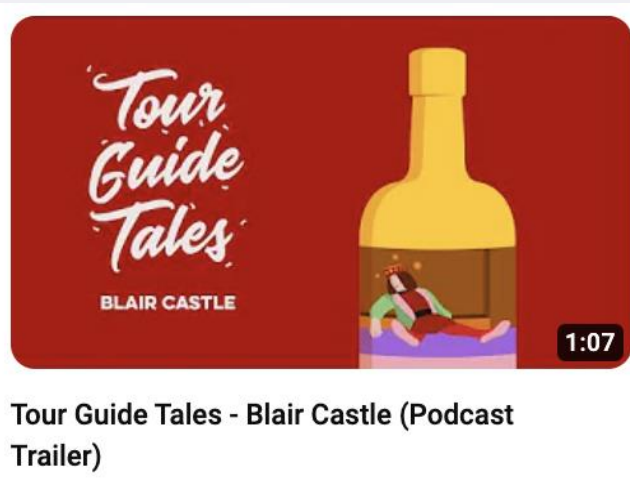
Leverage the storytelling power of video

Video is dominating our media and feeds, influencing travel decisions.

- Start low-fi and keep it simple
 - A smartphone
 - A tripod, gimbal or light may be useful
- Engage in the platforms and formats of the consumers' choice, i.e.
 - Shorts
 - Listicles
 - Long-form content, leveraging influencers and content creators
- Leverage channel trends to tap into wider conversation, i.e.
 - Hashtags
 - Stickers
 - Destination "dupes"

Storytelling Make me feel something

- We are **80%** more inclined to do business with a company that offers a personalised approach
- Content must work harder and there is no **one size fits all**
- **Audience-first** and **channel specific**



Consumer trends

Travellers are open to inspiration

55%

of travellers on Expedia
did not have a specific
destination in mind when they
first started thinking about a trip

Booking trends

Visitors are increasingly booking ahead

67%

of global travellers book activities and experiences online **ahead** of travel *

13k+

activity tickets sold via Expedia in 2023 **up 55%** on 2022 **

83%

of Gen Z say it is important that they can book their trips **entirely online** *

180+

Expedia searches for **180+ days** are growing over 10% WoW (Dec) for Scotland **

Opportunities Be discoverable and bookable

On average, travellers spend one month **thinking** about their trip and just over a month **planning** it (Expedia, 2023). This offers a multitude of touch points to inspire and influence travel decisions.

- Stand out and make sure you are present across platforms which provide **inspiration and booking** options
- Leverage strategic partnerships to maximise your presence across multiple touchpoints
- Make sure your web presence is mobile friendly
- Consider your 'always on' marketing approach
- Showcase your offering across seasons, attracting 'off-season' interest
- Consider opportunities to upsell (value-add or cross-sell activities and experiences) to increase yield per trip
- Ensure listings are up to date and accurate
- Set future rates to meet longer booking windows

Key takeaways

Be distinctive

Tell your **story** and showcase what makes you unique and compelling

Be discoverable

You must be present and stand out across touch points to **inspire early and often**

Be inclusive

Tailor your offering to meet the needs of the **individual** and maximise **value add** opportunities

Be collaborative

Consider where **partners** can maximise your offering, extend your reach and improve your impact

Be bookable

Make sure you are bookable through multiple **direct and indirect** routes, with accurate and up-to-date listings, rates and information

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Thank you

Any questions?