VISITSCOTLAND BRIEFING

SCOTO MEMBERS EVENT

OCTOBER 2022

River Lochy, VisitScotland / Airborne Lens

#SCOTLANDISCALLING

OUR CORE PURPOSE

Marketing: we promote all of Scotland to visitors across the world

Events: we promote and develop Scotland as the Perfect Stage for events

Quality & Sustainability: we help improve quality across the whole visitor experience

International Engagement: we build awareness and access to international opportunities for businesses

Inclusive Tourism: we help all of Scotland to be welcoming and accessible to everyone

RESPONSIBLE TOURISM AND TRANSITION TO NET ZERO

THE HEADLINES – 2019 DATA

11bn industry
up 9% on
previous year

229,000 jobs
up 5% on
previous
year; 9% of
all jobs

15,215
businesses,
highest on
record

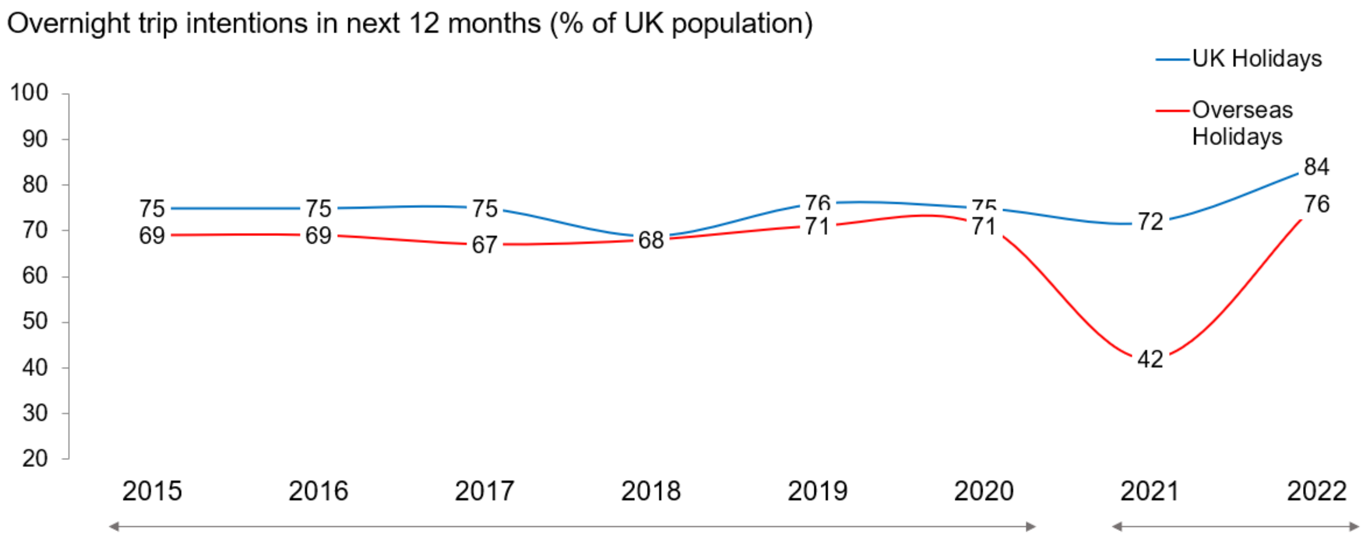
Overnight trips
up by 11% to
17.5m (of
which 3.5m
were
International);
spending up
12%

133 m day
trips; spending
up 6%

OVERSEAS TRIPS GAVE WAY TO DOMESTIC TRIPS

Restrictions meant that domestic trips were favoured to overseas trips

LOOKING AT 8 YEAR TREND

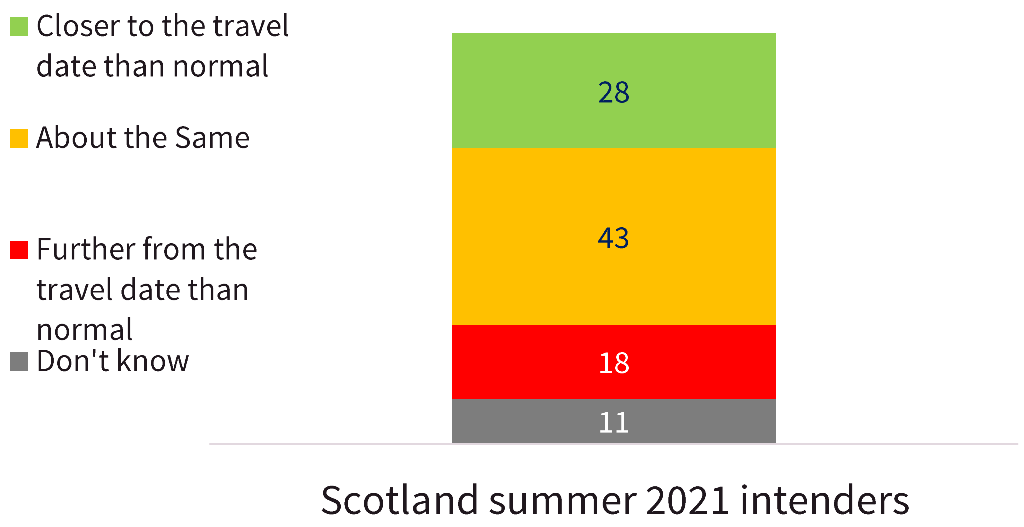


SUMMER 2021 – MORE LAST MINUTE BOOKINGS

Uncertainty meant that domestic overnight trips were booked more last-minute than normal

LOOKING BACK AT SUMMER 2021

Booking lead times for Scotland Summer trips in 2021 (%)



BUSY DESTINATIONS LIKE LARGE CITIES WERE AVOIDED

Busy destinations – such as large cities – were avoided.

LOOKING BACK AT AUGUST 2020

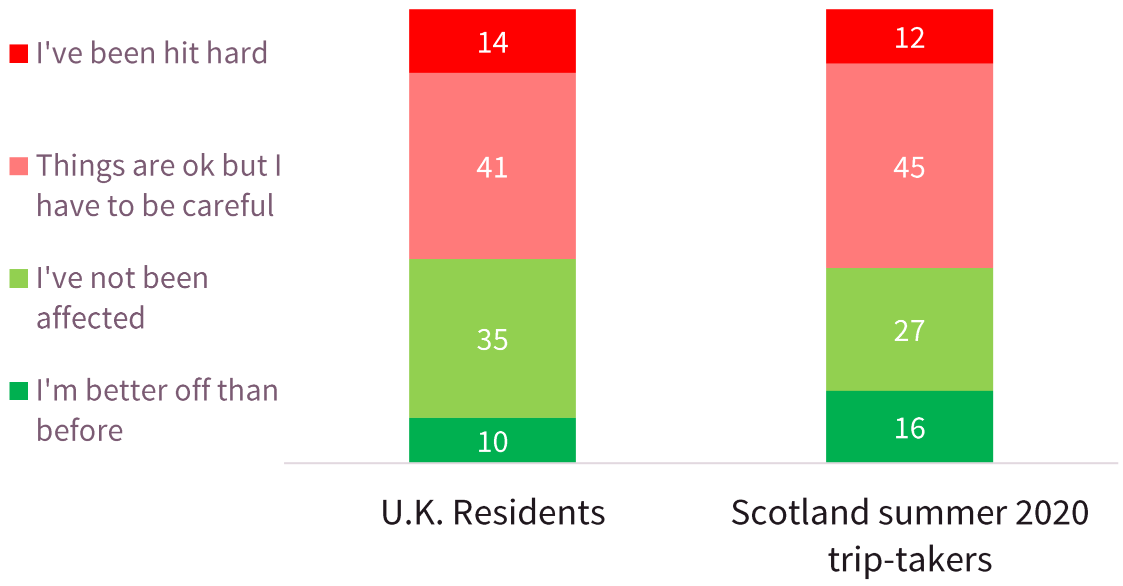
Proportion of all domestic trips that are planned to a city or large town (%)

COVID IMPACTS

Due to furlough and reduced travel/childcare costs, some people were financially better off during the pandemic

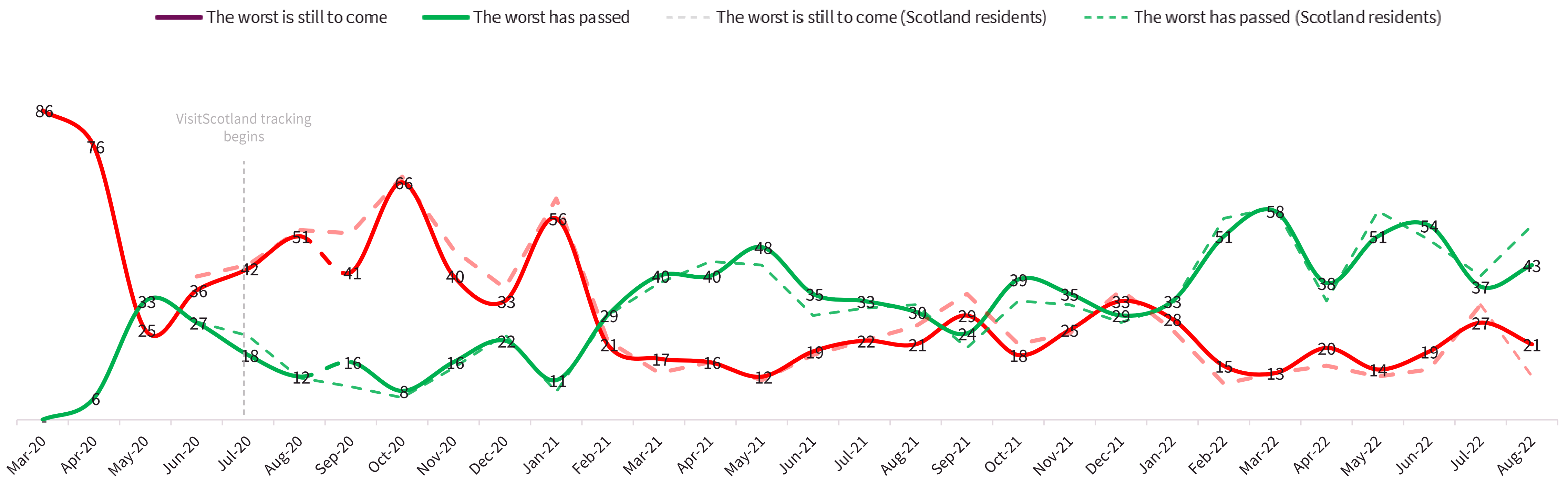
LOOKING BACK AT SUMMER 2020

Breakdown of Scotland summer 2020 trip-takers (%)



THE WORST HAS DEFINITELY PASSED

Perception of the situation with regards to COVID-19 - UK and Scotland (%)



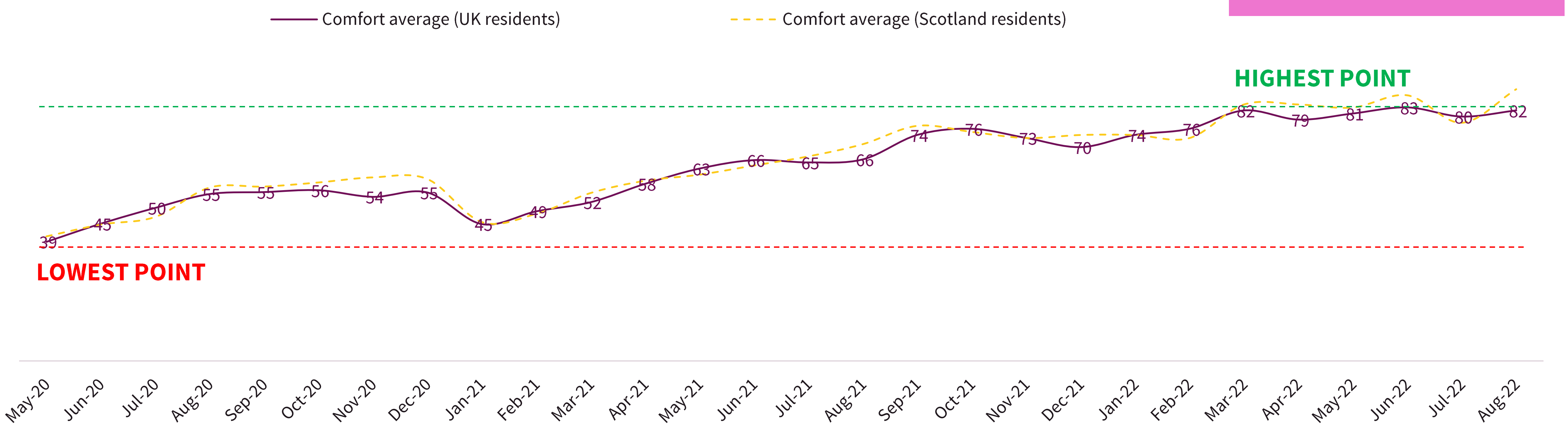
Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.260

‘COMFORT AVERAGE’ IS MORE THAN TWICE 2020 LEVEL

Comfort average is based on…

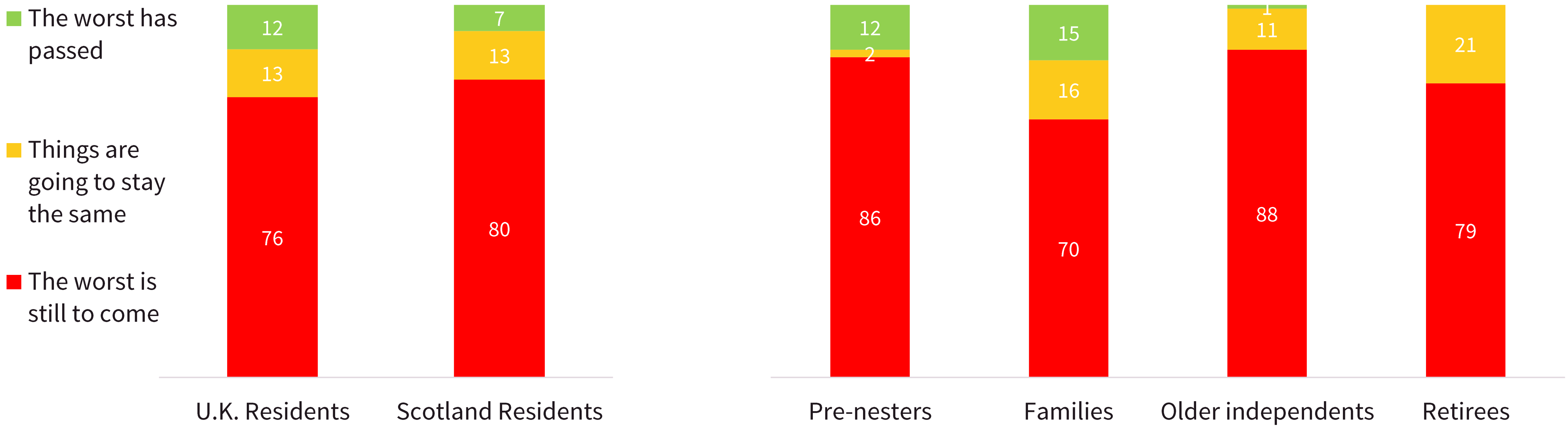
- Travelling by public transport
- Shopping in your local shopping centre
- Eating at a restaurant
- Going for a walk in a country park or trail

Level of comfort conducting leisure activities (% average)



VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.250
*For comparability, comfort average does not include ‘going to a visitor attraction’ or ‘visiting a city centre’ – statements that were added from March 2021 onwards

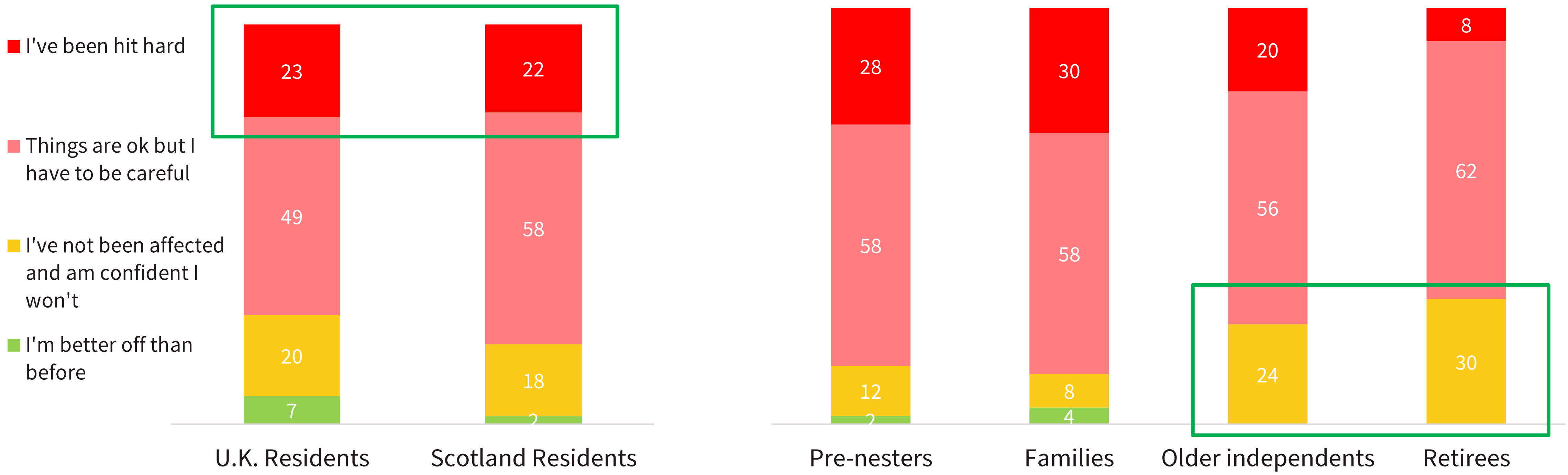
Perceptions of the cost of living crisis



Q7b: And now regarding the 'cost of living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion?
Base: All UK respondents. n=1760; All Scotland respondents n=259. Pre-nesters n=437; Families n=666; Older Independents n=382; Retirees n=274;

ALREADY IMPACTED 1 IN 4. OLDER LIFE STAGES MOST PROTECTED.

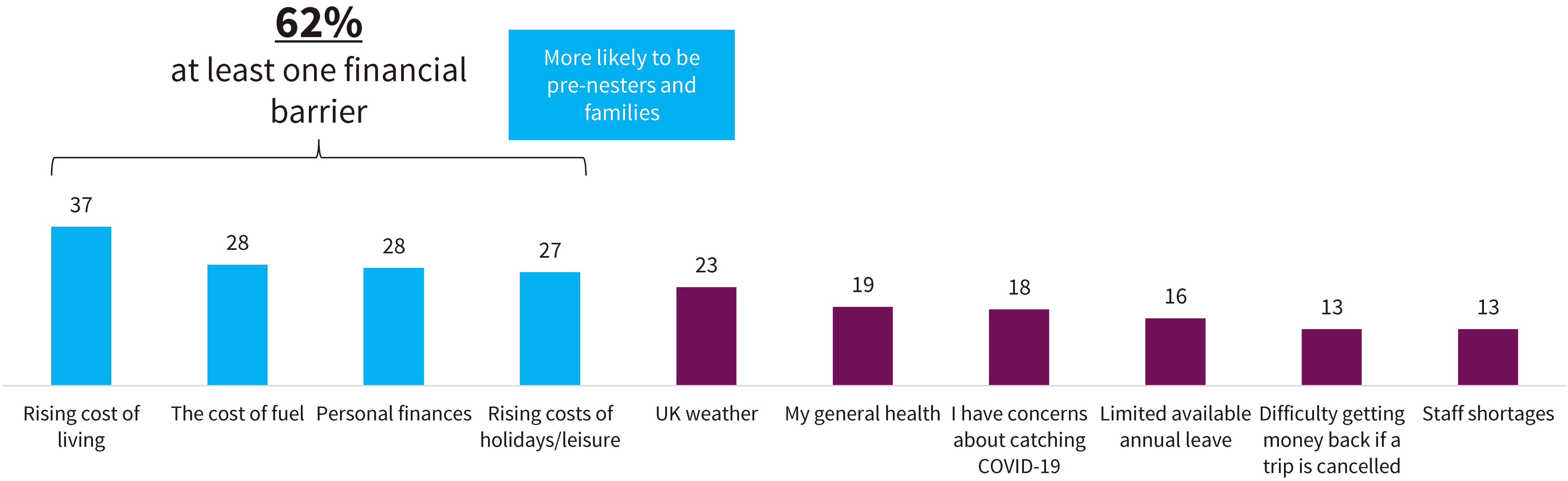
Impact of cost-of-living crisis on personal finances (%)



Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: All UK respondents. n=1760; All Scotland respondents n=259. Pre-nesters n=437; Families n=666; Older Independents n=382; Retirees n=274;

BARRIERS TO AN OVERNIGHT UK TRIP

Top 10 Barriers to taking an overnight UK trip in next 6 months (%)



VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>?
Base: All UK respondents. n=1760; All Scotland respondents n=259.

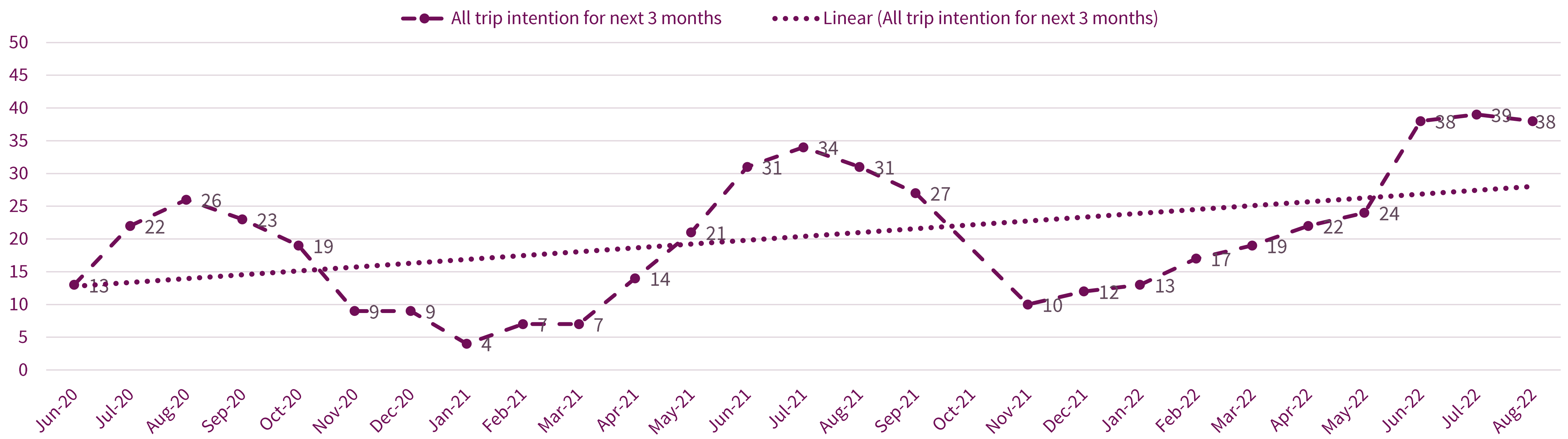
WHAT WOULD PROVIDE REASSURANCE?

Financial conditions that would incentivise use of tourism providers (%)

WHAT ARE VISITORS LOOKING FOR?

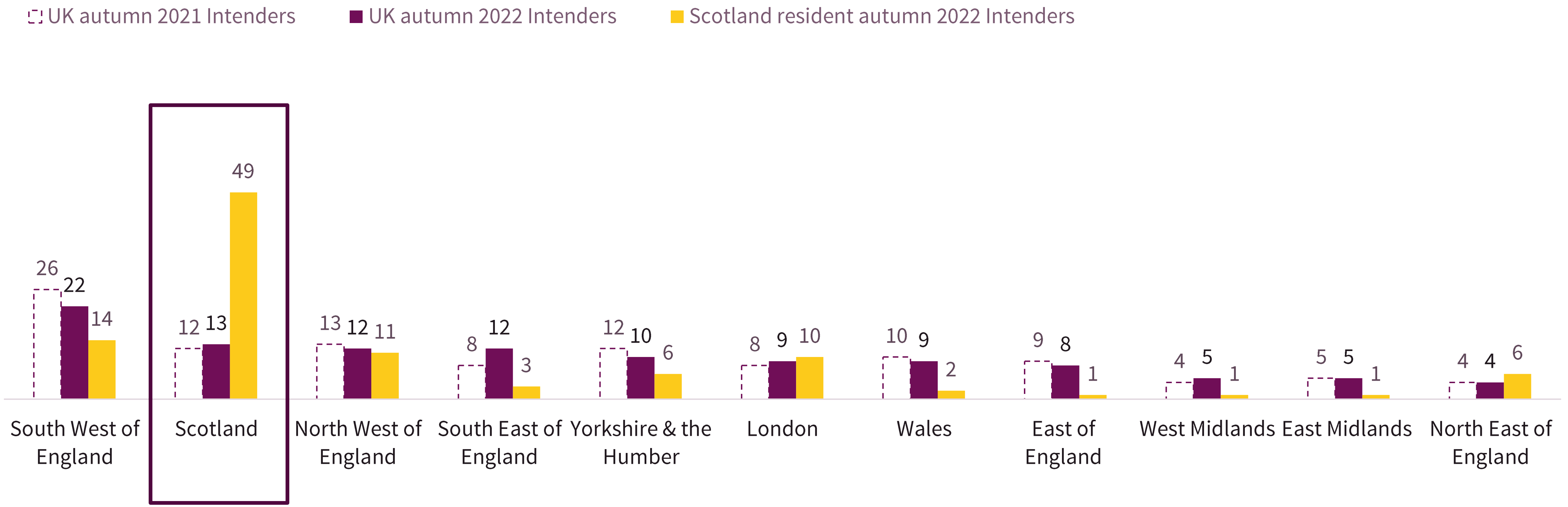
DOMESTIC TRIP INTENTION IS STRONGER THAN IT HAS BEEN THAN AT ANY POINT SINCE THE START OF THE PANDEMIC

All trips intended within next 3 months (%)



SCOTLAND IS THE SECOND MOST PREFERRED UK DESTINATION– CONSISTENT WITH 2021. ESPECIALLY TRUE FOR SCOTTISH RESIDENTS

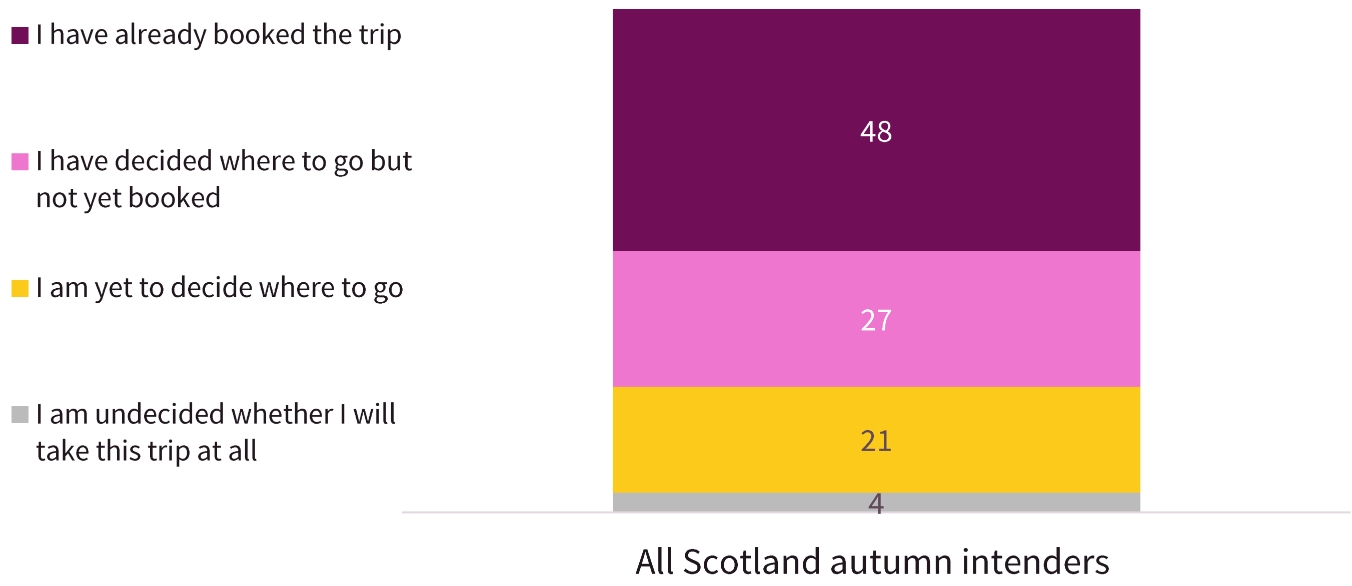
Where planning on staying on next UK overnight trip in autumn (%)



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: UK Autumn 2021 Intenders n=570; UK Autumn 2022 intenders n=1,036;

NEARLY HALF OF INTENDERS NOT YET BOOKED THEIR TRIP

Booking status of Scotland autumn holiday or short break (%)



As of early August, Half of Scotland autumn intenders have not yet booked their trip (higher amongst pre-nesters)

VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>?
Base: All Scotland autumn intenders n=153;

83% of global travelers think **sustainable travel is vital**

81% intend to stay in a **sustainable accommodation**

73% are **more likely to choose** accommodation that implements sustainable practices

69% committed to **reducing the carbon footprint** of their trip or pay to offset this

61% pandemic has made them **want to travel more sustainably**

31% said that they **didn't know how to find them**

49% believe there **aren't enough** sustainable travel **options**

Source: Booking.com Sustainable Travel Report 2021

CHANGE DRIVEN BY THE CONSUMER

NEW AUDIENCES, NEW MEDIA

TOURISM HAS NEVER BEEN SO COMPETITIVE

NEW AUDIENCES

Young people will lead the international travel market's post-Covid revival.

16-34 holiday market to grow by 47% in volume and by **81% in value** during 2021, expanding by a further 39% and 42% in 2022 *(Mintel)*

CONSUMER BEHAVIOUR

Consumers are looking to fill the void from lockdowns with **experiences** that promise to stir the **emotions** and elevate in-the-moment moods. Consumers will spend money based on their mood.

Consumers increasingly want to understand the impact of their actions - on the people around them and the wider world.

MEDIA LANDSCAPE

Significant drop in correlation between how 16-34 and 55+ spend their media time. A drop from 58% similarity between the media behaviours in 2015 to just **8% in 2020.**

Younger markets - digital time 2x TV. Older markets (34+) increasing time on TV and print. . **No single channel can deliver comprehensive reach**

IMPORTANCE OF PARTNERSHIPS

THINGS TO THINK ABOUT

Demand for Scottish breaks remains strong – albeit conversion needed

Strong interest in community tourism, if presented well - easy to discover, easy to buy

Flexible booking, deals/offers with other tourism providers and promoting 'free things to do' will all help convert bookings

Need to be visible where consumers are looking.

Base: UK autumn intenders n=1,036; UK Autumn rural coastline intenders n=84

Making the most of Digital

Things to Consider

1. Reputation & Reassurance
2. Social media
3. Search engine listings & SEO
4. Bookings & Discoverability
5. Content

CREATING QUALITY EXPERIENCES

Setting and exceeding guest expectations

- A focus on your pre-arrival digital visitor journey
- Benefits of being a member of the VisitScotland Quality Assurance scheme

Staff, not stuff

- The importance of personalisation and proactivity in your interactions with visitors
- Training resources for teams

Bring your story to life

- Taste our Best award for promotion of provenance
- Connect in with the Year of Storytelling

VisitScotland | Alba

HOW YOU CAN BENEFIT ?

- USE OUR ASSETS ON YOUR CHANNELS
- TIE IN WITH OUR MARKETING CALENDAR THEMES
- PR - LET US KNOW ANY OPPORTUNITIES
- Advice & Support from IRMs
- #SCOTLANDISCALLING / @visitscotland
- VisitScotland.com

Thanks

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