

# THE SPIRIT OF SCOTLAND



LIN O' DEE, DEESIDE

**THE WHOLE IS GREATER THAN  
THE SUM OF ITS PARTS**

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**ARISTOTLE**

**WE NEED TOURISM 'TEAM SCOTLAND'**

# CONTENTS

- MARKET CONTEXT
- MARKETING STRATEGY
- BRAVE NEW WORLD
- WHAT NEXT?



HIGHLAND COW, ROTHIEMURCHUS ESTATE





**VisitScotland (Default)**  
 October 27 at 12:00pm · 🌐

Fifty layers of grey in the Cairngorms National Park... now, THIS leaves us breathless!

Pic: stuart laing / Instagram



407,057 people reached

17x Likes 522 Comments 53x Shares

Like Comment Share

**497,687** People Reached

**47,668** Likes, Comments & Shares

<b>39,364</b> Likes	<b>17,019</b> On Post	<b>22,336</b> On Shares
<b>2,975</b> Comments	<b>508</b> On Post	<b>2,377</b> On Shares
<b>5,239</b> Shares	<b>5,239</b> On Post	<b>0</b> On Shares

**31,880** Post Clicks

<b>9,817</b> Photo Views	<b>12</b> Link Clicks	<b>22,061</b> Other Clicks
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**NEGATIVE FEEDBACK**

<b>160</b> Hide Post	<b>40</b> Hide All Posts
<b>0</b> Report as Spam	<b>1</b> Unlike Page



**VisitScotland** @VisitScotland · Oct 11  
 Smile, deer! The @cairngorms in #Scotland are a MUST if you're a #wildlife fan!



50 184



**visitscotland**  
 Dalwhinnie

4,911 likes

visitscotland We've been delighted with all the Northern Lights pics we've had this week...what a treat! @jaygolian was with the family & had a superb day hill walking, mountain biking and visiting the Enchanted Forest in Pitlochry. On arrival back at Dalwhinnie, this is the sight that met them! Doesn't sound like a bad day at all!

view all 88 comments

Add a comment...



**VisitScotland** @VisitScotland · Oct 6  
 We #LoveScotland too! 😊 RT @lolalouiseleach  
 Breathtaking scenery #hillwalking @cairngorms... | ❤️ #Scotland



66 128

**WE ARE ALL SHARING**



**NOISY CONSUMER MARKETPLACE**



**COMPETITIVENESS**







**CONSUMER BEHAVIOUR**



**RISE OF NEW DESTINATIONS**

**MARKET CONTEXT**

JAN-JUN	MARKET	TRIPS	% CHANGE	SPEND	% CHANGE
	<b>Great Britain</b>	5,623,000	+6%	£1,476m	+26%
	<b>Scots Residents</b>	2,658,000	-6%	£526m	+4%
	<b>Welsh Residents</b>	63,000	-28%	£16m	-20%
	<b>English Residents</b>	2,902,000	+20%	£934m	+44%

JAN-JUN	MARKET	TRIPS	% CHANGE	SPEND	% CHANGE
	North America	191,000	-14%	£150m	-19%
	Europe (inc Non-EU Europe)	728,000	-1%	£366m	+14%
	Other Countries	177,000	+14%	£129m	+4%
	Total World	1,095,000	-1%	£644m	+2%



# AGE GROUPS

## Age groups

### By Market

**United Kingdom** is the most evenly spread in terms of age groups. 25-34 is the largest and those under the age of 24 are the smallest group.

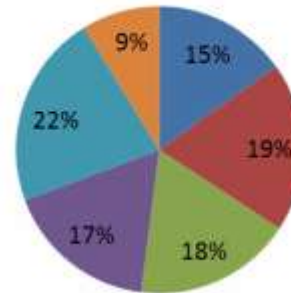
**United States of America** is the oldest of the four markets included. 44% are over the age of 55. Especially those in the 55-64 age bracket. It also has the lowest proportion of under the age of 25.

**Germany** has the highest proportion in the 44-54 category. Those either side of this age bracket are very similar.

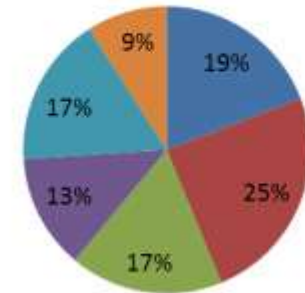
**France** is the youngest audience of the four markets. Almost a quarter are under the age of 35. It also has the lowest % of those over 55. Along with Germany it also has a higher proportion of those in the 18-24 bracket compared to the UK & US.

18-24 25-34 35-44 45-54 55-64 65+

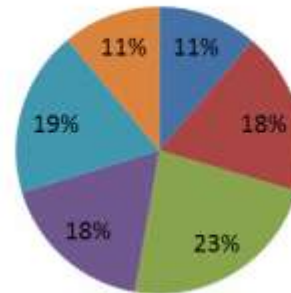
### United Kingdom



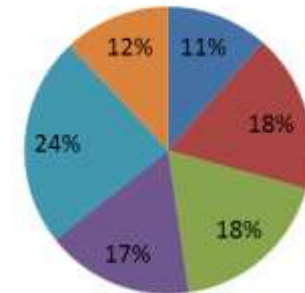
### United States of America



### Germany



### France





# CONTENT PREFERENCES

Themed content by age group

Looking at popular themed areas of content on the site. There are clear preferences by age group.

For the **over 55s**, Scotland's wildlife and whisky were strong preferences compared to the other themed content we looked at.

**35-55 year olds** had a strong preference for cycling/mountain biking. This could be related to this group having older children in the family?

The younger age groups (**under 35s**) had a broader interest across each of the categories we looked at. Nevertheless, city breaks and walking stood out.

%	Family Whisky	City Wildlife	Walking	Mountain Cycling	Biking		
65+	6.6%	10.0%	10.8	7.2%	12.9	12.3	
	10.7%		10.0		%	%	
					15.8		
55-64		14.5%	13.3	14.1	10.8%	%	15.5
			%	%			%
45-54	16.7	13.2%		18.9	17.6%	15.2	14.8
	%		13.3	%		%	%
		%					
35-44	27.7	16.6%	18.4	17.1	25.7%	16.7	17.2
	%		%	%		%	%
25-34	28.7	30.4	30.0	27.9	27.5%	29.7	27.0
	%	%	%	%		%	%
18-24	9.6%	15.3	15.1	11.2	11.3%	9.7%	13.0
		%	%	%			%