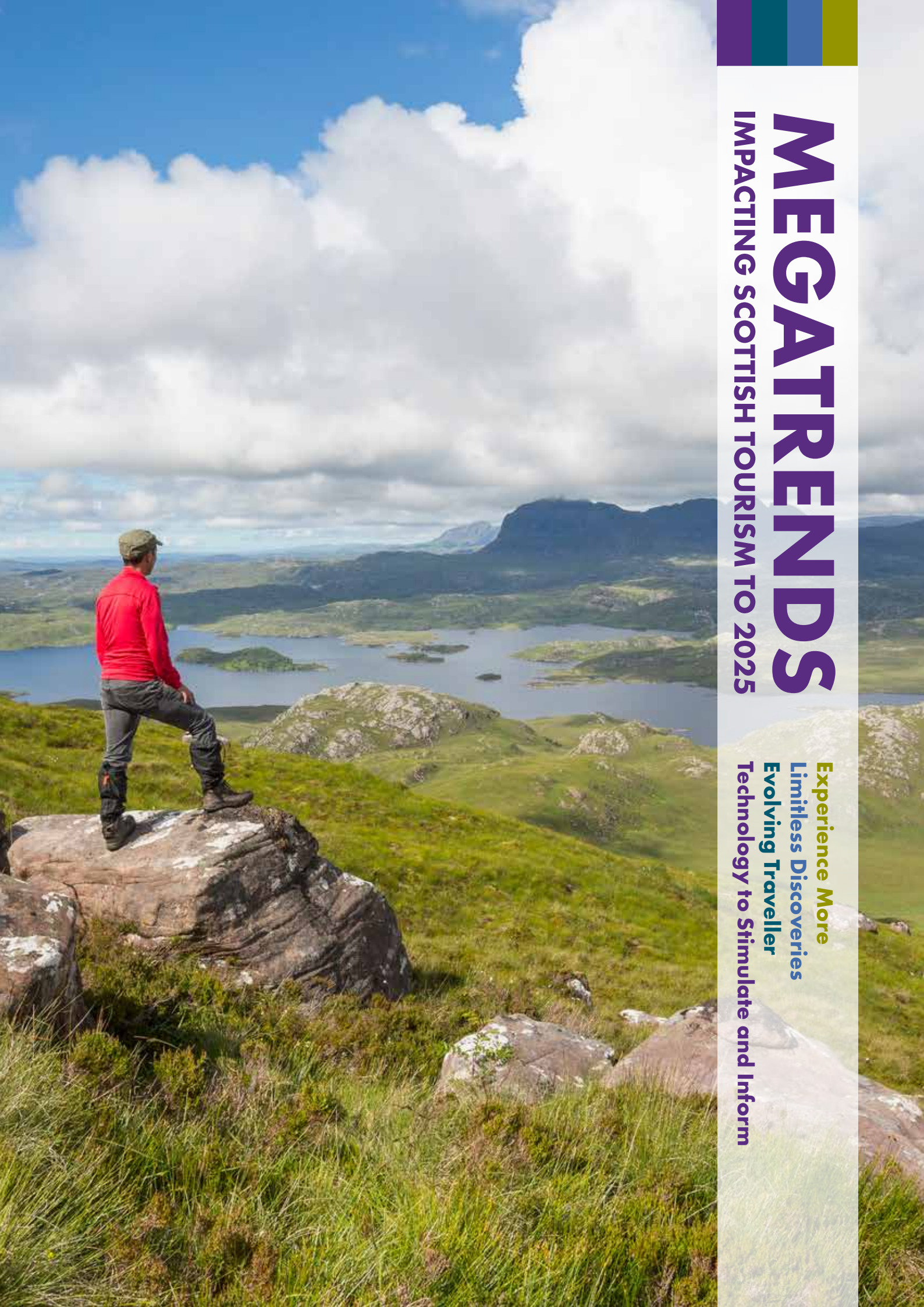




MEGATRENDS

IMPACTING SCOTTISH TOURISM TO 2025

Experience More
Limitless Discoveries
Evolving Traveller
Technology to Stimulate and Inform





What are Megatrends?

Megatrends describe the global shifts that have a huge impact on everything in our lives – business, economy, society, culture and more.

Megatrends are impacting Scottish tourism along with other global markets and we can increasingly see examples of how businesses are capitalising on them to grow and attract new markets.

This summary rounds up the key points from in-depth research and consultation that was carried out on behalf of Scottish Enterprise and Scottish Tourism Alliance.

Global tourism experts refer to twelve Megatrends happening today. By merging these original twelve, four key Megatrends evolved into the most relevant for Scotland looking forward to 2025.

In a nutshell these are the four:

- 1. EXPERIENCE MORE**
offering more genuine experiences and helping visitors to be more than 'tourists'
- 2. LIMITLESS DISCOVERIES**
marketing the whole of Scotland, not just the favourite places
- 3. EVOLVING TRAVELLER**
recognising the many different types of visitors, both culturally and demographically
- 4. TECHNOLOGY TO STIMULATE AND INFORM**
using widely available technology and data capture to improve and influence the visitor experience

EXPERIENCE MORE

- Beyond Boutique
- Living/Dining
- New Nature Cocoons

TECHNOLOGY TO STIMULATE AND INFORM

SUSTAINABILITY, TECHNOLOGY & CONNECTIVITY UNDERPIN ALL TRENDS

LIMITLESS DISCOVERIES

- Seamless Connections
- Arts 360
- Smart Destinations

EVOLVING TRAVELLER

- Business Travel Hacked
- Affordable Luxury

Experience More

What does 'EXPERIENCE MORE' mean?

The way that we can offer more genuine experiences and help visitors to become more than just 'tourists'.



The 4 components for every experience.

1. The product must be **authentic**
2. The service must **be of high quality**
3. The story must be **distinctive**
4. The telling of the **story must have something unique**

How to tap into 'EXPERIENCE MORE'?

Looking for the real thing

Travel has become part of everyday life and a rite of passage to younger generations to boast on social media about their experiences. Destinations are opening up worldwide to host these travellers in ever more sophisticated ways. These visitors want to get below the surface of a place and to be an adventurer and not a 'tourist'. They are increasingly disappointed to have a superficial experience that has been laid on for them. And this covers every part of the experience – be it their accommodation, the food and drink on offer or the things to do and see and so on. But this trend doesn't stop at the young. All visitors are increasingly looking for an experience that is authentic and one where they can feel local and part of the place they are visiting.

We're all in it together

It might feel uncomfortable to think of inviting our visitors to become ever closer to our daily life and activities and this is not just for cities but in rural and remote communities too. A sustainable balance must be struck, but this trend gives some significant opportunities for Scotland where we can extend our offer away from the beaten track and generate visitor income to more remote and rural areas. In cities too, we can promote individual neighbourhoods and the culture, heritage and food/drink offers that are there. Take a closer look at the tourism experiences in cities such as Berlin, Amsterdam and Barcelona who have been particularly good at promoting their neighbourhoods.

There is an issue with the term "tourism" and "tourist" as people don't like to think of themselves this way when travelling. They see themselves as explorers, discoverers, adventurers, experience-seekers ...

NESTA UK
(Charity and Global Innovation Foundation)



'EXPERIENCE MORE' to increase your income

CONSIDER THIS

Include locals in the experiences that you create for visitors

Beyond the boutique hotel. It is not so much about luxury now, but more about a unique experience that is deeply authentic, in a stunning setting or embedded within a community. Visitors look for simplicity, choice and meaning

Be a promoter of Scottish artisan food and drink

Tell more stories about Scottish gin and whisky and make it about people landscapes and our creative spirit

WHY?

People want to get beneath the tourist label and live like a local. Interactions with the local community can often be the highlight of a trip. What can you offer your visitors that you enjoy yourself? Could it be live music? Perhaps a pub quiz in your local? Or maybe a wine tasting, or yoga/meditation class?

We need to put our creativity to the test. We are struggling with accommodation options in more remote areas and yet we probably already have it. Be it a barn, a bothy, a disused bus, train or a tree house. What could be developed that is of the highest quality, simple in concept and where visitors would love to spend time?

Every experience in Scotland should be linking with our own artisan producers to offer food and drink with a sense of place and with provenance. From fish to game, street food to local markets. Local food and drink are at the heart of a visitors wish list

Whisky distilleries achieved a record 1.7 million visits last year – up 8% on 2015 with more than half of its 123 distilleries open to the public. With over 35 active gin distilleries, Scotland is one of the biggest exporters in the world. Smaller scale gin and whisky tours are an ideal way to connect the landscape, people and their stories



Ideas from others: Dark Dundee

DD Tours in Dundee, led by Louise Murphy and Stewart Heaton, offer one of the most highly rated experiential tours in the city. The business started three years ago, initially as a website, to bring Dundee's more notorious past and murky stories alive and then evolved into offering tours.

Initially the tours reflected the dark stories on the website, under the brand Dark Dundee but as the business developed, other tours emerged, such as Discover Dundee, to appeal to different audiences. The group were also very successful in collaborative ventures, with attractions such as with Dundee Science Centre, to offer 'Medical Marvels' tour. These collaborative partnerships let DD Tours access new themes and audiences while still being able to stay true to their own brand and style of engagement.

It is this unique brand of humorous storytelling that sets them apart, tapping into a more relaxed style that focusses on ordinary people and not just on the historical facts. Clocking up around 11,000 bookings over the three years, many of these bookings are coming from locals who are keen to discover more about their own city. They also attract a similar local audience from neighbouring Perthshire, Angus and Fife with tourism businesses, keen to use the opportunity of a DD Tour to brush up on their own knowledge to pass on to visitors and use this information to make better connections and stories in the products they offer.

Although to date DD Tours have attracted many more locals than tourists, this has been largely due to their very active Facebook page and marketing campaigns using this channel. They are now actively searching out collaboration opportunities to tap into new markets and

the obvious first step is with the newly opened V&A, and nearby waterfront businesses.

Louise and Stewart are able to offer a highly tailored and importantly, an authentic local take on the history of Dundee. The 'Experience More' Megatrend is exactly reflected in this business where people are looking to get under the skin of the place and experience something different, unexpected and real.

Louise and Stewart have definitely done their research on the history of Dundee and deserve all the encouragement and assistance to bring all of these hidden gems to life. Home grown talent should be encouraged.

TripAdvisor review



Ideas from others: Glasgow Canal Project

Once a focus for new industry and the city, the Forth and Clyde Canal which spans central Scotland, closed in the 1960's. In North Glasgow, the area between Port Douglas, Speirs Wharf and Firhill, this closure also coincided with the construction of the M8, effectively cutting the area off from the city and causing it to decline.

In 2001 the canal re-opened and the regeneration of the area began. With the proximity to the city centre and Cowcaddens being only a 10-minute walk, the canal and surrounding area were identified as a being a valuable hidden asset for the city.

More recently, The Glasgow Canal Project is seen as the catalyst for breathing new life to this whole area and also fully reflects one of the main ambitions of the Glasgow Tourism and Visitor Plan to 2023 of 'celebrating neighbourhoods and to promote inclusive growth'.

Glasgow has always had a strong sense of community and so it was fitting for the regeneration to be an inclusive collaborative initiative. Instead of knocking the remnants of the area down and rebuilding with new shiny buildings, the project (which was initially supported by Scottish Enterprise funding), encourages evolutionary growth coming from the existing organisations and residents themselves, where they express how the place should look and feel with the community at the heart of this expression.

The area has now transformed from one that people were desperate to leave to one of the most exciting and energetic areas of Glasgow for tourists and visitors alike. It is a vibrant neighbourhood hosting a wide variety of

cultural, sporting and leisure pursuits – mostly grassroots and independent in focus. From Scottish Opera and Scottish National Theatre through to more grassroots and independent organisations, there is lots of diversity and this mix is providing a strong heart and soul which is attracting many communities and events to join in.

As Glasgow's gateway to Scotland's canal network, the possibilities for this re-discovered city asset is huge. With Loch Lomond an easy 3.5-hour cycle along the canal paths and the links into central Scotland on the canal network accessible, many more visitor experiences and itineraries are ready to be developed. Now that the framework is in place, a cooperative group working together, organisations can more easily link together, and tourism can grow.

For visitors, this is exactly the sort of neighbourhood that they are searching for. Local in flavour, authentic in outlook, creative, diverse and with lots to see and do.

The 'Experience More' Megatrend is well reflected in this initiative and presents a good opportunity for local tourism businesses to look for ways to align what they offer their visitors with what is available to see and do around Glasgow Canal.

Make the most of 'EXPERIENCE MORE'



Be overt in your marketing about the values you hold and the sustainable practices you do. It is good for business



Social dining /long table dining. With the rise of sharing economy, people enjoy meeting others and this way of eating. Is this something you could offer?



Encourage visitors to explore smaller communities and neighbourhoods by showing them what's on offer and what YOU personally like to do



Farmers markets are great source of locally sourced produce and great for visitor's memories and souvenirs as well as ingredients for your menus. Are you making the most of the ones near you?



Visitors are increasingly attracted to soft adventure itineraries – can you offer this? Perhaps it is walking routes or easy, unchallenging activities for all ages and abilities

Limitless Discoveries

What does 'LIMITLESS DISCOVERIES' mean?

Marketing and selling the whole of Scotland and not just the favourite places.



How to tap into 'LIMITLESS DISCOVERIES'?

So much more to explore

The 'Limitless Discoveries' Megatrend has never been more topical than now, with the growth in visitors to Scotland expected to continue growing as new markets open up.

While this is an opportunity for Scotland, there are challenges to overcome as we need to be able to offer more connected routes and links around the country. As much as people want to feel like an explorer or adventurer, when it comes to finding a warm and welcoming bed for the night, a delicious and authentic meal and an onward ticket to the next place in the morning – visitors want it to be available and easy. And we need to be able to offer this everywhere, including around the more remote parts.

A balance needs to be struck so that the natural beauty of our tourism product is not compromised by too many people. We must manage this visitor growth in a sustainable way by encouraging visitors to disperse more widely, with more on offer to do and see. This will also encourage visitors to return more often to areas they haven't yet seen.

A walk in their shoes

'Limitless Discoveries' is also about joining up the gaps and seeing the experience through a visitors' eyes.

What would you do if there are a couple of hours between the attractions closing and the restaurants opening? Perhaps you are in a rural area where all the shops close on a Sunday. You are visiting an out-of-town museum and it closes at 5pm and to your surprise you find that public transport operates a different timetable on a Sunday and you have missed the last bus or train. What would you do?

If you have taken the ferry to an island for a weekend music festival but the main distillery on the island closes to visitors on a weekend. You can't even buy a bottle of whisky from that distillery to take home as a souvenir – what would you feel?

We need to join up the gaps for visitors and create a more connected Scotland, positioning the cities as gateways to other parts of the country. By marketing Edinburgh and Glasgow as these gateways we can help visitors to plan and make bookings with smart itineraries that join up the experiences, transport, accommodation and facilities.

Bang on trend

The new V&A Museum in Dundee is a good example of the Limitless Discovery Megatrend. This region is now set to revitalise as a dynamic cultural hub linking cultural products and experiences in the East Coast using Edinburgh as the gateway city. The Borders railway, is another example, connecting Edinburgh to Galashiels and revitalising tourism in all the towns and villages nearby. The Coig is set to connect the Clyde Coast, much of Ayrshire and some of the islands. 'Five routes and one great adventure'. So too, North Coast 500 is a great example of 'Limitless Discoveries' offering nine itineraries across all budgets and interests to experience this unforgettable road trip.

To attract and keep new markets, businesses need to work together to make sure that the itineraries are joined up, accessible and of a similar high standard, putting visitor needs at the heart.

DID YOU KNOW

Dundee was ranked alongside Shanghai, Madagascar and the Faroe Islands as one of the 10 "hot destinations" to visit in 2018.

A night-time economy is so much more than 24-hour partying. We need a 24-hour library, 24-hour workspaces. Shops where you can buy tomorrow's breakfast. It's very possible ...

Night Mayor, Amsterdam



Inspire new visitors

Edinburgh Festivals are well known around the world and our leading cultural brand internationally. In fact, they sell over 4.5 million tickets annually which put them on the same level as FIFA World Cup or the Olympics. One way that we can capitalise on the 'Limitless Discoveries' Megatrend in this sector is to attract a whole new audience by co-hosting with other places to encourage city hopping. Similarly, we could look at who else we could partner with nearby, such as the North Sea Jazz Festival in Rotterdam.

Turn day into night in the cities

Another way to encourage visitors to discover more of what we can offer is by linking up the daytime and night-time economies. In other European cities such as Toulouse, Zurich, Paris, Amsterdam and now London – they are taking this opportunity more seriously with the appointment of a 'night time mayor' to promote nightlife and champion the city.

Making it easy to get around

Low carbon travel projects are on the increase and are catching the eye of investors. For rural areas, the concept of connecting sites with 'green' public transport is the sustainable next step to encourage visitors to get around easily whilst leaving their car behind. So, whether this is an e-bus shuttle service, e-taxicabs, bicycles or e-bikes, using this type of transport is as good for visitors as it is for the environment.

DID YOU KNOW?

Glasgow Caledonian University's Moffat Centre found the night-time economy generates an impressive £2.16bn a year for Glasgow, supporting 16,200 full-time jobs.

'LIMITLESS DISCOVERIES' to increase your income

CONSIDER THIS	WHY?
Increase the amount and variety of experiences and places to discover for marketing to potential visitors	By marketing Scotland as a whole rather than the favourite spots we can encourage a better spread of visitors and also more repeat visits
Look at ways to create more joined up experiences. Connect either by geography or theme	To generate more tourism revenue that reflects the sorts of experiences visitors are looking for
Businesses need to collaborate around new attractions and routes to help join up the gaps in the overall visitor experience and provide a similar high standard of service	So that we can extend our offer well beyond the cities and encourage visitors to travel further afield
We need to think more flexibly about how we can make better use of the night time economy and to link it seamlessly to day time	So that there is always something on offer to fill a visitor's itinerary



Ideas from others: Edinburgh in 101 Objects

Inspired by Scotland's 'Year of History, Heritage and Archaeology' 2017, this initiative set out to create a new visitor experience in the city that was city-wide, collaborative and promoted the heritage of the city through a series of unique objects. Digital marketing was at the heart of the campaign with itineraries, themes, maps and information about the objects being presented on a mobile friendly, dedicated microsite hosted on edinburgh.org/101

An initiative led by Scottish Enterprise through Edinburgh Tourism Action Group, brought 42 diverse organisations together from the national institutions of the National Museums of Scotland, National Galleries Scotland etc. to pubs (e.g. Sandy Bells and the Sheeps Heid Inn) and places of worship from St Giles Cathedral to the Edinburgh Gurdwara and others too. There were also monuments on and in city streets, graveyards, banks – a complete and unexpected mix. A panel of heritage experts drawn from a diverse skillset under the chairmanship of Edinburgh World Heritage suggested, debated and ultimately whittled down a final list of 100 objects each being individually significant and collectively telling the story of Edinburgh over the last 1000 years. The decision for the 101st object was thrown back to the people of Edinburgh to choose. After 6 months of operation, the 'people's vote' was launched offering a valuable PR opportunity for the initiative. It wasn't a huge surprise that the object chosen was Greyfriars Bobby – an object that continues to be held in affection by the local communities.

Seven themes were chosen to allow visitors to follow a particular interest and 11 itineraries were developed, intended to appeal to a variety of different audiences and to encourage visitors to get off the beaten track in the city centre. Bus routes, opening times, admission costs (if any)

plus a host of other more 'local' information could be found on the 101-object website.

Collaboration was at the heart of this initiative. For the first time, using some of the city's most strategically important heritage objects, the diverse organisations had a way to link together, to cross sell, jointly promote and collectively provide a new experience to visitors that could appeal to everyone.

It is the breadth of the type of objects and their venues or locations that was a key success factor. Visitors could follow itineraries taking them to different neighbourhoods such as Morningside, Leith and Stockbridge. All points of the compass were covered: from Edinburgh Napier University in the South to Royal Yacht Britannia in the North to The Edinburgh Zoo in the West and Craigmillar Castle in the East. They were able to make these trips by local bus and follow a suggested itinerary that was tailored to their interest.

'Limitless Discovery' Megatrend is exactly about this. Visitors want to explore into the hidden and local neighbourhoods, but they need some help and guidance to do so. Linking to other things to do and see on the way, with some hand-picked food and drink suggestions and a day out in the city is complete for our modern-day visitor.



Ideas from others: Wild about Argyll

With close proximity to Glasgow and the Central Belt, Argyll and the Isles had traditionally been a delightful getaway for day trippers, weekenders and holiday makers. However, it was identified that visitors now tended to be an older demographic and despite the wealth of activities on offer, Argyll and the Isles was not as well-known as other parts of Scotland.

It was apparent that if there was more collaboration amongst businesses and better marketing, much more could be made of the area. So, the Argyll & the Isles Tourism Cooperative (AITC) was set up – as a cooperative company representing 11 marketing and DMO groups operating across the region and collectively representing some thousand businesses located.

In 2016 with some funding support from Highlands and Islands Enterprise, AITC challenged the Scottish endurance athlete and cyclist, Mark Beaumont to undertake a 12-day challenge to give an appraisal of the area and its adventure credentials. Mark travelled across the area in the 12 days with an adventure film crew, meeting many local providers and taking part in more than 12 different sporting activities. From running and cycling to wild swimming, kayaking, fell running, quad biking and horse-riding. bit.ly/2VnbaQp

The insights and feedback from Mark's epic journey developed into a wider initiative, to reposition Argyll & the Isles as one of Scotland's premier outdoor destinations – Scotland's Adventure Coast. The main aim was to target a younger and more adventure focussed audience for short breaks in the area. Support came from VisitScotland Growth Fund and the marketing activities included content creation, social media posts, paid searches, competitions cinema advertising, online brochure and attendance at many festivals and events to promote the brand, 'Wild about Argyll'.

There was a very good level of business engagement during the campaign with many businesses taking part in content creation and promoting #wildaboutargyll. Social media channels reported the new demographic that became engaged – shifting from predominately aged 45+ 'leisure visitor' to aged under 45 and 'adventurer visitors'.

With new audiences and itineraries in place, the next step was to focus on product development. Linking up with events and festivals, telling stories of the history, heritage and geography and collaborating with the food and drink offers in the area, new products and experiences are on the horizon. AITC have also developed a powerful twin centre campaign with the City of Glasgow –The Heart & Soul of Scotland, which links many operators and DMO's, linking city culture with the adventures available on each other's doorsteps. Skerryvore, the folk-rock band provided the soundtrack and through their own channels has reached and targeted an international audience who are exactly the right market segment to consider choosing an adventure in Scotland.

The recent developments for Argyll & the Isles are a great example of how a destination can reposition itself to not only appeal to new markets but to provide existing markets with a much more tangible and compelling reason to spread out from the cities and explore.

Make the most of 'LIMITLESS DISCOVERIES'



Collaborate with other businesses to develop itineraries around cultural, historical, seasonal and wilderness themes to help to encourage visitors into other areas of Scotland



Offer better information about the routes and links around the country so that visitors can more easily plan, book and travel further afield



Identify the biggest gaps that exist for YOUR visitors. What can you do to help create a more connected Scotland?



Collaborate within your area to develop a sustainable transport offer to visitors. Would it be an e-bus shuttle service, an e-taxicab or bicycles. What would be viable in your area?



Consider how you could collaborate with others to offer visitors more to do in the evenings

The Evolving Traveller

What does 'EVOLVING TRAVELLER' mean?

Recognising the many different types of visitors, by common interests, culture, and demographics.



How to tap into 'EVOLVING TRAVELLER'

Visitors are changing – dramatically

We know that tourism is changing, and we are feeling the ripples of these societal and demographic changes everywhere. We have seen the short break market growing and visitors increasingly looking for more 'curated' experiences that are hosted by communities. People want to have a 'real' experience and will want to live more like a local to find it. There is an increase in older travellers and a decrease in those travelling with kids. Increasing numbers of disabled people are visiting and they are also taking part in more activities. This is now mainstream not niche. And all of these visitors, old and new have an increase in expectations of technology and connectedness with a new-found independence and confidence in how they buy the experience they want.

Emerging new markets – are you ready?

With direct flights to Scotland from Beijing already started, we can expect many more Chinese visitors in the future. In fact, the number of Chinese visitors to Scotland has risen by 200% in just a decade. This is expected to rise to half a million a year arriving in UK. And this is being closely followed by significant visitor growth from India, the Middle East and South East Asia. These affluent people are looking to spend, but we need to understand their expectations better.

We also should not forget our international student population. With at least 21% of students in Scotland being from elsewhere, there is a huge pool of people, many from our target markets, who are passionate spokespeople of all that Scotland has to offer. Offering them part time jobs or ambassador roles can be very useful in making that cultural bridge that your business may need.

The challenge is to recognise and get to grips with their likes and dislikes.

Over the last three years, Scottish Enterprise and the Edinburgh Tourism Action Group has worked with more than 30 industry partners to deliver the 'China Ready' programme, www.etag.org.uk/china/ which aims to ensure Edinburgh businesses and the destination are well positioned to capitalise on this emerging market for the city. A growing number of city businesses are now welcoming customers from China which has accelerated the growth in the value of this market for the city.

DID YOU KNOW Scotland's stunning landscapes make a big impression on students from around the world. Students describe arriving in Scotland, 'like walking into a garden'. Students from Asia especially love the way we preserve our heritage; from environmental protection schemes to the way historic buildings are adapted to modern use.

Sustainability and social responsibility

Millennials are committed to creating a positive environmental impact and expect businesses to do the same. They will also pay more because it is so important to them. We need to find creative ways to encourage and reward responsible behaviour.

Most visitors want to be seen as responsible when they travel, and increasingly younger generations are taking this further, to look for experiences that are not materialistic and where they are in like-minded company. In Scotland this desire could manifest into conservation projects which would help to connect a visitor into a local community whilst helping to restore the natural environment.

We're talking about people starting to see themselves as part of a smaller segment. In the past you might define yourself by your nationality, but now it's by smaller niche segments as well – it's an individual identity rather than a collective identity.

Festivals Edinburgh Marketing



Accessibility for all

According to *Euan's guide Access Survey, 54% of people with access requirements will avoid you if they can't find accessibility information. And 83% of disabled travellers tell others about their experience. With an ageing market and an increasing recognition of the needs of disabled people, we need to dispel the myth that accessible tourism is in some way niche or different.

***Source:** Euan's guide Access Survey, GB Tourism Survey, Barclay's Bank report

Marketing in a different way

So, it's not so much about offering different products to these 'Evolving Travellers' but how we package and market our existing products. We need to engage our communities, curate specialist and targeted experiences and offer this to our visitors in new and exciting ways.

Segmenting the market according to nationalities alone, is no longer effective enough. It needs to be more individual and around age group and common interests. To go a level deeper, we now need to understand what their passionate interests and closely held values are.

And then we need to be able to identify how to reach each of these 'tribes' – through social media and other marketing channels. What sort of marketing appeals to this segment? What booking methods do they prefer? What secondary interests do they have? Do they travel independently or in a group? These are much deeper marketing considerations than we have ever had before and to keep up with our visitors, we need to address it.

VisitScotland's segmentation model now includes segments such as; Engaged Sightseers, Food Loving Culturists and Curious Travellers, which is worthwhile for businesses to keep up to speed on.

Business tourism also meets 'Evolving Travellers'

The expectations of business tourists are ever increasing. With our landscapes, food and drink, heritage, golf and outdoor pursuits, Scotland is seen as a more appealing destination than many. The challenge is to continually engage these visitors and allow the blurring of leisure and business tourism to reflect this.

'EVOLVING TRAVELLER' to increase your income

CONSIDER THIS

Define your target markets based on their beliefs and values. What booking method do they prefer? What are their other interests? Do they travel independently or in a group? What new channels to market can you tap into?

Demonstrate your own values and beliefs and get noticed. Show your self-awareness and attitudes to social responsibility. Go green and encourage guests to go green too. Then reward responsible behaviours

Consider how accessible your business is for older and disabled visitors. Accessibility is now a mainstream requirement and their needs must be integral to a business offer

Involve and recruit international students to help provide the cultural bridge for your business to better understand the challenges of visitors from emerging markets

WHY

'Evolving travellers' and particularly younger generations, move fast, book late and are permanently connected. If you want to attract them, you need to be visible on the platforms they are using and understand the experiences they want

Because visitors will more often choose a tourism or hospitality business whose ethical and sustainable beliefs mirror their own

It is reported that tourism parties with at least one member being disabled contributes £1.3 billion to Scotland's economy. These visitors are increasingly more active and want to take part in much more

Because over 21% of our students are not from Scotland and would love to be more involved in our communities. They will also be powerful influencers for potential visitors through social media

Ideas from others: Glen Tanar Estate, Royal Deeside

How the estate uses innovation to develop new sustainable products and services.

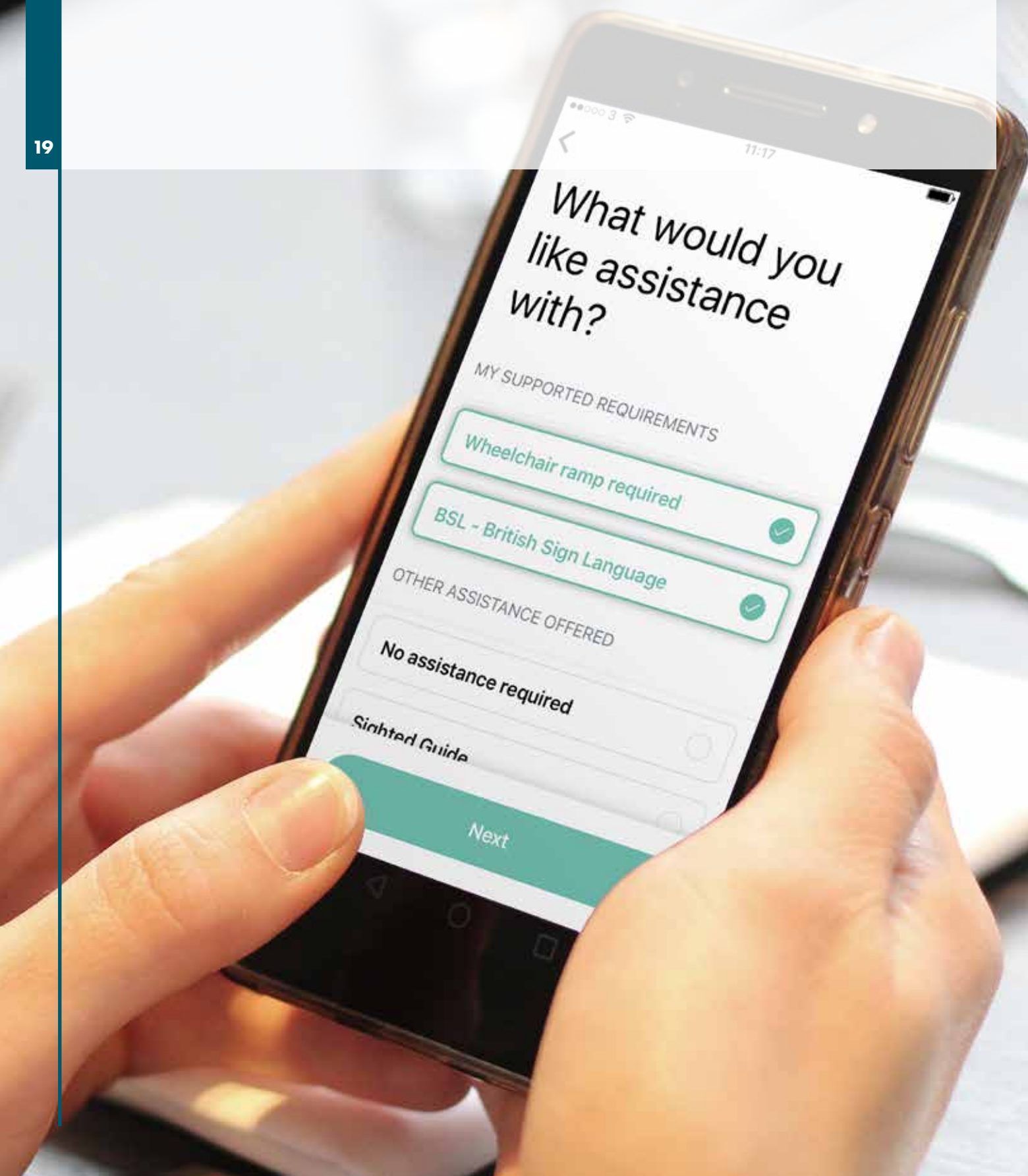
bit.ly/2BUXIMe



Ideas from others: Neatebox

An innovative app for inclusive tourism in Edinburgh.

bit.ly/2Tn4xjG



Make the most of 'EVOLVING TRAVELLERS'



Can you re-package and re-market the products that you offer to become even more appealing and targeted to your visitor segments?



Review your marketing strategy. Are there other platforms that you should be visible on? Are there other routes to market to explore?



54% of people with accessibility requirements will avoid you if they can't find the information they need. Does your website need to say more?



People will buy from businesses they can align to. Can you be more overt about your beliefs, values and sustainability practices?



Visitors of all types expect their needs to be met. How well do you understand the needs of Chinese, Indian and Middle Eastern guests? Can you get more advice, help or staff training?

Technology to Stimulate and Inform

What does 'TECHNOLOGY TO STIMULATE AND INFORM' mean?

Using all the widely available technology and data capture you can, to improve and influence the visitor experience

21

Hotel

★★★★★ 40m

Grocery Store

★★★★★ 30m



How to tap into 'TECHNOLOGY TO STIMULATE AND INFORM'

Smart Tourism

Smart Tourism is the buzz word. In the context of tourism, smart technologies are changing consumer experiences. Geo-tags services, location-based services, virtual reality, augmented reality and social networking services are all cutting-edge examples of smart technologies enhancing visitor experiences and services. These technologies also allow for new ways of managing visitor flows, offering better services, new advertising models and new collaborative ventures that build on cloud services and open data to innovate beyond the traditional industry boundaries.

Visitors expect facts at their finger-tips in an instant; they want news, reviews and information on their phones, tablets or computers. They want personalised offers of what to do and see, immediate information on transport options and delays and everything in between.

Connectivity is still an issue

According to a recent Which? study, there is still a disparity in broadband speeds across the country. For example, ranging from just 3MBps in Orkney to 29.6 MBps in West Dunbartonshire. Lack of 4G and mobile reception in rural areas is also a real challenge.

Although the Scottish Government have the goal of 100% minimum speed of 30 MBps provision by 2021, connectivity is a problem for visitors and businesses alike. Scotland needs to keep pushing ahead to achieve its tech goals – not only to keep up with other countries but to surpass them.

But this is at a national level? What can I do?

Well, yes and no. On one hand it is about making the country more connected and technologically savvy and this is up to the Scottish Government and other public bodies to join together to make our cities and destinations work better. But on the other hand, there are lots of opportunities for a business to get involved in the digital journey and run their business more effectively using technology while at the same time offer a much better experience for visitors.

Using technology to increase profits and improve efficiency

The information we collect gets us ever closer to our evolving visitors, but we need to use this to put us ahead of the game. From pricing, to bookings and everything in between – we need to know more about the choice's visitors make. With knowledge comes power. Digital Tourism Scotland, set up to help tourism businesses on their digital journey, offer a range of support through workshops and guidance.

Meldrum House in Aberdeenshire is one organisation who followed advice from Digital Tourism Scotland and had a complete overhaul of their digital presence and how they collect data and use customer insights. They now have 90% of bookings made online and are using social media platforms to engage potential customers at a deeper level and convert to more sales.

Sharing data at a national level

This is termed 'open data sharing' and the idea is to use and share all the data that is collected from visitors on a minute by minute basis. Businesses hold lots of valuable data and many don't even know they have it. Join this together with the data collected by the airports, by google, by Skyscanner, by Airbnb, by mobile phone providers, by transport hubs ... and the list goes on.

Most businesses have a good idea of their own customers, but we are collectively missing what it looks like at a city and country level. Imagine if we had insights on all visitors to Scotland at a much deeper level. Imagine if we knew why our visitors come, what they look for, where they visit, how they move around, what they like and don't like and who they tell? This is the data that could be a game changer for Scottish tourism where our data sources are pulled into one system for everyone to access.

Collaborating with small tech start ups

New collaborations with smaller tech companies are emerging. These groups are using technology to help address the tourism challenges in Scotland. From data sharing to new ways to overcome connectivity, transport and sustainability challenges.

**Things have changed.
The way business is done is evolving. Digital and social are now part of daily life.
If you're not there, you're not in the game.**

**Andy Burgess,
Director of Meldrum House, Aberdeenshire**

Follow the footprint

Most tourists leave a digital footprint wherever they travel. It is possible to track them as they sleep, eat and visit as they often leave a trail of comments and ratings. One method is a pre-paid tourism card which can be used on transport as well as tourist attractions. Gothenburg already has such a scheme with users being offered half price admission to venues and other benefits. A similar scheme covering transport is already being piloted in the Highlands and Islands with flights, ferries, buses and rail routes throughout the region to be booked and paid for with one card.

Finding what you want – is not that easy!

Consumers want lots of choice – at their finger-tips and really quickly. They may research in advance but on arrival, they will book and buy instantly, doing their planning at the last minute. Why? Because with the internet and digital revolution – they can do this elsewhere and so expect to do it here too.

There is no shortage of product and places to experience, but the issue is finding it. Businesses need to understand the range of platforms that visitors use to search and be visible on them. There are an increasing number of platforms emerging who act as an umbrella site for others. The most successful apps and websites are those which make someone's life easier to negotiate.

Working together makes it easier for everyone

The best way for everyone to take advantage of new technology is to work together. Edinburgh Festivals is leading the way on events with one of the world's largest Application Programme Interfaces (API) for culture, which means that on one site, ticket buyers can find information on 11 different festivals that take place in the city. This is a

great example of working together to facilitate the needs of a potential audience.

Scary new technology is not so scary

From augmented reality to virtual reality. From chatbots to 3D holograms These sorts of new technologies are becoming mainstream.

With Scotland now attracting more visitors from further afield, the industry needs to be ready to welcome them in any language. This is where Augmented Reality (AR) steps in to help.

When visitors have difficulty reading signs or menus, they can simply point an AR enabled device at the content and – hey presto! – it will be translated. AR is already being used in several attractions such as The Engine Shed in Stirling and Perth's Heritage Trail, making these places very attractive for non-English speaking visitors. What needs to be done? Invest in AR, especially if you want to attract foreign visitors.

Virtually Amazing

Virtual Reality can take you anywhere in the world while sitting on your own sofa. Well produced, VR can be an incredibly persuasive marketing tool. There will be some, such as the elderly, who will use VR to experience a place that they are unlikely to be able to visit but according to new research by Tourism Australia, one in five travellers have made a choice of holiday destination through experiencing it first by VR.

Several Scottish attractions have successfully produced VR experiences such as the Laphroaig Distillery, Cairngorms National Park and in Edinburgh the innovative Smart History app shows tourists what the streets they are standing in looked like in 1544.

How to increase your income using this trend

How to make the most of this 'Technology to Stimulate and Inform' Megatrend

CONSIDER THIS

Understand the importance of collecting and using visitor's data

Collaborate using technology to enhance the visitor experience

Progress your digital journey

Use technology to enhance your own business practices

WHY

Because there is a wealth of knowledge that is lying untapped that could take Scotland forward

We need to become better at joining our resources to better deliver the experiences that visitors want

If not, you will be left behind. Engage Digital Tourism Scotland to get ahead

Technology can help with a wide range of in-house practices including customer service. Get advice from Digital Tourism Scotland



Ideas from others: SnowRoads Scenic Route

Supported by Scottish Enterprise's Tourism Destination Development Fund and VisitScotland's Growth Fund, Cairngorms Business Partnership has created a digital immersive visitor experience to help visitors to explore one of Scotland's favourite scenic routes. SnowRoads Scenic Route is a 90 mile journey linking Blairgowrie to Grantown-on-Spey through Glenshee, Braemar, Ballater and Tomintoul.

The main output of the project is an app that uses the latest virtual and augmented reality technology to bring the route to life and includes local stories, treasure hunts, business listings, maps and things to do and see. There is an audio guide, video content, music and opportunities to tailor the content to suit an individual's interest. Content is themed under headings such as hidden gems, castles, history, arts & crafts, outdoor activities, cycling, viewpoints, distilleries, walking, wildlife, sports, architecture etc. There is also a 'companion' SnowRoads website with a tool to customise the journey by creating an itinerary which can be sent to the mobile app for further interactivity on the route.

To get around the connectivity issues of the mountainous area, the app is completely cached, and so visitors are encouraged to download it before the journey starts and then continue to use it through GPS when the 4G signal is low or non-existent.

It is the community engagement element of this initiative that is central to its success. The businesses along the route were involved in highlighting the best content to include and promote under the set themes. Local stories were unearthed, and hidden gems found. This gave rise to a lot of original content being created that was both local and authentic in flavour. These local stories and recommendations then add

so much more depth to the visitor experience and encourage people to spend more and stay longer in the towns and villages along the route. With the local community taking ownership of the listings and sharing content on their own channels, the tools can continue to build and grow in an organic and natural way. Through social media, visitors too can add their own recommendations and pictures which in turn can be remarketed by the businesses.

This digital marketing approach also has sustainability benefits where there is less of a need for physical signage and large bill boards with so much more information and advertising being available and delivered straight to a visitor's phone.

For data capture too, the mobile app will be able to deliver more accurate stats to inform future growth. A 'heatmap' can be created showing where the majority of people are visiting along the route and gives great potential for capturing insights and images to use in marketing and analysis.

Using technology in this way, addresses several different issues – connectivity, sustainability, interpretation, marketing and data capture is a good example of this 'Technology to Stimulate and Inform' Megatrend.



Ideas from others: Crabtree & Crabtree

Crabtree & Crabtree is self-catering holiday home company with over 200 properties that they market on behalf owners in the Borders, Northumberland and most recently in East Lothian. The company started in 2009 'at the kitchen table' and has grown organically and steadily doubling their revenue year on year.

From the outset Emma Crabtree, recognised the need for making the booking process as easy as possible and that offering online booking was essential. With the rise in self-catering as a holiday accommodation choice, they also needed to stand out and for Emma this was using technology to be ahead of the competition.

Capturing data is essential for Crabtree & Crabtree and they leverage every opportunity to do so. From an initial enquiry through to a booking and beyond, the company will do all they can to capture an email address. In the past it was easier to do this through inviting entry to competitions or signing up to a newsletter but with the new GDPR rules in place, extra care is taken to operate strictly within the guidelines. The data collected sits on a secure CRM system and can be segmented and re-mined. They know that a conversion to sale is much higher if the potential customer receives tailored and relevant marketing and increasingly this is most effective when it relates to a person's interests. So the data collected is segmented— e.g. 'fishing on the Tweed', 'dog walkers', 'visitors with kids', 'romantic retreaters' etc. This has the potential to become ever more sophisticated with bespoke software to assist.

In 2018, a full overhaul of the website was carried out and Crabtree & Crabtree found a 9% uplift in online bookings. Once the site was fully responsive and

tablet/mobile friendly, they also realised that booking behaviours changed. Interestingly, now 42% of bookings were made on a mobile, 33% on a tablet and 25% on a desktop which reversed from the previous website.

Through increased segmentation and data collection, a better understanding of visitors was achieved. Insights such as 37% of bookings included dogs encouraged the company to take on 20 new dog friendly properties. They saw that 3 out of 10 bookings were repeat bookings which was a 5% increase on 2017. Family bookings with children increased by 16% and so represented a quarter of all bookings. These insights could drive strategic business decisions as well as marketing.

Using the 'Technology to Stimulate and Inform' Megatrend is at the heart of Crabtree & Crabtree's continuing success and growth. As technology use becomes more widespread and available and the Evolving Traveller more sophisticated, this is good example of a company who have understood how to stay ahead of the curve and be reactive as new opportunities emerge through effective and consistent data capturing and using the insights it provides.

Make the most of 'TECHNOLOGY TO STIMULATE AND INFORM'



Consider how AR could grow your business. Could it help with language, storytelling? Or just enhance the experience? The investment may be comparatively little for the return



Join in with open data sharing projects in your destination and sector



Would VR be a tool that you could use in your marketing? It could attract a new potential audience



Find out more about the umbrella platforms visitors use and make sure your business is much more visible



Sign up to a workshop with Digital Tourism Scotland and make more of your own data and insights to grow business



Further information

There is a huge array of support available to help grow your business in ways which will enable you to benefit from the 4 Megatrends we have outlined in this resource.

For further inspiration and to access many case studies on the four key Megatrends from the UK and further afield, go to www.scottishtourismalliance.co.uk

Also go to www.scottishtourismalliance.co.uk where the BIG 5 questions will get you thinking about what to do next.



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