

Lucid

Project Unlimited



Insight findings June 2017

Moving Brands Further

Structure of presentation

Objectives and sample

Findings on strategy and idea

Brand comms

Overall summary and recommendations

Visit comms

Invest comms

The perspective of PALS

Summary



Project Unlimited
Insight findings June 2017



Objectives and sample

Moving Brands Further

Background and overall objectives of Project Unlimited

VisitScotland and Scottish Enterprise (inc. SDI, HIE) are collaborating to build a future brand for Scotland

Conviction:

Unprecedented opportunity to harness collective assets, deliver impact/influence in increasingly competitive global economy

Aim:

Leverage Scots that represent Scotland's most attractive characteristics and optimise their impact

Desire:

Create 'national movement' not just a marketing campaign



Scottish Enterprise



SCOTTISH
DEVELOPMENT INTERNATIONAL

Communications objectives of Project Unlimited

Scotland's brand assets/product well known and loved

But tendency to reflect past not project positive future

Objective is to use core differentiator of Scotland's people to allow Scotland to be projected as a modern exciting destination to visit, live, study or invest

Key to this will be identifying connected ambassadors that can deliver Scotland's narrative across the globe and inspire this national movement



Research objectives were to explore and identify:

Appeal, relevance and motivational value of the creative concept for the target audiences

Understanding of key messages – and specifically, appeal and power of 2 alternative endlines

Flexibility of the idea to deliver key messages of ‘live, work, study, visit and invest’ in the priority markets

Whether brand perceptions of modern Scotland are improved by the concept

Opportunities for optimisation



Sample:
Visitors
Investors
PALS



London
San Francisco
New York



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Findings on strategy and idea

Moving Brands Further

Observation on the media strategy

Support from all for notion of ambassadors as conduit

For Visit

Idea of click-through from impactful specific social media post to broad/varied film also works well

For Invest

Click through to broader film works for minority

But most frustrated to have specific interest piqued and then offered a broader, more general message (when want specific detail)

For Brand

Hard for all to understand what the target and role of these comms are – and thus hard to imagine why people would share it



'[The Invest film] is far too long and says far too much. I can't share that. It needs to be in bite size chunks, bite size chunks' (PAL, NYC)

'No that [Brand film] is not doing it for me. It's obtuse and I can't see the point of it.' (CEO, London)

'I don't get who it's for or what they're trying to say. I mean, I sort of do get what they're trying to say by *why* are they saying it? (Y Visit, London)

The device of a quick-fire, varied series of scenarios in the films

← Most successful

Least successful →

Visit:

Invest:

Brand:



Works well for many in the context of Visit film:

Conveys motivating 'lots going on' style variety of things to see/do, enabling appealing mix of traditional/known and surprising/new

Some interest but overall impression too broad/vague/lacking in specific support

Series of clips of successful people talking to camera has potential for Invest audience but the range and variety of people worked for a minority only – most called for more focus

Overall effect confusion

Some Visit in the US warmed to key messages in this film but majority responded negatively – trying to say too many things to too many different people

Toasting device

Toast device did not work well for any target

Often distracted attention/got in way of any other message

Most, if not all, missed its symbolism

On prompting, fraught with range of issues:

Why all the water?
Does Scotland
have good water?

Bad luck to
toast with
water (US)

Either use
alcohol, or
don't toast

+

Feels self-
congratulatory on
Scotland's part



'Here's to x' toast device fell flat across the board



'Yeah what's with the bottles of water? Maybe they have really great water there – do they?'
(O Visit, US)

'All the water was really distracting. And not just the water. I mean, who does a toast with a takeaway cup of coffee?'
(Y Visit, UK)

Using many nationalities to carry the message - Visit

Many Visit left wondering - why so many nationalities?

As a result tends to become another distraction

On prompting, means: Scotland welcomes the world

Few understood testimonial effect, and anyway these typologies rely on *personal contacts* for this, not ads

In US, additional barrier: not being able to distinguish all these UK (or even EU) accents

Also don't *want* 'loads of other tourists' on holiday

Importantly, lacks the appeal of getting to meet interesting/fun *Scottish* people



'When I go on vacation I don't want to think I'm going to be surrounded by tourists. It's the Scottish people I want to meet' (O Visit, SF)

'I don't know how much these people's opinions matter; (Y, Visit NY)

'I might be swayed by a friend, but that's not going to influence me' (Y Visit, UK)

'You get no impression of Scotland from these people' (O Visit, NY)

Visit – what they want instead

In short, ‘many nationalities’ did not work well for Visit audience

The diversity effect warmly appreciated, however

More powerful to see diversity of *resident Scots*, showing pride in what their country has to offer, and a warm welcome



Using many nationalities to carry the message - Invest

'Many nationalities' worked slightly better for Invest

Some 'got' from it Scotland is player on world stage

But, whilst positive message for many, doesn't answer the vital question for Invest: *what's in it for ME?*

Many also plainly *confused* by the multiple nationalities

Are these people Scottish?

Do they live in Scotland?

What's their link with Scotland?

Where are all the Scots?



'Oh I see. They're trying to say Scotland has impacted the world. OK well that wasn't obvious to me before. I suppose that's a good message but it's not what I need. I want to know about the people I'm going to hire. That's what I want to know about. The Scottish people' (CEO, SF)

Invest – what they want instead

Quality of local talent and attitude of workforce are key for Invest

Therefore more motivated to see more Scottish people in the comms



What's the overall takeout?

Brand film:

Visit comms:

Invest comms



(At best, for some):

“Scotland is clever, pioneering, innovative, diverse/inclusive and welcoming”

“Scotland offers a variety of (mainly outdoor) experiences, both ancient and modern”

“Scotland has invented many things and has (youthful) science and tech credentials”

Is the overall idea communicated?

What's under-communicated is the core differentiator that it is your objective to use and convey – the tenacity/determination of Scottish people and their character/personality/(work) ethic....

... which is motivating to both targets, especially to Invest

SCOTLAND'S CALLING

For centuries, Scotland has pursued the new, the needed and the better. Our greatest minds and achievements are honoured the world over and act as a steady reminder of the need to challenge and aspire to better things - even the things that do not exist (yet). This tenacity, this attitude to never settle is set against a backdrop of stunning landscapes, history and mystery and the warmest of welcomes that is hard to resist. And it's calling out to you. Can you hear it? To all those listening, we say join us. To live, to learn, to invest, to visit. Scotland's Calling.

GO SCOTLAND

Being Scottish is a state of mind that seeks out new possibilities, pushes limits and strives for accomplishment, after accomplishment - even in the face of adversity. Our pioneering drive and determination is set against a backdrop of natural beauty, a rich history and the warmest of welcomes - a combination that creates a truly unique spirit. No matter where you go, or what you see, this spirit imbues our land and our people: the spirit of 'anything is possible.' A spirit to go and seize opportunities the world has to offer. To go and discover the undiscovered, and change the unchangeable. To go and share our beautiful land and welcome all who visit. To go and reach out to the rest of the world and say, whether it's to live, to work, to study, to invest, to visit... Go Scotland.



Observation on additional barrier here for Invest

How the films structured (and use of a toast) means people hearing Scotland's achievements *after the event*

So hearing *what* has happened which (although impressive) gives little sense of *how* it happened e.g. how hard people worked or support they got

It's also *past*-focused with little sense of what is to come



Invest want to know 'what would be in it for me?' so would be more motivated to have a sense of what *support* was provided to enable past success and how Scotland is investing in the *future*



'I'm more interested to know – how long did it take them? What was it the banks, other investors and the government did to help them? And what's being set up for the future – like are they building a new biotech research facility. That kind of thing' (CEO, NY)

Endlines - overall

'Scotland's Calling' most popular with Visit audience in US and most UK consumers

Some UK Visit/Invest in UK rejected both lines for political reasons

Invest/PALS more split: some in favour of 'Go' on basis it's more active/punchy (albeit 'done before'), more in favour of 'SC' – but many thought *neither* strong enough



**Of the two, 'Scotland's Calling' has the edge but neither line feels truly strong and both have issues
In conclusion, new line needed**



'Scotland's calling is more inviting and more about me. The other one is cheering Scotland on' (Y Visit UK)

'Go Scotland' is shorter, and punchier but it is kinda sporty, and a bit 'go you guys'!' (O, Visit NY)

'Honestly? Neither works for me. They're both cheesy' (CEO, SF)

‘Scotland’s Calling’ – positives and issues



**‘Heard before’ for some and a bit ‘soft’ for some Invest
Overall more appealing than ‘Go Scotland’ as includes the listener and feels involving but not compelling or a strong call to action**

'Go Scotland' – positives and issues

- Short and punchy
- Passionate and strong sounding
- SOME VISIT: More of a direct call to action (go there)
- SOME INVEST: active and go-getting (making it feel more business-like than SC)



- For all, (over)done before
- Sporty/too sporty
- Cheesy, trite
- SOME UK: 'too American'
- Queries over grammar ('to')
- More about Scotland than me and self-congratulatory
- SOME UK VISIT: (ref Brexit) hear 'go away Scotland'
- SOME INVEST: cheering the underdog



Overdone, too sporty, too much about Scotland and not the listener

Key observation on response in the UK in light of Brexit

Reactions against both lines in the light of Brexit prompt us to wonder whether *any* line phrased as call to 'come here' can work in today's climate?



Endline expressing benefit of being in Scotland (instead of direct call to come) may be less risky and more meaningful?



Endline expressing things like:

- 'Scotland's happening' (CEO, SF)
- 'Uniquely Scotland' (O, London)
- Scotland is the place to be/where it's at
- Scotland has it all

You've got to get me thinking not about you asking me to come, but about me wanting to be there' (CXO, SF)

End-frame ambassador - UK



[all images redacted]



Successful end ambassador in UK
Well known to some, less to others
Popular with those who know her
Scottish link not known - +ve surprise
Cues achievement
Says modern, diverse, creative

Well known
Seen as figurehead
by some already
Obvious/over-used
Known as dour

Not well known
Doesn't qualify as
enough of an
'achiever'



End-frame ambassador - US

[redacted]



Completely unknown
Makes sense of the music
Cues creativity
Cues diversity/inclusion

Complete unknown to most
Not 'successful'?
Known by tiny minority
On prompting cues youthful,
modern, creative

Not known by most
Not 'modern' or creative
Known by tiny minority
On prompting cues achievement



Of these three, on balance {redacted} offers most positive messaging in US

End-frame ambassador – observations on use of celebrities

As is to be expected, we also had calls for someone more famous in both markets....

...the inevitable Sean Connery suggestions, Ewan McGregor (and in the UK 'the man from Coast')

But celebrities polarise, drawing as many 'aren't they just paid to do it?' comments as more positive views



**Use of 'big' celebrities a double edged sword?
Most in this sample felt 'not needed'**

Role of the music

Music not frequently commented on, by any target

On prompting, it feels positive, uplifting and builds well

Also turns the (appealing) final scene into a 'reveal'

And whilst US targets don't know Emeli Sande, overall effect is to say 'cultured, diverse, creative'



No major spontaneous pluses or minuses re the music but communicates positively



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Insight findings June 2017



Response to Brand
communications

Moving Brands Further

Overall observations on Brand comms

Brand was the least successful strand overall

Minority warmed to the film

But most were highly critical - both Visit and (especially) Invest

Response to social post lukewarm at best



Brand comms overall – the upside

Some US Visit and a few Invest warmed to Brand film

For some US Visit:

Gave nice warm feeling, primarily based on what it conveys about diversity, inclusivity and welcome

'That was much more emotional for me, especially the refugees. I love how Scotland comes across in it' (O, US)

'What a great country. I had no idea. That makes me see it in a whole new light' (Y, US)

We think what responding to was film reflecting their values in comforting way in trying times



But in reality not a *vacation* driver

For a few (mainly less knowledgeable) Invest

Impressed how Scotland came across as having impacted the rest of the world

Impressed that Scotland feels so diverse and 'international'

'It's saying Scotland punches way above its weight in the world' (Invest UK)

'It's a look what we've done' for Scotland and its is kind of impressive' (Invest, US)



But queried use of one catch-all film

Observations on the implications

We think main learnings here are on messaging not format:

- **value to US Visit of an inclusive/ welcoming feel and more of a sense of the Scottish people**
- **value of making Invest aware of Scotland's impact on the world stage (but with major caveats on 'what does that mean for me? - as we unpack in Invest, later)**



Brand comms overall – the downside

Majority responded negatively to Brand comms

Many Visit and most Invest confused, disengaged and/or irritated

Many struggled to 'get' the role of the film, even after explanation

And even then, queried it - feeling lacked a cohesive story, and 'trying to do too many things' – but failing



Response to Brand social

Lukewarm response at best:

Many didn't recognise Mike Myers

For those who did – how is that interesting?

Ref to 'famous faces' also felt trite – and 'who cares?'

'Responsible for' also negative (blamey) language

No real motivation to click through



Lacked impact, meaning and a 'hook'



'I just wouldn't pay attention to it I don't think' (O Visit, US)

'What's it trying to do? Tell us there are a lot of Scottish achievements? OK but then as a holiday destination it just feels depressing' (Visit O, London)

Key barriers to Brand film (beyond unclear role/target)



Confusing/unclear

Main barrier:

- Who are these people?
- Why are they saying this?
- What's the connection with Scotland?
- Who are they targeting?
- Why are you telling me this?



Too 'international'

Are you saying all these people live in Scotland? Where are all the Scots? (whom Visit want to meet, and Invest want to hire)



Self-congratulatory

(Esp. if exposed to GO first) can feel uncomfortable that Scotland is patting itself on the back – and feels too much about Scotland and not what this means for *me*



Past focused

More like award film than manifesto for the future
Focus on achievements says 'we've been clever' but for Invest, misses what's being planned for the future



Too much hard work/effort and not enough about 'what's in it for me'

Positives of Brand film (despite confusion)



Innovation message

Revelation to most that Scotland invented all these things that benefit the world (especially healthcare ones)

Impressive to all and motivating to Invest



Education message

Known to many London Invest but not known to many others



Inclusivity/diversity message

Motivating to Visit when perceived as welcoming attitude to incomers
 Motivating to many US Invest: modern attitude, antidote to current political climate

Motivating to all



Boost in other comms, especially Invest?

More motivating scenes in Brand film

Most appealing



Wonderful news
Well done Scotland
Appealing archetype

Why is she Welsh?
Accents all sound the same to me (US)



Appealing that
Scotland invented
beta-blockers

But is that what you're
saying/say it straight?
Why is he French?



Motivating to many
– shows Scotland
open minded and
welcoming

Others felt too
controversial



Communicates open-
mindedness/
inclusivity to some

Others confused –
were they first?

More polarising



Polarising according
to personal interest

Too known to be
'news' or
interesting?

'Scotland helps the world'

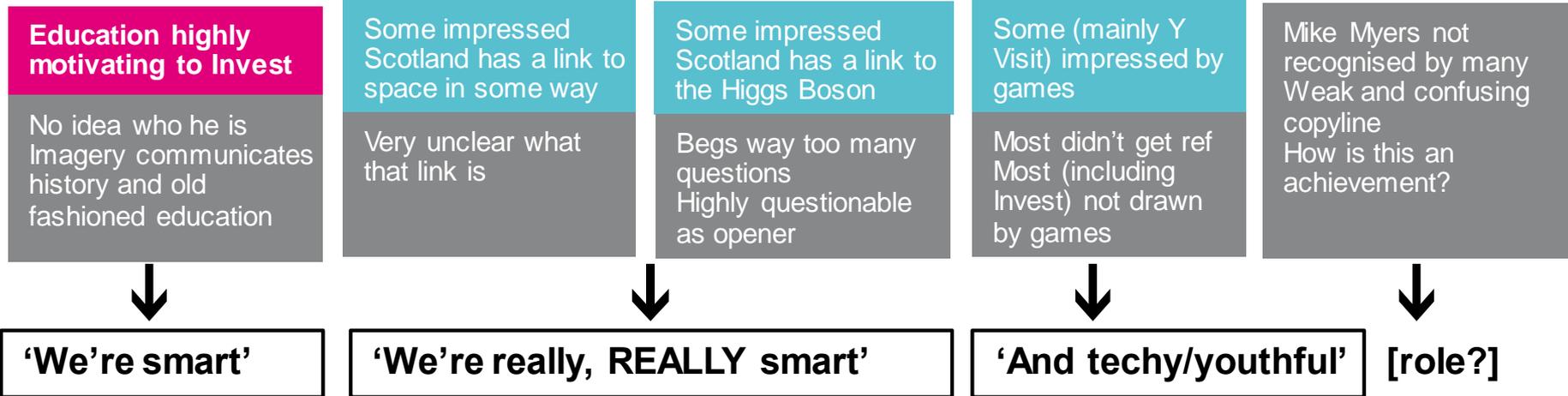
'Scotland welcomes the world'

[role?]

Confusing scenes in the Brand film

Confusing but more appealing [images redacted]

Confusing and less appealing



Overall main takeout from Brand film (only when understood)

**“Scotland is two main things:
- clever, pioneering and innovative
- diverse/inclusive and welcoming”**

Expresses these key qualities

- ✓ Progressive
- ✓ Pioneering
- ✓ Innovative
- ✓ Leading edge
- ✓ Inclusive
- ✓ Welcoming
- ✓ Open minded
- ✓ Liberal

Debatable?

- ? Visionary
- ? Inspirational
- ? Generous of spirit



Doesn't express these qualities

- ✗ Determined
- ✗ Tenacious
- ✗ Collaborative
- ✗ Bold
- ✗ Passionate
- ✗ Creative
- ✗ Ingenious
- ✗ Curious

Scottish personality and 'grit' (motivating, esp, to Invest) are missing

Learnings on language in the Brand script (UK and US)

Most motivating (albeit link to Scotland not always clear)

- ✓ **The world's first cancer vaccine and fresh hope**
(news + truly amazing)
- ✓ **My world-class education**
(impressive + broadly appealing especially to invest)
- ✓ **The beta-blockers that allow me to watch them grow up**
(news + motivating, but haven't they been around a while)
- ✓ **Somewhere safe to call home**
(news + positions Scotland as welcoming)

Polarising

- ? **And record-breaking games development** (record breaking sounds good – but vague and minority appeal)
- ? **The greatest day of our lives** (appeals to many but begs questions)
- ? **The most amazing and frustrating game in the world** (debatable + polarising)

Doesn't work so well

- ✗ **The unrelenting pursuit of the Higgs Boson**
(complex, unclear, confusing)
- ✗ **Gravitational waves offering a new window to the universe** (complex, unclear, confusing)
- ✗ **The best 007. Arguably**
(obtuse, facile compared to cancer vaccine - how is that an achievement?)

Final copy in Brand film - Calling

Strange language
Sounds bossy/
desperate

Nobody makes
connection between
listen and 'calling'

'All' seems a stretch – not everyone will be interested. Better to say 'and to all who believe' or 'and to you who believe'?

And to all of you.
Who also believe that anything is possible.
We invite you to listen. And to join us.
Because Scotland's Calling.

Too strong a claim
Hard to sign up to

Not the takeout from
the film so jars with
people



Overall, feels OTT and some odd language
Many calls to simplify

Final copy in Brand film - GO

Again 'all' a stretch [see previous chart]

Awkward language
Implies it's very hard work

Again, not the takeout from the film so jars

And to all of you, who are also striving forward.
Why not join us?
And we'll go even further together.
Go Scotland

Weak invitation
'Marketing speak'

We invite you to join us' – or a simpler, bolder 'join us' would be better

Awkward language
Who's 'we'?
Patronising



Also OTT, some odd language and also feels awkward and patronising – again, calls to simplify

Response to Activations: the hopes

Where response was positive (mainly in US and with Invest/PALS, after the ideas better explained):



RE:ENLIGHTENMENT:

The Scottish Enlightenment was a period in the late 18th Century where Scots achieved many intellectual and scientific accomplishments that have helped revolutionise the world. The Re: Enlightenment is (an aspiration to create) a bold new event where we bring the greatest of minds of every background together to collectively solve a problem that affects the modern world. With a backdrop of seminars and performances that celebrate the best that Scotland has to offer, the event will engage, inspire & entertain.



TWINNING:

This is a road show with a purpose. We connect businesses by twinning cities and fostering international partnerships. We collectively solve a global problem to improve the world we live in. This is about connecting great minds for the greater good.

**Links past with future achievement
Brings world to Scotland; creates hub**

**Feels active, dynamic, task-based
Scotland proactively going out there
not waiting for it to come to you**

Potentially a big idea – ideally combined/feeding one another

Response to Activations: the fears

Especially where response was less positive (mainly in UK, before ideas fully explained):



RE:ENLIGHTENMENT:

The Scottish Enlightenment was a period in the late 18th Century where Scots achieved many intellectual and scientific accomplishments that have helped revolutionise the world. The Re: Enlightenment is (an aspiration to create) a bold new event where we bring the greatest of minds of every background together to collectively solve a problem that affects the modern world. With a backdrop of seminars and performances that celebrate the best that Scotland has to offer, the event will engage, inspire & entertain.

Unrealistic for a conference – Enlightenment was long term



TWINNING:

This is a road show with a purpose. We connect businesses by twinning cities and fostering international partnerships. We collectively solve a global problem to improve the world we live in. This is about connecting great minds for the greater good.

Name cues 'not new' and parochial
What if don't find solution?



Implication is it would need to be large scale, sustained and long term (not just a conference or a few visits)

Observation on the potential of the Activation ideas

Not popular with (or not shown to) all UK Visit or UK PALS but once better explained and understood, and assuming large scale/sustained, response very positive with US Visit and Invest/PALS

Felt like potentially powerful way to 'walk the talk' of the brand message in a concrete, future-focused way that landed the message more firmly with many



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Overall summary
and recommendations

Moving Brands Further

Summary of findings on the executions

Strategy	<p>Ambassador idea strong and Emeli Sande works fairly well</p> <p>Toast device failed, 'many nationalities' not optimal (all want to see Scottish people/character/ethnic) and though 'Calling' stronger, new endline needed</p>
Brand (all)	<p>In the context of the research, changed perceptions of some (mainly Visit in the US) for the better and Activation ideas have potential</p> <p>But confusing and in reality 'too much like hard work' to most</p>
Visit	<p>Most positive overall: film not 'original' but surprising to some and motivating to most, some OOH strong, social has potential following work to address issues</p>
Invest/PALS	<p>Some motivating themes, techniques and could move on views of Scotland</p> <p>But not most motivating message(s), lacks visual impact, obtuse/unclear, too much about Scotland and not enough me, not specific enough, lacks data, too past-focused – and better streamed by topic</p>

Observations on what already works well and overall impact

What works well

- ✓ Using ambassadors
- ✓ Linking through from social to films
- ✓ Quick-fire series of scenarios in films
- ✓ Fore-fronting people as carriers of message in films
- ✓ Surprising target audiences with (relevant) things they didn't know about Scotland

Impact

- ✓ Projects a more modern Scotland
- ✓ Projects exciting destination to visit
- ✓ Has potential also to project exciting destination invest



**Many of the fruits of your collaboration/joint strategy had a positive impact
Views of Scotland moved forward in positive way, and in the same direction**

Reminder of overall takeout from executions currently

Brand film:

Visit comms:

Invest comms:

[images redacted]



(At best, for some):

“Scotland is clever, pioneering, innovative, diverse/inclusive and welcoming”



“Scotland offers a variety of (mainly outdoor) experiences, both ancient and modern”



“Scotland has invented many things and has (youthful) science and tech credentials”

Observations on what has potential to work well

What has potential to work

- Use the core differentiator of Scotland's people more
- Sharpen both Visit and Invest social (imagery and 'hooks' in both, data in latter)
- Tweak the scenarios in Visit film to better match what motivates people
- Stream the message for Invest films, better match their core drivers, clarify what we're seeing and make more future-focused
- Fully invest in Activations as concrete, future-facing way to project brand message



Potential to significantly enhance Visit and Invest comms, with clear direction on how to do so

Issues for debate and Lucid's observations on these

Endline

Question mark over whether a single endline can optimally match the needs of both Visit and Invest. We hypothesise adopting the approach we suggest may make this more feasible – but remains to be seen

Role of brand film

We believe research indicates minimal role for externally-targeted film that attempts to cover broad 'Scotland brand' – hence suggestion instead to boost key themes in Visit/Invest and investing in Activations

Can films work without Toast device?

This is a creative issue. We note that overall takeout from the films was not diminished when people did not notice the Toast device but we question impact/standout/engagement without a device

Summary of key tasks to improve impact and appeal/motivation

	Visit	Invest
Endline	New endline - expressed not as direct invitation to come (risky ref Brexit) but benefit of doing so?	
Brand comms	Query external role and value of Brand comms (too broad, too general, to hard to decode)	
Social media	Ensure quality, atmospheric 'storytelling' photos, high visual impact and headlines that prompt a response	Ensure immediate visual impact, use infographics/charts that visualise progress, harder-hitting data messages and 'top 10 reasons', more future focus
Visit/Invest Films	Reconsider/replace Toast device, clarify what we're seeing (ticker tape?)	
	Use all or mainly Scots	Use more Scots
	Add more (Scottish) culture, more indoors/city/activity	Stream by topic, clarify Scottish connection, boost education, medicine, diversity, add future focus
OOH	Stunning, 'only in Scotland' imagery and copy expressing drama, mystery, story	More impactful images, more specific claims, reverse copy and headline, ensure clear CTA



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Insight findings June 2017



Visit response

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Overall observations on Visit comms

Visit most successful strand overall

Scenery still key draw but call from some - especially (though not only) Younger - to add indoor/city culture

Film reminded many of campaigns for other countries (esp. California, NZ) so not original but good 'of its kind'

(Although does have several executional issues)

Some OOH very motivating and clear what to avoid

Social has potential but currently not strong enough – needs more quality, stunning, 'storytelling' imagery and more quirky facts

'As far as your standard 'come here, see this, do this' ads go it's pretty good' (Y Visit, New York)

Overall observation on Visit comms

Visit comms have potential and executional issues 'fixable'

A film executed as well as California's and NZ's ads (which people recall) would put it in an impressive category

What may be debatable is: will it 'break the trance' in reality?





Visit competition: where is higher up the list and why - US

All had been to 'a bunch of places' in Europe – London, Paris, Berlin, Rome...
Key recurring themes on the shortlist for the future were:



Greece: 'They had some ads with amazing photos, all blue and white and beaches, Santorini'



Spain (esp. Barcelona) and Portugal: 'I know someone who just came back, said it was fantastic'



Croatia (esp Y): 'Everyone seems to talk about Croatia. I don't know why. I guess it feels newer maybe?'



Ireland (inc. Dublin): 'Ireland always does a ton of advertising here'



**Most of these had been subject of visible marketing campaigns
Friends had been as a consequence, and reported back positively**



Starting point: perceptions of Scotland - Visit, US



'Castles and fog'

Core perception

Castles appeal a lot - but 'not enough to make a vacation or even a short trip of it'?



'Nothing to do'

No concept of any activities beyond seeing castles, hiking and drinking whisky
No concept of sport/activities, arts etc



'Pretty much like Ireland'

Rolling green hills
Castles and not much to do
'I've been to Ireland so what would be the point?'

Narrow, limited view of Scotland and little sense of differentiation



Impact of the Visit comms on US audience

In context of these perceptions and low level of knowledge:

Visit campaign surprised in a number of positive ways...

...especially beaches, activities (rafting) but also mountains, festival, ceilidh





Visit competition: where is higher up the list and why - UK

Some (especially younger), think of Scotland as (if anything) weekend-only so competition mainly cities. Dublin sometimes still on the list, plus long list of European cities offering history plus 'things to do'



WONDERFUL
COPENHAGEN



Others (especially older) think of Scotland as short break or secondary week/10 day holiday - but put off by hassle of driving there. Competition an array of many European destinations, often via word of mouth recommendation not ad recall



Scotland often somewhere 'always wanted to go' but never quite got round to it

Starting point: perceptions of Scotland - Visit, UK



Castles



History



Drinking



Golf



Hiking



Not much to do



Bad weather

'Scotland is dry. Not literally but emotionally. Sitting in a pub. Walking and hiking. Going and seeing a castle and getting drunk (Y)



'Not a holiday, more of a short break. Grey and rainy. Windy and miserable. And not much culture. Not very creative. (O)

Know much more about Scotland than US audiences
Some (mainly older) saw politics in everything (post referendum/Brexit effect)



Impact of the Visit comms on UK audience

Level of knowledge meant Visit comms surprised them less

But some (esp Y) surprised by beaches, rafting

And most still found film interesting and appealing – a good reminder of what I've forgotten and a good balance of known and new

Question of standout remains



Main takeout from Visit comms (both markets)



**“Scotland offers a variety of
(mainly outdoor) experiences,
both ancient and modern...”**

**(Something for everyone and
more than you expected)**

Key caveat/need (both markets) - how far is it?

Not knowing about (and fear of distances) a stumbling block both sides of the pond

UK look at stunning places in the ads and query how feasible it would actually be to get there

US struggle having no concept of how things join up/how vacation in Scotland could be constructed



As ever, calls for indications of what/where things are, how long it takes to get there and sample itineraries



'I don't feel like I have a sense of how you get around. I'd be worried it would be hours in the car' (Y, UK)

'I want, like, sample itineraries. What can I do in 3 days, 5 days that kinda thing' (O, NY)

What worked in Visit social: key executional do's, don'ts, wishes

Do's

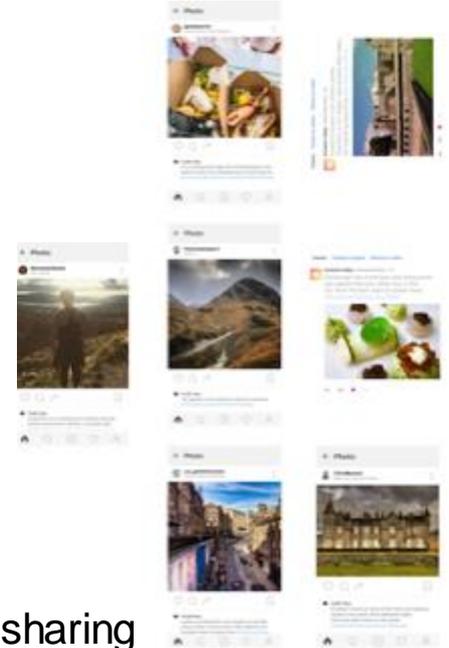
- ✓ Focus on quality of image (especially on Instagram where text is very much secondary)
- ✓ The story/atmosphere the image conveys is vital
- ✓ Strongest images either:
 - moody and atmospheric
 - colourful and intriguing

Don'ts

- ✗ 'Could be anywhere' images
- ✗ Unprofessional-looking images
- ✗ Close ups lacking setting and context

Wishes

- More cultural activities
- More indoors (bars, cities, shopping)
- More quirky facts that spark curiosity and encourage sharing



Response to Visit social

← Most successful

Least successful →



Stunning images
Unique looking places
Conveys story, atmosphere

Perfect castle
 Moody and mysterious
 Realistic weather

Intriguing
 Colorful
 Quirky
 Cultural, city

Some (not all) into food
 New news that food great and plentiful here

Michelin draws some
 Impactful image on Twitter

Street feel draws others

Better if more context shown?

Boring looking castle/part of a castle

Poorly shot (bad holiday snap)

Play to dark/cold/gloomy stereotype – and/or simply not clear

Dark, dull
 Monochromatic
 Lacks atmosphere
 Lacks a 'story'
 Could be anywhere

What worked in the Visit film: key executional do's, don'ts, adds

Do's

- ✓ Dramatic opening scene
- ✓ Surprising activities and places
- ✓ 'Only in Scotland' places/activities
- ✓ Classics like castles and stunning scenery

Don'ts

- ✗ 'Could be anywhere' (not exclusively Scottish) places
- ✗ Too much outdoors (not realistic with weather)
- ✗ Children put people off (avoid on holiday)
- ✗ Toast device falls flat (confuses, why water?)
- ✗ Many nationalities doesn't have testimonial effect and puts many off (don't want it to be full of tourists)

Adds

- More 'only in Scotland' cultural activities i.e. not art/gallery that could be anywhere
- More indoors scenes/activities (bars, cities, shopping)
- Add what/where it is (ticker tape?)
- **Change other nationalities to diverse Scots**

Scenes in the Visit film that are already great (UK and US)



Most popular
Stunning beach
Surprising and
delighting to all
 (though wanted to know how far)

Highly popular
Stunning shots
 Many US had no idea Scotland has big mountains
 UK know but this one exemplary

Highly motivating
to Younger -
surprising,
exciting

Less appealing to Older

A bit of Scottish
culture also vital
 Also shows life in evening and warmth of people

But 'Hipster' cheesy ?

Castle motivating
and considered
'essential'
element in any ad
about Scotland

But children can be a negative

Observation on opening scene

As a way of hooking people in, ideally Visit film needs to open on:

- an arresting image
- and one that's not already obviously associated with Scotland

Beach scene is strong potential candidate for this job



Scenes in the Visit film that *could* be great if..... (UK and US)



Edinburgh festival motivates many
Surprises many in US

Korean dance image rejected
(not Scottish, could be anywhere)
Royal mile scene could be any city



**More obviously Edinburgh
Give sense of scale visually
to reinforce 'world's biggest'**



Whisky and distillery visits
unique and motivating

Images bleak, lack warmth
Outdoor perspective feels
disconnected from what appeals



**Indoor scene (whisky stills,
warm light, friendly staff)
would be more motivating**



Some love the idea fresh seafood
and great chefs

In US could be anywhere (Maine?)
Some put off thinking about fishing



**More motivating to more
people if leads to restaurant/
people at a table (so more
about eating than cooking)**

Least motivating scenes in the Visit film



Polarising - minority appeal in this sample
Nothing new : *'everyone knows about the golf'*

But some think ad for Scotland *'should have golf'*
And some think could work if the dackdrop/
scenery were more stunning



**Not surprising enough for role in film
(as opposed to targeted social)?**



Minority interest

'That could be anywhere'
'It's just dull, compared to the others'
(On realising location) too far away to be feasible



**Weak, especially as opening scene
Recommend cut entirely**

Learnings on language in the Visit script (UK and US)

Most motivating

- ✓ **Having the place all to yourself** (Rare + motivating)
- ✓ **Aging we can all look forward to** (clever line + motivating idea)
- ✓ **Join the world's biggest arts festival** (unique + exciting)
- ✓ **To being left speechless And a little breathless** (match action + motivating benefits)

Appeal to at least some, but issues

- ? **The mysteries that still astound** (mystery very motivating but scene not mysterious currently - better allied to castle scene?)
- ? **And the battles never forgotten** (historical ref appeals to some but line weaker as not about the 'benefit to me')
- ? **But most of all – to the people!** (appealing idea – but not dramatised currently)
- ? **To the most amazing and frustrating game in the world** (debatable, polarising topic)
- ? **Fresh seafood every chef wants to work with** (less interested in the cooking, more in the eating)

Final copy Visit film

As in Brand film:
Strange language
Sounds bossy

Nobody makes
connection between
listen and 'calling'



And to all of you.
Who also want to go somewhere special.
We invite you to listen. And to join us.
Because Scotland's Calling.

As in Brand film: 'All' seems a stretch
Better to say 'and to all who believe' or
'and to you who believe'?

Generic
Uninspiring

**'You'll always be welcome here' (from GO script) more motivating and better match?
But both too long-winded for most – shorten and simplify?**

What worked in the Visit OOH: key executional do's, don'ts, wishes

Do's

- ✓ 'Only in Scotland' places/activities
- ✓ Stunning scenery
- ✓ Castles and ancient monuments
- ✓ Strong sense of atmosphere
- ✓ Headline that promises drama, mystery, story

Don'ts

- ✗ 'Could be anywhere' (not exclusively Scottish)
- ✗ 'I could get that here' activities
- ✗ 'Flat' images – lack of depth/contrast in images

Wishes

- Main headline bigger than endline
- Easier to see where it is
- Clearer call to action/what next?
- More 'character' in the headline copy?
- More city/activity/indoor images?

Response to Visit OOH: more successful (and one 'wild card')



Stunning images with real atmosphere
Unique looking places
Headline conveys appealing experiences people hope for in Scotland:
fairy tale, majesty/drama, storytelling

The perfect castle
 3 key elements – hills,
 water, castle to visit
 Great depth of field

Awe-inspiring scale
 Slightly less unique in
 SF (Big Sur)

Mysterious, ancient
 history (especially
 appealing in US)

Humour draws many

Headline conveys
 appealing (self
 deprecating) Scottish
 character to many

Cheesy for some
 For most (US and some
 UK) background could
 be anywhere

Response to Visit OOH – polarising or less successful



Headline witty (UK)
Route 66 idea appeals to some in UK
Some love open road

Some drawn to idea of great views
A few likes this image

Idea of Edinburgh Festival a big draw

Quirky, appealing image for some

Route 66 means something different in the US (so ref jars)
Image flat, monotone
Oppressive to some
Could be US?

It's not a great view
It could be anywhere (Arizona, Utah)
Headline dull - lacks a 'story'

But this image (albeit visually appealing to some) failed because:

- not Scottish
- could be anywhere
- no sense of scale

But even for them:

- could be anywhere
- I can get great art (probably better) here
- wouldn't attract me to Scotland



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Invest response

Moving Brands Further

Overall observations on Invest comms

Invest comms have potential, but not 'there' yet

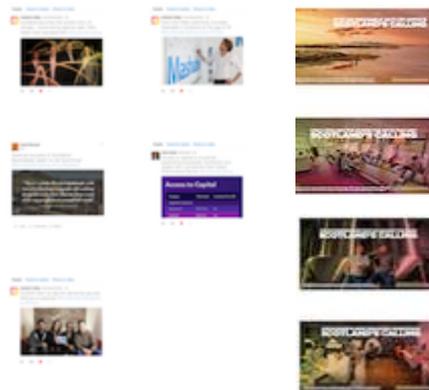
Ultimately, overall, gave a different impression of Scotland from now (skilled, techy, entrepreneurial)

Those less knowledgeable (mainly US and mainly CEOs/PMs rather than VCs/advisors) most impacted

But for many, too vague/indirect/hard work and for all:

**X Not hitting primary messages
Invest need to hear**

**X Images not impactful enough
for environment/ target**



Invest competition: where is higher up the list for EU expansion

Key recurring themes:



Ireland: Works hard to win us, great support, low tax and good incentives, good education, good people



Eastern Europe (esp. Poland): Low costs, good skills. work very hard to make it easy for us (and for Poland, great access to rest of EU)



Frankfurt: Business hub, largest financial centre on continent, very international



Often ahead of the others

London, Paris: Obvious first steps into EU, major business and tech centres, well connected etc

Ireland is biggest competition - known for being keen and very proactive
Advised framing comms much more clearly with competition in mind

Starting point: perceptions of Scotland - Invest



Good education standards



Financial expertise - albeit controlled by *'Edinburgh mafia'*



Some aware tech creds, but others not



Those aware waiting to see how Brexit dust settles



Some (esp. advisors) aware tech creds



Most lack any real knowledge of any kind so similar views to Visit:

'I think Scotland I think castles, golf and whisky. I don't think business or tech'



Most non-advisors have paid no attention so comms a revelation

Invest: what they look for – and want to see/hear in your comms

First order priorities

Talent

- Education and skill levels
- Type of skill and work ethic
- Cost of talent
- Rate of attrition

Access

- Access to global markets
- Transport and communications

Hub effect

- Presence of other business
- Strong business community
- Porter's 'Diamond' effect*

Support

- Proactivity of govt, development agency and academic institutions
- What is being developed by way of business infrastructure

Costs

- Cost (and speed) of setting up
- Cost of doing business
- Tax

- Environment and culture
- Work/life balance
- Quality and cost of housing
- **In US especially:** clean air/water

Second order priority

QOL

* SF has a Diamond in software, Texas has a diamond in oil

Invest: what they look for – as one interviewee puts it:

© The Boyd Company

T A L I O

Talent

Education level
Education type
(relevant subjects)
Cost of talent
Rates of attrition

Access

Access to global
markets
Non-stop flights
(short and long haul)

Lifestyle

Quality of life
Environment
Activities
Cost of living, housing

Incentives

Specific government
incentives

Operating costs

Set up costs
Cost of doing
business
Cost of talent
Taxation

How do the Invest comms stack up against this?

Some appealing themes related to these priorities

But most interviewees felt their key concerns were at best hinted at and at worst, not addressed at all

Also felt 'this could be anywhere'



Need to sharpen up how well this target's priorities are matched, and do do in a way that feels more competitive – and distinctively Scottish

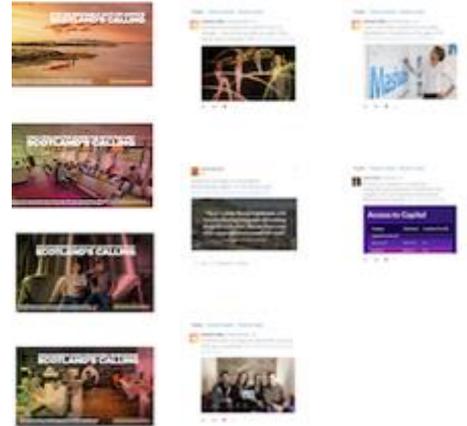
'I see so much of this kind of thing. You could take Scotland out and it could be one of many. There's nothing distinctively Scottish about it – nothing to say why not go to Ireland? No competitive edge'
(CXO, London)

In all of them I miss why go to Scotland not somewhere else
(CEO, SF)

Main takeout from Invest comms (both markets)



“Scotland has invented many things and has (youthful) science and tech credentials”



News to many, appealing in many ways but not landed in a way that feels sufficiently relevant, clear, specific to target, competitive, future focused

Observation on the main opportunity – the people/talent

Arguably talent (the people) are where Scotland has most potential to shine – and shine competitively and distinctively

This is about education and skills – but also about the work ethic and modern Scottish personality

None of this comes across strongly enough in the Invest comms now



Europe's most educated workforce. If that's a fact I would hammer that – absolutely **HAMMER** that! (CEO, SF)

Other overall observations on message of the Invest comms are:

We're not a start-up

Overall takeout for most Invest is Scotland is a good place for tech start-ups – but any company ready to expand is beyond this stage, so the comms often seemed to be targeting someone else



Good to hear tech/start-up but don't over-egg it

Not enough about me

Invest comms came across as too much about Scotland – too much self congratulation – and not direct enough about what's in it for businesses to expand/move there



Need to anchor much more in 'what's in it for me?'

Not enough about future

Also came across as too much about past achievements. Much more motivating to hear some of this 'evidence' but also what's happening in business now and what's coming - what Scotland doing to fuel *future*



Comms need to say much more on future plans, investment

Specific overall observations on message of the Invest *film* are:



Too vague/indirect

Combination of toast device, many nationalities and indirect references meant many unsure exactly what message is



Needs to be clearer, more direct



What's the link?

Many unsure (had to work out themselves) what the link with or message about Scotland was



Where are the Scots?

Shows (or rather implies) impact of Scots on the world but doesn't show enough Scottish people – the people we'd be hiring



Add Scots and Scottish attitude/character



Too much

Too much in it
Too wide a variety of subjects for many (frustrating if drawn in by specific post)
'tech' itself too broad



Stream into shorter films?

What worked in Invest social: key executional do's, don'ts, wishes

Do's

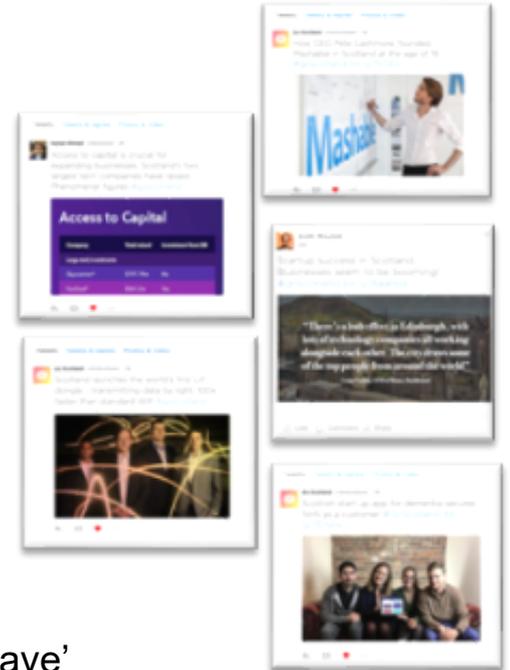
- ✓ Focus on quality of image (especially on Twitter)
- ✓ Specific, data or fact based headline

Don'ts

- ✗ Dull looking image
- ✗ Broad/obvious general claims
- ✗ Too much text over image
- ✗ Overt marketing in headline

Wishes

- More arresting imagery
- More future-directed data/infographics
- Sharper, headlines that entice to read on e.g.
 - 'How being in Scotland fuelled Mashable's success'
 - '5 reasons tech workers in Scotland will never want to leave'



Response to Invest social – most successful execution

- ✓ Bright, arresting, Twitter-friendly image for most (albeit some think ‘stock image’)
 - ✓ Appealing, relevant company
 - ✓ Appealing, relevant character
 - ✓ Didn’t know he is Scottish
- Headline strong but could be even sharper – less just *that* he founded in Scotland and more about *how* being in Scotland helped him



Response to other Invest social executions

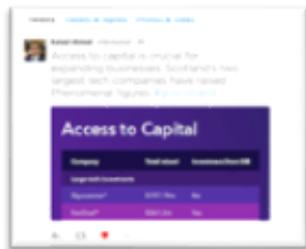
Strong message, but execution weak



'Hub' v. motivating message
Craig Findlay meaningful

Focus on start-ups narrow and lacks relevance
'Seem' to be booming weak
Image too dark
Too much text

- Elevate hub quote to headline and use better pic

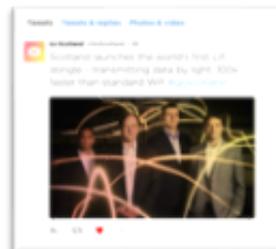


Concept motivates many

Image flat
First line headline obvious
Not high figures for some
Only 2 companies?
What is 'SIB'?
Past not future based

- Headline about potential
- Interesting infographic

'Interesting' message only - and execution weak



LIFI and 100x faster interests some

Dark image - confuses - looks like a movie?
- who are these people?

- Brighter image
- Show the dongle itself



Solutions for dementia interesting to some
Seeing successful young people appeals to some

'Could be anywhere'
US don't know 'NHS'
Dull predictable image - Too much about them

- Show app in action
- Text on how app helps people - get drawn into Scotland that way

Better data images would be....

They need to get more social media savvy. There is specific guidance now on how to get it right in different channels and it doesn't look like they know about this. It looks old fashioned. It needs to be much more dynamic (CEO, London)

Twitter images need to be a lot edgier (CEO, SF)

- **More specific data**
- **Visualised in an interesting way**
- **Infographics and graphs**
- **Ideally showing positive direction over time**



[Example sent by London-based CEO]:

What worked in the Invest film: key executional do's, don'ts, adds

Do's

- ✓ Successful business stories/people speaking to camera
- ✓ Show innovation and specified tech successes (but not too many)
- ✓ Cue quality of life
- ✓ Show uniquely Scottish places



Don'ts

- ✗ As with other films, toast device fell flat (if even noticed)
- ✗ Avoid obtuse/oblique references
- ✗ Avoid too many 'high brow' science refs
- ✗ Assume US target will be able to distinguish British (even European) accents

Adds

- Be much more direct and data specific
- Clarify what is being referred to and the link with Scotland (ticker tape?)
- **Dial up 'educated workforce' message**
- **More Scottish people (see who I'm hiring and know which country this is)**
- **Learning from Brand film: potential also to boost medicine, inclusivity?**

Also query use of single film

More motivating scenes in the Invest film



Impressive to most
Emotionally as well as
rationally appealing:
Scotland helps the world
Communicates science as
well as tech
Clear what the invention is

Lacks clarity on link with
Scotland
*'No American would say
brilliant he'd say awesome'*



Feels very 'advanced'
Communicates science as
well as tech
Feels very 'international'

Unclear what invention is
Lacks clarity on link with
Scotland



Very relatable
Recent success story

Many did not know Scottish
Some knew Scottish, but
good to be reminded

Missed opportunity to
actually see some of
Scotland, not just inside of
standard-looking office



QOL matters as support to
primary talent message
Chance to see some of the
beauty of Scotland – what
makes it unique

Missed opportunity to say
more about her
education/skills – and for
her to be Scottish
Opportunity to convey
proximity of nature too

Less motivating scenes in the Invest film



Everyone knows about it
Very current

But how is this relevant to my business?
Also query the presentation

- odd setting
- who is she and why is she in the ad?
- app not clear enough



A very 'big' and super-clever subject

But too big: what's the relevance to my business?
Also begs questions:

- who is she?
- why is she Italian?
- did Scots invent the HB?
- isn't it in Switzerland?

Don't mention God in US



Feels science-y, tech-y and shows diversity of business

Lacks relevance to many
Visually dull
Invention not clear
Role of Scotland not clear



Minority impressed that Scotland has games industry

Ignored by most:
Have to work too hard to decode it
Not relevant to me
Everyone has a games industry now anyway

Learnings on language in the Invest script (UK and US)

Most motivating	Polarising	Doesn't work so well
<ul style="list-style-type: none"> ✓ Sky-high thinking from Europe's most educated workforce ('sky-high thinking' cheesy but 'most educated' highly motivating) 	<p>? Tech that means I can pick and drop Le Bron (unclear + benefits whom?)</p>	<ul style="list-style-type: none"> ✗ ..into the God Particle (don't mention God in the US)
<ul style="list-style-type: none"> ✓ Brilliant inventions that changed my life (says innovative + Scotland punches above its weight) 	<p>? Backing innovation with investment. Not just words (investment ref appeals but 'not just words' ref feels weak)</p>	<ul style="list-style-type: none"> ✗ Record-breaking games development (not distinctive)
<ul style="list-style-type: none"> ✓ World-class university research.. (means I'll have access to world class minds) 	<p>? A quality of life that's more valuable than any Unicorn. (QOL message strong but Unicorn ref undermines message)</p>	

Final copy Invest film - Calling

Comments over and above comments in Brand film section:

And to all of you.

Who are also pioneering the way ahead.

We invite you to listen. And to join us.

Because Scotland's Calling.

**And to all of you, who are also
pioneering the way ahead. Come join
us.**

And we'll go even further together.

Will that apply to everyone?

Is that really what people want
to think they will do in Scotland?

Patronising and presumptive

This sample not wanting to go
anywhere 'together' with Scotland

What worked in Invest OOH: key executional do's, don'ts, wishes

Do's

- ✓ Focus on *their* priorities: talent, hub, support/cost benefits, access, QOL
- ✓ Give more, and more precise, data
- ✓ Compare with Europe (specifically if possible)

Don'ts

- ✗ Messy/complex imagery
- ✗ Endline drowns out the headline
- ✗ Comparison with rest of UK weak for US Invest
- ✗ Body copy too small (and often more compelling than headline)
- ✗ Lacks a call to action
- ✗ 'Invest' is not ideal page name for CTA: *'What now you're telling me you want straight into my pocketbook?'*

Wishes

- Much more impactful imagery
- More prominent headline vs endline
- In some cases, reverse headline/copy (to bring data into headline)
- Clearer CTA



Response to Invest OOH – execution with most potential

- ✓ **Headline matches primary concern**
- ✓ **‘Europe’s most’ is highly competitive**
- ✓ Data useful - but there could be more of it, and more specific (and many would prefer data in the headline i.e. ‘more’ in what way – highest number of higher level degrees in tech subjects in Europe?)

? **Much debate about the image:**

- some think cool, modern, how it should look in an office these days
- others think unclear, messy, not distinctive
- **all think could be more impactful/arresting**



Needs more impactful image, sharper headline

Response to other Invest OOH



Stunning image
Speaks to QOL point for some
Outdoors and clean air highly relevant to young tech workers esp. in SF

To others says holiday/travelogue so would not pay attention

➤ **Much more powerful if headline e.g. 'From office to kayak in 40 minutes'**



Tech sector, Skyscanner and Fanduel refs appealing

Image lacks impact
Looks like a canteen 'anywhere'
Headline cheesy
Faster than UK only meaningful vs London (US looking elsewhere too)

➤ **More impactful image**
➤ **More competitive text**
➤ **More direct benefit to me**



Arresting image for some – metal silos would catch attention
Communicates modernity, youth

Most struggled to see relevance to their industry or business
None in this sample would go to new location to launch a new idea

➤ **Query value of this execution**



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PALS response

Moving Brands Further

Overall observations on PALS' response

PALS accurately predicted the Invest response

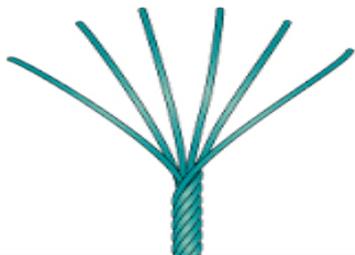
Also personally agreed main points on structure/content (therefore will not repeat here)

Willing to 'get on board' with campaignbut not without some changes....



Key overall advice from PALS

Agreeing with Invest.....and adding their own perspective.....

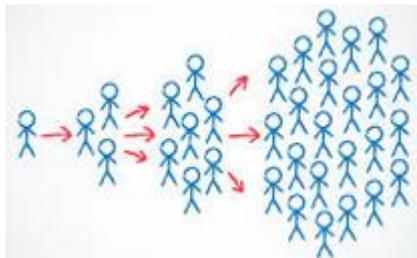


Strand it + firm it up

Not comfortable to *share* such general film(s) – as could reflect badly on PALS to look so vague/imprecise



Need to strand by topic, in bite size chunks with specific facts to back



Make it worth sharing

Happy to share info-based posts but fear it will 'stop here' – nobody else will share – so no cumulative effect



Need SM campaigns with viral effect – true incentive to share

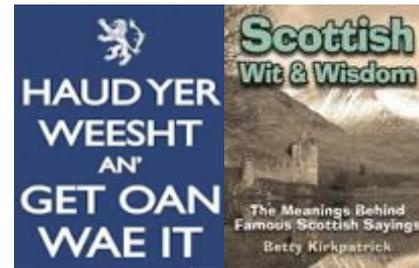


Don't rely on comms

More effective to have real people speaking/meeting
Need to show-case success in way people can relate to



**Create meaningful events
Use Scots/non who 'made it' in Scotland**



Add Scots character

Comms too outward-facing, too much about non-Scots
Priority for Invest is to know *who they'll be hiring* locally



Add Scottish personality and people to comms

US PALS particularly urged direct, positive comparison with Ireland

Realistically, anyone looking at locating their business in Scotland will also be looking at Ireland. We can't compete with them on tax breaks, but we can in many other ways - and should play to those strengths (NY)

- Highly-skilled local workforce (Ireland's young people tend to leave - this is less the case for Scotland)
- Dependable, straightforward local work ethic, etc.
- Relative financial stability (Ireland's boom/bust past is a recent memory)
- Scotland represents an "early adopter" opportunity - it's fresh, fertile ground - something tech leaders in particular love
- Proximity to Europe (if not EU membership - but many US companies see Edinburgh as somewhere that will get a whole lot more interesting post-Brexit)





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A landscape photograph of a Scottish lake with mountains in the background. The text "SCOTLAND'S CALLING" is overlaid in white, bold, sans-serif font.

SCOTLAND'S CALLING

A landscape photograph of a Scottish lake with mountains in the background. The text "GO SCOTLAND" is overlaid in white, bold, sans-serif font.

GO SCOTLAND

Summary

Moving Brands Further

Starting point and competition

Visit:



Invest:



Perceptions of Scotland



Castles, history, hiking, golf and drinking
Not a lot to do
Weekend maybe but not a holiday
Bad weather

'Castles and fog'
Nothing to do
Green rolling hills
Similar to Ireland
Might tack on to somewhere better

Good education standard
Financial expertise
'Edinburgh mafia'
Some aware tech creds, others not

Some (esp. advisors) aware tech creds
Most lack any real knowledge of any kind

Key competition



Dublin for some
Long list of European cities offering history as well as 'more to do' (and in some cases better weather)

[In Europe]
Greece
Spain and Portugal
Ireland
Croatia (*mainly Y*)

Dublin
Frankfurt
Eastern Europe especially Poland

London, Paris
Dublin
Eastern Europe especially Poland

Overall findings

<p>Strategy</p>	<p>Ambassador idea strong and Emeli Sande works fairly well Toast device failed, 'many nationalities' not optimal (all want to see Scottish people/character/ethnic) and though 'Calling' stronger, new endline needed</p>
<p>Brand (all)</p>	<p>In the context of the research, changed perceptions of some (mainly Visit in the US) for the better and Activation ideas have potential But confusing and in reality 'too much like hard work' to most</p>
<p>Visit</p>	<p>Most positive overall: film not 'original' but surprising to some and motivating to most, some OOH strong, social has potential following work to address issues</p>
<p>Invest/PALS</p>	<p>Some motivating themes, techniques and could move on views of Scotland But not most motivating message(s), lacks visual impact, obtuse/unclear, too much about Scotland and not enough me, not specific enough, lacks data, too past-focused – and better streamed by topic</p>

Overall takeout

Brand film:

Visit comms:

Invest comms

[images redacted]



(At best, for some):

“Scotland is clever, pioneering, innovative, diverse/inclusive and welcoming”

“Scotland offers a variety of (mainly outdoor) experiences, both ancient and modern”

“Scotland has invented many things and has (youthful) science and tech credentials”

Recommendations on Brand

Strong argument Brand film is trying to do too many things to serve useful external purpose

Arguably it may be useful internally - as a means of building and supporting cross functional working?

For external use we would recommend considering:



Boost (streamed) Invest comms with more on education, healthcare innovation and diversity/inclusivity



Invest fully in Activations, enabling news-based, future-focused 'brand' comms to arise from that



Visit: recommendations



Social

- Quality of image key (esp Instagram where text secondary)
- Use photographs that are either:
 - stunning, classical images with atmosphere that tell a story
 - quirky, cosmopolitan, unusual, intriguing places/activities
- Add more cultural things, more indoor things
- More quirky facts that spark curiosity and encourage sharing



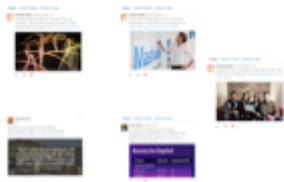
Film

- Drop/replace Toast device
- Use diverse Scots instead of other nationalities
- Open on the beach
- Make Festival scene bigger/more obviously Edinburgh
- Make distillery indoors and show seafood eaten
- Cut Neolithic scene and child at castle
- Add another indoor/activity (evening?) instead
- Add what/where it is (ticker tape?)

OOH

- Stunning 'only in Scotland' places + 'storytelling' headline
- Add city/'things to do' (e.g. inside a distillery, a comedy club)
- Make the main headline bigger than the endline
- Make it easier to see where it is
- Add a clearer call to action/what next?
- More 'character' in the headline copy?

Invest: recommendations



Social

- More arresting imagery
- More future-directed data/infographics
- Sharper, headlines that entice to read on e.g. 'How being in Scotland fuelled Mashable's success' '5 reasons tech workers in Scotland will never want to leave'

Film

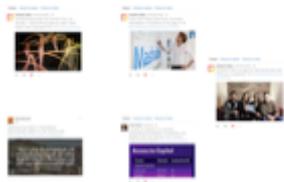
- Steam by topic
- Be much more direct and data specific
- Clarify what referred to/link with Scotland (ticker tape?)
- Drop Toast device
- Dial up talent – education/skills and attitude/work ethic
- Add more Scottish people
- Show uniquely Scottish places
- More future-focused
- Less emphasis on either 'highbrow science' or start-ups
- Consider add more medicine/inclusivity for emotional impact



OOH

- Focus on *their* priorities: talent, hub, support, access, QOL
- Much more impactful imagery
- More prominent headline vs endline
- Reverse headline/copy and give more/more precise data
- Clearer more appropriate CTA (not 'invest')

PALS: recommendations over and above these



- Bite-size chunks will make it easier for us to share in a targeted way
- Make it truly worth sharing – needs a proper viral effect
- Don't rely on comms: create meaningful events (people speaking at conferences, showcase Scots **and** non-Scots who made it in Scotland)
- Add more Scottish people and a real sense of the Scottish character
- Direct, positive comparison with competitors especially Ireland



Summary of key tasks to improve impact and appeal/motivation

	Visit	Invest
Endline	New endline - expressed not as direct invitation to come (risky ref Brexit) but benefit of doing so?	
Brand comms	Query external role and value of Brand comms (too broad, too general, to hard to decode)	
Social media	Ensure quality, atmospheric 'storytelling' photos, high visual impact and headlines that prompt a response	Ensure immediate visual impact, use infographics/ charts that visualise progress, harder-hitting data messages and 'top 10 reasons', more future focus
Visit/Invest Films	Reconsider/replace Toast device, clarify what we're seeing (ticker tape?)	
	Use all or mainly Scots	Use more Scots
	Add more (Scottish) culture, more indoors/city/activity	Stream by topic, clarify Scottish connection, boost education, medicine, diversity, add future focus
OOH	Stunning, 'only in Scotland' imagery and copy expressing drama, mystery, story	More impactful images, more specific claims, reverse copy and headline, ensure clear CTA



Project Unlimited
Insight findings June 2017



Thank you

Moving Brands Further