

VISITSCOTLAND – DLP WEBINAR INTERNATIONAL MARKETS



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AGENDA FOR TODAY

- **Sources of information**

- VisitScotland market intelligence
- Insights team

- **Market recovery prioritisation**

- Beginning of 2020 and initial market prioritisation
- Sentiment from international markets
- Critical factors for market prioritisation

- **Marketing activity**

- Ongoing key account management
- First stages of marketing activity

BEFORE WE START



No crystal ball



Supply vs Demand

VS SOURCES INTELLIGENCE GATHERING

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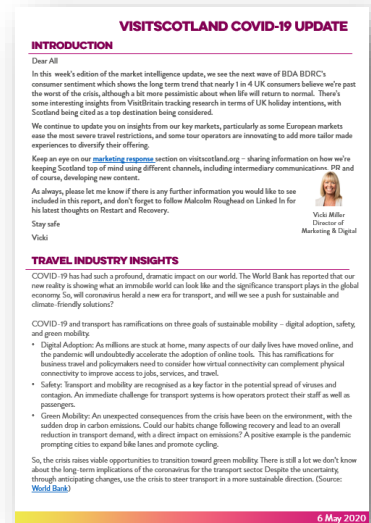
VISITSCOTLAND: MARKET INTELLIGENCE

SOURCES

- Various trackers, macro data websites and commissioned surveys
- Network of contacts
 - Other national tourist boards
 - Tour operators / agent consortia
 - OTAs eg Expedia, Trip Advisor
 - Sister agencies (VisitBritain, SG/SDI in market)
 - Agencies – media, PR, social – in market
- Owned channel data – Brand watch, website, search, visitscotland.com

OUTPUT

- Weekly Market intel report
- VisitScotland.org
- Webinars
- Weekly e-newsletter
- Malcolm Roughead Linked In



Current marketing activity



Intelligence gathering

Knowledge is vital to making informed decisions, and ensuring we're in the best position to recover quickly when the time is right. Teams across VisitScotland have access to different sources of information, including macro trends and horizon scanning reports; networks of NTOs and DMOs; papers and insights from our in-market agencies and contacts; direct relationships with inmarket intermediaries such as tour operators, agents and OTAs; plus data and insights from our owned channels including search trends, website visits and social monitoring. We are curating all this information for you on a weekly basis, see the latest report on the [monitoring the impact of COVID-19 page](#).



Social activity

We are continuing to connect with our followers and fans around the world during this time, sharing Scotland virtually while encouraging people to stay safe and stay home. Our contact strategy will evolve as travel restrictions are eased, to reflect the phase of planning and activity we are in.

Social media activity - April 2020
Published: April 2020

Download (609Kb)



Content activity

People are consuming more content than ever, with more time at home browsing the internet for news, current trends, and inspirational stories. The Content Team, in collaboration with teams across VisitScotland, has been working to develop suitable content ideas to support your business and to inspire future visitors.



Content marketing activity April 2020
Published: April 2020

Download (361Kb)



Intermediary activity

Our intermediary marketing activity includes destination inspiration and training, product development and intelligence gathering. Working with our key accounts across tour operators, travel agents, destination management companies and online travel agents in our key markets, the teams are keeping in close contact during the current situation, to help people get ready to sell Scotland again as soon as possible.



Intermediary activity April 2020
Published: April 2020

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INSIGHTS TEAM

CAN OFFER:

- Advice to sector groups / DMOs
- Information on existing insight that may assist
- Advice on questionnaire wording:
 - To facilitate benchmarking
 - To expedite analysis
- Complementary surveys that other areas / groups may be conducting

DOES NOT HAVE CAPACITY TO:

- Design questionnaires
- Run surveys on your behalf
- Carry out analysis

Most insights shared on [VisitScotland.org](https://www.visitScotland.org)

Email research@visitscotland.com – 5 working day SLA

CHANNELS TO REQUEST INSIGHT DATA:

STERG

Sector Groups

eg. ASVA, ASSC

DMOs

Industry groups

eg FSB Chambers of commerce

DISCUSSION

MARKET RECOVERY PRIORITIES

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BY THE BEGINNING OF 2020

- Strong prediction in visitor numbers for 2019 and beginning of 2020



2019 visits/value at Q3 had already exceeded whole of 2018



Showing strong indication of growth to Scotland



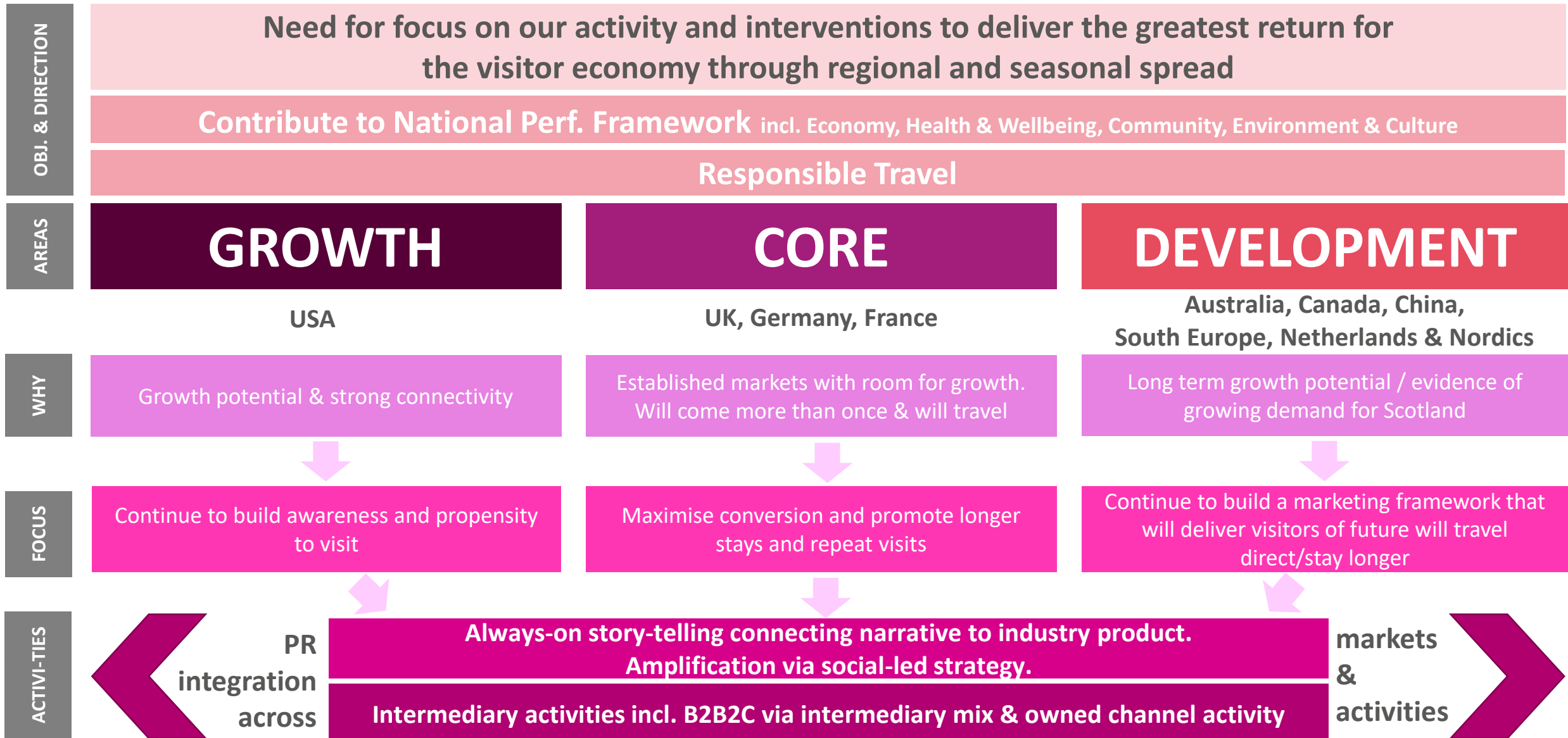
No further growth expectation after a record year of visitor numbers in 2018



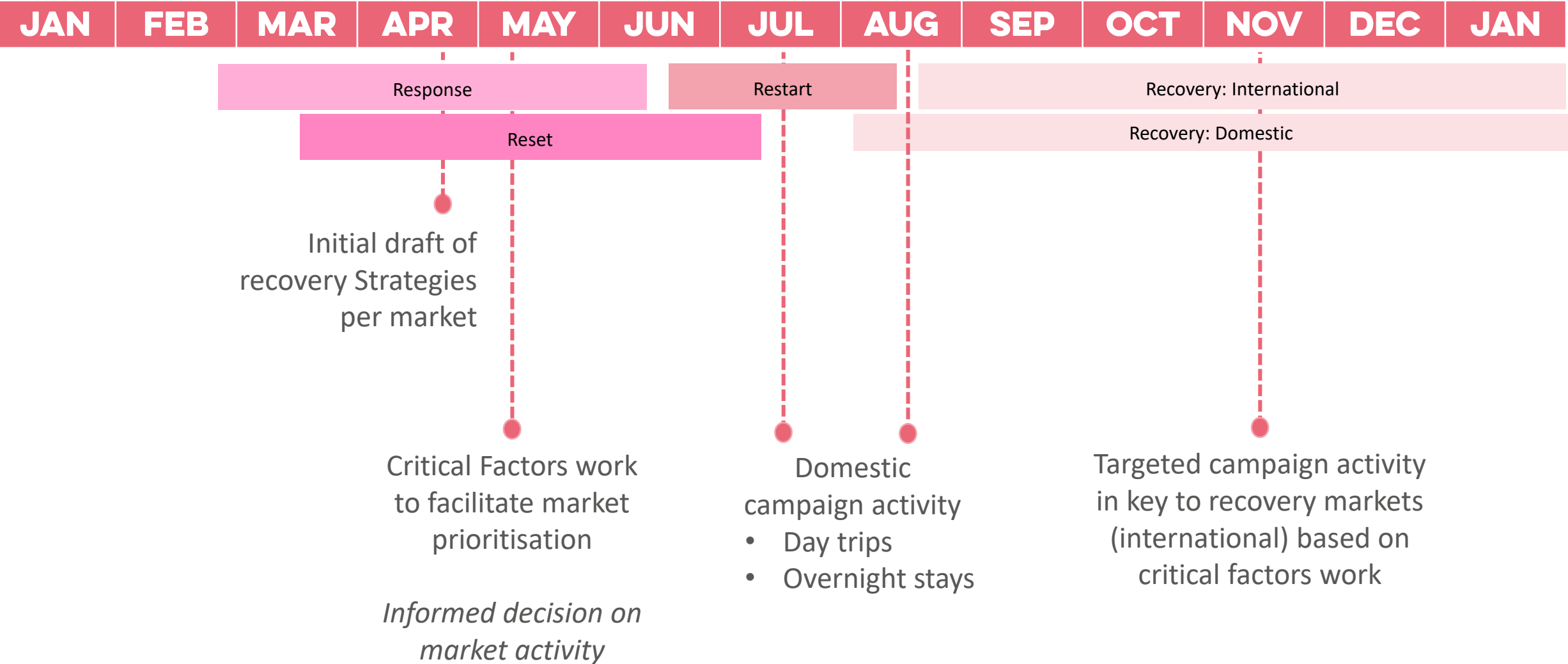
#1 outbound tourism; GB forecast to become #3 destination

- Increasing interest in Scotland from International travel trade with a number of new products in programmes
- Bumper Expo attendance forecast with more exhibitors and highest buyer numbers for an Aberdeen show
- New and innovative campaign activity with stronger partnerships, extending reach and value
 - US: Matador / REI partnership in US – *paused 13 March*
 - UK: South of Scotland C4 & Expedia partnership in UK – *paused 17 March (will be re-activated)*
 - Europe: European 'reassurance' Touring campaign and airline activity – *paused 17 March*
 - China: 'Embrace Scotland' campaign – *halted as it was due to commence, early Feb*

MARKET PRIORITISATION 2020 – BEFORE COVID



APPROACH TO RECOVERY - TIMELINE



SENTIMENT FROM INTERNATIONAL MARKETS



European markets

- Increasing demand for experiential and remote travel, low expectation for visits to tourist hot spots
- Increasing appetite from national/transport partners to collaborate after COVID
- Optimism from tour operators for bookings out-of-season (autumn/winter breaks 2020), fair share of operators still hopeful for end of summer travel, many are promoting 2021 season early
- Expectation for FIT to recover faster than group travel
- Germany, Italy & recently France most active markets, increasingly more demand for practical info
- *Dream now, Travel Later messaging resonating well, need to focus*



US & other long haul markets

- Largest international market in terms of volume and value
- More resilient than 10-15 years ago, and optimistic about return to travel
- Independent attitude to drive recovery – businesses implementing measures without waiting for Federal / State instruction
- Looking for experiential, ‘physically distanced’ travel – some increased enquiries around exclusive use
- Like Europe – expectation for FIT to recover faster than group travel – travel agents and tour operators (FIT) may increase market share in short term
- Monitoring closely other long haul markets

CRITICAL INDICATORS TO FACILITATE MARKET PRIORITISATION

Likelihood of markets returning to Scotland in 2021

Legal

**Propensity to Travel
Visitor Perceptions**

Perceived fear factor

Economic & Financial

Affordability

Competitor Analysis

Visitor Preferences

DISCUSSION

MARKETING ACTIVITY

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INFORMED DECISION ON MARKET PRIORITISATION

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC JAN



- Owned channels - always-on story-telling connecting narrative to industry product
- Ongoing destination training and product development discussions
- Ongoing Long Lead PR activity
- Marketing Automation (Lead-gen ads, YouTube Lift & Content Marketing campaign)

Partnership activity & PR integration
Scotland & UK



- Partnership activity & PR integration
- Key to recovery international markets**
- Support direct route activity
- Development international markets**

ONGOING KEY ACCOUNT MANAGEMENT

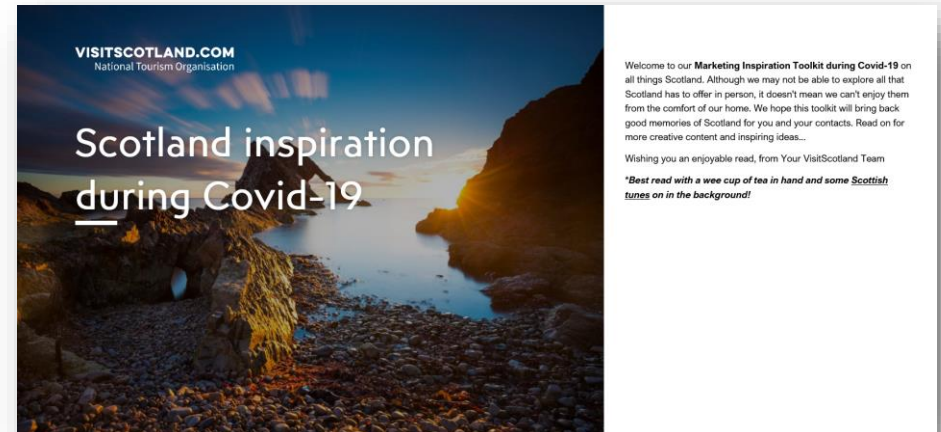
RESPOND	RESET	RESTART	RECOVERY	
ALL NON ESSENTIAL TRAVEL PROHIBITED		SOME EASING	DOMESTIC MOVEMENT	INTERNATIONAL MOVEMENT
<p>Objective: Keep yourself and Scotland safe</p> <p>Messaging: Dream now, travel later</p> <p>Activity:</p> <ul style="list-style-type: none"> All paid and social activity paused Messages of support to intermediaries Industry support priority – new pages on VisitScotland.org 	<p>Objective: Keep Scotland top of mind, build advocacy & trust</p> <p>Messaging: 'Only in Scotland' Dream now, travel later</p> <p>Activity:</p> <ul style="list-style-type: none"> Absence video / social Armchair travel – virtual tours on VisitScotland.com Activity to engage / inspire Intelligence gathering VisitScotland.org extended Market/audience insight webinars for industry 	<p>Objective: Reconnecting Scots with Scotland</p> <p>Messaging: 'Only in Scotland' Scotland: Day trips UK: Start planning trip Intl: Inspiration</p> <p>Activity:</p> <ul style="list-style-type: none"> Domestic day trip inspiration Intermediary destination training & content sharing PR inspiration Video distribution via YouTube (UK) 	<p>Objective: Increase demand for short notice Scotland holidays</p> <p>Messaging: 'Only in Scotland' UK: Book your trip Intl: Start planning your Scotland trip</p> <p>Activity:</p> <ul style="list-style-type: none"> UK & Intl inspiration Virtual intermediary workshops / webinars PR inspiration Video distribution via YouTube (UK/EU) UK campaign Content partnerships 	<p>Objective: Increase demand for 2021 Scotland holidays</p> <p>Messaging: 'Only in Scotland' Book your trip to Scotland Market prioritisation</p> <p>Activity:</p> <ul style="list-style-type: none"> Virtual intermediary workshops / webinars Destination training events Media fam trips / PR Video distribution (YT) Campaign activity Content partnerships

PRODUCT DEVELOPMENT

- Destination training and webinars for intermediaries across markets
- Standard and tailor-made versions depending on requirement intermediary

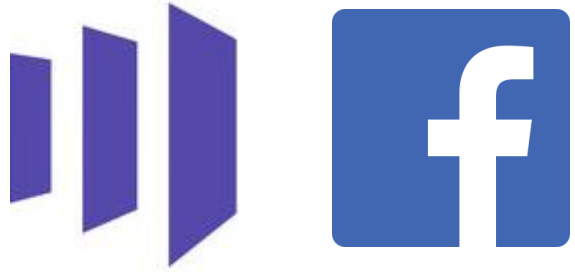
CONTENT SHARING

- Creation of Scotland inspiration toolkit for every recovery phase.
- Shared with media and strategic partners.



Scotland Inspiration toolkit 1 – Respond/Reset

MARKET AUTOMATION

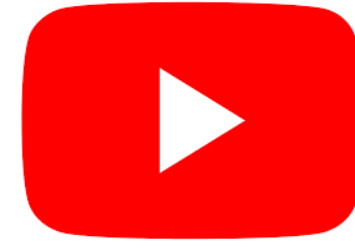


Nurture

Use insights and behavioural response to secure lead generation

Personalised nurturing through email and social activity

Direct response referrals & bookings



Inspire

Target based on search, video, web behaviour

Serve relevant inspirational videos

Measure uplift in destination 'consideration'

Regional/ product performance

Easily switched on and off depending on restrictions

DISCUSSION

HOW CAN YOU GET INVOLVED

**#share
VisitScotland assets**

**Keep us up to date to
help inform planning**
(mail or VS surveys)

**Follow the
Coronavirus section on
visitscotland.org**

**Ideas on what you
need from us**

MORE INFORMATION

Marketing assets

- VisitScotland [YouTube](#) videos
- [Absence makes the heart grow fonder](#) video
- VisitScotland's [Digital Media Library](#) – imagery and video for sharing
- See [Scotland from home](#) content
- Our suite of [100,000 Welcomes](#) podcasts (6 differently themed episodes)

Coronavirus response on [visitscotland.org](#)

- [Home page](#)
- [Weekly Market Intelligence updates](#)
- VisitScotland's [marketing response](#) including Intermediary response by key market
- Advice on [sharing content](#) for Scottish tourism industry
- Examples of how [Scottish tourism businesses](#) are keeping Scotland front of mind
- [Malcolm Roughead Linked In](#)

Travel trade

- www.visitscotlandtraveltrade.com
- [Itineraries](#)
- [Product planning e-books](#)
- Email enquiries : traveltrade@visitscotland.com

Getting in touch

- Contact business advice team: business.advice@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

INDUSTRY SUPPORT & MARKET INTELLIGENCE

More business resources

Find business support in Scotland

findbusinesssupport.gov.scot/coronavirus-advice

Information on how to manage your business during the impact of coronavirus - including sources of finance, business rates and funding, HMRC, employee advice and business continuity.

UK Government financial support for businesses

gov.uk/government/collections/financial-support

Find out what financial support you can get for your business.

FSB guidance for employers

fsb.org.uk/campaign/covid19.html

The Federation of Small Businesses has outlined guidance on reducing the risks from the COVID-19 virus to you and your business, including key contacts and considerations for employers.

ACAS Webinars for Employers

acas.org.uk/webinars

Employers can join a free ACAS webinar. The webinar provides practical advice for employers to help manage the impact of coronavirus in the workplace.

Our latest report



In this week's edition, we look at some interesting insights from VisitBritain tracking research in terms of UK holiday intentions, with Scotland being cited as a top destination being considered and continue to update you on insights from our key markets.



Marketing Intelligence: COVID-19 update 6 May 2020

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GO TO VISITSCOTLAND.ORG

THANK YOU



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