



# VISITSCOTLAND & HIGHLAND COUNCIL REGIONAL UPDATE

31 MAY 2023

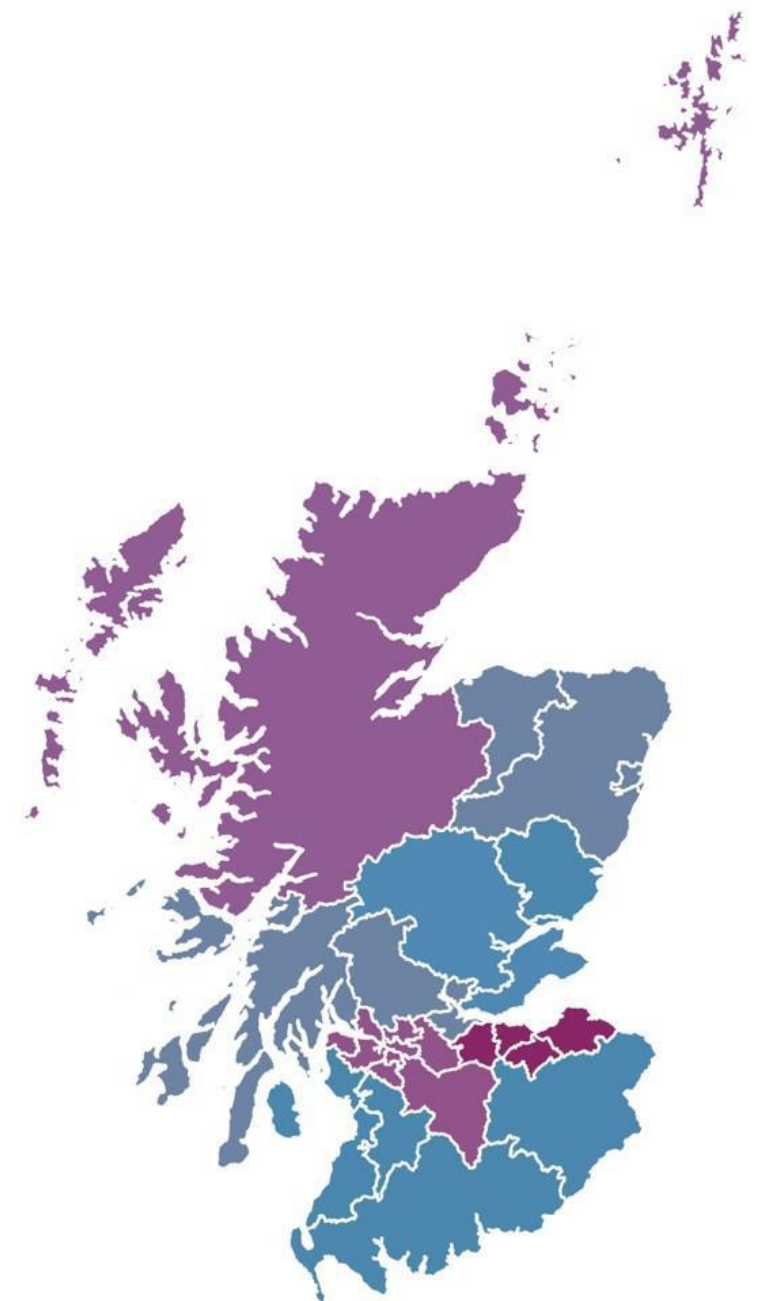


 [Rock Route, North West Highlands UNESCO Global Geopark](#) [VisitScotland / Airborne Lens](#)

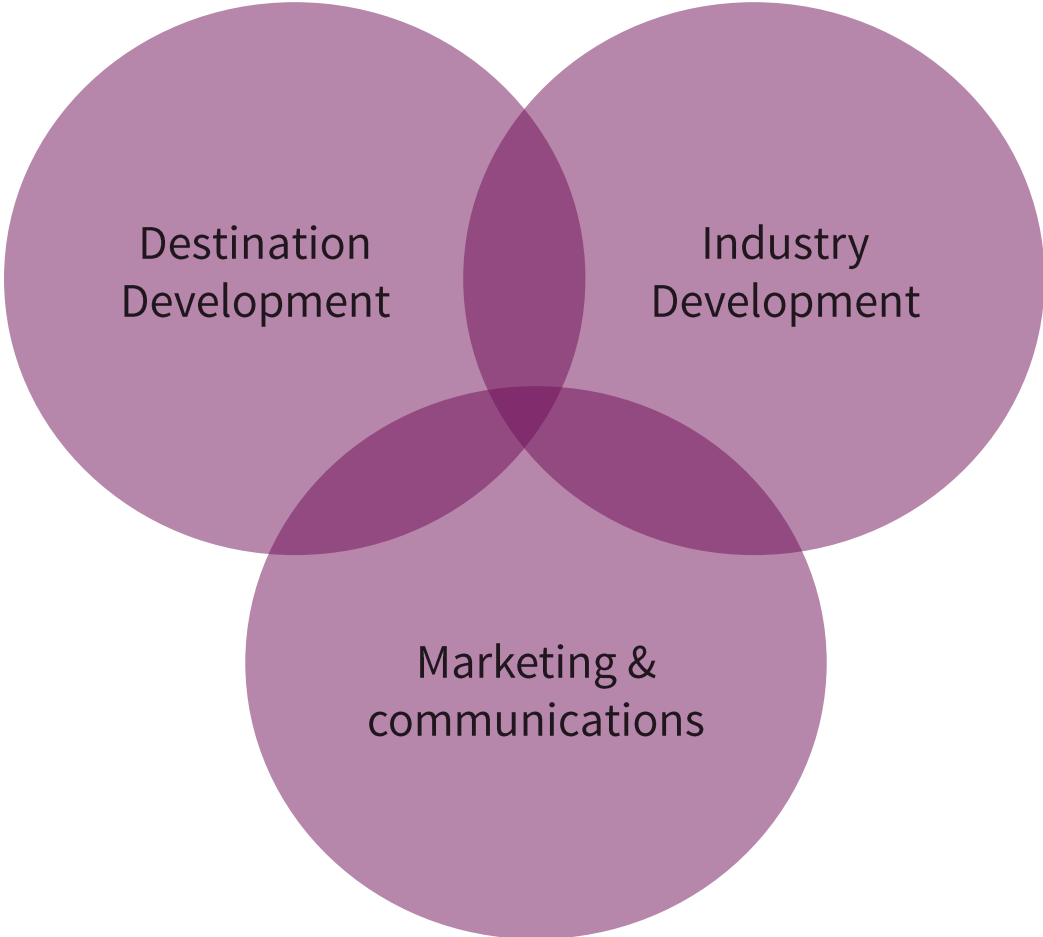


# TODAY

- VisitScotland focus & priorities
- Visitor insights
- Round up of promotion & events
- Resources
- Highland Council tourism update
- Q&A



# VISITSCOTLAND – SCOTLAND’S NATIONAL TOURISM ORGANISATION



# FRAMING SUCCESS



Spread

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Regional spread  
Seasonal spread  
Industry (benefit) spread



Spend

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Quality over quantity  
Value over volume  
Elongating visits  
Shop local



Sustainability

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Net zero (Energy Mgt, Waste Mgt, Climate action)  
Natural & cultural heritage  
Responsible, inclusive & regenerative experiences  
Transport options



Satisfaction

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**Local satisfaction**

Visitor satisfaction

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

# TOURISM HAS NEVER BEEN SO COMPETITIVE

## Travel demand is back

- Scotland & the Highlands are top destinations for UK travellers, with interest to travel year-round
- Last year there were 3.2 million visits to Scotland from overseas visitors, compared to 3.46 million visits over the same period in 2019.
- For intermediaries, Scotland continues to be highly requested


## Changed consumer behaviour

- Escapism and to 'get away from it all' while building connections with people & places
- Rising awareness of impact on our planet and the importance of making sustainable choices
- To experience new things and receive personalisation
- Personal finances vary

## Changed booking habits

- Flexible booking options - free cancellation, deals, discounts
- Turning to intermediaries such as travel agents, tour operators and online travel sites, including for their activities

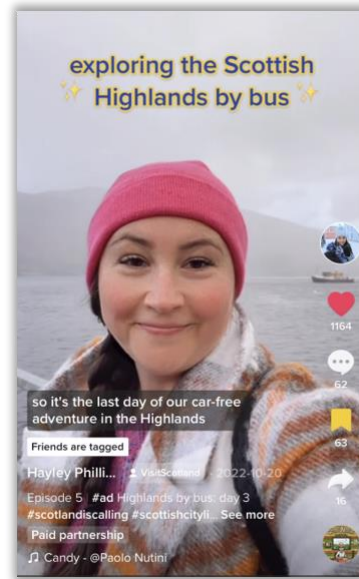


 Balintore, Easter Ross Peninsula, [Credit Tain and District Development Trust](#)



# RESPONSIBLE APPROACH TO MARKETING SCOTLAND & THE HIGHLANDS

- Keeping Scotland in holidaymakers minds
- Visitor management marketing & education
- Dedicated campaigns for slowing down
- Partnership working



# 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 2021 – 2022 activity achieved:

- ✓ 100m full video views
- ✓ 4.1m clicks to VisitScotland.com
- ✓ 34.9k hours spent reading about Scotland

## 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](#)



# KEEP SCOTLAND UNSPOILED

## Key Themes

- Camping
- Fire
- Water Safety
- Litter
- Motorhomes & Campervans
- Scottish Outdoor Access Code

## Assets - Examples

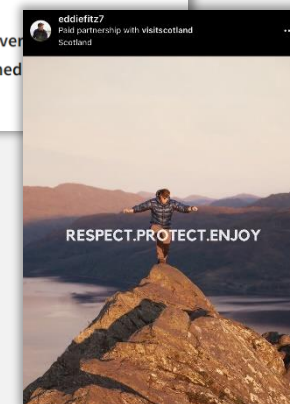


### ACTIVE

## A GUIDE TO SAFETY OUTDOORS IN SCOTLAND



Scotland's great outdoors is an incredible wonderland to uncover magnificent Munros, sparkling lochs, golden beaches, untouched and more to explore.



## VisitScotland.org

Information and our Responsible Tourism Toolkit available on [VisitScotland.org](https://www.visitScotland.org)

Content is kept up-to-date and new assets as they are created and signed off.



## Forestry and Land Scotland

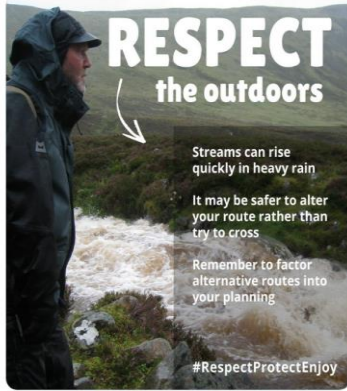
Forestry and Land Scotland @ForestryLS · Jun 24  
From wildfires to bin fires, using disposable BBQs can create a whole lot of problems for our rangers. If you're thinking of cooking outdoors, consider using a gas stove instead.

#RespectProtectEnjoy



## Mountaineering Scotland

Mountaineering Scotland @Mountain\_Scot · Jun 11  
Sometimes the weather just doesn't play ball - but make sure it doesn't catch you out together. When you're planning your route take good note of any stream or river crossings and make plans for if they might be uncrossable.  
[mountaineering.scot/safety-and-ski...](https://mountaineering.scot/safety-and-ski...)



## Loch Lomond & The Trossachs

Loch Lomond & The Trossachs @lomondtrossachs · Jul 10  
On Loch Lomond, byelaws mean you must carry lifejackets or buoyancy aids for everyone on board a vessel. If you arrive without them, you can purchase from Duncan Mills Memorial Slipway in Balloch or hire from leisure providers around the loch.



*Paddle safely  
this summer.*

## Cairngorms National Park Authority

Cairngorms National Park Authority @cairngormsnews · Aug 27  
#ItsAWalkInThePark keeping your dog close by, and it keeps our livestock safe. Get more guidance at [bit.ly/3Kk3QQa](https://bit.ly/3Kk3QQa)  
#CairngormsTogether #TreadLightly



Keep woof from wool.  
Dogs can harm livestock, so put them on a lead or keep close at heel.

## Ramblers Scotland

SCOTTISH OUTDOOR ACCESS CODE  
[outdooraccess-scotland.scot](https://outdooraccess-scotland.scot)

**Stoves beat  
fires and BBQs**



**Whip me up  
one of those.**

TikTok  
@ramblersscotland

## Scottish Water

Scottish Water @scottish\_water · Aug 24  
While we welcome you to come and enjoy our many beautiful reservoirs. Please do so respectfully. #RespectOurReservoirs #RespectProtectEnjoy #StaySafe



but please treat them  
with a bit of respect

## NatureScot

NatureScot @nature\_scot · Aug 14, 2022  
Scotland, yours to explore. All of ours to care for.  
Litter is dangerous for our wildlife and an upsetting sight for others. Take a bag with you to carry your litter until you can dispose of it in a bin.  
[ow.ly/nXAh50KIaVh](https://ow.ly/nXAh50KIaVh)

#FollowTheCode #RespectProtectEnjoy

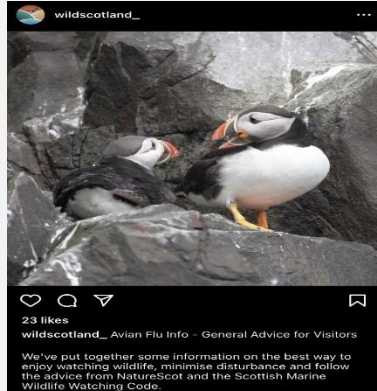
**Take any litter  
away with you.**

Be kind to nature  
and each other.



SCOTTISH OUTDOOR ACCESS CODE  
[outdooraccess-scotland.scot](https://outdooraccess-scotland.scot)

## WildScotland

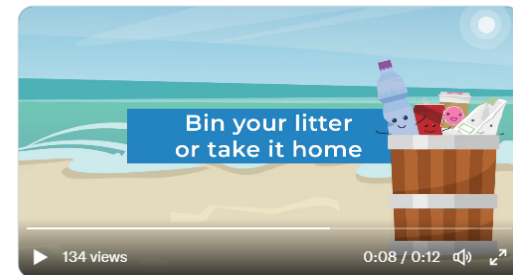


23 likes  
wildscotland\_ Avian Flu Info - General Advice for Visitors

We've put together some information on the best way to enjoy watching wildlife, minimise disturbance and follow the advice from NatureScot and the Scottish Marine Wildlife Watching Code.

## Keep Scotland Beautiful

Keep Scotland Beautiful @KSBScotland · Jul 16, 2022  
☀️ Out at the beach today? 🏖️ Help us #KeepScotlandBeautiful and protect the sand and sea by binning your litter or taking it home. 🗑️  
#RespectProtectEnjoy #MyBeachYourBeach #LeaveNoTrace #CleanUpScotland



**Bin your litter  
or take it home**

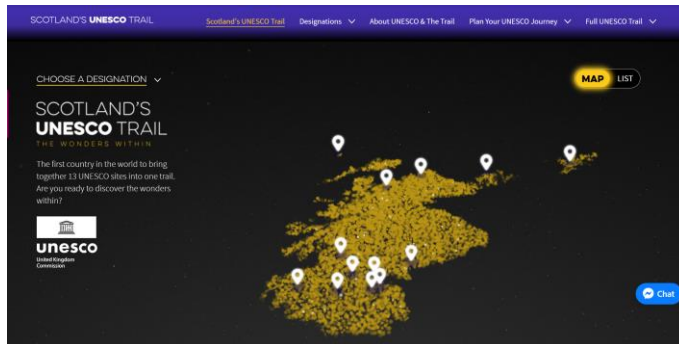
134 views

0:08 / 0:12

# SCOTLAND'S UNESCO TRAIL

The creation of Scotland's UNESCO Trail allows us to tell the story of Scotland in a new way that is innovative, exciting and, most importantly, encourages responsible behaviour.

## OWNED CHANNELS



13 designations – Biospheres, Global Geoparks, World Heritage Sites and Creative Cities.

- Dedicated [landing page](#)
- New video & imagery
- Inspiring content on VS.com
- Bespoke UNESCO Trail e-newsletters to EU markets

Through our social media channels

- ✓ Nearly 100 UNESCO Trail posts
- ✓ Reaching over 11m users
- ✓ Generating over 5k comments

## PROMOTION & COMMS



The launch of the trail was a great news hook. Highlands UNESCO sites featured throughout paid media content and online travel agent activity.

- **Géo magazine (France)** – [article on Highlands Geopark & Biosphere](#), over 5k views / 3min reading time
- **Skyscanner (Germany)** - [Landing page](#) to drive awareness and bookings.
- **Wanderlust (UK)** – [A Guide to Scotland's UNESCO Trail](#) spotlight information & inspiration on sites and how to be a responsible traveller. Live Nov 2022

## INFLUENCER ACTIVITY



Influencers who are passionate about history, culture, nature & travel making the content engaging, informative & authentic



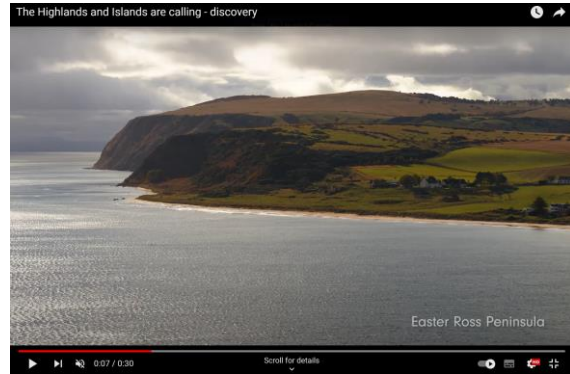
# SPIRIT OF THE HIGHLANDS & ISLANDS VISITSCOTLAND & HIGHLIFE HIGHLAND

[HTTPS://DISCOVERHIGHLANDSANDISLANDS.SCOT/](https://discoverhighlandsandislands.scot/)

Schottlands Highlands und Inseln rufen

Mehr erfahren

VisitScotland | Alba Spirit Spiorad



VisitScotland (Default) Sponsored

Who's up for a spring adventure? The Highlands and Islands are calling 🍷

Uncover your Spirit for adventure

discoverhighlandsandislands...  
Uncover your Spirit for Adventure

Learn more



News Opinion Sport Culture Lifestyle More

Paid content About

Spirit of the Highlands and Islands

## Red deer, winter walks and malt whisky: the Scottish Highlands and islands through the eyes of local people

Guidebooks and travel blogs will get you so far, but there's nothing quite like being told by a local to visit an ancient tomb or a hidden first world war relic this autumn and winter

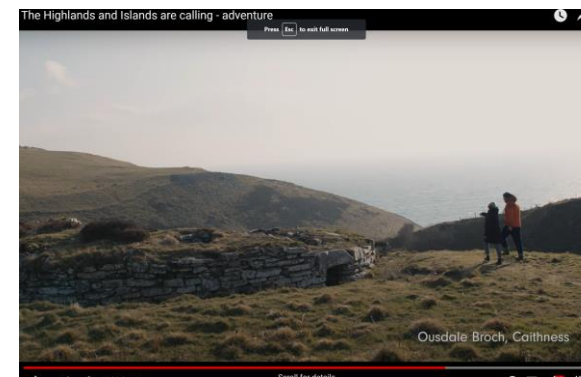
Paid for by:  
Spirit Spiorad  
VisitScotland | Alba

About this content:  
Arusa Qureshi  
Wed 12 Oct 2022 13:07 BST

The lighthouse on Bressay, in Shetland. The island is also noted for its archaeological sites. Photograph: mauritius images GmbH/Alamy

**The Highlands - people and their passions**  
Scotland's Highlands and islands are renowned for their natural beauty

Advertisement:  
Find winter gems in the Scottish Highlands and islands >



### SPOTLIGHT ON: THE ISLANDS

Coastal dreaming? Make it a reality and enjoy the serenity and beauty of a natural paradise.

SEE ISLAND ADVENTURES

### SPOTLIGHT ON: THE HIGHLANDS

Iconic landscapes paired with mysterious wonders and fascinating stories, feel part of the history as you wander ancient land.

DISCOVER NOW



### TIME FOR ADVENTURE

Immerse yourself in the sights & sounds, the Highlands & Islands are calling...

WATCH VIDEO

# EVENTS

[Scotland's National Events Strategy review & consultation](#)

## Scotland's Year of Stories 2022

- [Evaluation Report](#)

## UCI Cycling World Championships

- 11 days, 3-13 August 2023
- [Cycling Tourism Industry Guide](#)
- [www.cyclingworldchamps.com](http://www.cyclingworldchamps.com)

YEAR OF  
STORIES  
— 2022 —

## UCI CYCLING WORLD CHAMPIONSHIPS





# THE VISITOR OPPORTUNITY

- Over **2.3 billion** cycle tourism trips taken in Europe annually, generating an estimated value of **£37 billion**
- Scotland's share is **0.5% of trips and around 0.8% of spend**

	Cycling	MTB	Combined
Trips (000)	338	251	589
Nights (000)	1,322	1,234	2,556
Spend (£m)	£154	£112*	£266
No. of nights	3.9	4.9	-

Source: GBTS 2019 (3-year average 2017-19) and Scotland Golf Visitor Survey 2016  
\*Frontline Scotland 2016 estimated at £105m with potential to grow to £158m by 2025.

- Rise of **e-bike** purchasing and increase in popularity of **gravel biking and bikepacking**
- **New audiences** – beginners and experienced
- Supports our **responsible tourism** and **Net Zero** ambitions while reaching visitor needs of experiences that benefit their wellbeing



# INVESTMENT IN CYCLING, BENEFITING COMMUNITIES ACROSS SCOTLAND

## Highlands

- Inverness Mountain Bike Skills Loop - £40k
- Laggan Forest Mountain Bike Trails - £100k
- Abriachan Forest Kelpies Bike Trails - £50k
- Lochaber Wheeled Sport Bike Park - £290k (overall investment £525k)
- Boat of Garten Pump Track - £50k\*
- ScotRail Highland Explorer services to Oban, Fort William and Mallaig

## Argyll & The Isles

- Dunoon Bike Park – The Dunoon Project
- ScotRail Highland Explorer – Oban, Fort William, Mallaig

## Stirling & Forth Valley

- Callendar Park Cycling Hub - £158k
- Gala Park Pump Track - £50k
- Clackmannan Pump Track - £50k

## Glasgow & Clyde Valley

- Pollock Park Cycling Hub - £100k
- Cathkin Braes Cycle Hub - £145k
- Bellshill Cycle Hub - £100k\*
- Bellahouston Park Cycle Hub - £100k
- Shotts Pump Track - £50k
- Clyde Cycle Park phase 2 - £550k
- Cumbernauld Upgrade BMX track - £58k\*

## Ayrshire & Arran

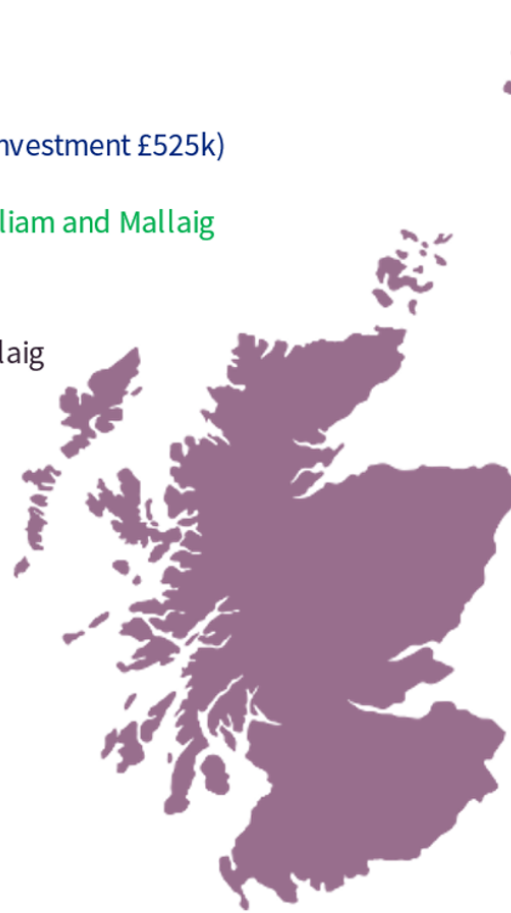
- Isle of Arran HS MTB – new cycling hub - £190k

## National

- National Cycle Network - £10.6m
- Cycling Facilities Fund - £8m
- Cycling Community Fund - £1.4m
- Energy Saving Trust e-bike scheme - £900k

## South of Scotland

- Stow Pump Track - £50k
- South of Scotland coast-to-coast £350k
- Scotland's Mountain Bike Innovation Centre & Bike park - £19m
- 7stanes Mountain Bike Trail Centres refresh - £5m
- Destination Tweed long distance trail - £24m



## Orkney

- Possible Hoy on Hoy event/route

## Moray Speyside

- Glenlivet Mountain Bike Trails - £13k\*

## Aberdeenshire

- Banchory Cycling Hub - £100k
- Tarland Trails 2 - expanded MTB Trail centre - £299k
- Aberdeen (Transition Extreme) Pump Track - £50k
- Friends of Haughton Park - £100k

## Perthshire

- Auchterarder Pump Track - £50k
- New road, gravel and e-bikes routes

## Fife

- Middleden Mountain Bike & Skills Area - £100k
- Lochore Meadows Whitewood Mountain Bike Trails - £49k
- Kennoway Pump Track - £50k\*

## West Lothian

- West Lothian Cycle Circuit - £600k
- Balbardie Park Pump Track - £45k\*

## East Lothian

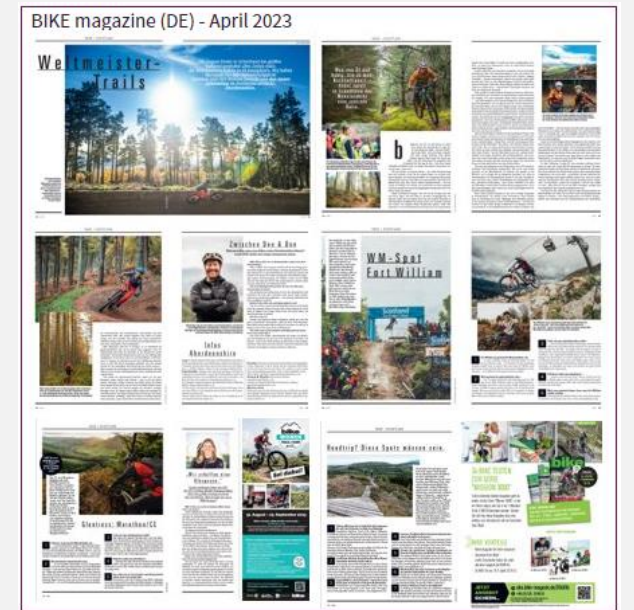
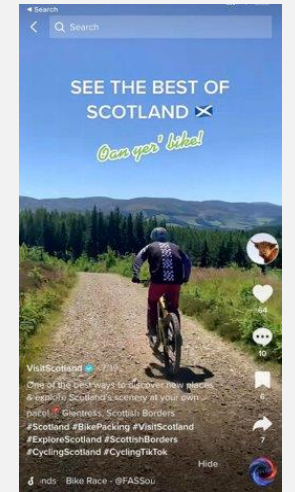
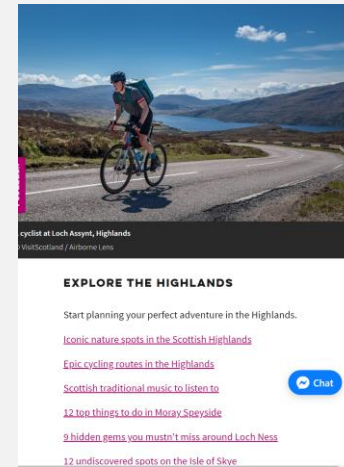
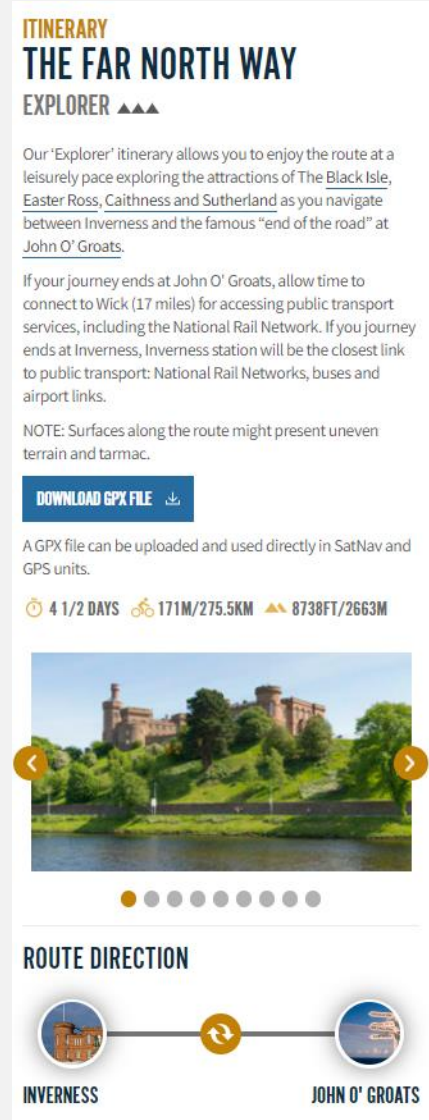
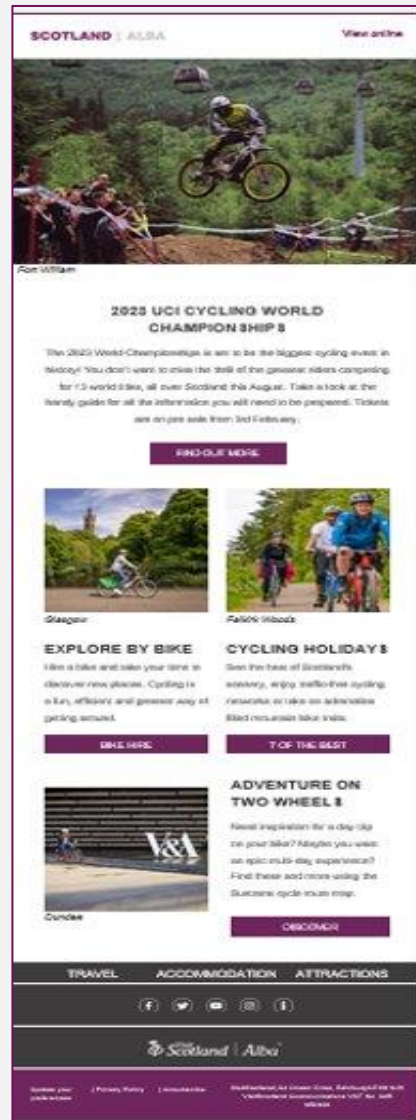
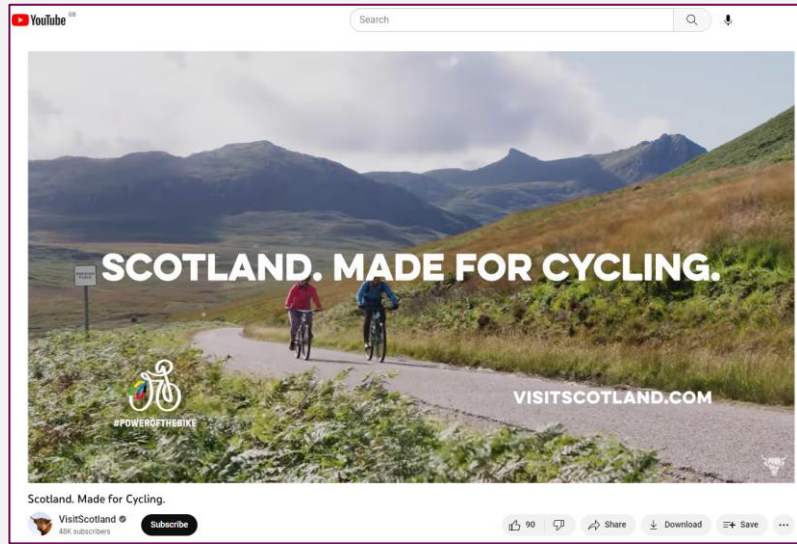
- Hallhill Pump Track - £50k
- North Berwick Pump Track - £50k
- Ormiston Park Pump Trail - £45k\*
- Roslin-Portobello QuietRoute 61 improvements - £1m\*

Cycling Facilities Fund - £8m

\* Completed



# RAISING AWARENESS








# THANK YOU

**CAITLIN MCLEOD,  
REGIONAL DEVELOPMENT EXECUTIVE**

 River Coe, The Highlands

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 Visit Scotland | Alba™