

GLOBAL MARKETING INSIGHT & PLANS



CONTENT

- The journey so far
- Insights & context
- Pandemic impact / observations by Market
- A Responsible Future – “Scotland a world leader in 21st Century Tourism”
- Objectives & building blocks to recovery
- Strategic Marketing approach
- What Next



**SCOTLAND
RECONNECT
2020**

23-25 NOV

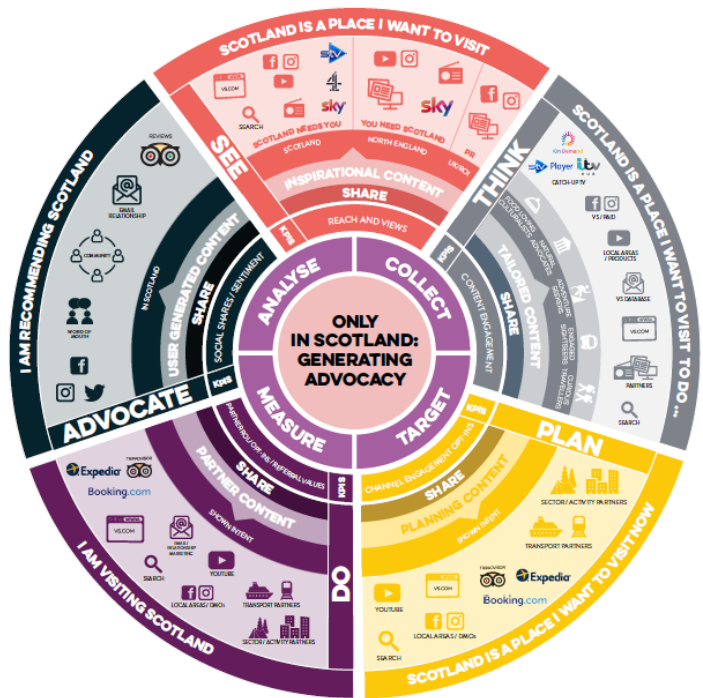
**KEEPING SCOTLAND
TOP OF MIND**

**ONLY IN
SCOTLAND**

**A GUIDE TO
SAFE TRAVELS
IN SCOTLAND**

**ABSENCE MAKES THE
HEART GROW FONDER**

UK – ONLY IN SCOTLAND INTEGRATED CAMPAIGN (15 JULY – 31 OCT)



SEE



TV ads seen at least once by 4.5m Scots



Facebook posts reaching 2x more non-followers vs last year



97,000 video views; 134,000 social engagements; 100,276 page views



Expedia campaign uplift in lesser known areas



High e-mail open rate Scots with 34%



tripadvisor

Trip Advisor reach = 2m

THINK

VISITSCOTLAND.COM

PLAN

6.3m sessions on VS.com - back to 'normal' levels. Much higher UK share



753k business referrals from UK up 7% in October YoY

DO

Nearly 50% of Expedia bookings to Scotland within 6 days of travel (UK)



Over 53k nights booked as a result of Expedia campaign



#ONLYINSCOTLAND

More than 23 k uses of #OnlyinScotland on social channels since launch

Slightly lower percentage of social posts identified as containing a negative sentiment YOY

ADVOCATE

CONTEXT



HIGH LEVEL CONTEXT – 2020 A YEAR LIKE NO OTHER



Consumer Demand:

- Evidence of **strong UK intent this summer** for Scotland
- Estimate that **30% of UK residents had a domestic holiday** (demand curtailed by restrictions)
- Majority of Scots that took a holiday stayed in Scotland
- Greatest ever global engagement on VisitScotland Social Media
- **40% uplift in UK web traffic to visitscotland.com** July – Oct
- Confidence & intent for travel in the next 6 months is low
- **However evidence of pent up demand & vaccine news** is starting to change search behaviour
- **International traffic on vs.com has increased** for the 1st time since March (w/c 20 Nov)



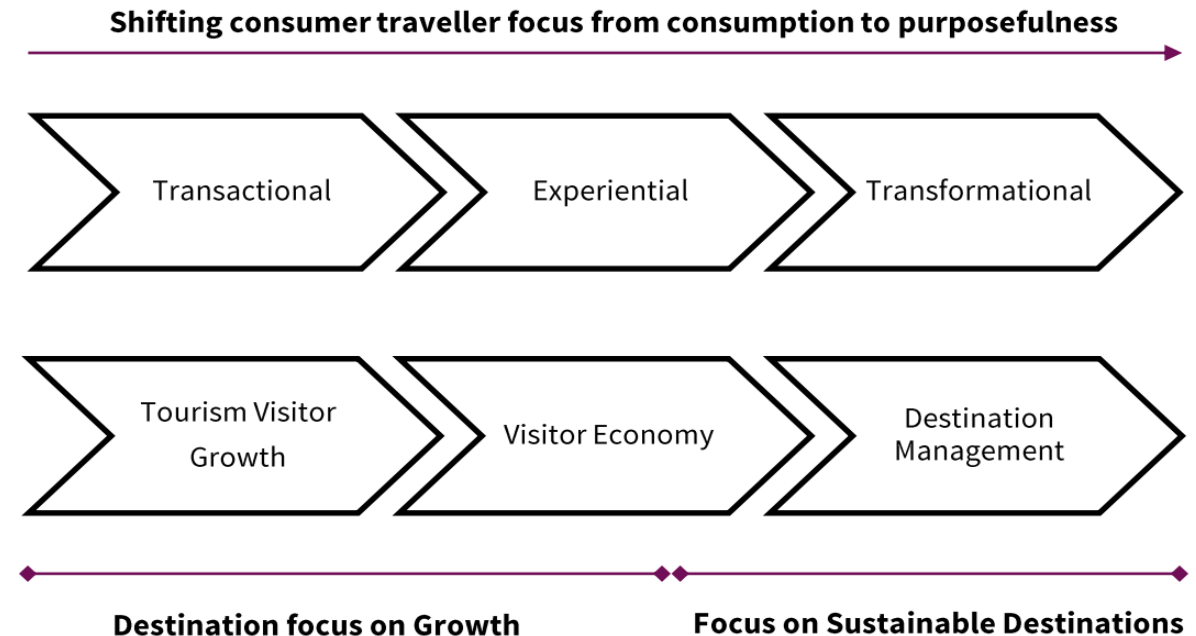
EMERGING TRENDS

- Connection to **nature & the outdoors** has increased with new to the countryside audiences, typically younger
- Importance of **wellness, connection** with people/place and **authenticity**
- Acceleration of **transformative travel** – traveling with purpose/ giving back
- Travellers seeking **unique experiences**
- Growth in **luxury travel**
- Growth in Tour Operators/Agents focusing on **FIT/small group travel**
- Increasing **awareness of the environmental impact** of travel
- **Importance of technology** for inspiration & booking
- While OTA's remain important, an **increase in booking direct**
- Importance of **hygiene and COVID-19 secure** environments
- **Booking flexibility** in particular cancellation terms
- **Shorter planning** and **booking times**

Insight Department: Trends 2020

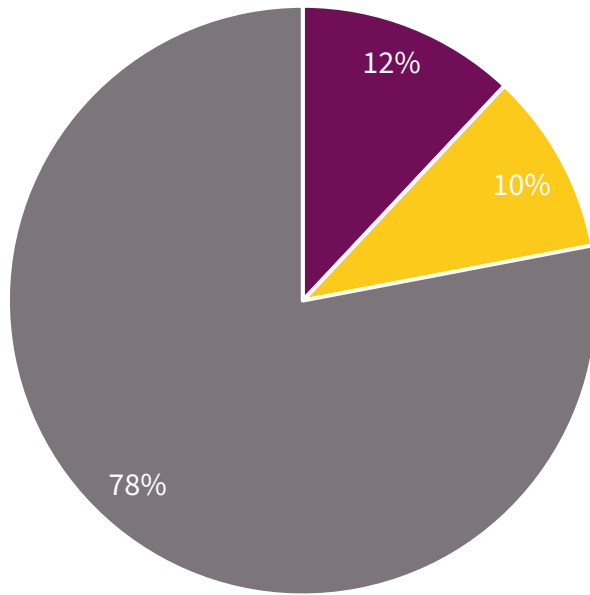
Travelling towards transformational tourism

February 2020



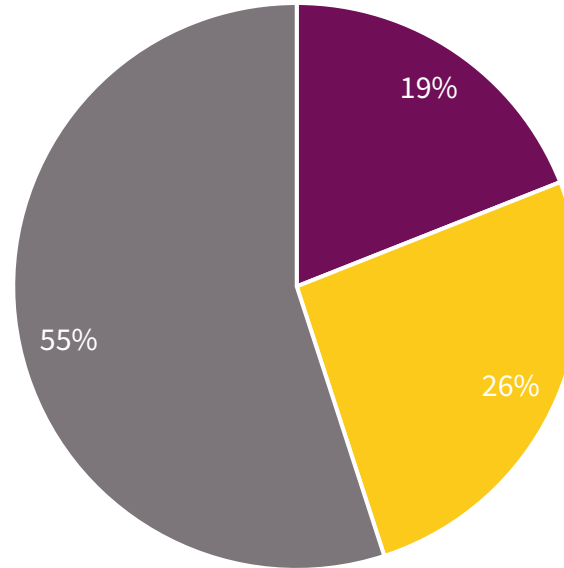
PRE-COVID-19 VISITORS

Visits



■ Europe ■ Long Haul ■ UK

Spend



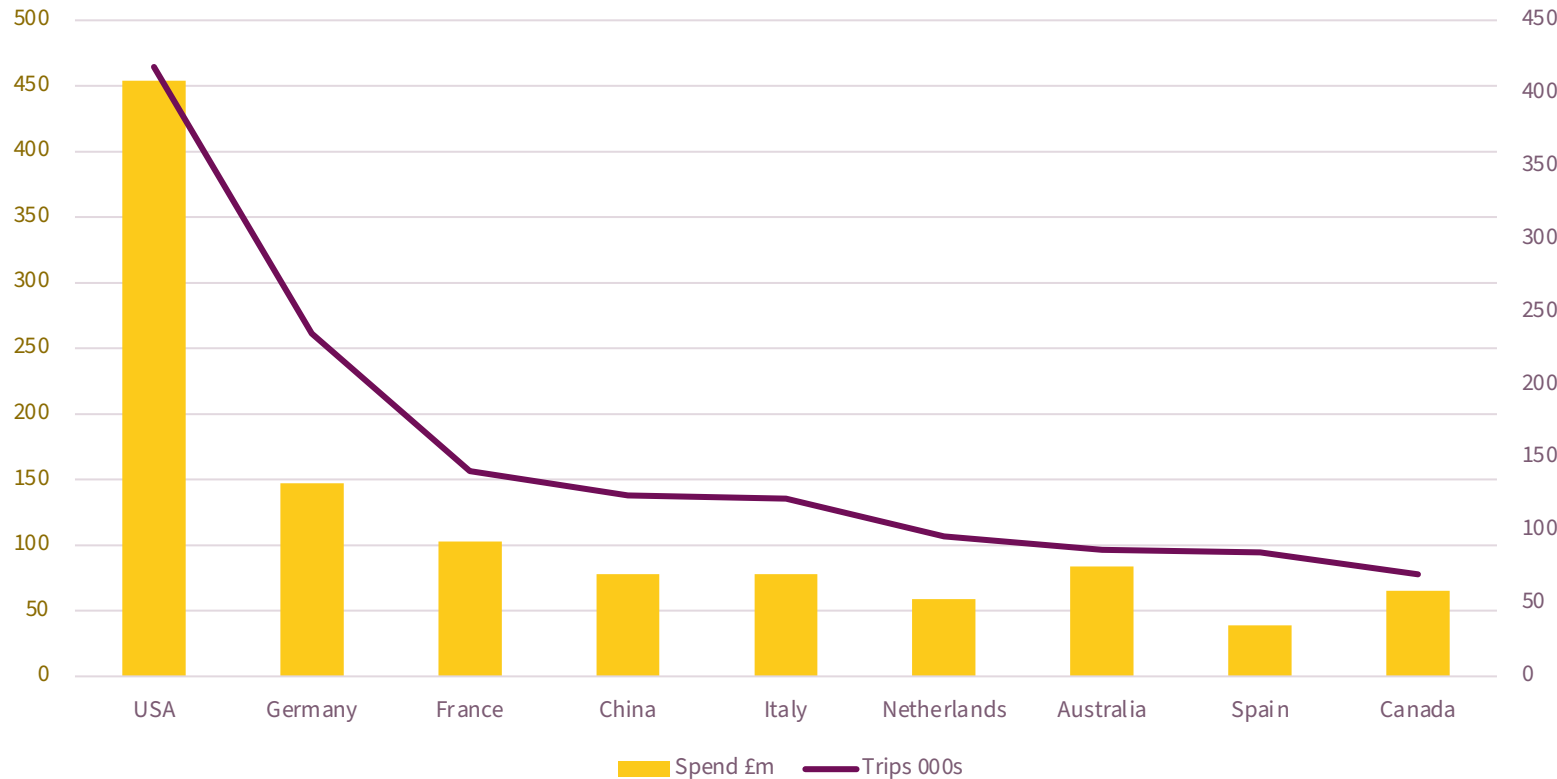
■ Europe ■ Long Haul ■ UK

- UK visitors deliver high number of visits, high repeat visits and visit year-round, but typically spend less
- International visitors spend much more per head, but fewer visits and more likely to visit in April – September

Source: Overnight visitors to Scotland by Country/Market Region, 2017-2019 Average Annual Figures (IPS/GBTS)

HOLIDAY VISITS FROM INTERNATIONAL MARKETS

IPS figures: annual averages 2017-2019 / pre-Covid-19



- Markets were showing strong growth pre Covid, and will likely be key to recovery
- Strong pent up demand in key markets – strategy to keep Scotland top of mind once safe to return
- Matching unique bookable experiences in Scotland with what visitors are looking for is critical
- Responsible tourism to underpin all activity – including seasonal and regional spread and encouraging Slow Tourism
- 21/22 – think ahead

Source: Top 9 Inbound International Countries to Scotland (holiday visits), IPS annual averages 2017-2019



PANDEMIC IMPACT: UK & INTERNATIONAL MARKETS

COVID-19 IN EUROPEAN VISITOR MARKETS @ 18 NOV

	UK	Germany	France
Situation	Infection rate varying regionally – England, Wales, NI & Scotland all have slightly different restrictions / measures. Some air corridors still open with limited number of countries and subject to short notice change – people may still prefer a ‘staycation’. Internal air, rail and ferry routes operating reduced schedules.	Due to a rise in new infections, Germany is in a partial national lockdown until at least early December. With domestic movement currently restricted and a strong ‘limit your contacts’ message in place, German citizens are postponing travels abroad. Airlines with direct and connecting flight routes to Scotland are operating on reduced schedules and with smaller aircraft.	Due to a rise in new infections, France is in a full national lockdown until at least early December. A strong ‘stay at home’ message paired with restrictions on domestic movement is making French citizens reschedule international travel plans. Many airlines with direct and connecting flight routes have either paused their operations or reduced their schedules.
Horizon scanning	Travel within the UK will continue in line with restrictions with group travel/coach tours being the most affected by this. Responsible travel, ease of travel and unique experiences will be increasingly important to differentiate Scotland from other destinations.	Once domestic travel restrictions are lifted, European travel corridors reinstated and flight connectivity restored, we can expect German visitors to return to Scotland (similar to mid-July 2020). FIT travel is expected to recover earlier than group tours, but uncertainty amongst both remain high, especially when adding Brexit challenges in 2021.	Once domestic travel restrictions are lifted, European travel corridors reinstated and flight connectivity restored, we can expect French visitors to return to Scotland (similar to mid-July 2020). The French market is known to show a more even seasonal distribution of visits, however, Brexit may add to overall uncertainty in 2021 and influence destination choices.
VisitScotland view	If vaccine roll-out is successful, many UK travellers will want to travel abroad – however Scotland remains important for short break and year round breaks. We should aim to capitalise on UK visitors that visited Scotland for first time in 2020.	Travel-loving Germans will want to engage in experiences they missed out on in 2020, preferably in neighbouring countries for that ‘close to home’ feeling of safety. We aim to regrow confidence in German travellers in 2021 by providing inspiration, information and reassurance – and showcase the uniqueness of Scotland close to their doorstep.	Travel-loving French will want to engage in experiences they missed out on in 2020, but may be persuaded to support their own economy even more than in the past by choosing a staycation in France. We aim to inspire French travellers to explore the uniqueness of Scotland in 2021 by providing stimuli for the perfect ‘home from home’ escape and destination reassurance.

COVID-19 IN EUROPEAN VISITOR MARKETS @ 18 NOV

Situation

Spain

Due to a rise in new infections, Spain is in a partial lockdown until at least early December. Regions with particularly high infection numbers have been closed off, domestic movement in these areas is restricted.

Visitors from the Canary Islands are currently exempt from quarantine in the UK.

Italy

Due to a rise in new infections, Italy is in a second national lockdown until at least early December.

A strong 'stay at home' message paired with restrictions on domestic movement is making Italians reschedule international travel plans. Many airlines with direct and connecting flight routes have either paused their operations or reduced their schedules.

Benelux & Nordics

Due to a rise in new infections, many Benelux and Scandinavian countries are either in partial or full lockdown until at least early December.

Visitors from Norway, Finland and Iceland are currently exempt from quarantine in the UK, but will have to self-isolate upon return to their home countries.

Horizon scanning

Once European travel corridors are reinstated and flight connectivity restored, we can expect travel-loving Spaniards to return to Scotland.

Spanish authorities introduced some of the strictest restrictions in Europe, which is likely to impact long-term economic growth and disposable household income.

Once domestic travel restrictions are lifted, European travel corridors reinstated and flight connectivity restored, we can expect Italian visitors to return to Scotland (similar to mid-July 2020).

Newly imposed passport regulations for EU travellers to the UK will make Scotland even more expensive for Italians in 2021.

Once European travel corridors are reinstated and flight connectivity restored, we can expect travel-loving Dutch, Belgians and Scandinavians to return to Scotland (similar to mid-July 2020).

Brexit does not appear to be a large barrier for these markets, however, uncertainty may grow if new regulations are imposed in 2021.

VisitScotland view

Spaniards will want to resume leisure travel in 2021, but might be more cost-conscious than before.

Airlines may prioritise return of flight routes that accommodate UK outbound travel.

We aim to position Scotland as affordable destination that offers unique experiences and a warm welcome year round.

Italian enquiries for Scotland holidays have been coming in steadily throughout the past months, suggesting it will remain a sought-after destination when international travel resumes.

We aim to position Scotland as affordable destination that offers unique experiences and a warm welcome year round.

Travel-loving North Europeans will want to engage in experiences they missed out on, more likely by visiting lesser known regions and out of season.

We aim to inspire North European travellers to explore the uniqueness of Scotland in 2021 by showcasing hidden gems and sustainable touring options.

COVID-19 IN LONG HAUL VISITOR MARKETS @ 18 NOV

Situation

Horizon scanning

VisitScotland view

US

The US Government has issued a level three travel advisory to the United Kingdom where it advises US citizens to reconsider travel to the United Kingdom due to COVID-19. US citizens are still subject to a 14-day quarantine period when travelling to UK and Europe. COVID-19 case numbers remain high across the USA with the overall infection number reaching 11 million this week.

Direct flights between Scotland and the US are scheduled to return in 2021 by three of our key aviation partners- American Airlines, Delta Air Lines and United Airlines.

American Airlines and British Airways announced a Covid-19 testing trial for U.S.-London travelers.

United Airlines is also trying out preflight Covid-19 testing on Newark-London flights

Pent up demand for international travel including to Europe/UK/Scotland as 2019 was a successful year for US visitors to huge amount to capitalise on when travel returns.

Travel Advisors increasing in importance as consumers look to well established sources for advice and support in planning & booking.

FIT and luxury travel is expected to be the first segment to rebound. Vaccine and a lifting of quarantine will help market recover.

Canada

A second wave is being experienced with a rise in cases across the country. Provinces currently responsible for implementing local restrictions

Travel Advisory remains in place with only essential travel permitted. Those arriving into Canada are required to self-isolate for 14 days. The CA/US border also remains closed to non-essential travel. Both being reviewed monthly.

Rapid testing trials are taking place at Toronto, Vancouver & Calgary International Airport in hope evidence will support a reduction in quarantine measures.

Both Transat & Air Canada have flights loaded for 2021. Transat resuming their TOR-GLA service from Feb 21 and Air Canada scheduling TOR-EDI from Jun 2021*

Pent up demand for international travel including to Europe/UK/Scotland with Travel Advisors becoming more important in the travel planning and booking cycle.

Visiting Friends and Relatives is expected to be the first segment to rebound.

A mix of availability of a vaccine, rapid airport testing and demonstrating Scotland is a 'Covid-safe' destination will get Canadians visiting

Australia

Infection rate is minimal in Australia, with the country controlling numbers well throughout the pandemic. Recent new cases have been from people in hotel quarantine.

The Australian Government has established a safe travel zone with New Zealand from 17 October, with a 'one-way' trans-Tasman bubble. New Zealanders are not required to quarantine on arrival in Australia.

Indications from the market are that the international border will remain closed for some time into 2021, with no confirmed dates for re-opening.

Health minister suggested that widespread international travel could resume by the end of 2021 if a vaccine was successfully rolled out.

As international borders are likely to remain in place until late 2021, travel trade in Australia have turned to developing their domestic product offering and adapting it to be COVID suitable.

Visiting Friends and Relatives is expected to be the first segment to rebound internationally.

COVID-19 IN LONG HAUL VISITOR MARKETS @ 18 NOV

Situation

China

China is largely open and operating normally domestically. Domestic tourism has recovered to pre-covid levels.

Airlines are reporting profits.

The government remains concerned about imported infections.

Flights are heavily restricted and suspensions are imposed on routes bringing in passengers who test positive for covid on arrival.

Once international travel restrictions are lifted, 3-6 months will be required for consumer confidence to return

We expect to see an acceleration in the shift from large groups to small groups, family travel and FIT. This isn't a new pattern, today only 20% of the outbound Chinese market is composed of package tourists, but it's a trend we're likely to see accelerate.

Robust hygiene and safety measures and providing reassurance will be key to attracting Chinese visitors. Incentives and special offers such as discounts, upgrades and add ons are likely to be popular.

We're working to keep Scotland front of mind and to inspire and reassure travellers that Scotland will be a safe destination, perfect for getting away from it all. Slow Travel will be a key theme.

Middle East (GCC)

Both Qatar and the UAE both had difficult Covid outbreaks, although not high in total numbers, it affected significant percentage of population.

UAE and Qatar have been added to the UK's list of travel corridors from 14 November.

Middle East Carriers started to fly direct to Scotland in July. Qatar is currently operating a limited service between Edinburgh and Doha and, from 1 December, Emirates will operate daily flights from Dubai to Glasgow (increasing from 4 flights per week).

Both UAE and Qatar have fantastic direct access to Scotland, and this represents a clear opportunity now quarantine restrictions have been removed.

We expect to see demand from those UK expats in the GCC who are looking to return to the UK to visit friends and relatives.

India

India is the 2nd worst country in the world in terms of infection numbers. However, a young population has resulted in a recovery rate of 85%.

Though infection numbers are still high, the government has said they won't impose another lockdown. It is estimated that India's herd immunity is about 35%.

International travel is currently permitted to 21 countries which have been cleared to enter India's 'Travel bubble' agreement. Among the outbound long-haul destinations featured in this travel corridor include UK, France, Germany, USA and Canada.

India is bucking the trend in aviation as a number of new routes to the UK are starting. There will be 52 flights a week from India to the UK, with almost all Indian airlines soon flying to the UK.

India is a very robust market and we expect that Indians will start visiting the UK again as soon as lockdowns lift.

With the new aviation routes into the UK, there is opportunity for more Indians to be visiting Scotland as part of their UK-wide trip. We expect they will firstly be visiting friends and relatives and will return to leisure travel soon after.

Horizon scanning

VisitScotland view

STRATEGIC APPROACH TO RECOVERY



MARKETING APPROACH AND MESSAGING FOR DIFFERENT LEVELS UK ACTIVITY

	Level 0	Level 1	Level 2	Level 3	Level 4
	Visitor attractions open / Leisure (except adult) open Events permitted Hospitality open / No travel restrictions Shopping open	Indoor events closed	Leisure reduced Events closed	Leisure closed Hospitality for locals only No alcohol No non-essential public transport	All hospitality closed Shopping closed
UK Tier system	UK: Low	UK: Medium	UK: High	UK: Very High	
	Dream Now, Travel Later Social media posts from VisitScotland channel with carefully tailored messages; <i>Stay local</i> for Scots / <i>Dream now, travel later</i> for others Inspirational-only email content Social posts to encourage people to sign up to our database for future emails Consumer PR - ongoing destination awareness building via media relations				<i>Possibly pause / augment message further depending on extent of restrictions. Activity/ engagement monitoring</i>
	Support Your Local Industry. Stay Safe, Good to Go, Know Before You Go <i>Stay local</i> / HameTownTourist social activity and local influencer engagement for Scots / <i>Dream now, travel later</i> for others Collaborations with local DMOs, LAs and sector groups to co-create content for audiences on our website, email, social & digital channels Emails with appropriate Safe Travels, Know Before You Go messaging or targeted to specific postcodes promoting attractions open in local area				
	Dream Now, Book Now & 2021. Stay Safe, Good to Go, Know Before You Good Scottish influencers exploring Scotland Video sharing retargeting recent visitors to visitscotland.com Agile social & digital campaigns responding to market changes Email - Dream, book & travel now messaging Selected paid consumer activity targeting people researching holidays				
	Dream Now, Travel Now. Stay Safe, Good to Go Consumer campaigns - Digital paid/social/OTA/Publishing media Sharing new content – videos, blogs, articles Proactive comms with intermediary, industry partners and media relations (fam trips TBC)				

MARKETING APPROACH AND MESSAGING FOR DIFFERENT LEVELS INTL' ACTIVITY

Scenario 1	Scenario 2	Scenario 3
<i>Air corridors & people able to travel. Proactive promotion permissible.</i>	<i>Air corridors but some restrictions. Reactive messaging.</i>	<i>Quarantine in place (on arrival to Scotland)</i>
International brand building - Dream Now, Plan for 2021 Focus on inspirational (Responsible Tourism, Only in Scotland) with some educational messaging (Stay Safe, Know Before You Go & Brexit for EU) Adverts to encourage people to sign up to our database for future emails Social media posts from VisitScotland channel with carefully tailored messages Inspirational-only email content Regular comms with intermediary & industry partners and ongoing destination training & product development Consumer PR ongoing destination awareness building via media relations (off the desk pitching and media comms)		
Reactive and selected Marketing activity - Dream Now, Book for 2021 Balance between inspirational (Responsible Tourism, Only in Scotland) and educational messaging (KBYG & Brexit) Selected intermediary activity in key markets - Keep Scotland top of mind for your clients Proactive destination training & product development with 2021/22 focus Agile social & digital campaigns responding to market changes		
Close to normal marketing activity in markets with highest propensity & ability to visit – Dream Now, Travel Now & 2021 Email & social travel now content Consumer activity in key markets - Book & Travel now Intermediary partnerships - promote Scotland for 2021/22 travel incl. tactical/welcoming messaging Ongoing creation of new videos and content Proactive comms with intermediary, industry partners and media relations (fam trips TBC)		



SCOTLAND
OUTLOOK 2030

Responsible tourism for a sustainable future.

A RESPONSIBLE FUTURE

Responsible Tourism is about "making better places for people to live in and better places for people to visit." Responsible Tourism requires that operators, hoteliers, governments, local people and tourists take responsibility and action to make tourism more sustainable.

Characterised by travel and tourism which:

- minimises negative economic, environmental and social impacts;
- generates greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry;
- involves local people in decisions that affect their lives and life changes;
- makes positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;
- provides more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of local cultural, social and environmental issues;
- provide access for people with disabilities and the disadvantaged;
- is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence.

OBJECTIVES

Task Force: Tourism Recovery Recommendations include:

- Common purpose: To take all action necessary to secure the asset¹³ base to **maintain and increase the domestic market share in the next 6 months**, to bring back international visitors to pre-Covid levels within two years and create the conditions for longer term resilience and agility.
- **Boosts product innovation to help adapt sector to new normal**
- identify the **support destinations and businesses will need to recover and adapt their offer** to reflect continuing restrictions and changing consumer taste.
- New opportunities to provide **local employment** and wealth creation should be supported.
- **Support the inbound tour operator community** that plays a significant role in both brokering and facilitating the accommodation and leisure programmes plus the co-ordination travel for both domestic and international travellers around Scotland



LOOKING AHEAD – THE BUILDING BLOCKS FOR A SUSTAINABLE RECOVERY

Brand Building at Scale

Always on approach
“Scotland, a powerfully enriching
personal experience”
Why you need Scotland

Building Consumer Confidence

Balancing inspiration with practical
information, responsible travel
messaging & reassurance

Driving Performance

Stimulating demand/bookings at
pace as markets open up

New Visitor Management Strategy

Infrastructure
Marketing & Comms
Policy

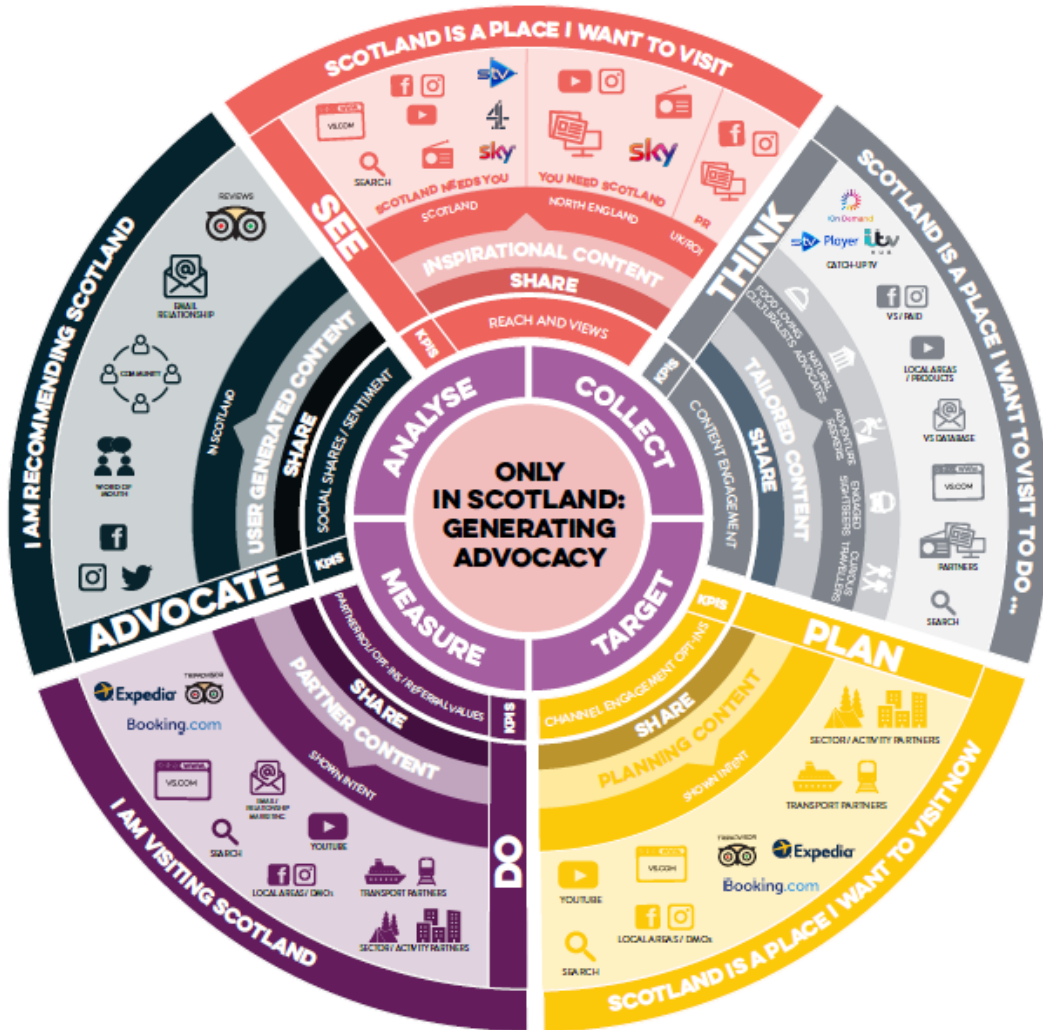
Community, Place and Sector Collaborations – inc. Themed Years (2021 YoCW)

Working together to deliver
sustainable growth, authentic &
responsible visitor experiences

Leveraging Global Partners

OTAs
Airlines
VisitBritain
Tour Operators/DMCs

EVER PRESENT IN THE CUSTOMER JOURNEY



Key principles:

Scotland is discoverable – 365 days

Leverage our global networks & fans

Agile content publishing strategy (hero, hub & help)

Tailor our approach to each market based on insight/scale of opportunity

B2B and B2C

**WINTER CAMPAIGN
SCOTLAND**



**JANUARY CAMPAIGN
EUROPE**



WHAT NEXT

**SPRING CAMPAIGN
GLOBAL**



**FACILITATING
GLOBAL NETWORKS**



FURTHER INFORMATION AND LINKS

INDUSTRY SUPPORT

VisitScotland.org | Visit our dedicated advice page at www.visitscotland.org/supporting-your-business/advice/coronavirus for up to date information and advice on Coronavirus (COVID-19) for tourism businesses, including:

Dedicated tourism industry advice | Our experienced team of Industry Relationship Managers can be reached at business.advice@visitscotland.com to help with any questions you have about business operations or marketing at this time.

Financial support advice | 0300 303 0660 | Contact the dedicated Scottish Enterprise business support line. Open Monday - Friday between 8.30am and 5.30pm or go to findbusinesssupport.gov.scot

Industry newsletter | Stay up to date with the latest regional and national news by signing up to VisitScotland's Tourism Insider newsletter at visitscotland.org/news

Social media | Stay in touch with the latest from VisitScotland on [LinkedIn](#) or [Twitter](#)

USEFUL CONTACTS

- Contact business advice team: business.advice@visitscotland.com
- Travel trade enquiries: traveltrade@visitscotland.com
- Send updates & story ideas to the PR team at: travelpr@visitscotland.com
- Sharing virtual tours or web cams: content@visitscotland.com
- Information on new experiences you're developing: marketing@visitscotland.com
- Advice regarding insights: research@visitscotland.com

USEFUL RESOURCES / KEEP UP TO DATE

VisitScotland.org

- **Market Webinars** – useful webinars on each of our key markets giving insight into who our visitors are and what motivates them
- **Market Information** – factsheets on each of our key markets
- **Market Coronavirus updates** – fortnightly updates on what the latest Coronavirus insights are for each of our key markets
- **Scotland's Covid-19 Protection Levels** – pdfs explaining which regions are in which level, and tourism implications – updated weekly (also available on VisitScotland's Digital Media Library)
- VisitScotland Marketing

VisitScotlandTravelTrade.com

- Range of resources to help you get to know Scotland better and plan your programme
- Suggested itineraries on a wide range of themes and regions
- Database of trade ready Scottish suppliers
- Practical information on getting to and around Scotland

VisitScotland's Digital Media Library

- Register to download a range of imagery and video
- Infographics to share with your clients
 - Enjoy Scotland Responsibly infographic
 - Scotland's Covid-19 Protection Levels



THANK YOU