

United States of America ([Market Factsheet](#))

The US is our largest International market and VisitScotland has a well established relationship with:

- Tour operators- groups & FIT
- Travel Agents/ Travel Advisors
- Key DMCs and wholesalers
- Airline Vacation Arms
- Online Travel Agents (OTA's)

Situation summary @ 17 June

- Most operators focused on 'dream now travel later' messaging to consumers.
- Many tour operators remain optimistic about 2021 with contracting continuing where possible.
- Travel agents – mainly small operators – are handling amendments, cancellations and rebookings with some beginning to look at destination training
- Increased interest in virtual Scotland content to allow consumers to experience Scotland from home.

HORIZON SCANNING

- Smaller and more private groups will likely be favoured with a greater interest in exclusivity and exclusive use.
- Opportunities for private tours / niche activity / sustainable measures.
- How to incorporate distancing measures and communicate this to US consumers and travel trade.
- Social responsibility will be higher on the agenda.
- Increased focus on added value.
- US Consumers likely to be resilient future travelers.

ACTIVITY

US Market status: 17 June 2020	Scotland status: Phase 1 Response			US Market Status: Phase 1 Response	
	Phase1 Response	Phase2 Re-set	Phase3 Restart	Phase4A Domestic movement	Phase4B International movement
Recovery Phases	Lockdown		Early recovery		
Intelligence gathering & relationship management with key account tour operators	✓	✓	✓	✓	✓
Future travel/bookings insights		✓	✓	✓	✓
VisitBritain insight/market strategy development	✓	✓	✓	✓	✓
Trade Media – travel intention insights		✓	✓	✓	✓
Airline marketing activity/activation				✓	✓
OTAs – Intelligence gathering			✓	✓	✓
Travel Agents – relaunch of agent comms			✓	✓	✓
Lockdown comms	✓	✓	✓		
Product dev discussion				✓	✓
Marketing toolkit incl content assets: Lockdown inspirational		✓	✓		
Marketing toolkit: Book now recovery				✓	✓
Scotland webinar/destination training		✓	✓	✓	✓

Canada ([Market Factsheet](#))

Travel Trade business forms a large part of the travel distribution in Canada with our strategic focus to increase regional & seasonal spread. Our work in-market focusses on the following types of travel trade businesses:

- Tour operators - groups & FIT (Fully Independent Travelers)
- Travel Agents
- Key Destination Management Companies and Wholesalers
- Airline Vacation Arms
- Online Tour Operators (OTAs)

SITUATION SUMMARY @ 17 June

- The CA-US border remains closed until 21 July with all but essential travel to Canada restricted. Federal, Provincial & Territorial governments are progressing to reopen the economy with provinces reopening albeit cautiously and with no inter-provincial travel.
- Many tour operators have rebooked customers for later in 2020 or for 2021.
- Focus being placed on providing travel credit/vouchers for future travel within a 24 month period for those not looking to rebook immediately. This is not consistent across the industry.
- Industry and customer absorbing ‘dream now travel later’ content across all digital channels.

HORIZON SCANNING

- Tour Operator marketing will focus on smaller group tours, health & safety messaging to provide reassurance to customers.
- FIT will grow in popularity and travel agents will emerge with extra kudos for their expertise
- Transat have announced return to flight and tour operator services from 23 July. Toronto – Glasgow service to resume from 25 July if restrictions allow.

ACTIVITY

Canada Market status: 17 June 2020	Scotland status: Phase 1 Response			Canada Market Status: Phase 1 Response	
Recovery Phases	Phase 1 Response	Phase 2 Re-set	Phase 3 Restart	Recovery	
	Lockdown		Early recovery	Domestic movement	International movement
Intelligence gathering & relationship management with key account tour operators	✓	✓	✓	✓	✓
Future travel/bookings insights		✓	✓		
VisitBritain insight/market strategy development	✓	✓	✓	✓	
Trade Media – travel intention insights	✓	✓	✓		
Airline marketing activity/activation					✓
OTAs (Intelligence gathering)			✓		
Travel Agents – relaunch of Agent Comms			✓	✓	✓
Lockdown comms	✓	✓			
Product dev discussion			✓	✓	✓
Marketing toolkit incl content assets: Lockdown inspirational		✓	✓	✓	
Marketing toolkit: Book now recovery				✓	
Scotland webinar/destination training		✓	✓	✓	✓

UK ([Market profile](#))

The UK is our largest market in terms of visitor volume and spend. Our strategic priorities include encouraging regional and seasonal spread. To reach this key market we work closely with intermediaries such as;

- Tour Operators and Wholesalers (we are a partner of the Coach Tourism Association)
- Transport Providers (Airlines, Rail Operators, Ferries)
- OTAs (Online Travel Agencies)

Situation summary @ 17 June

- Operators are dealing with cancellations and looking to postpone tours where possible.
- Many businesses have furloughed staff. Of those still operating, there are signs of interest in product development for future tours (2021).
- Communication strategies are mostly focusing on ‘dream now, travel later’ message (encouraging customers to share photos of past trips or wish list destinations) but some are incentivising 2021 bookings with deals & offers.
- The Coach Tourism Association continues to support UK wholesalers and coach operators with practical advice related to coach operations, however a number of big players in the industry have went into administration highlighting the extent of their challenges at this time.

HORIZON SCANNING

- Potential move away from larger coach tours to smaller group tours in light of social distancing. Coach groups tend to be made up of an older demographic so this could lead to a lower demand from these vulnerable customers.
- FIT business is likely to recover faster than group travel, so more couples & families travelling independently in small groups.
- Some domestic air routes will soon be available again, but research indicates a preference to travel by car when travel is permitted.
- Increased interest in active, nature and off-the-beaten track activities with (initially) lower demand for tourism hot spots.

Activity

UK Market status: 17 June 2020	Scotland status: Phase 1 Response			UK Market Status: Phase 1 Response	
Recovery Phases	Phase 1 Response	Phase 2 Re-set	Phase 3 Restart	Phase 4A Domestic movement	Phase 4B International movement
	Lockdown		Early recovery		
Lockdown Comms (Offering support)	✓	✓			
Relationship Management with key accounts	✓	✓	✓	✓	✓
Intelligence Gathering from intermediaries	✓	✓	✓	✓	✓
Monitoring travel intentions/booking behaviour		✓	✓	✓	✓
Transport Partner Activation				✓	✓
Sales & Marketing Support		✓	✓	✓	✓
Product Development			✓	✓	✓
Destination Training				✓	✓
Recovery Comms (Booking call to action)				✓	

EUROPE

[\(Market Factsheet - Germany\)](#)

[\(Market Factsheet - Italy\)](#)

[\(Market Factsheet - Sweden\)](#)

[\(Market Factsheet - France\)](#)

[\(Market Factsheet - Netherlands\)](#)

[\(Market Factsheet - Spain\)](#)

[\(Market Factsheet - Norway\)](#)

Europe is our largest international source region in terms of visitor volume and spend. It includes our two core markets Germany and France, as well as development markets with identified growth potential: Netherlands, Nordics, Spain and Italy. Our strategic priorities for these markets include encouraging regional and seasonal spread. To achieve this across all markets, we primarily work with intermediaries such as:

- Tour Operators (FIT & Group), DMCs & Wholesalers
- (Online) Travel Agents & Travel Advisors
- Transport Partners (Airlines & Ferries)

Situation summary @ 17 June

- Many intermediaries are offering flexible re-booking and refund options, often with incentives for clients that choose to postpone rather than cancel their travel plans.
- With many businesses having furloughed staff, key operations are managed by reduced numbers of teams. Of those still able to run operations other than sales/call centres, there is growing interest in Scotland destination training and product development for future tour programmes, as well as early marketing support for 2021.
- European markets are gradually re-opening for leisure purposes. Many EU country borders re-opened on June 15 for tourism from other EU and Schengen states. More information on border re-openings can be found here: <https://reopen.europa.eu/en>

HORIZON SCANNING

- Every European market is managing its own lockdown measures and exit strategies. While travel restrictions between EU and Schengen states now largely lifted, restrictions on international (long haul) movement are to be reviewed on July 1.
- FIT business is likely to recover faster than group travel, with a shift in visitors' core age to below 55+.
- Potential increase of slow travel, mindfulness, off-the-beaten track activities and sustainability, with (initially) lower demand for tourism hot spots.
- Increasing enquiries from tour operators and consumers around when the UK and Scotland will re-open for EU tourism.

ONGOING ACTIVITY

- Product development: Providing customised product recommendations to encourage tour creation and extensions across all Scottish regions and seasons.
- Sales & marketing support: Providing tailored destination training for sales & marketing staff alongside royalty-free imagery, videos and destination content, as well as advertising opportunities and sharing market updates.
- Intelligence gathering & relationship management: Collating and sharing information on market trends and tourism developments, plus building/maintaining relationships with key intermediaries

EUROPE (Cont.)

Activity / response to lockdown

Europe Market Status: 17 June 2020	Scotland status: Phase 1 Response			Europe Market Status: Phase 3/4 Restart/Recovery	
Recovery Phases	Phase 1 Response	Phase 2 Re-set	Phase 3 Restart	Phase 4A	Phase 4B
	Lockdown		Early recovery	Domestic Movement	International movement
Lockdown Comms	✓	✓	✓	✓	
"Book Now" Recovery Comms					✓
Intelligence Gathering & Relationship Management.	✓	✓	✓	✓	✓
Future Insights: Travel intentions		✓	✓	✓	
Future Insights: Travel/booking behaviour				✓	✓
Transport Partner Activation				✓	✓
Sales & Marketing Support		✓	✓	✓	✓
Product Development			✓	✓	✓

AUSTRALIA [\(Market Factsheet\)](#)

Australia is the second largest long haul market for Scotland contributing strongly to the visitor economy with high levels of spend and length of stay. We work with the following types of Travel Trade in Australia:

- Travel Agents
- Tour operators- groups & FIT
- Key DMCs and wholesalers
- Airline Vacation Arms
- Online tour operators (OTAs)

SITUATION SUMMARY @ 17 June

- Current focus of most agents and operators is processing cancellations and postponements for 2020, with most offering very flexible options including re-booking up to December 2022.
- Agents and operators are seeing temporary and permanent redundancies across the industry as well as a number of travel agent store closures.
- Most operators focused on ‘dream now travel later’ messaging to consumers.

HORIZON SCANNING

- Some interest in destination training sessions
- Content sharing with key operators via social channels
- Looking at how to incorporate longer term social distancing measures into product
- Currently contracting 2021 product.

ACTIVITY

Australia Market status: 17 June 2020	Scotland status: Phase 1 Response			Australia Market Status: Phase 1 Response	
Recovery Phases	Phase 1 Response	Phase 2 Re-set	Phase 3 Restart	Phase 4A Domestic movement	Phase 4B International movement
	Lockdown		Early recovery	Domestic movement	International movement
Intelligence gathering & relationship management with key account tour operators	✓	✓	✓		
Future travel/bookings insights				✓	✓
VB insight/market strategy development		✓	✓	✓	
Trade Media – travel intention insights	✓	✓	✓		
Airline marketing activity/activation					✓
OTAs (Scotland Product)				✓	✓
Travel Agents – relaunch of Agent Comms			✓	✓	✓
Lockdown comms	✓	✓			
Product dev discussion				✓	✓
Lockdown inspirational marketing toolkit incl content assets			✓	✓	
Book now recovery marketing toolkit				✓	
Scotland webinar/destination training programme			✓	✓	✓

CHINA ([Market Factsheet](#))

China is a valuable and fast-growing international market for Scotland. Over the past few years we have developed close working relationship with various types of intermediaries including wholesalers, tour operators, on and offline travel agencies, and DMCs as well as smaller, niche FIT tour operators.

SITUATION SUMMARY @ 17 June

- On 24 January (and still in place today), the Chinese government ordered that Chinese travel trade suspend sales of international packaged tours and “flight + hotel” packages
- Many of our key accounts in China are still operational and most have temporarily switched their focus to domestic travel to see them through this period. The domestic travel market has picked up considerably.
- The travel trade in China are very keen to be informed via webinars and online training – our B2B Manager, Ada has delivered webinars to 3,000 travel trade in the past 2 months.
- The trade's top areas of interest are hidden gems and regions that are not known to them, new itinerary ideas, practical destination information such as around visas, transport, accommodation, F&B, shopping and festivals.
- They are also keen to hear about new products or services and upgrades or discounts that suppliers can offer, as well as safety information.

HORIZON SCANNING

- Consumers will only plan to travel internationally when the coronavirus situation is under control at destination. It is estimated that once international travel safely resumes, it will take 6 weeks for consumer confidence to return.
- We expect to see a shift in demand from large coach tours to smaller sized family (from 2021) and bespoke tours. We anticipate first to return will be young FIT market.
- Research suggests increased interest in travel itineraries which include the natural landscape, outdoor activities, wellbeing, and family experiences.

CURRENT ACTIVITY

China Market Status: 17 June 2020	Scotland status: Phase 1 Response			China Market Status: Phase 3/4 Restart/Recovery	
Recovery Phases	Phase 1 Response	Phase 2 Re-set	Phase 3 Restart	Phase 4A Recovery	Phase 4B Recovery
	Lockdown		Early recovery	Domestic movement	International movement
Intelligence gathering with strategic and commercial partners	✓	✓	✓	✓	✓
Market Recovery Strategy Development	✓	✓	✓	✓	✓
Webinars and 121 destination & product training to Chinese trade	✓	✓	✓	✓	✓
Future travel/bookings insights	✓	✓	✓	✓	✓
Identify Scottish product to fit new trends and develop product presentations and webinars			✓	✓	✓
Distributing Scotland content through VB, DMCs and other trade partners	✓	✓	✓	✓	✓
Airline marketing activity/activation					✓
Developing Scotland Product				✓	✓