

Responding to the certainty of uncertainty

Malcolm Roughead OBE,
Chief Executive, Visitscotland

Association of Scotland's Self-Caterers
Annual Conference 2017



TODAY

- The challenges
- Innovation
- Trends
- Investment & skills
- Working together



The challenges





**NOISY CONSUMER
MARKETPLACE**



COMPETITIVENESS



CONSUMER BEHAVIOUR



RISE OF NEW DESTINATIONS

I-WANT-TO-GET-AWAY MOMENTS



60%

of destination information searches come from mobile devices.²

Approximately ...



2/3

of watch time for top travel videos on YouTube happens on mobile.³

TIME-TO-MAKE-A-PLAN MOMENTS



70%

of travelers with smartphones use them to research travel.⁴



During the planning phase, travelers say that search is the most common way in which they discover the brand they ultimately book with.⁵

LET'S-BOOK-IT MOMENTS



31%

of leisure travelers say they've booked travel on a smartphone, while 53% of business travelers say the same.⁷



88%

of travelers with smartphones would switch to another site or app if yours doesn't satisfy their needs.⁸

CAN'T-WAIT-TO-EXPLORE MOMENTS



85%

of leisure travelers decide on activities only after having arrived at the destination.⁹



+30%

increase in smartphone searches from hotel properties in the last year.¹⁰

think with Google

**Growth in visits
and spend from
north america –
90,000 new
airline seats**



**International
Trips up 14%
Spend up 25%
(jan – dec 2016)**



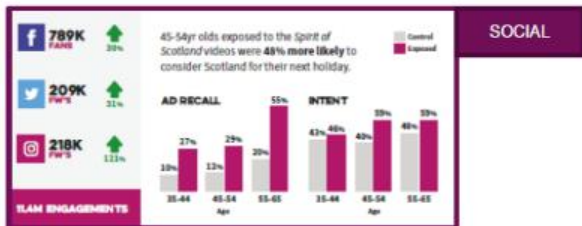
**Strong day visit
market and
visitor
attraction
performance**



UK market – soft

**France and germany
continue to be top**





Consumer trends

Consumers are seeking experiences over products, with greater emphasis being placed on:

- Road trip based holidays
- seeking adventure experiences within a controlled environment, such as mild camping
- Inspired by film, literature, folklore....story telling
- Rise in Green living
- Wellbeing
- More reliant on technology – just in time inspiration

OUTLANDER FILM LOCATIONS

Craigh na Dun or Castle Leoch may have been a figment of Outlander author Diana Gabaldon's imagination but this fascinating world of standing stones, romantic castles and sweeping scenery was inspired by real places and heritage. Not only that, the TV adaptation was filmed entirely on location in Scotland. Follow this map and discover the sites in Scotland that double for the fictional land of Claire and Jamie.

- 1 DOUNE CASTLE
- 2 KINLOCH RANNOCH
- 3 CULROSS
- 4 TULLOCH GHRU
- 5 FALKLAND
- 6 GLENCORSE OLD KIRK
- 7 HIGHLAND FOLK MUSEUM
- 8 BONESS & KINNEIL RAILWAY
- 9 ABERDOUR CASTLE
- 10 HOPEFOUN HOUSE
- 11 LINTHGHOW PALACE
- 12 BLACKNESS CASTLE
- 13 GEORGE SQUARE, GLASGOW
- 14 TROON
- 15 PRESTON MILL
- 16 POLLOCK COUNTRY PARK



NC500

Page views:



VS Online Community

RECOMMENDATIONS FOR PLACES TO VISIT CLOSE TO THE NC500

Search by Scotland · Month · General Distances
And for the southern part of the **NC500** I would highly recommend Cornishalloch Gorge



RECOMMENDATIONS FOR PLACES TO VISIT CLOSE TO THE NC500

Search by Scotland · Month · General Distances
The first one will be the **NC500** (and clockwise)

MOTORHOME ON NORTH COAST 500

Search by Scotland and/or · February 22 · Planning and Possibilities
Hi @Dodders, I have traveled parts of the North Coast 500 twice now in a motorhome, and although it was a bit smaller than the one in your picture we never encountered any problems at all. There are a

NC500 STAYING ONLY AT PUBS.

Search by Scotland and/or · February 22 · General Distances
There's a good, google based, **NC500** map here - <http://www.northcoast500.com/interactive-map.aspx>

Google Search

11 things to know before driving the north coast 500 — along dusty ...

<https://www.alongdustyroads.com/.../guide-things-to-know-driving-the-north-coast-500/>
27 Jun 2016 - The first and most important thing to know is that the North Coast 500 is a jaw-droppingly beautiful route. Amongst some of the most picturesque

NC500 - Tour Scotland's Scenic North Coast 500 Route - The Torridon

<https://www.thetorridon.com/nc500/>
The North Coast 500 (NC500) is a new and exciting route across the Scottish Highlands. Start planning your route and see what Torridon has to offer.

I would drive 500 miles: Scotland's new North Coast 500 route | Travel ...

<https://www.theguardian.com › Travel › Highlands holidays>
23 Aug 2015 - The new North Coast 500 road trip is Scotland's answer to America's Route 66. Our writer gets her kicks from wild beaches, high passes, and

Top 10 reasons to drive the North Coast 500 - Room5

room5 travgo.co.uk · Worldwide destinations · Europe
17 Nov 2015 - The North Coast 500 (NC500) is Scotland's answer to the legendary Route 66 and prolific Wild Atlantic Way. Measuring at just over 500 miles, ...

North Coast 500 - Motorcycle Scotland

www.motorcyclescotland.com · Route
The North Coast 500 (NC500) have been described as 'Scotland's answer to the renowned Route 66' and it's a motorcycle route that doesn't disappoint

Top landing pages on

vs.com:

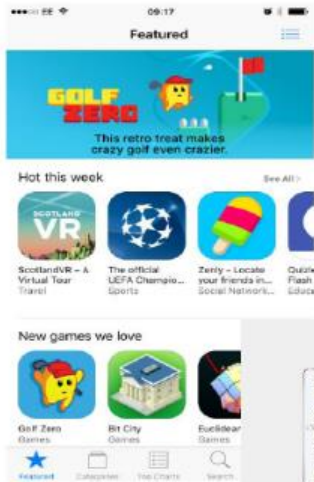
NC500 – 95k

Northern Lights – 117k

Outlander – 111k

| immersive content

Driving advocacy: creating positive sentiment





Glencoe, the highlands

Scotland: Life

INFLUENCERS and Natives

What is an influencer?



Essentially it's an individual whose actions and opinions have an influence and effect on the decisions of their audience.



TRADITIONAL:

- Journalists
- Celebrities



New media:

- Bloggers
- YouTubers
- Instagramers

Why utilise influencers?

- influencers have the power to drive **conversations and engagement**, deliver **authentic content**, supercharge **SEO**, create inspiring **UGC** and become **brand advocates**
- Influencer marketing is **11 times** more effective than banner ads
- **47%** of online consumers use ad blockers
- people **trust** influencers nearly as much as they trust their friends
- micro influencers are just as **valuable** as top tier – capitalising on high engagement and popularity within a certain audience



Consumers
trust real
people

INFLUENCER

Samuel & Audrey (Canada)

ARTS/CULTURE

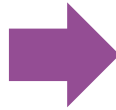
[NOMADIC SAMUEL](#)



IG
25K
COMBI

TW
27.5K

YT
65k



NATIVE

Alan Pettigrew, Cowal Highland Games
Official



INFLUENCeR

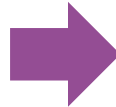
Sasha – ARTS / CULTURE
[ABOOKUTOPIA](#)



IG
203K

TW
61.5K

YT
352k



NATIVE

Paula Swan, Castle Keeper at
Castle Fraser



INFLUENCER

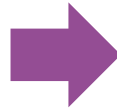
Devin Supertramp USA –
ACTIVE/OUTDOORS



IG
586k

YT
4.5M

TW
133k



NATIVE

Robbie Griffiths
Parkour athlete





Role Finder

Search by role or keyword

Interests

[More options](#)

Choose up to five

Only show Reserve roles

-  Fixing things
-  Decision making & responsibility
-  Risks and adrenaline
-  Leading & managing people
-  Performing in public
-  Outdoor activities
-  Helping people
-  Technology
-  Flying
-  Driving
-  Photography
-  Playing musical instruments



Electrical Engineer (Comms)

Set up and service field power generators on battlefields and military bases.



Dental Nurse

Help Army dentists around the world give treatment, and carry out admin tasks.



Petroleum Operator

Deliver vital fuel supplies to personnel on bases or troops in the field.



Technical Intelligence

Analyse intercepted communications and advise Commanders on the local culture.



Driver

Drive, maintain and service Army vehicles from HGVs to forklift trucks.



Aviation Support Officer

Lead a groundcrew team preparing hi-tech helicopters for missions.




Plasterer / Painter

Finish newly-constructed buildings to the Army's high standards.




Electronics Technician

Look after electronics systems, from those on tanks to communications equipment.




Building Materials Technician

Test the ground and building materials to make sure construction is safe.



Infantry Platoon Officer

Command and lead your platoon on the battlefield or in barracks.



Vehicle Mechanic

Fix everything from motorcycles and generators to armoured vehicles and tanks.



Infrastructure Engineer

Use your civilian qualifications on engineering projects from roads to railways.



Universities
Scotland



 Visit
Scotland | Alba™



Scottish Government
Riaghaltas na h-Alba
gov.scot



The Association of Scotland's Self-Caterers Supporting self-catering in Scotland

Endorsed by Government and Industry, committed to quality accommodation since 1978.

- Benefits & Discounts
- Marketing
- Advice
- Representation

[Join Today](#)

ASSC Conference

Futureproofing: Self-Catering
Tomorrow's world has become today's reality. Are you prepared?

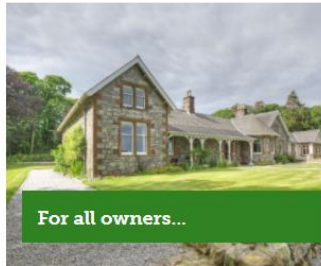
Tickets are on sale now



Supporting Self-Catering...

Our recent study has identified that the self-catering industry in Scotland contributes £723m to the Scottish economy per annum.

- We represent the short-term let and holiday home sector, rural or urban



For all owners...

Anyone who owns, or is considering buying or developing, self-catering in Scotland is welcome in the Association:

- Owners of single properties



Service, support & savings...

The Association offers a wide range of services, including this website, to owners of self-catering accommodation. We can help you:

- Boost your bookings

SCOTLAND'S TOURISM COMMUNITY

FACE TO FACE
PUBLIC / PRIVATE
PARTNERSHIP

ONLINE
PEER TO PEER
ENGAGEMENT

BETTER QUALITY INFORMATION AND ADVICE,
TO MORE PEOPLE, IN MORE PHYSICAL PLACES

BETTER QUALITY INFORMATION AND ADVICE,
TO MORE PEOPLE, IN MORE VIRTUAL PLACES

iCENTRE

iKNOW
SCOTLAND

iKNOW
SCOTLAND
A TRAVELER'S NATIONAL PARTNER

VISITS

CITIZENSM

NATIONAL PARTNERS

LEGAL PARTNERS



FACE TO FACE HELP AND ADVICE WHERE IT'S NEEDED MOST

SCOTLAND | ALBA

FOR PERFORM

SPIN CHAT



ENABLING ONLINE HELP AND ADVICE WHERE IT'S NEEDED MOST

SCOTLAND | ALBA

A new direction

Responsive / alive to opportunity

Tell stories, sell experiences

Be a great partner

If it's not measurable don't invest

Think mobile first



Thank You

