



Insight Department:
Unique Scotland: Promoting the
benefits of a holiday in Scotland

Topic Paper | Updated October 2019

Welcome

STANDING OUT FROM THE CROWD

The wild beauty of the Scottish landscape, the vibrancy of Scotland's cities and the diversity of its culture, the country's magnificent architecture – both old and new – and its authentic, romantic heritage and history; in terms of destination brands, Scotland is in a pretty enviable position – but everyone involved in the tourist industry in Scotland still has to work hard to ensure that their voice is heard within the highly competitive tourism market.

Today, almost every country can lay claim to a 'unique' culture and heritage and is able to offer their visitors diversity and a wealth of appealing products - from five star resorts to breath-taking scenery and from adrenaline-fuelled activities to culturally enriching opportunities.

With hundreds if not thousands of locations to choose from, how can tourists be encouraged to pick Scotland for their next holiday?

USING INSIGHT TO INFORM THE TOURIST OFFERING

VisitScotland has conducted research with visitors and potential visitors to explore what they perceived as being the benefits of a holiday in Scotland. What emerged was a set of recognisable core attributes or features as well as a set of important emotional benefits. This document brings together the research findings, with knowledge and marketing insight, to help everyone in the Scottish tourist industry understand the perceived features and benefits of a holiday in Scotland – from a rational as well as an emotional perspective - and promote these all-important points of difference when marketing any tourist offer.

Understanding more about the benefits that Scotland can offer visitors will help the Scottish tourism industry work to the country's strengths when marketing to current and potential visitors.

Further research Topic Papers are available on www.visitscotland.org. Our series of **Trends Papers** provide further insight into consumer trends.



Understanding perceptions of Scotland

Today, visitors are increasingly discerning in their choice of holiday destination and their reasons for visiting a country are often a desire for a deeper and wider experience rather than just 'a place to spend time'. Tourists want to make real connections with the countries they visit so will actively seek destinations that can deliver an enriching life experience.

Exploring perceptions of Scotland as a holiday destination with audiences who reside both in the UK and in key overseas markets highlighted a number of strong and consistent features and emotional benefits that are explored in detail over the next few pages.



I A visit to Scotland is perceived as being a powerfully enriching personal experience.

Key features: what tourists expect to see and experience in Scotland

The features that people associate with a holiday in Scotland are the assets of the country that resonate most strongly with visitors and potential visitors. Making these features stand out as key points of difference between Scotland and its competitors will help everyone working in Scottish tourism promote Scotland more effectively and increase the country's appeal to holiday-makers.

Landscape

A dramatic and breathtaking landscape remains the core expectation when thinking about Scotland.

People – across all geographical markets – expect to be awed by the majesty, openness and sheer scale of Scotland's landscape; they think in terms of 'breath-taking and dramatic' rather than 'picturesque and pretty' and this makes the natural environment stand out from other destinations, including domestic competitors. A variety of scenery is also expected – so remember that urban as well as rural landscapes appeal to visitors.

"It has beautiful sceneries and landscapes, I'm really attracted by those semi-mystical landscapes."



History & Culture

Scotland's historic and cultural icons are strong and distinctive; they are often top of mind for visitors, particularly those people who don't live in Scotland.

Visitors and potential visitors look forward to enjoying a living experience of the country's rich historical past and believe that they will encounter legends, myths and romantic stories which may date back to many centuries ago but still play a vibrant role in contemporary Scottish culture.

"This country breathes history"



People

The Scottish people are expected to be warm and down-to-earth yet passionate and spirited.

Visitors imagine that they'll engage and benefit from interactions with local people who are honest and open, friendly, welcoming and hospitable. They expect to meet people who are proud of their history and display a real passion for, and knowledge of, their country.

"... the thing I enjoyed most was the absolute genuine warmth and kindness of the Scottish people."



Emotional benefits: how tourists expect to feel when they come to Scotland

The promise of an emotional experience is critical for today's tourist; it's a powerful differentiator when selecting one destination over another. That sense of connection and enrichment is often what people will remember most about visiting a country... and it's certainly one of the things they'll tell their friends about when they get home. Remember that places can be photographed – experiences have to be lived!

Awe

Visitors and potential visitors imagine that a holiday in Scotland will be an intense experience with the potential to move them at a profound level.

Their feelings of awe may emerge from connecting with the landscape, being caught up in the history or exploring the culture of Scotland and there's a perception that Scotland may offer a more enriching experience than other destinations.

“Goose bumps all over at the sheer splendour”

Spirit

The individual spirit of one country cannot be easily reproduced by any other and VisitScotland's research highlighted a perception of mysticism and passion in the spirit of Scotland which sets it apart from other destinations.

People imagine that a holiday in Scotland will allow them to connect directly to this spirit - bound up in landscape, history and culture - rather than merely witness it.

“It gets into your soul.”

Connection

An expectation of making a connection to Scotland runs through all the emotional benefits that VisitScotland's research uncovered.

Visitors expect to feel re-centred and re-connected with their own lives as a result of a Scottish holiday – and they also expect to make a real connection with Scotland – to feel a true involvement rather than a superficial engagement. Some imagine that they will feel 'at home' and connected to Scotland's people and passionate spirit.

“... a feeling of connection – being part of it...”

Escapism

Needing a place to escape to is a common priority for tourists right across Europe.

There is an expectation of experiencing real space on a Scottish holiday – this may come from the openness and vastness of the landscape as well as simply being away from everyday life – and de-stressing is also seen as one of the key benefits of taking a holiday in Scotland.

“You can feel your shoulders drop”

Meeting visitors' expectations

Scottish Residents



'Getting away from it all' stands out strongly for people living in Scotland when they think about taking a holiday in their home country. They feel a sense of not having to travel far to see or experience something amazing. Scottish residents also expect to feel proud and patriotic when they holiday on their home soil – as well as lucky to have all this on their own doorstep.

"I feel like I own it."

Domestic Markets



Although there are a number of shared benefits (such as naturally beautiful scenery, relaxation and quality accommodation) with holidaying in England, Wales or Northern Ireland, it is Scotland that is most associated with having a breathtaking and dramatic landscape.

"Walking in the beautiful natural environment, the scenery was breathtaking."

Key European Markets: France



The tangible features of our vast and beautiful landscape, castles, lochs, golf, whisky and hiking are all top of mind for French tourists. But there is also a strong expectation in this market that Scotland has an atmosphere all of its own – a sense of history and a mythical quality are anticipated!

"I want to see the hidden mysteries and the hidden marvels, the hidden wonders, the hidden places and the secrets, the customs..."

Key European Markets: Germany



The openness, remoteness and ruggedness of Scotland's vast landscape are all perceived by German tourists to be strong benefits of a holiday in this country.

"It is vast, open, intangible – you can't hem it in or restrict it."

Key Long Haul Markets: USA



Being able to 'feel' the mysteries of the past stands out for American tourists – in particular, being able to see castles (they can't get enough of them!). They also anticipate vast landscapes which (unlike the USA) are wild and not managed, green and not dry. The American market wants to feel a spiritual connection with Scotland – the land, history and people – they also expect to 'feel at home'.

"The wild landscapes and the castles. Always the castles."

Overcoming negative perceptions

Every tourist destination gives rise to negative as well as positive associations and Scotland is no exception. Although the focus of this Topic Paper is on the positive emotional benefits and associations of holidaying in Scotland, it's important to recognise – and respond to – some of the perceived barriers to visiting the country. After all, every cloud (even a grey Scottish one) has a silver lining...

“Scotland is an individual place, not one of mass tourism but a special mystical place that offers a real and authentic experience.”



Joined up geography

Research indicates that many people think of Scotland as a whole destination, rather than in terms of specific regions such as Perthshire, the Highlands or Argyll for example. This is common for Wales too, but different for England where separate regions such as Cornwall or the Lake District are readily identified.

Help tourists understand ‘how to do’ Scotland by focusing on your region and its similarities or differences to other Scottish regions and also giving indications of how much time visitors should allow if they want to explore more than one part of Scotland.



Are we there yet?

Even within the domestic market, some people imagine that you have to travel huge distances between places in Scotland, or drive for miles to get anywhere. Others perceive it as a cul-de-sac at the furthest tip of the UK and think it's difficult to get to. Some European visitors don't want to drive in Scotland (“the idea of driving on the left terrifies me!”) but their awareness of the Scottish public transport system can be limited. Ensure that you always provide clear advice on distances and introduce alternative methods of travel!



Bring your brollie!

It's fair to say that the unpredictable Scottish weather remains a barrier to some visitors when they consider Scotland as a destination – particularly those who have never visited before. Interestingly, previous visitors to Scotland state that their expectations of the benefits of a Scottish holiday outweigh the weather factor. So bear this in mind and focus on the positive benefits of an enriching experience to reduce doubts over weather as a factor in the decision making process.



What's the hurry?

For many people considering Scotland as a holiday destination, a sense of immediacy is missing – there's an assumption (especially for domestic visitors) that Scotland will always be there so they can put their trip off for another day or when they're older. Use the many events in Scotland's calendar to encourage visits that have a seasonal or date/time imperative.

Emerging Consumer Trends

Our series of Trends papers ask ‘Have you noticed the world changing?’ Alongside research with consumers about what they expect from a holiday in Scotland, VisitScotland conducts environmental scanning to identify trends within consumer lifestyles which may also influence how we market and attract visitors to Scotland.

Mega-drivers are ‘slow burn’ movements or changes that may be developing, establishing or embedding within society. We can consider these changes and how the tourism industry can reflect these when marketing Scotland or marketing products and unique experiences to consumers.



The 2019 Trends paper discussed 3 key Mega-trends:

THE ART OF NOW

Looks to the development of the individual. This may be through self-development or an appreciation of the culture and heritage of the destination the individual has found themselves in. **This embraces enrichment and personal growth.**

THE ART OF NOW

BASIC NEED
Which deep consumer needs and desires does this trend address?

- Uniqueness
- Convenience
- Provenance
- Value for money

EMERGING CONSUMER EXPECTATION
What new consumers needs, wants, and expectations are being created by the Drivers of Change? Where and how does this trend satisfy them?

- Family friendly authentic experiences.
- Joined up travel options and itineraries with convenience.
- Home grown produce and product.
- Access to educational experiences and creative pursuits.

DRIVERS OF CHANGE
Why is this trend emerging now? What's changing?

- Flexible family units
- Supporting local economies
- Valuing experiences over possessions
- Searching for simplicity
- Connectivity



SENSORY TOURISM

Sensory Tourism immerses the visitor in the environment they have found themselves in. Both rural and urban destinations can contribute to the visitors desire to experience tangible sensations.

SENSORY TOURISM

BASIC NEED
Which deep consumer needs and desires does this trend address?

EMERGING CONSUMER EXPECTATION
What new consumers needs, wants, and expectations are being created by the Drivers of Change? Where and how does this trend satisfy them?

- Environmentally responsible tourism organisations.
- Ease of access to natural beauty of destination.
- Wellness-focused facilities.
- Authentic (sometimes imperfect) visitor experiences.
- Experiencing the unexpected.

DRIVERS OF CHANGE
Why is this trend emerging now? What's changing?



NEW SOCIETY NORMS

New Society Norms – more people are seeking something meaningful in their lives which travel can in part contribute to.

NEW SOCIETY NORMS

BASIC NEED
Which deep consumer needs and desires does this trend address?

EMERGING CONSUMER EXPECTATION
What new consumers needs, wants, and expectations are being created by the Drivers of Change? Where and how does this trend satisfy them?

- Accessible experiences and personalisation for individual needs.
- Immersive experiences and real life stories.
- Instant reward for custom.
- Splurge opportunities.
- Social spaces and networking opportunities on business trips.

DRIVERS OF CHANGE
Why is this trend emerging now? What's changing?



Marketing Scotland’s great products and experiences needs to highlight not only the emotional benefits of a break in Scotland but also tap into these wider trends impacting upon consumer lifestyles and wishes: **a desire for unique, enriching experiences, looking for personal growth and connection to boost wellbeing.**

Summary

USING INSIGHT TO INSPIRE INTEREST

Scotland may share some tourism ‘products’ with other tourist destinations – landscape, friendly people and a range of urban, rural and coastal activities – but it is the emotional benefits that the country provides which differentiate Scotland from other destinations. People imagine that a visit to Scotland will provide a powerfully enriching personal experience and they expect an intense and authentic personal journey that will affect them at a deep level.

Think about key emotional benefits of a break in Scotland in your communications and storytelling

Consider what visitors expect to see, feel and experience on a break in Scotland. Highlight opportunities for visitors or potential visitors to:

- Explore Scotland’s dramatic landscape
- Get caught up in the country’s history
- Connect with Scotland’s mystical spirit
- Make a deep emotional connection
- De-stress and re-connect with themselves

Think about the drive for unique experiences, wellbeing and personal growth

Highlight the unique things that visitors will see and experience in Scotland/in your area/in your business. Feature the personal and authentic moments which sets us apart as a destination.

The Time Is Now

Promoting seasonal events and highlighting activities that take part on specific dates will also encourage visitors to ‘book now’ rather than think about visiting Scotland at a later, unspecified date.

Seeing is Believing

Research revealed that a positive response to motivational imagery is consistent across all markets. However while wild, dramatic scenery, landscapes and castles are always popular, do try to maintain a balance with other iconic subjects and don’t make Scottish landmarks look too remote. Remember to caption images and locations so that visitors can act on inspiration and think “I want to go there!”. Consider imagery which captures your unique Scotland stories

Learn more about the ‘Only in Scotland’ marketing campaign

In October 2019, VisitScotland’s latest marketing campaign drawing on consumer insight was launched. Access the Industry Toolkit to find resources that you can use within your business. www.visitscotland.org/supporting-your-business/marketing-toolkits/only-in-scotland

Appendix

SOURCES

*Based on research undertaken for VisitScotland on Scotland as a holiday destination (2001-2019)
VisitScotland research is undertaken with 'holiday takers' (consumers who regularly take holidays).

ADDITIONAL RESOURCES

VisitBritain: [Britain's Image Overseas](#)





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