



VISITSCOTLAND – DLP WEBINAR DOMESTIC MARKET

28 April 2020

TODAY

- Pre COVID-19
- COVID-19 and post-COVID
 - VisitScotland response and our phased approach
 - Marketing update and market intelligence
 - Activity supporting businesses
- Staycation market
 - Importance of domestic & Scotland market
 - UK audience segments and families market
 - Changing consumer and media behaviour as result of Covid-19
 - Continuation of storytelling
- Wrap-up

PRE-COVID-19

#SCOTLANDISNOW

19/20 ON TRACK FOR BUMPER YEAR

- Forecast for strong growth in visitor numbers for 2019 and beginning of 2020



Showing strong growth to Scotland
+17% in overnight trips and +16% in expenditure
(GBTS, 2019 vs 2018)

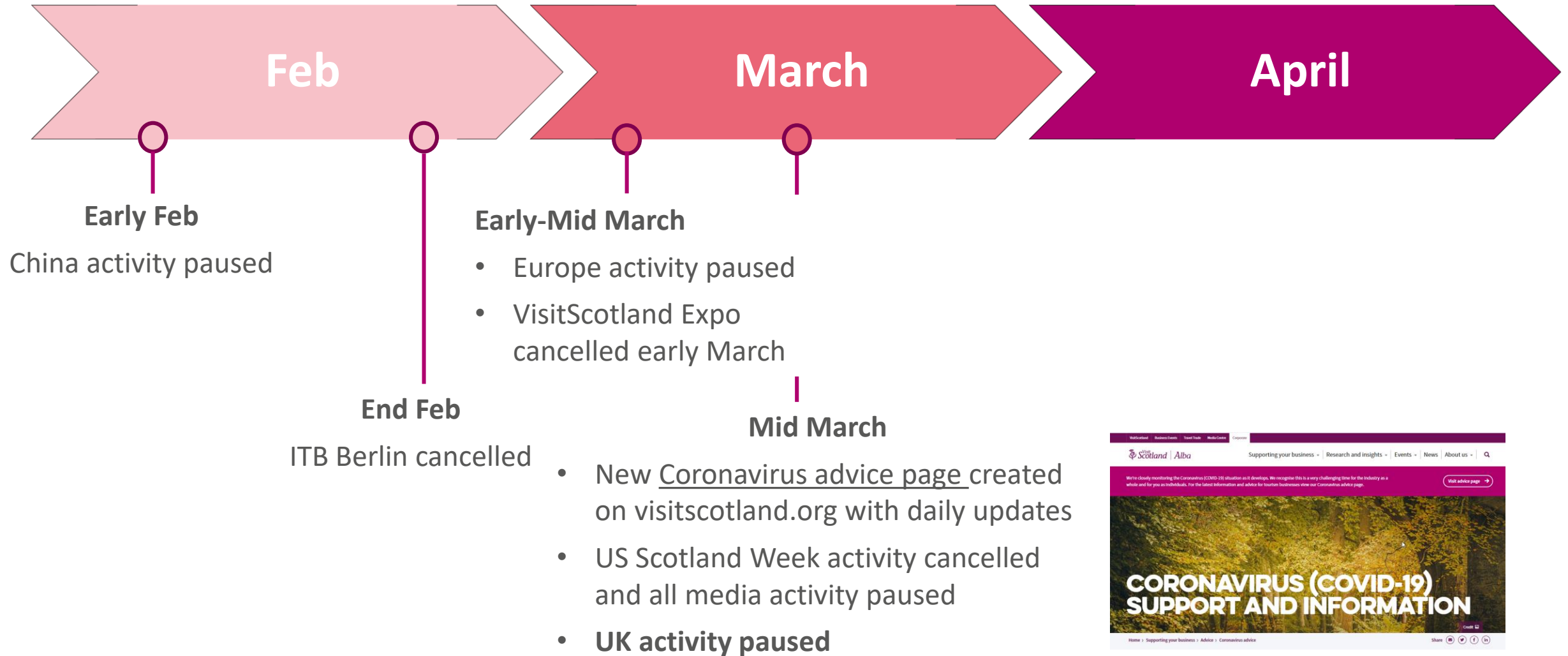
- Growing interest in Scotland from travel trade, with a number of new products in programmes
- Bumper Expo attendance forecast with more exhibitors and highest buyer numbers for an Aberdeen show
- New and innovative campaign activity with stronger partnerships, extending reach & value
 - South of Scotland C4 & Expedia partnership in UK – *paused 17 March (will be re-activated)*
 - Contextual Advertising
 - Innovative partnerships
 - Direct Access co-operative campaigns
 - Year 2020 Coast & Waters activity with National Geographic

COVID-19 & POST-COVID

#SCOTLANDISNOW

HOW VISITSCOTLAND RESPONDED

PRE UK LOCKDOWN



HOW VISITSCOTLAND RESPONDED

RECOVERY PHASES IN LINE WITH SG

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: <i>'Only in Scotland'</i> 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: <i>'Only in Scotland'</i> 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: <i>'Only in Scotland'</i> 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: <i>'Only in Scotland'</i> 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

HOW VISITSCOTLAND RESPONDED

NON ESSENTIAL TRAVEL PROHIBITED - UK LOCKDOWN

- Email sent to all consumers and key buyer contacts, 'no travel' messaging
- Social posts paused due to challenge of people still travelling to rural areas
- New ['Absence makes the heart grow fonder'](#) video created
- New weekly Market Intelligence report, including aviation updates
- [Coronavirus](#) response section on visitscotland.org extensively extended to include:
 - Industry support, including financial
 - OTA support
 - Government advice
 - Mental Health and Wellbeing
 - Marketing respond information
- Inspirational 'Stay at home' content curated on visitscotland.com



HOW VISITSCOTLAND RESPONDED

NON ESSENTIAL TRAVEL PROHIBITED - UK LOCKDOWN

- [Marketing 'respond' information](#)

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](#).



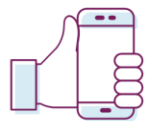
Relationship marketing

In Relationship Marketing, it's important to genuinely connect with people and present an authentic picture of Scotland and never more so than in these uncertain times. To get priorities right we need to listen constantly, keeping communication and content under review, with dream now, travel later messaging.



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.



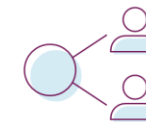
Social activity

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.



PR activity

The PR team have been working across markets to pitch stories to media contacts, many of whom are still hungry for appropriate content. We are also gathering media insights across all key markets to best inform recovery approach. The PR team's close media relationships have been invaluable for these activities.



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.



Social media activity - April 2020

Published: April 2020

Download (609Kb)



PR activity April 2020

Published: April 2020

Download (305Kb)



Intermediary activity April 2020

Published: April 2020

Download (408Kb)



VISITSCOTLAND CONTENT

DISCOVER SCOTLAND FROM HOME



SCOTLAND FROM ABOVE

Watch amazing aerial footage of iconic spots.



WEBCAMS AROUND SCOTLAND

Lovely landscapes and wonderful wildlife - watch now!



SAIL SCOTLAND IN 360°

Sail the west coast of Scotland (without leaving the house).

🏴󠁧󠁢󠁳󠁣󠁴󠁿 LET SCOTLAND IGNITE YOUR IMAGINATION



BE INSPIRED BY ROBERT BURNS

Create your own masterpieces with help from Rabbie!



MYTHS AND LEGENDS

Fairytales and folklore - get to know some Scottish tales.

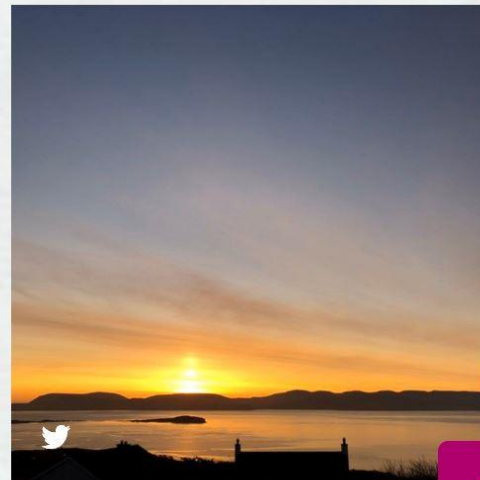
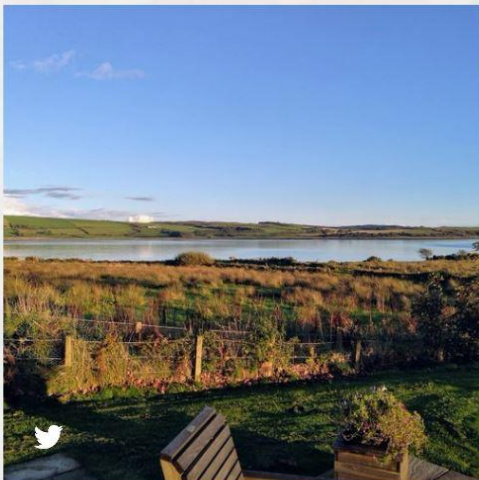
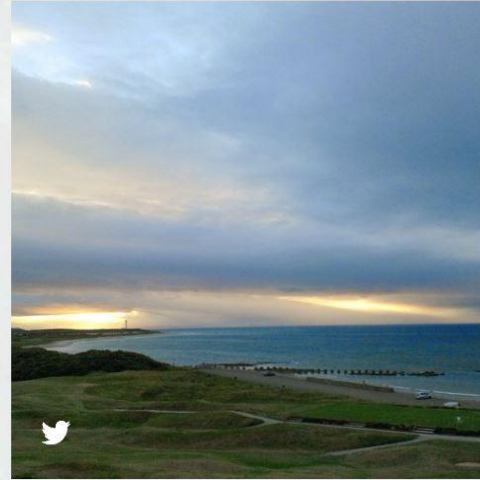


WILDLIFE SERIES

Read about the lovely animals that call Scotland home.



OPEN A WINDOW ON SCOTLAND AND SHARE YOUR VIEWS USING #AWINDOWONSCOTLAND AND #VISITSCOTLAND



SUPPORTING BUSINESSES

- Industry support
 - Ongoing
- Toolkits
 - New B2B content



SAMPLE ITINERARIES WITH TRADE READY PRODUCT

PRODUCT PLANNING E-BOOKS

Explore Scotland

- Angus - 3 Days [↗](#)
- Cairngorms National Park - Snowroads - 4 days [↗](#)
- Dumfries and Galloway - 4 Days [↗](#)
- Fife - 4 Days [↗](#)
- North Highlands NC500 - 4 days [↗](#)



History and Heritage

- Edinburgh and South Scotland - 4 Days [↗](#)
- Glasgow, Ayrshire & Arran, Dumfries & Galloway and Argyll & the Isles - 4 Days [↗](#)
- Stirling and The Forth Valley - 4 Days [↗](#)
- North of Scotland - 4 Days [↗](#)



Unique Experiences

- Perthshire - 4 Days [↗](#)
- Unique Experiences Sample Itinerary - The Highlands, Perthshire, Edinburgh and The Scottish Borders - 3 Days [↗](#)
- Unique Experiences Sample Itinerary - Edinburgh, Perthshire, Angus and Aberdeenshire - 3 Days [↗](#)
- Unique Experiences Sample Itinerary - Aberdeen, Aberdeenshire, Perthshire, Stirling and Stirlingshire - 3 Days [↗](#)



Film and Literature

- Stirling, Clackmannshire, Falkirk and West Lothian - 4 Days [↗](#)
- Scotland's Tay Country - 4 Days [↗](#)
- Film and Literature Sample Itinerary - Angus, Perthshire, Fife and Edinburgh - 3 Days [↗](#)
- Storytelling Sample Itinerary - Edinburgh, Stirling, Perthshire, Fife, Angus and Aberdeen - 3 Days [↗](#)
- A Royal Passion for Scotland - Perthshire, Fife and Edinburgh - 3 Days [↗](#)



Coastal Landscapes

- Edinburgh, Lothians, Stirling and Borders - 4 Days [↗](#)
- Glasgow, Ayrshire, Dumfries and The Isles - 4 Days [↗](#)
- Orkney and Shetland - 4 Days [↗](#)
- Aberdeen, Moray, Highlands and Outer Hebrides - 4 Days [↗](#)
- From Coast to Coast Sample Itinerary - Isle of Bute, Glasgow, Perthshire, Dundee, Fife - 3 Days [↗](#)



Food and Drink

- Scotland's Tay Country [↗](#)
- Cairngorms National Park [↗](#)
- Food and Drink Sample Itinerary - Angus, Perthshire, Ayrshire and Glasgow - 3 Days [↗](#)
- Food and Drink Sample Itinerary - Glasgow, Stirling, Perthshire, Dundee and Angus - 3 Days [↗](#)

The collage features several e-book covers:

- ALL YOU NEED TO KNOW**: A cover with a sunset over a body of water.
- SCENERY & LANDSCAPES**: A cover with a sunset over a body of water.
- UNIQUELY SCOTTISH FOOD AND DRINK**: A cover featuring a close-up of salmon with a lemon slice.
- EDINBURGH, STIRLING & THE BORDERS**: A cover with a map of Scotland highlighting the regions.
- ISLAND HOPPING BY FERRY**: A cover showing a ferry boat on the water.
- FILM LOCATIONS BY REGION**: A cover with a large stone building.
- The 5 Whisky Regions**: A cover with a map of Scotland and a list of distilleries: Highland Park Distillery, Glen Wyvis Distillery, Benrinnoch Distillery, Famous Grouse Experience, The Port of Leith Distillery, The Scotch Malt Whisky Society, and Annandale Distillery.

- Edinburgh History [↗](#)
- Glasgow History [↗](#)
- Stirling History [↗](#)
- Aberdeenshire History [↗](#)
- Edinburgh Architecture [↗](#)
- Aberdeen [↗](#)

SCOTTISH SUPPLIERS

DEDICATED CHANNEL W/WEBINARS



Scottish Suppliers

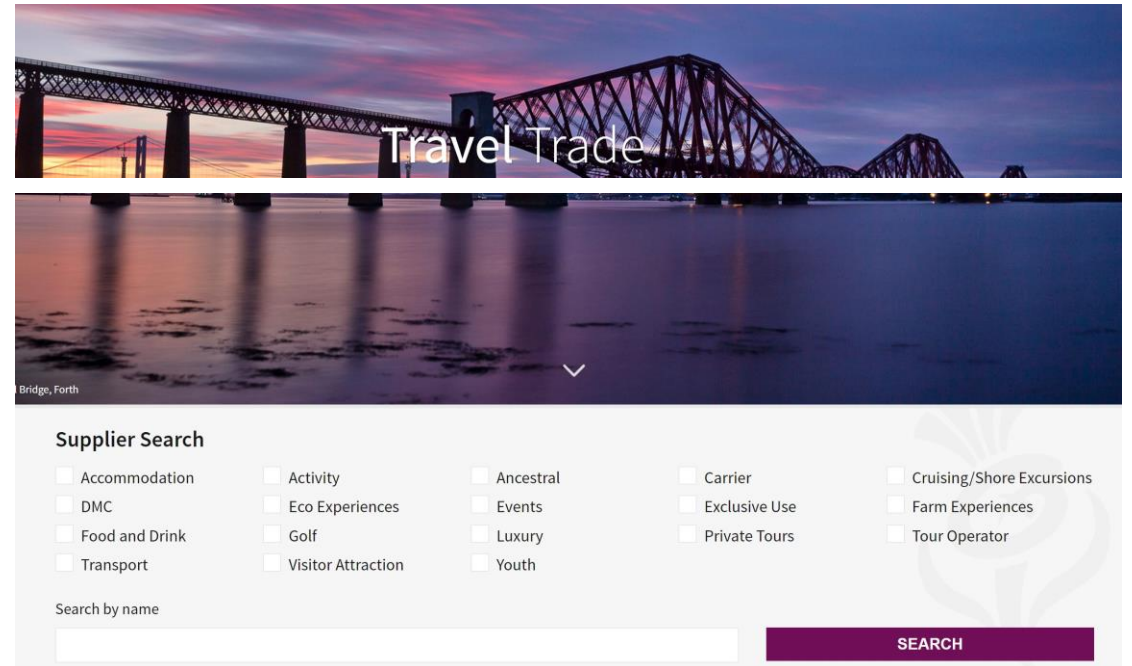
Latest product updates from Scotland, who are trade ready and wanting to connect with you, to help you with new product development planning.

Looking forward

- Virtual business development platforms

TRADE SITE

NEW CATEGORIES ADDED



VISITSCOTLANDTRAVELTRADE.COM
OR TRAVELTRADE@VISITSCOTLAND.COM

INDUSTRY SUPPORT & MARKET INTELLIGENCE



Find Business Support

COVID-19 Business Support helpline | 0300 303 0660



Marketing Intelligence: COVID-19
update 15 April 2020

Published: April 2020

Download (621Kb)



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.

GO TO

VISITSCOTLAND.ORG

Q&A

DOMESTIC MARKET

#SCOTLANDISNOW

DOMESTIC MARKET SHARE



81%

of all overnight visits to
Scotland from
Jan-Sep 2019 were made
by residents of GB

GB Overnight Trips 2019
Volume: 13.8m

56%

of all overnight spend to
Scotland from
Jan-Sep 2019 were made
by residents of GB

GB Overnight Trips 2019
Value: £3.2bn

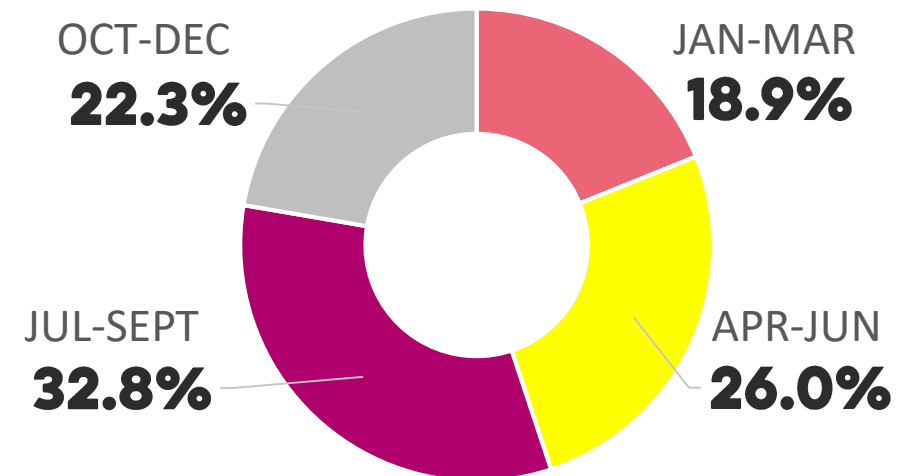
WHAT WE KNOW ABOUT THE GB VISITOR

TOP 5 MOST VISITED REGIONS (GB)

OVERNIGHT VISITS

- **Edinburgh and Lothians: 22.2%**
- **Highlands and Islands: 20.3%**
- **Greater Glasgow and Clyde Valley: 15.2%**
- **Argyll, The Isles, Loch Lomond, Stirling & Trossachs: 12.8%**
- **Aberdeen and Grampian: 7.9%**

SEASONALITY OF TRIPS (GB)



WHAT WE KNOW ABOUT THE GB VISITOR

TOP DRIVERS OR MOTIVATORS (UK)

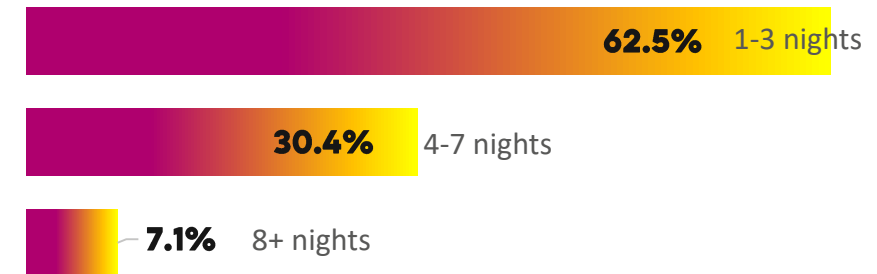


TOP ACTIVITIES (UK)



DURATION OF STAY (GB)

HOLIDAY PURPOSE ONLY



ORIGIN OF VISITORS (GB)

OVERNIGHT VISITORS IN 2019

- Scotland: 55.7%
- North West England: 9.7%
- South East England: 6.5%
- Yorkshire and the Humber: 5.3%
- North East England: 4.8%
- London: 4.2%

AND THE AUDIENCE WE TARGET



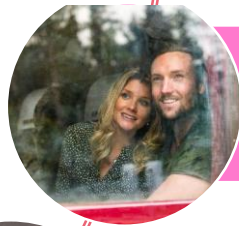
Adventure Seekers



Natural Advocates



Engaged Sightseers



Curious Travellers



Food Loving Culturalists

UK Target
Audience Profile

IMPORTANCE OF THE SCOTLAND MARKET



55.7%

of the 13.8m domestic
overnight trips in 2019 were
made by residents of
Scotland

Scots
Overnight Trips: 7.7M
Value: £1,422M

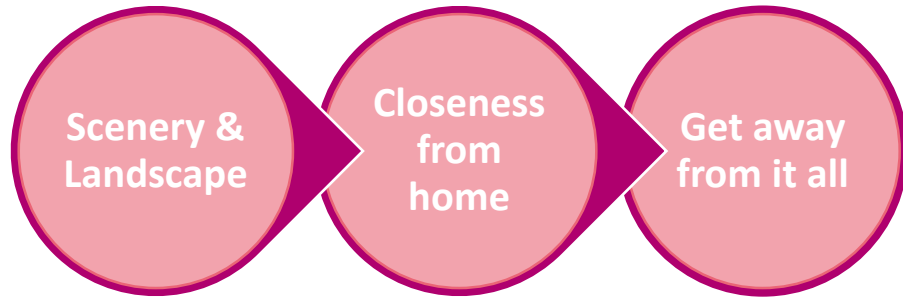
86.2%

of the 133.6M day visits
in 2019 were made
by residents of Scotland

Scots
Day trips: 115.2M
Value: £4,455M

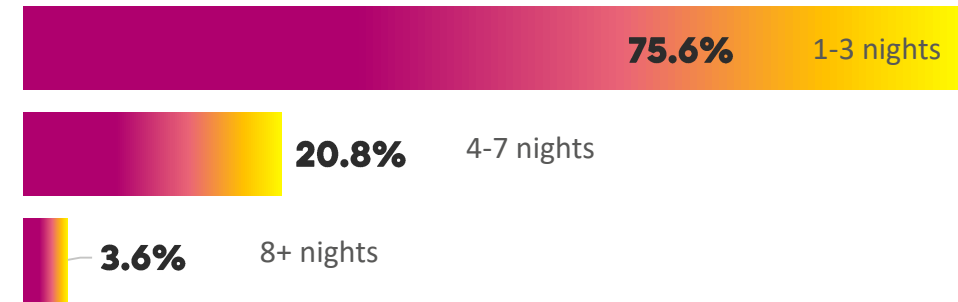
WHAT WE KNOW ABOUT THE SCOTTISH VISITOR

TOP DRIVERS OR MOTIVATORS (SCOTS)

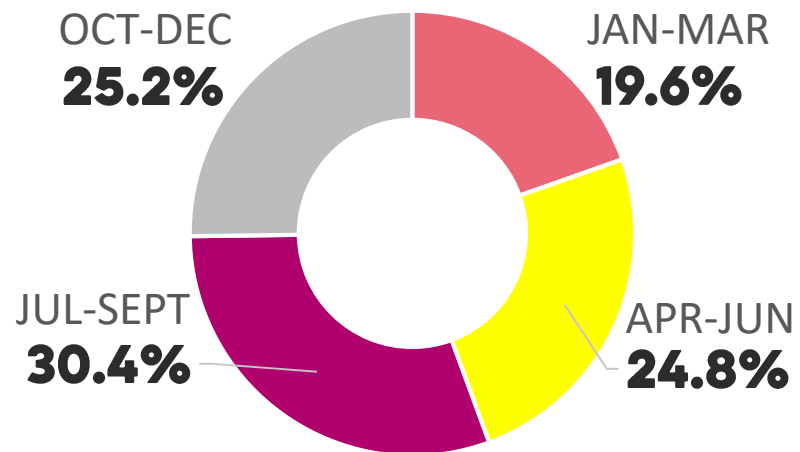


DURATION OF STAY (SCOTS)

HOLIDAY PURPOSE ONLY



SEASONALITY OF TRIPS (SCOTS)



TOP 5 MOST VISITED REGIONS (SCOTS)

OVERNIGHT VISITS

- Highlands and Islands: 23.7%
- Edinburgh and Lothians: 15.5%
- Argyll, The Isles, Loch Lomond, Stirling & Trossachs: 15.1%
- Greater Glasgow and Clyde Valley: 12.2%
- Aberdeen and Grampian: 11.1%

AND THE SHARE OF FAMILIES TRAVELLING

29%

all domestic (Scotland)
overnight holiday trips done
by UK families



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: <i>'Only in Scotland'</i> 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: <i>'Only in Scotland'</i> 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: <i>'Only in Scotland'</i> 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: <i>'Only in Scotland'</i> Book your trip to Scotland Market <u>prioritisation</u></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

Children's home school education materials to support our ambition to raise awareness of Scotland

Families market will be important for all phases



Bedtime stories
"The Three Canny Heilan Coos"



FAMILIES MARKET

INFLUENCE FROM THE WEE ONES



Children have some influence

69% of parents tell us that children have some influence on families holiday choice

Key elements for great experiences

Togetherness, shared activities and exploration

Key consideration for children

Recommendation, family nostalgia, school study & well known attractions

Triggers for parents to go on a UK holiday

Affordability, transport and nostalgia but also current macro climate

Sources:

Boxclever research, 2018

UK children aged 8-12 years and their parents to explore what they wanted from a family holiday

CHANGING CONSUMER BEHAVIOURS

CONSTANTLY EVOLVING



**Significant move to an
online economy**

**Priority to reconnect
with loved ones
& the outdoors**

**Increased focus on
health & wellbeing**

**Holiday 'Dreaming'
as a means to escape
the crisis**

**Domestic
replacements for
cancelled holidays
abroad**

CHANGING MEDIA LANDSCAPE

CONSTANTLY EVOLVING



Advertisers moving
media budgets or
postponing campaigns

Increased use of
websites
& social media

Increased use of
TV & streaming
devices

Increased number of
radio listeners

Increased reach of
news channels &
online publishers

Increased relevance
of native &
content marketing

CONTINUATION OF STORYTELLING ONLY IN SCOTLAND




THE BLOG 18 MUST-DO FESTIVALS ON SCOTLAND'S ISLANDS


Alasdair Peoples · February 24, 2020 · View Comments

DAY 4

OVERVIEW
MULL

There's a bit of retracing your steps as you head back to beautiful Islay, and then back to Kennacraig on the mainland before driving north to Oban. Alternatively you can take the ferry from Islay to Oban, via Colonsay, on certain days. But you won't get long to pause for breath - you are off to the largest of the Inner Hebridean islands, the Isle of Mull!

MILES	KM	STOPS	TRANSPORT
92	147	2	



Scotland's islands are not only beautiful things to do throughout the year. A trip to the shores of Orkney or a trip to the whisky mecca of Islay, it's a great idea to

Connection

Appreciation

2020/21

Escapism

Rest,
Relaxation &
Satisfaction



EXPERIENTIAL TOURISM

DRIVEN BY EMOTIONAL BENEFITS OF A HOLIDAY IN SCOTLAND



Landscape
Scenery
History &
Culture



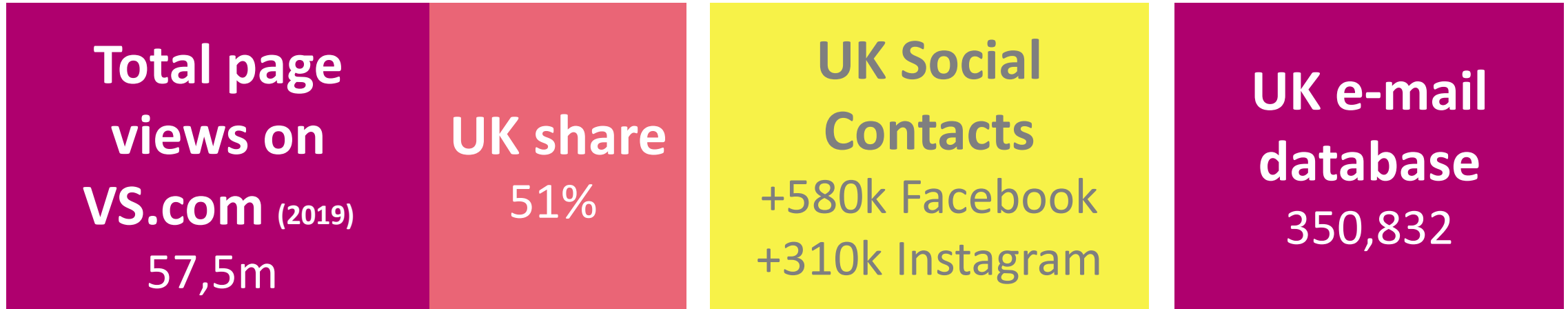
Getting away
from it all



Opportunity to
learn, develop
& grow

Experiential tourism

IMPORTANCE OF OUR OWN 'WARMED UP' CHANNELS



KEY SEARCH TERMS & UK AVERAGE MONTHLY SEARCH VOLUME



WRAP-UP

#SCOTLANDISNOW

KEY TAKE-AWAYS

**UK market first to
recover**

**Focus on responsible
travel messaging**

**Balance of
inspirational and
informative activity**

**Consider personal
health/safety aspect
in your offering**

OUR ASK FROM YOU

**#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**

FOR 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

Travel trade

- www.visitscotlandtraveltrade.com
- [Itineraries](#)
- [Product planning e-books](#)
- Scottish supplier webinar series – coming soon
- Email enquiries : traveltrade@visitscotland.com

Insights

- Topic Paper (Oct, 2019) [Listening to children and their parents Exploring Scotland's appeal as a family holiday destination](#)
- BVA/ BDRC Research [Tracking consumer sentiment on the impact of COVID-19](#)

Q&A

THANK YOU

A photograph of a Highland cow and a calf resting on a grassy hill. The cow is on the left, facing left, with long, curved horns and thick, reddish-brown fur. The calf is on the right, facing right, with a brown coat and a white patch on its face. The background is a dense forest of trees with yellow and green foliage, suggesting an autumn setting. The overall scene is peaceful and natural.

Judy Mariëns, Senior Market Manager UK & Europe
Fiona Holmes, Market Manager UK