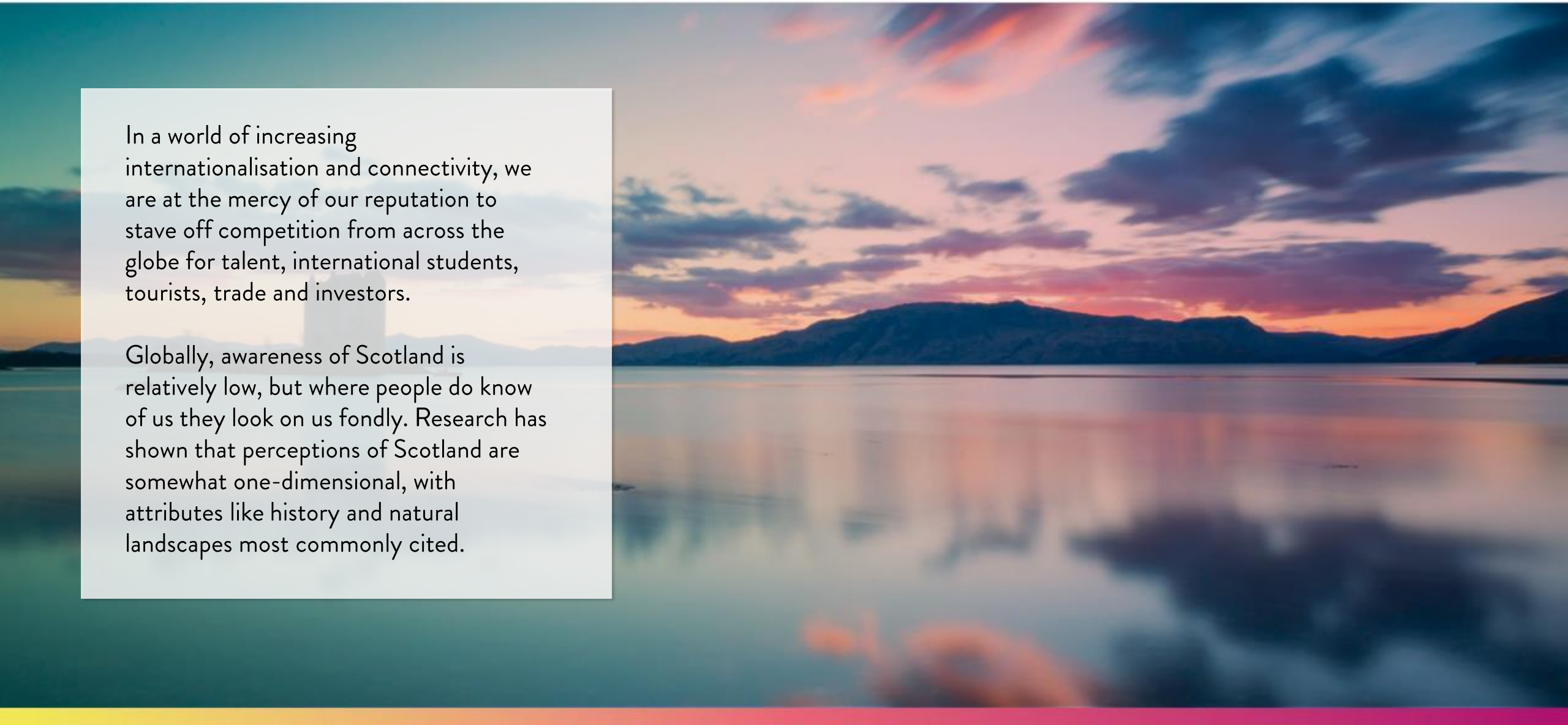
ROB CATTERSON
BRAND SCOTLAND

LEVERAGING THE POWER OF BRAND SCOTLAND TO DRIVE SUSTAINABLE GROWTH

BRAND SCOTLAND

INTRODUCTION

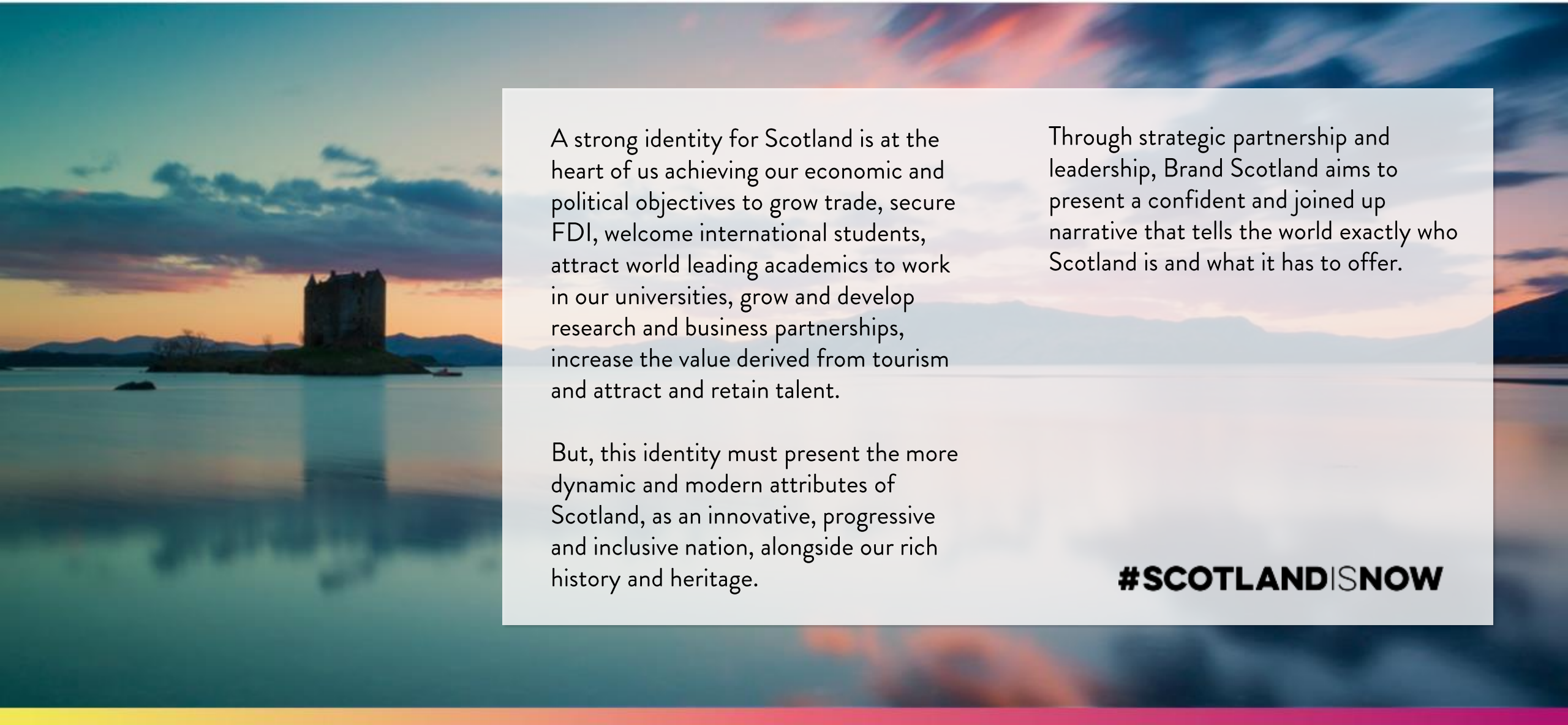


In a world of increasing internationalisation and connectivity, we are at the mercy of our reputation to stave off competition from across the globe for talent, international students, tourists, trade and investors.

Globally, awareness of Scotland is relatively low, but where people do know of us they look on us fondly. Research has shown that perceptions of Scotland are somewhat one-dimensional, with attributes like history and natural landscapes most commonly cited.

BRAND SCOTLAND

INTRODUCTION



A strong identity for Scotland is at the heart of us achieving our economic and political objectives to grow trade, secure FDI, welcome international students, attract world leading academics to work in our universities, grow and develop research and business partnerships, increase the value derived from tourism and attract and retain talent.

But, this identity must present the more dynamic and modern attributes of Scotland, as an innovative, progressive and inclusive nation, alongside our rich history and heritage.

Through strategic partnership and leadership, Brand Scotland aims to present a confident and joined up narrative that tells the world exactly who Scotland is and what it has to offer.

#SCOTLANDISNOW

“

ALONE WE CAN DO SO LITTLE TOGETHER WE CAN DO SO MUCH

- Helen Keller

#SCOTLANDISNOW

BRAND SCOTLAND

WHY?

NEI: MORE INTERNATIONAL STUDENTS (INCLUDING R.UK), WORLD LEADING ACADEMICS, RESEARCH AND BUSINESS PARTNERSHIPS, ATTRACT TALENT, GROW TRADE & FDI

BRAND SCOTLAND

WHY IS IT IMPORTANT TO YOU?

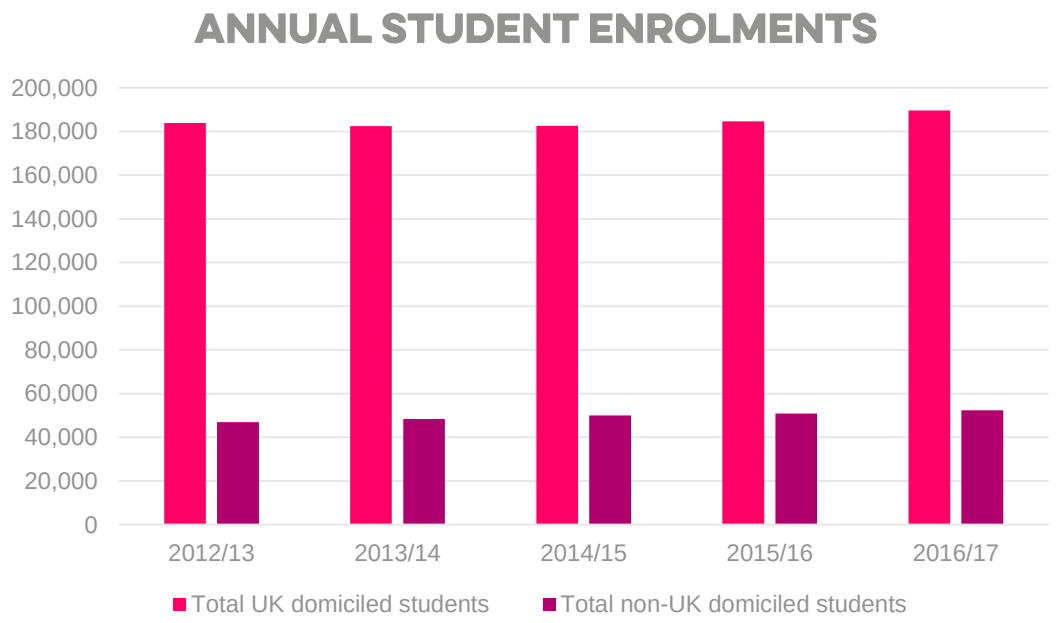
But as our competitors step up their game and the uncertain world of migration, business,
investment and travel evolves, one thing is for certain:

Scotland needs to shift gear if it is to sustain,
let alone grow, its international appeal and success.

Other countries are ramping up the competition and influencing international students to study in their institutes rather than in Scotland.

A collective voice and effort has more power, more reach and more impact.

- 1% increase from 2014/15 to 2015/16 in total enrolments
- Number of non-EU domiciled international students increased 3%
- However, we're seeing significant drops in major markets – India and Nigeria



22%

SCOTLAND HAS THE HIGHEST % OF INTERNATIONAL AND EU STUDENTS IN THE UK

INTERNATIONAL STUDENTS CONTRIBUTE TO THE ECONOMY

£2 BILLION

In direct fees & spending – London Economics, 2017

VISITORS TO INTERNATIONAL STUDENTS EVERY YEAR

GENERATE AROUND

£57M

Oxford Economics 2014/15

Halo effect

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Strategic Pillar	**STORYTELLING** Building profile and changing perceptions of Scotland	**IDENTITY & REPUTATION** Establishing a clear global proposition and identity that endures	**INTERNATIONAL NETWORKS** Leveraging the power of connected global partners and joined up in-market activity	**ADVOCACY & STRATEGIC PARTNERSHIPS** Building pride and advocacy with Scottish audiences
Key activity and deliverables (18/19)	Marketing activity: New content, assets, media and events. 1. #ScotlandIsNow launch, ongoing content and campaign activity 2. New assets added to DML 3. Diversity film (Aug) 4. Dundee regeneration story (Sep) 5. STV partnership & entrepreneurial stories (Sept – Nov) 6. Invent calendar (Dec) 7. Robert Burns film (Jan) 8. GoOverseas partnership (Jan) 9. NY Times content partnership (Jan/Feb) 10. NBC content partnership (Jan-Mar) 11. Love Scotland – people story film (Feb) 12. Develop a Scotland European campaign platform to support all pillar activity (Mar) 13. Scotland is Open film	A brand identity and strategic unit. 1. Establish core team and project teams 2. Identify new office space 3. Establish Brand Scotland strategy 4. Conduct brand research and stakeholder engagement 5. Establish working groups 6. Brand creative development process 7. Digital infrastructure: • Launch new sdi.co.uk • Launch new vs.org (Hippo CMS) • Discovery for vs.com (Hippo CMS) • Discovery for Scotland.org (Hippo CMS) • Procurement of marketing automation platform and partner	A new international network platform and export toolkit, aligned with connected international events. 1. Gap analysis of assets and contracting of phase 1 new international asset creation • China strategy • Updated China content and assets 2. DML scoping and requirements gathering 3. Global Scots scoping and requirements gathering 4. International Hubs scoping and requirements gathering 5. Alumni scoping and requirements gathering 6. Technology partner engagement 7. Phase 1 International Network proposition development 8. Phase 1 joined up event activity: • MIPIM	An advocacy and engagement platform and tools that unite Scotland's global voice. 1. Draft advocacy strategy 2. Draft partnership strategy 3. Research into domestic use of Scotland Is Now campaign vehicle 4. Gap analysis of assets and contracting of new asset creation (phase 1) for ambassadors 5. Scoping of ambassador programme (in line with international networks) 6. Partner onboarding – HIE, SDS
Budget FY 18/19	£5M + partner (pillar level) spend & in-kind resource	£30K + resource of lead partners (/in-kind support) c£300K capex (digital projects)	Core budget from partners, resource + in-kind	Resource.

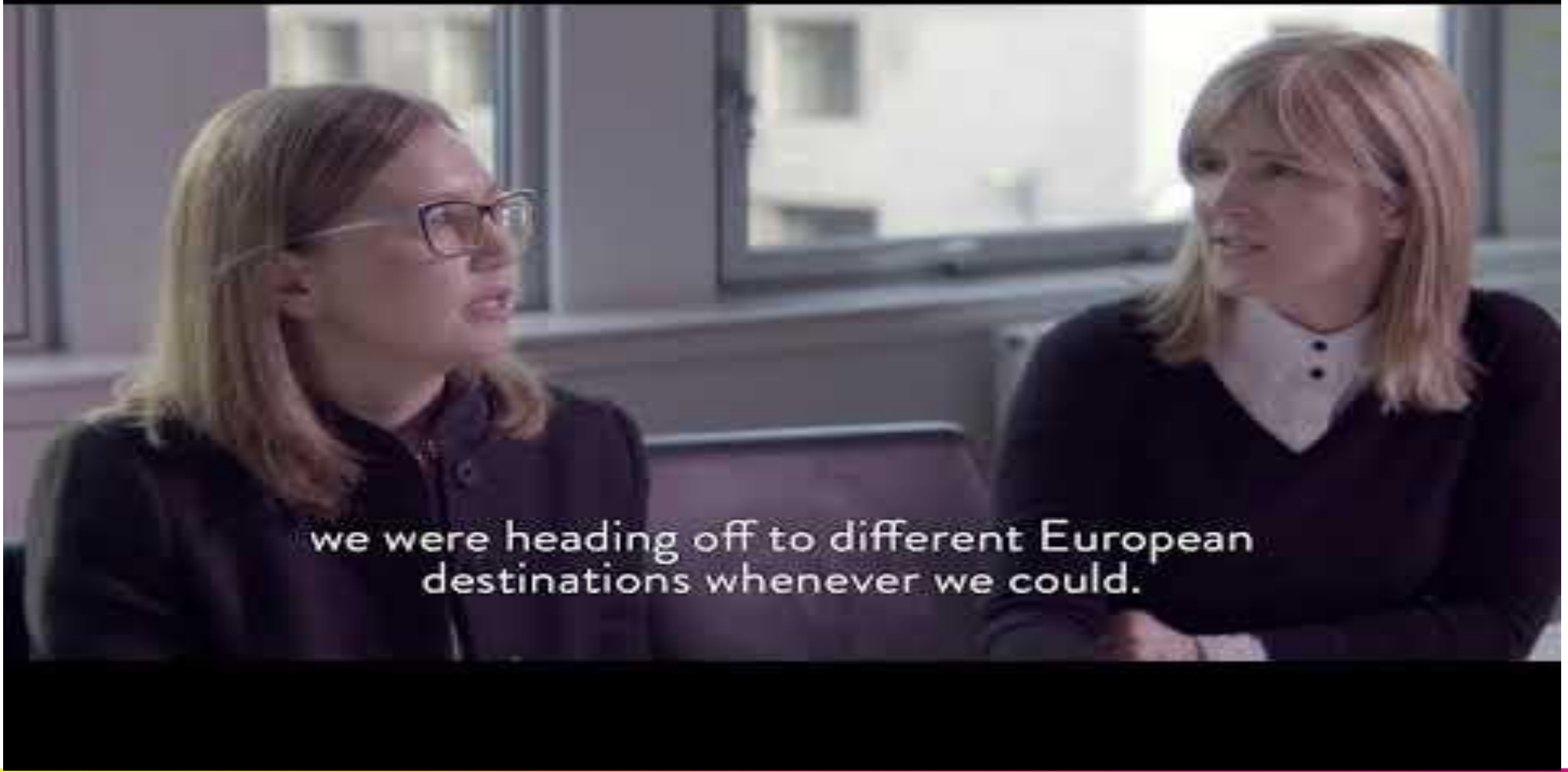
STEP 1

CHANGE THE NARRATIVE

#SCOTLANDISNOW

The visual look and feel reflected the brand image that Scotland is modern, creative and innovative.

I had a really easy transition


we were heading off to different European
destinations whenever we could.

MEASURING SUCCESS

This is a **long-term** ambition.

With conservative budget and resource we need to prioritise activity and be strategic in our thinking.

The behaviours we are trying to influence build over time. So, success will be measured over three phases.

#SCOTLANDISNOW

LAUNCH RESULTS

LAUNCH DAY

1/6

R.UK POPULATION REACHED

WITH YOUTUBE AD
on launch day

TOP 10%

YOUTUBE PERFORMANCE

Beating performance of Apple and BMW in April despite considerably lower spend

LAUNCH WEEK

28X

MORE POSITIVE SENTIMENT

SOCIAL ENGAGEMENT THAN NEGATIVE

2.5X

THE ENGAGEMENT **VISITIRELAND** DID FOR A SIMILAR CAMPAIGN

During it's launch a week earlier in the same year

#SCOTLANDISNOW

QUALITY OF TRAFFIC DRIVEN

MORE INTERNATIONAL TRAFFIC

GROWTH OF

84%
FROM LONDON

724%
FROM CHINA

51%
FROM USA

REFERRALS FROM SCOTLAND.ORG

105%
YoY **INCREASE**
REFERRALS TO **SDI**
(2K to 4K clicks)

100%
YoY **INCREASE**
REFERRALS TO **VS**
(27K to 54K clicks)

119%
YoY **INCREASE**
REFERRALS TO
STUDYINSCOTLAND
(3K to 6K clicks)

22%
YoY **INCREASE**
REFERRALS TO
TALENTSCOTLAND
(70K to 86K clicks)

April 2018 – June 2019

#SCOTLANDISNOW

#SCOTLANDISNOW
THE STORY SO FAR - YEAR 1

SCOTLAND.ORG

62%
INCREASE IN WEBSITE VISITORS ON LAST YEAR

RESULTING IN THE GROWTH OF NUMBER OF USERS IN KEY TARGET MARKETS WITH A

+61% FROM THE USA

+96% FROM LONDON

+408% FROM GERMANY

+290% FROM FRANCE

+1025% FROM CHINA

REFERALS

GROWTH IN REFERRALS TO ALL PARTNER WEBSITES:

78% GROWTH IN CLICKS TO **VISITSCOTLAND.COM**

96% IN CLICKS TO **SDI.CO.UK**

7.5% GROWTH TO **TALENTSCOTLAND**

105% UPLIFT IN CLICKS TO **STUDY IN SCOTLAND**

SOCIAL MEDIA

LOYAL AND ENGAGED AUDIENCE OF ALMOST
50K PEOPLE
ACROSS OUR SOCIAL MEDIA PLATFORMS
(many of which were new at launch)

SUSTAINED USE OF THE **#SCOTLANDISNOW** HASHTAG OF
OVER 1000 TIMES
EVERY SINGLE DAY

+181M **VIEWS** OF OUR VIDEOS TO DATE

+34MILLION OF THESE THROUGH TO COMPLETION

SCOTLAND IS OPEN
BEST PERFORMING ACTIVITY TO DATE

IN 2 WEEKS,
+80M PEOPLE
DIGITALLY REACHED

VIDEO PLAYED
+52M TIMES
(WITH MORE THAN 25M OF THESE TO COMPLETION)

40% AWARENESS IN THE EU WITH

OVER 3 MILLION
PEOPLE IN IRELAND

22.8 MILLION
PEOPLE IN SPAIN

25.5 MILLION
PEOPLE IN GERMANY

29 MILLION
PEOPLE IN FRANCE

SCOTLANDISOPEN

BEST PERFORMING ACTIVITY

In just two weeks, performance on this campaign exceeded any results to date.

The campaign was live online from **29 March – 2 April 2019** and in Munich and Paris airports from **29 March – 11 April**.

All KPI targets have been exceeded and there was a staggeringly positive response from our European audiences.

#SCOTLANDISNOW

TOP LINE KPIS

80M+
PEOPLE REACHED

via paid media (unique, based on cookies served)

>90%
POSITIVE SENTIMENT

Tracked across social media

>27%
of POPULATION REACHED

In key markets

25M+
COMPLETED VIDEO VIEWS

measured as 100% view

21K
USES of #SCOTLANDISNOW

March 29th – April 2nd

#SCOTLANDISNOW

ORGANIC PERFORMANCE (UNPAID MEDIA)

640K

ORGANIC VIDEO VIEWS ON SOCIAL MEDIA

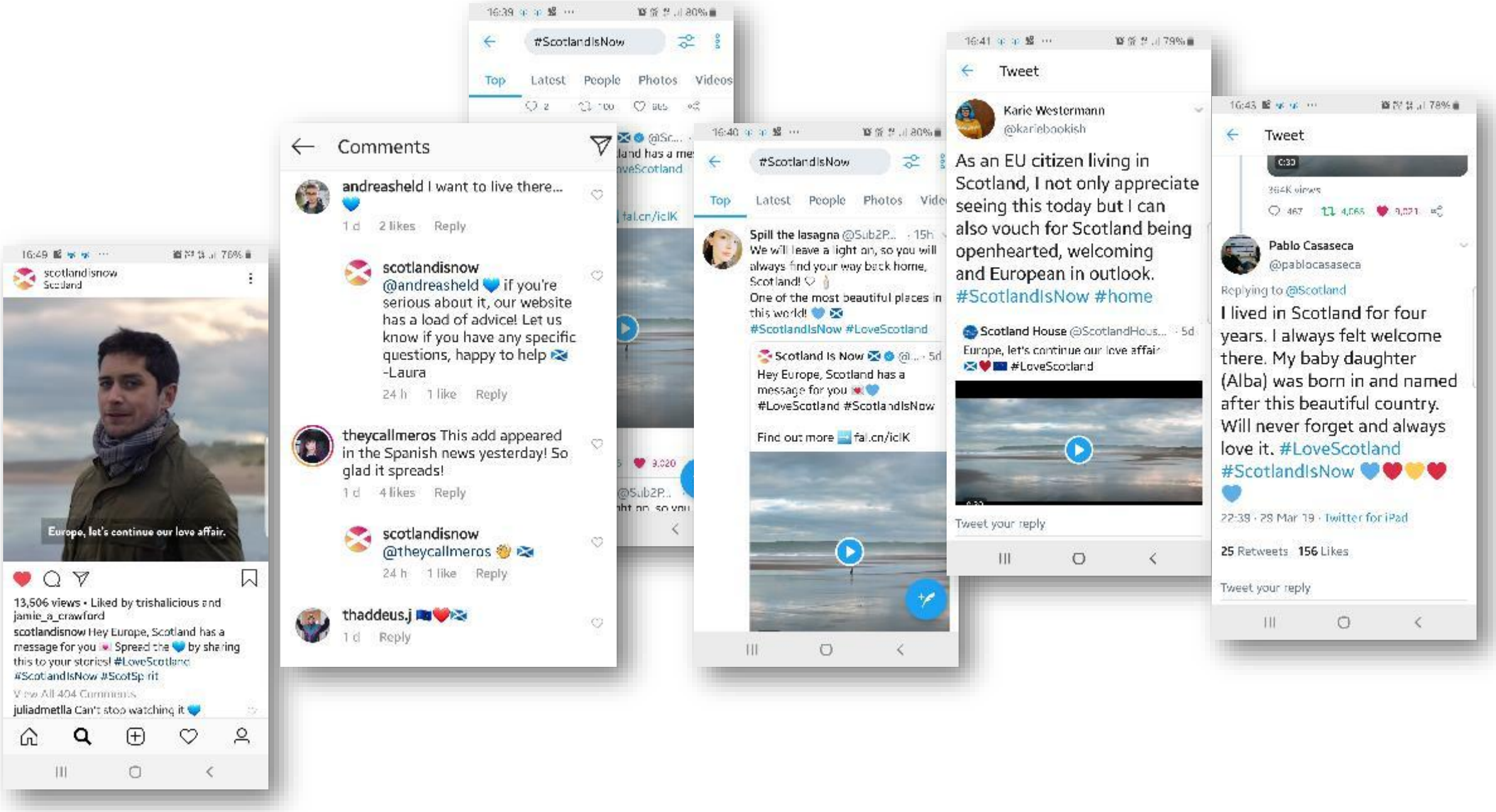
1.1M

ORGANIC IMPRESSIONS (TIMES SEEN)

>90%

POSITIVE SENTIMENT TO ORGANIC POSTS

#SCOTLANDISNOW


#ScotlandIsNow
Top
Latest
People
Photos
Videos
Comments
andreasheld I want to live there...
1 d 2 likes Reply
scotlandisnow
@andreasheld if you're serious about it, our website has a load of advice! Let us know if you have any specific questions, happy to help
-Laura
24 h 1 like Reply
theycallmeros This add appeared in the Spanish news yesterday! So glad it spreads!
1 d 4 likes Reply
scotlandisnow
@theycallmeros
24 h 1 like Reply
thaddeus.j
1 d Reply
scotlandisnow
Scotland
Europe, let's continue our love affair.
13,506 views • Liked by trishalicious and jamie_a_crawford
scotlandisnow Hey Europe, Scotland has a message for you Spread the by sharing this to your stories! #LoveScotland #ScotlandIsNow #ScotSp rit
View All 404 Comments
juliadmetlla Can't stop watching it
#ScotlandIsNow
Top
Latest
People
Photos
Spill the lasagna @Sub2P... · 15h
We will leave a light on, so you will always find your way back home, Scotland!
One of the most beautiful places in this world!
#ScotlandIsNow #LoveScotland
Scotland Is Now
Hey Europe, Scotland has a message for you
#LoveScotland #ScotlandIsNow
Find out more fal.cn/iclK
Tweet
Karie Westermann
@karliebookish
As an EU citizen living in Scotland, I not only appreciate seeing this today but I can also vouch for Scotland being openhearted, welcoming and European in outlook. #ScotlandIsNow #home
Scotland House @ScotlandHous... · 5d
#LoveScotland
Tweet your reply
Tweet
Pablo Casaseca
@pablocasaseca
Replying to @Scotland
I lived in Scotland for four years. I always felt welcome there. My baby daughter (Alba) was born in and named after this beautiful country. Will never forget and always love it. #LoveScotland #ScotlandIsNow
22:39 · 28 Mar 19 · Twitter for iPad
25 Retweets 156 Likes
Tweet your reply

STEP 2

BUILD OUR NATIONAL IDENTITY

A centre of excellence, delivering strategic guidance, leadership, governance and cohesion.

- Develop and govern the national brand
- Create and distribute content that promotes living, working and studying in Scotland to attract and retain talent
- Unite global ambassadors to create an informed army to sell Scotland internationally
- Develop tools and networks to support Scotland's exporters and enhance global reputation
- Leverage key skills and resources of partners to coordinate and elevate Scotland's international engagement efforts

HOW WE WORK
GOVERNANCE

#SCOTLANDISNOW

GOVERNANCE OVERVIEW

Brand Scotland
VS
SG
SE
HIE

CABINET SECRETARY
Culture, Tourism & External Affairs

CABINET SECRETARY
Economy, Finance & Fair Work

INTERNATIONAL BOARD

CHAIR
Charlie Smith

PROGRAMME BOARD
John Booth

PROGRAMME BOARD
Vicki Miller

PROGRAMME BOARD
Pauline Aylesbury

PROGRAMME BOARD
Anna Allan

PROGRAMME MANAGEMENT OFFICE
Emma Donnelly (PM)

BRAND SCOTLAND
Cat Leaver

POLICY ADVISOR
Karen McKechnie

PROGRAMME ASSURANCE
VS Board, SE Board, DEXA

PAN-AGENCY WORKING GROUPS & PROJECT TEAMS
VS, SG, SE/SDI, Universities Scotland, HIE

BRAND SCOTLAND TEAM (FT)

- Brand Scotland central resource
- Current gap
- VS committed resource
- SG committed resource
- SE committed resource

DIRECTOR
Cat Leaver

BRAND MANAGER
Rob Catterson

CAMPAIGN MGR
Karin F / Natalie N
(20%)

HEAD OF DIGITAL
Natalya Ratner (80%)

BRAND MANAGER
Mark Irwin

PROJECT MGR
Emma Donnelly (20%)

CONTENT EXEC
Norry Wilson

SOCIAL LEAD
Seonaid Heeps

CONTENT LEAD
Michael Thorburn

NETWORKS LEAD
Noelle Campbell

CHANNEL EXEC
Laura Brown

CONTENT EXEC
Rachel MacCallion

CONTENT DELIVERY TEAM

- Brand Scotland central resource
- VS committed resource
- SG committed resource
- SE committed resource

SOCIAL LEAD
Seonaid Heeps

CONTENT LEAD
Michael Thorburn

CROSS-PILLAR CONTENT CREATOR
Norry Wilson

BUSINESS CONTENT CREATOR
Rachel MacCallion

SOCIAL & INFLUENCER MANAGER
Laura Brown

VISIT CONTENT CONTRIBUTOR
Sarah Clarke (10%)

TOOL SUPPORT
Lesley McIvor (10%)

ANALYTICS SUPPORT
Barbara AS (10%)

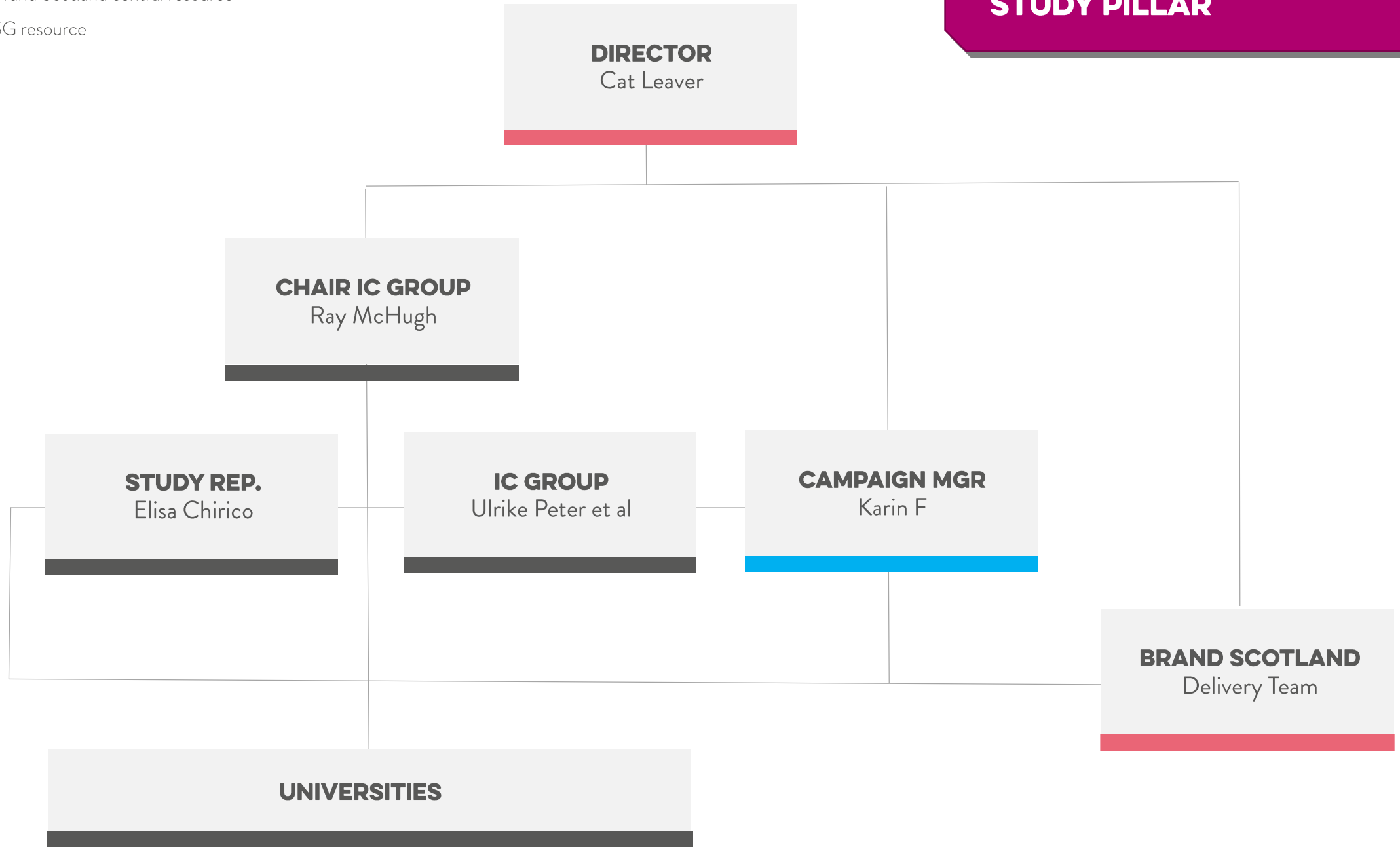
MODERATOR
Liam Kane (5%)

MODERATOR
Calum MacLeod (5%)

STUDY PILLAR

Brand Scotland central resource

SG resource



BRAND SCOTLAND TEAM & PARTNERS

KEY CONTACTS

Lead Area	Name	Title	Email	Phone
Brand Scotland	Cat Leaver	Director	Cat.leaver@visitscotland.com	0141 566 4014
Digital & Content	Natalya Ratner	Head of Digital & CX	Natalya.ratner@gov.scot	0131 244 3557
Live/Work Pillar	Karin Finlay / Natalie Neilson	International Marketing, Scottish Government	Karin.Finlay@gov.scot Natalie.neilson@gov.scot	
Business (invest/trade) Pillar	Rob Catterson	Brand Manager	Rob.catterson@scotent.co.uk	0141 468 6043
Visit Pillar	Mark Irwin	Brand Manager	Mark.irwin@visitscotland.com	
Study Pillar	Elisa	Connected Scotland Project Officer, Universities Scotland	elisa@universities-scotland.ac.uk	0131 225 0702
Visit – International Networks	Noelle Campbell	Scottish Connections Manager	noelle.campbell@visitscotland.com	0131 472 2039
China channels & content	Thorranze Cheung	Consultant, Red Unit	thorranze@redunit.co	07421317357

WHAT HAVE WE DELIVERED COLLECTIVELY FOR THE 'STUDY' PILLAR

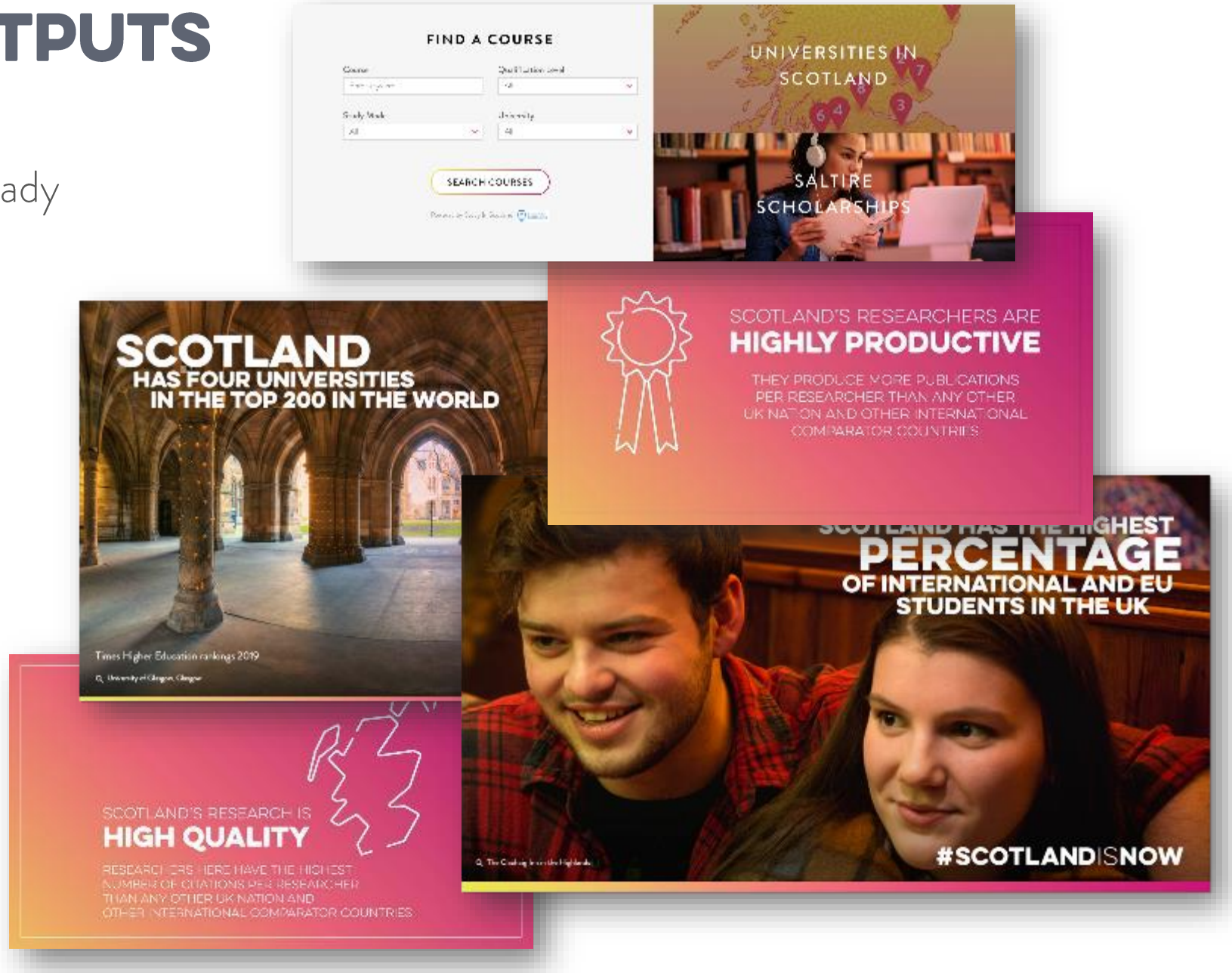
#SCOTLANDISNOW

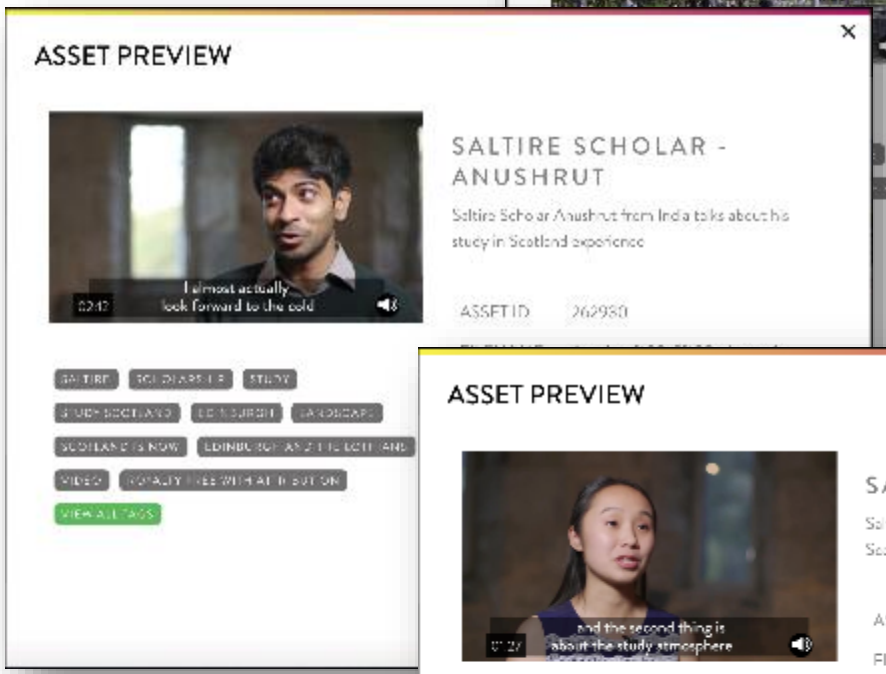
STUDY

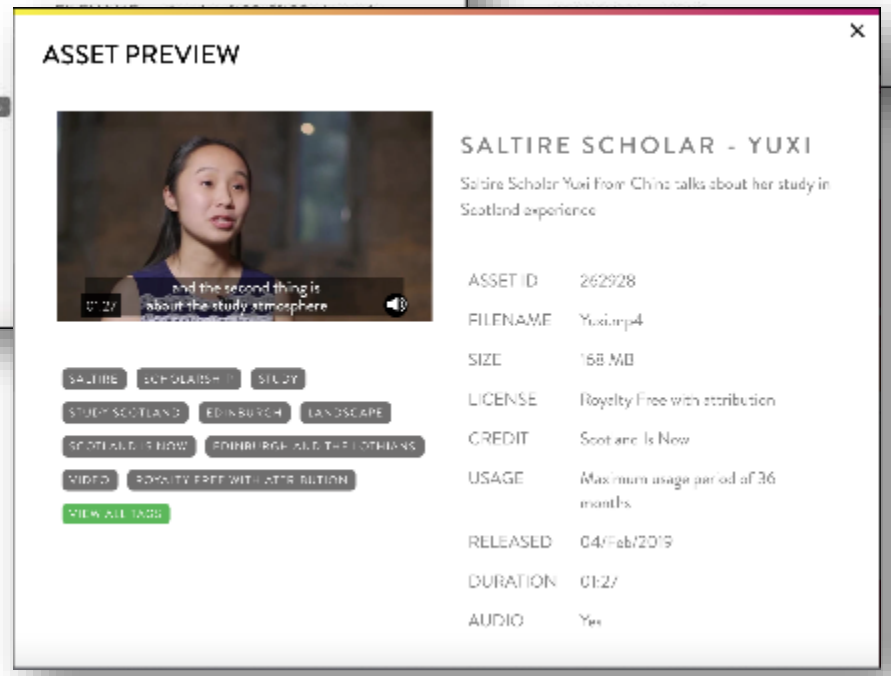
COLLECTIVE OUTPUTS

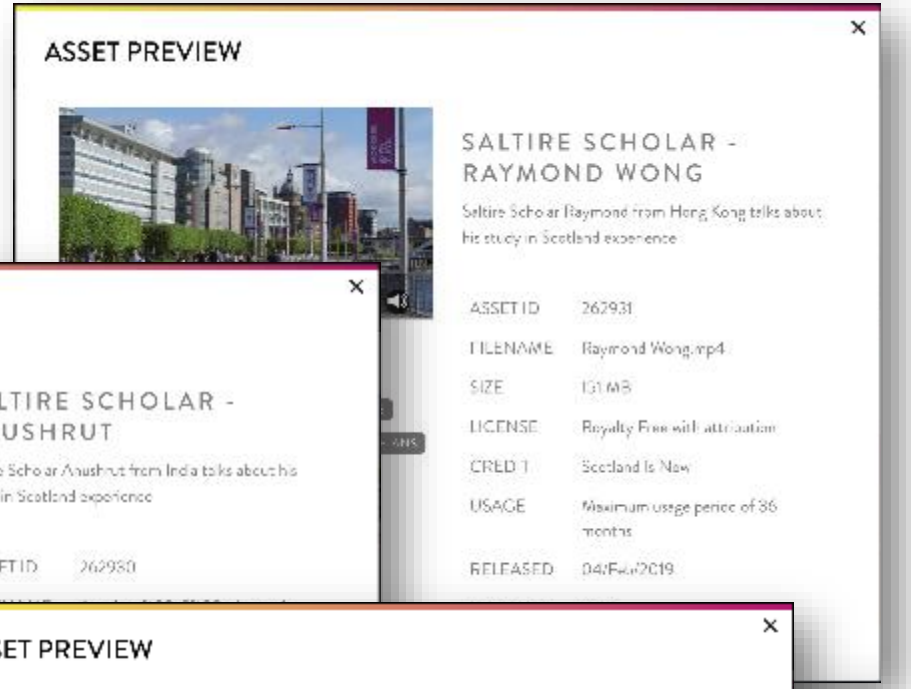
It's still early days but we've already delivered:

- Study specific assets & comms
  - Study video
  - People films
  - Imagery
  - Social media tiles
  - Infographics
- An aligned campaign
  - Brochure
  - Print collateral
  - Presentations
- Go Overseas campaign
- Integration into Scotland.org underway



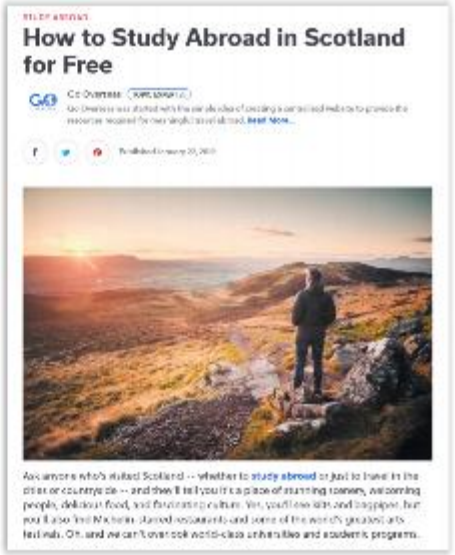

ASSET PREVIEW
I almost actually look forward to the cold
SALTIRE SCHOLAR - ANUSHRUT
Saltire Scholar Anushrut from India talks about his study in Scotland experience
ASSET ID 262930


ASSET PREVIEW
and the second thing is about the study atmosphere
SALTIRE SCHOLAR - YUXI
Saltire Scholar Yuxi From China talks about her study in Scotland experience
ASSET ID 262928
FILENAME Yuxi.mp4
SIZE 168 MB
LICENSE Royalty Free with attribution
CREDIT Scotland is Now
USAGE Maximum usage period of 36 months
RELEASED 04/Feb/2019
DURATION 01:27
AUDIO Yes


ASSET PREVIEW
SALTIRE SCHOLAR - RAYMOND WONG
Saltire Scholar Raymond from Hong Kong talks about his study in Scotland experience
ASSET ID 262931
FILENAME Raymond Wong.mp4
SIZE 131 MB
LICENSE Royalty Free with attribution
CREDIT Scotland is Now
USAGE Maximum usage period of 36 months
RELEASED 04/Feb/2019

#SCOTLANDISNOW STUDY

THE POWER OF WORKING TOGETHER



https://www.gooverseas.com/scholarships/scotland

#SCOTLANDISNOW

DRIVING IMPACT TOGETHER

1517
TOTAL APPLICATIONS
2019

- **50,562**
  SCOTLAND SCHOLARSHIP VISITORS
- **15:05 min**
  AVG TIME ON SCHOLARSHIP PAGES
- **751,095**
  TOTAL IMPRESSIONS ON GO OVERSEAS

£916,000

VALUE TO THE SCOTTISH ECONOMY

Our goal is to increase the number of study abroad students going to Scotland. This year, we've helped raise awareness of Scotland as a study abroad destination, educate students on their study abroad options, and ultimately guide them towards enrolling in a Scottish institution. This impact is immense and will only continue to grow as the Go Overseas Study Abroad in Scotland Scholarship becomes a branded name.

*Based on a value of £12052.5 per semester for each enrolled study abroad student

SCOTLAND.ORG PROJECT TEAM

- Contracted (agency) resource
- VS committed resource
- SG committed resource
- SE committed resource
- BAU resource only (not project based)

PRODUCT OWNER/SERVICE MANAGER
Natalya Ratner

BUSINESS PILLAR LEAD
Rob Catterson

VISIT PILLAR LEAD/UX LEAD
Esther Gauld

PROJECT MANAGER
Martin Swan (WS)

ACCOUNT MANAGER
Jenni Jones (WS)

CONTENT LEAD
Mike Thorburn

CONTENT CREATOR
Norry Wilson

ANALYTICS LEAD
Magda / Barbara Alvarez Solanilla

PRINCIPAL DESIGNER
Adam Wilson (WS)

UX & USER TESTING
Dan Richardson (WS)

CONTENT CREATOR
Rachel McCallion

CONTENT CREATOR
Sarah Clarke

DESIGNER
Leah Moss (WS)

DEVELOPMENT LEAD
Olly Jackson (WS)

DIGITAL MEDIA PRODUCER
Andrea Dahlen

ACCOUNT MANAGER
Katie Boyd

WHAT IS NEXT

FUTURE PLANS

FOR BRAND SCOTLAND

#SCOTLANDISNOW

WE'VE ALREADY DONE A LOT, WITH A LITTLE. IMAGINE WHAT WE COULD DO WITH MORE...

We are presented with an opportunity, a window in time, in which we can be bold.

We need to take chances. To build on the momentum created to deliver real traction.

We must seize the opportunity collectively and invest in change.

We want to dial up the volume on our study, business (invest/trade) and talent narrative and better equip ambassadors around the globe to promote Scotland on the world stage. We are seeking support to:

- Drive forward the new Scotland brand identity as a distinctive mark of provenance and quality
- Develop an export toolkit that supports increased trade
- Develop international student recruitment tools
- Develop trade and investment proposition
- Deliver coordinated, cross-partner events in market to grow our reach and impact
- Grow an ambassadorial community
- Work with partners to address skills gaps and coordinate talent acquisition activity

CONTINUE TO CHANGE THE NARRATIVE

CONTENT CALENDAR 2019/20

Build momentum for our collective narrative, supporting a more consistent identity for Scotland, by galvanising support around our values, key themes and events.

VALUES / BRAND ATTRIBUTES	KEY OVERARCHING THEMES	INTERNATIONAL EVENTS
• Welcoming • Generosity of spirit • Determination • Pioneering • Creativity	• **Sustainability** • **Wellness & well-being** • **Innovation** • Good Global Citizenship • Inclusivity / Kindness *(all agency cross over themes in bold)*	• MIPIM • Scotland Week • TEDxGlasgow • TED Summit • Japan Rugby World Cup • REMT in Sydney 2019 (TBC) • Dubai EXPO 2020 • Australia 2020 • REMT in China 2020
SCOTLAND: Live, Work, Study, Visit, Do Business (Invest/Trade)		

Strategic Pillar	**STORYTELLING** Building profile and changing perceptions of Scotland	**IDENTITY & REPUTATION** Establishing a clear global proposition and identity that endures	**INTERNATIONAL NETWORKS** Leveraging the power of connected global partners and joined up in-market activity	**ADVOCACY & STRATEGIC PARTNERSHIPS** Building pride and advocacy with Scottish audiences
Key activity and deliverables (19/20)	Marketing activity: New content, assets, media and events. 1. Deliver a brand level content calendar and multi-agency campaign approach 2. Scotland Week campaign activity 3. Post Brexit, focus 2019/20 brand content and storytelling on Scotland as a place to live, work and study in support of migration targets 4. Leveraging the Coast & Waters theme year to showcase Scotland's unique coastal and island communities and key industries inc. renewables, wellness, food & drink, etc 5. Climate & Sustainability 6. Innovation 7. Talent acquisition – inward migration activity 8. Solheim Cup 2019 – gender equality and inclusivity 9. Winter Festivals	A brand identity and strategic unit. 1. Launch the new brand identity and guidelines 2. Delivery of new SE brand identity 3. Engagement with key stakeholders in potential brand family 4. Redevelopment and delivery of vs.com 5. Redevelopment and delivery of scotland.org with full Study integration and beginning of Talent Scotland integration 6. Phase 1 VS brand evolution 7. Discovery for marketing automation 8. TBC – research into global reputation and attributes	A new international network platform and export toolkit, aligned with connected international events. 1. Re-launch Global Scots & a new international networking platform (with SE) 2. Deliver an enhanced Scotland Week presence with a 4-day programme of events 3. Develop a multi-agency calendar of international networking events and support materials for these in support of export/FDI/visit targets • TED Summit • REMT Australia 2019 • Rugby World Cup 2019, Tokyo • Prep for Dubai 2020 • Prep for REMT China 2020 4. Deliver new trade and investment assets 5. Launch export toolkit	An advocacy and engagement platform and tools that unite Scotland's global voice. 1. Launch phase 1 Ambassador Strategy at Scotland Week 2. Deliver a Brand roadshow to showcase and gain buy in to key stakeholders & industry 3. Partnership strategy agreed 4. Partnership engagement activity underway

THANK YOU

ANY QUESTIONS?

#SCOTLANDISNOW