SEEING OURSELVES AS OTHERS SEE US: PROMOTING THE BENEFITS OF HOLIDAYING IN SCOTLAND
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 conducted consumer 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.
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.

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”

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…”

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.”

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”
‘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.”

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.”

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…”

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.”

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.”
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.”

**Overcoming negative perceptions**

**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 furthermost tip of the UK and think it’s difficult to get to. Many 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.
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.

Marketing from the Scottish tourist industry needs to reflect the strong emotional benefits – awe, escapism, spirit and connectivity – which overlay the country’s core attributes – landscape, history, culture and people – and which are strong and consistent drivers for previous and potential visitors across every tourist market.

Focus on emotional benefits in your communications

Try highlighting 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

Introduce motivational imagery to your marketing

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!”.

Feature interesting activities and events

Tap into tourists’ emotional responses by showcasing a range of things to see and do which will allow them to see how they can make positive connections with the Scottish landscape, culture and people.

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.
APPENDIX

Sources
*Based on research undertaken for VisitScotland on Scotland as a holiday destination (2001-2015)
VisitScotland research is undertaken with ‘holiday takers’ (consumers who regularly take holidays).

Additional Resources
VisitBritain: Britain’s Image Overseas www.visitbritain.org/britain%E2%80%99s-image-overseas

CONTACT US

Insight Department
VisitScotland
Ocean Point One
94 Ocean Drive
Edinburgh EH6 6JH

T: 0131 472 2222
research@visitscotland.com
www.visitscotland.org

February 2016

Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omissions.

Images: © VisitScotland and © Thinkstock