

VISITSCOTLAND COVID-19 UPDATE

INTRODUCTION

Dear all

This is the first in a series of regular intel reports that we will create to keep you updated on travel news, consumer intent and market insight from around the globe. In this first edition the news and insight as you would expect is very hard to digest.

Planning for the period beyond this current no-travel phase is going to be critical in the weeks ahead, so that we can develop robust recovery plans and ensure we get the timing of future proactive marketing activity right. Learning from China's gradual return to some kind of normality will provide useful insight. To guide us through this time, the teams at VisitScotland will use their collective global networks and contacts, and the data and insight we can access via various partners and from our own channels.

We are all in this together and now more than ever we need to pool our collective resources to help each other, share ideas and navigate our way forward. Please continue to review the [Covid-19 pages](#) on VisitScotland.org for business advice and support. If there is something missing in this report that you would like to see please let us know.

Tourism is of strategic importance to the Scottish economy and has the potential to restore jobs and income to communities as we start to come out of this crisis.

So, for now we need to keep Scotland front of mind with all travellers and inspire them to dream of a future trip to Scotland.

Stay safe.

Vicki



Vicki Miller
Director of
Marketing & Digital

TRAVEL INDUSTRY INSIGHTS

The World Travel and Tourism Council has warned the COVID-19 pandemic is putting up to 50m jobs in the global travel and tourism sector at risk, with travel likely to slump by a quarter this year, Asia being the most affected continent in terms of impact to the tourism industry.

The impact will depend on how long the epidemic lasts. Phased globally recovery could be exacerbated by ongoing restrictive measures held in place on outbound and inbound travel by national administrations. It is estimated that once the outbreak is over, it could take up to 10 months for the industry to recover. By sector, airlines and cruise ships were currently being more impacted than hotels, the official added.

The tourism sector is unique in economic activity with social impact, it's based on interaction amongst people. Small and medium sized enterprises (which make up around 80% of the tourism sector) are expected to be particularly impacted. Due to its cross-cutting economic nature and deep social footprint, tourism is uniquely positioned to help societies and communities affected return to growth and stability.

As tourism brands pause planned marketing activities, many still take an inspirational approach. Many are giving consumers reassurance and hope that things will eventually return to normal and encouraging them to think about future travel plans instead of the present moment. Positively, a recent [report from Izea](#) suggests that self-isolation is increasing consumers researching future holidays. Regular travel consumers say they 'may' or will 'likely' purchase a future holiday while confined to their homes during the outbreak

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AN INTERNATIONAL PERSPECTIVE

VisitScotland works closely with other national tourism organisations around the world. We are an Affiliate Member of the UNWTO and Scotland's approach to tourism is often sought out by others. What these relationships also allow us to do is gather insight into how other destinations are responding to the COVID-19 crisis.

The UNWTO's key message - staying home today means being able to travel tomorrow – has resonated around the world. #TravelTomorrow emphasises the shared responsibility to put people first, to be patient and to prepare for the time when tourism can lead recovery efforts.

General priorities coming through from tourism bodies around the world:

- Financial support for our industry – now. This is in recognition of the strategic importance of tourism for our economies. More than almost any other sector, tourism can most quickly restore jobs and income to communities.

SPECIFIC DESTINATIONS

Consumer facing

- Most destinations have suspended all marketing activity but are preparing to support industry with staycation and other campaigns when the time is right.
- Liguria region – working with museums and galleries to provide virtual tours and experiences to maintain visibility of key product.
- Iceland – currently considering the feasibility of a government-funded scheme that would, at the appropriate time, help stimulate domestic tourism by offering all adults a voucher for use at visitor experiences / attractions across the country.

Industry facing

- Tuscany, Catalonia and other regions – supporting industry capability through delivery of digital labs; supporting business readiness with courses and webinars.
- Paris region (Île de France) – preparing a rollout of specially trained tourism ambassadors. When visitors are able to travel again, these uniformed ambassadors will be stationed around the region to welcome, reassure and provide information to visitors. It follows a similar approach after the 2015 terrorist attacks in Paris.
- Flanders – government providing €5m to support and protect social and youth tourism, recognising the importance of inclusive tourism for social impact and economic recovery.

MARKET INTELLIGENCE

BROADER INDUSTRY TRENDS

Industry adaptation to the COVID-19 situation has developed in several ways as further restrictions on movement have occurred:

Virtual Village Squares – Hotels are continuing to engage with guests through virtual channels through weekly pub quiz, party nights and bingo sessions. Hospitality providers are also targeting specific groups during this activity to engage with their own key clientele but also expand out to new segments including families, mature markets and LGBTQ communities. (Source: TrendWatching)

Pinterest has brought forward the release of its curate inspiration feature, to serve quarantined users. The Today tab provides daily inspiration with curated topics and trending Pins, making it easy to explore popular and timely ideas. This may provide insight into what tomorrow's traveller is thinking today?

Many fitness providers are providing online paid for classes. Are there other resources and facilities that can be commercialised for in virtual home participation? Restaurants and Hotels can provide paid for cookery classes, particularly around healthy local produce. Artisans can demonstrate their craft, particularly around transferable skills or as a platform for retailing their produce via online sales and delivery?

A survey conducted by CGA (18th March) showed that around half (53%) of the public are either currently using or planning to use, takeaway food delivery as an alternative to shopping during the current crisis. There was 13% of respondents reporting getting a delivery from a restaurant or takeaway for the first time or more often than usual in the last fortnight. Therefore restaurants are playing a vital role in feeding the nation. Look to the right channels to promote your new service and follow current official guidelines. (ncass.org.uk)

SCOTTISH TOURISM INDUSTRY

Having insight to track industry trends is essential for both short- and long-term strategic planning. With the unprecedented impact of COVID-19 situation traditional methods of insight scanning are not sensitive to the situation of individual business or reactive to the rapidly changing legislation and regulation we find ourselves under.

We are working on developing a more current forward indicator methodology to address this and will be interpreting a range of data to address the current state of the industry and its immediate outlook.

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MARKET INSIGHTS

UK

- UK is in week 2 of initial 3 week period of restricted movement, with UK government advising against all but essential travel and enforcing work from home measures. Scientific insight is that UK is in early stages of high growth phase.
- [Coach Tourism Association](#) is supporting UK wholesalers and coach operators with advice and have provided a legal helpline. Operators have cancelled all tours until 30 April 2020 and are dealing with cancellations, refunds and postponing tours where possible. Operators appreciate suppliers taking more lenient measures e.g. reducing group cancellation from 28 to 7 days.
- Loganair cut back to [emergency flight schedule](#); [easyJet](#) has grounded all flights; BA is operating reduced schedule and no longer operating out of [Gatwick](#), Ryanair have grounded over 90% of flights (DUB-EDI/GLA are part of limited schedule still operating). [Flybe](#) went into administration (5th March).
- Expedia are working on a recovery plan of action & expecting domestic market to pick up quickest when enter recovery stage.

GERMANY

- Germany issued a travel warning against all but essential travels abroad. The country is not under federal lockdown, but some cities have used lockdown measures at their discretion to contain the spread of COVID-19. All official measures are in place until 19 April (restrictions of public life / closing of schools etc.).
- Global airline carrier Lufthansa reduced operations down to 10%, with many employees now in short-time work. Austrian Airlines suspended all scheduled flight operations until 28 March.
- DER Travel Agents have started short-time work, TUI & FTi paused their programmes until April.
- The German federal government is supporting businesses having to register employees for short-time work, meaning social contributions are covered 100% and salaries of min. 60% by state aid up to a maximum of 12 months. Eligibility criteria: A minimum of 10% of staff needs to be facing more than 10% reduction in salary.

FRANCE

- Since 17 March, France is in lockdown for a minimum of 4 weeks (until 15 April).
- Eurostar and DFDS cancelled 50% of passenger traffic to the UK on their Channel routes. Brittany Ferries stopped all rotations until April 12. Global airline carrier Air France is reducing its flight capacity by up to 90%.
- TUI France put some employees in short-time work for the next 6 months. SETO – the union of the 70 biggest tour operators in France is postponing all trips until 30 April. They are offering vouchers to customers to rebook their holidays valid until 31 December min.
- The French government put in place measures to facilitate short-time work and to postpone business taxes and yearly financial contributions to safeguard jobs. With SMEs in mind, the state created a €2 billion emergency plan to help businesses whose sales turnover decreased 70% between March 2019 and March 2020. Tourism was mentioned as one of the sectors eligible for support.

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MARKET INSIGHTS

SPAIN & ITALY

- In Italy the entire country has been in lockdown since 9 March. Spain has been in lockdown since 14 March.
- British Airways, easyJet and Ryanair started reducing the number of flights to and from Italy early March when the northern regions of the country were already in quarantine and have gradually stopped operating most of their routes to the country. In Spain, Ryanair cancelled over 80% of their flights between 18-24 March. easyJet has since grounded all 344 aircraft.
- Large and small tourism operators from both countries experienced a high number of booking cancellations due to the fear or the impossibility of leaving the country. All concentrate on encouraging their clients to reschedule their tours instead of cancelling them.
- Governments in both countries introduced economic measures: Italy is not allowing employees to be made redundant and has allowed citizens to delay mortgage payments in case of unemployment; Spain implemented same measures in case of a reduction of regular income.

BENELUX & NORDICS

- Belgium & Luxemburg only allowing essential domestic travel, however borders remain open. Finland, Faroe Island & Norway require min 14 days' quarantine upon arrival, meaning borders are effectively closed. The Netherlands only allow travel for EU, EFTA & UK citizens.
- Scandinavian Airlines suspended all flight operations. Transavia & Ryanair suspended flights into the Netherlands and DFDS are pausing their Amsterdam-Newcastle sailings until 28 April.
- Tour operators are facing cancellations. Eagerness for rebooking trips is steadily growing after tour operators have been faced with having to cover cancellation costs and deal with loss of future income.
- The Dutch government has announced measures to help businesses by providing financial help for employers to help pay their employees' wages. Self-employed professionals can apply for an extra benefit. A €4k compensation for entrepreneurs in the Tourism Industry has been opened.

USA

- The White House announced an extension to its current travel ban to Europe to include passengers from the United Kingdom and Ireland in an attempt to stop the spread of the coronavirus in the U.S. effective 16 March. This ban is still in operation.
- President Trump extended social distancing guidelines through to end April, a change from the President's stated desire to reopen on April 12. The President referenced 1 June as the date when he hopes to see the country recovering.
- President Trump has signed the largest-ever US financial stimulus package, worth \$2tn (£1.7tn) to tackle the impacts of the coronavirus pandemic. This stimulus package will include \$58 billion in support for US airlines.
- The new stimulus will also enable direct payment to individuals and companies whose livelihoods and businesses have been affected by the pandemic.
- Feedback from US tour operators that they are continuing to place increased emphasis on asking consumers to amend and postpone bookings rather than cancelling outright.

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MARKET INSIGHTS

CANADA

- Borders closed to non-citizens and Canadian/US land border closed for a period of 30 days (from 20 March).
- WestJet and Transat will ground all International flights for April with the majority of staff placed on 'off duty' status or furlough. Air Canada will reduce to only 3 key destinations: London, Paris and Frankfurt between 1 – 30 April with staff also placed on 'off duty' status and managers on furlough.
- Insight Vacations, Luxury Gold, Trafalgar and Contiki have temporarily suspending all guided vacations globally for trips departing up and until 30 April. Temporary & permanent redundancies from Tour Operators noted
- \$82bn package announced, \$27 billion in support to Canadian workers and businesses to include Travel Agents and operators, plus \$55 billion to meet liquidity needs of Canadian businesses. No details of Airline support packages as of yet.

AUSTRALIA

- Australia is now essentially in lockdown with restrictions on international and domestic travel, and all non-essential businesses closed, including restaurants, cafes, bars and gyms etc. Schools currently remain open, with most states implementing new regulations to keep people at home.
- Qantas international flights cut by 90% until at least end May. Emirates ceased all flights from 25 March – will be reviewed regularly, Government support of airline confirmed 1 April. Qatar Airways is still operating 4 flights a week to Edinburgh from Doha until the end of April, and also assisting with repatriation flights.
- Tour operators are seeing temporary and permanent redundancies across industry as well as a significant number of travel agent store closures.
- Australian Government putting in place raft of financial support measures to assist small businesses and covering salaries of employees. Airlines and airports are petitioning the Government for additional assistance.

CHINA

- Sales of domestic and international travel remain suspended. The foreign ministry in china is advising against travel to COVID-19 affected countries including the UK. Anyone who has just returned from the UK to China quarantine for 14 days. CAAC announced one flight per carrier per week allowed in and out of China and each plane should be no more than 75% full.
- All foreign visitor and business visas suspended until further notice
- China's domestic tourism sector is starting to show signs of recovery
- Domestic flights rapidly resuming
- Low interest loans are being granted to tourism SMEs to aid cash flow.
- Large tour operators and OTA's, have been granted low interest loans to aid liquidity. Ctrip's preferential loan conditions have been extended to Ctrip's 5000 franchised branches.
- The Culture and Tourism Ministry announced they will provide support to tourism business, including refunding corporate deposit, loans etc.
- Immediately after the Chinese government announced public holidays after April, searches for air and train tickets increased by 40%.

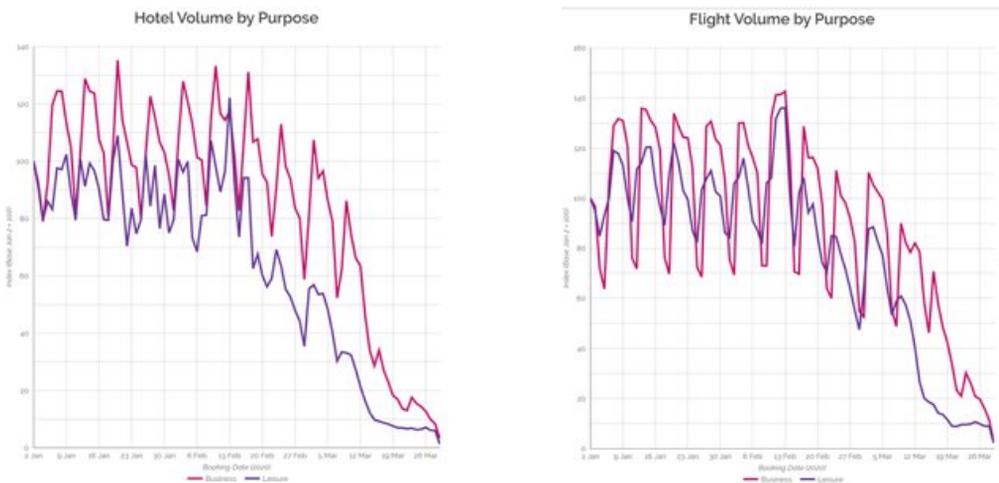
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DIGITAL INSIGHTS – THIRD PARTY

ADARA

ADARA provide insights to accommodation and flight search patterns, and also booking behaviours. The trends below are reflective of visitscotland.com patterns, with a rapid decrease in activity over February / March.

VisitScotland will monitor ADARA booking window data, which extends up to 91+ days in advance of departure. This will help inform timings for future marketing activity, when visitors are ready to consider travel once more.



BRANDWATCH

Coronavirus analysis on Social listening looking at worldwide conversations in English. Data gathered contains conversations in first person about “travelling to Scotland” or “visiting/planning a trip to Scotland” in the context of Coronavirus. For the purposes of this analysis, mentions from news sites have been excluded.

Conversations volume

There have been 77K mentions about “Coronavirus and Scotland” in the last 31 days. Mentions on the topic increased by 5000% compared to the previous month. When narrowing the search to conversations about Coronavirus and “travelling to Scotland”, volumes decrease to 5,116 mentions in the last 31 days. Conversations also increased by 3,500% compared to the previous month.

The increase in volumes, although exponential, is expected given the current circumstances, latest government guidance and the fast-changing nature of the issue.

In both cases the increase in mentions happens from 13th March onwards after further governmental guidance leads to cancellations of events and trips.

DIGITAL INSIGHTS – THIRD PARTY

BRANDWATCH



Figure 1: Conversations about Coronavirus and Scotland

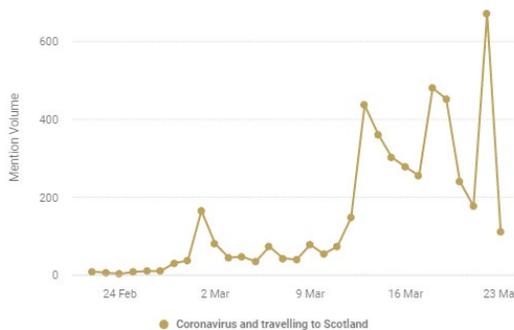


Figure 2: Conversations about travelling to Scotland or visiting Scotland in the context of Coronavirus

Main conversation topics

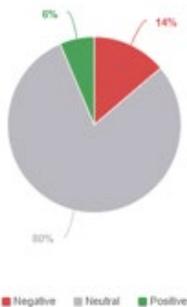
The peak in conversations is similar in both instances, with comments about the situation in Scotland, number of deaths, measures applied by the UK government and the role of the Scottish Government in the subject.

The need to be careful with hygiene and staying home when possible are constant topic during the whole period.

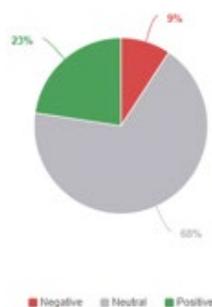
Online Sentiment

Due the nature of this issue, a higher percentage of negative sentiment is expected. Conversations are widely neutral and negative sentiment is higher when looking at the wider conversations (14%). When analysing conversations focused on “travelling/planning/holiday” to Scotland, negative (from 14% to 9%) and neutral sentiment (from 80% to 64%) decline in favour of a more positive conversation (from 6% to 23%).

Coronavirus and scotland: 77098 total



Coronavirus and travelling to Scotland: 5638 total



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DIGITAL INSIGHTS – OWNED CHANNELS

SCOTLAND.ORG

- Traffic volumes are decreasing but referrals to all partner websites remain relatively stable YoY
- March 1st - 21st saw a minimal decrease of only -0.91% (14,690 to 14,557) on last year's referrals
- A much greater drop has been seen in this period compared to the previous (MoM), down from 21.4K to 14.6K).

VISITSCOTLAND.COM

- There has been a marked decrease in the volume of Industry Referrals (clicks from vs.com to businesses own websites). For February, this reduced from 219k to 128k year-on-year, and March 1st-28th has reduced from 185k to 80k year-on-year (-57%).
- This is reflective of the wider trends we are seeing in both Google search volumes, and from 3rd party data partners.
- visitscotland.com organic traffic has decreased markedly across all markets. The decline has accelerated as COVID-19 takes hold in each country. Core markets are still generating visits to visitscotland.com, but is significantly down across all countries:

Organic Traffic over last 7 days (excluding today) compared to same dates last year as a percentage:



Organic Traffic over last 7 days (excluding today) compared to same dates last year as absolute figures:



Organic Traffic by UK country over last 7 days (excluding today) compared to same dates last year as a percentage:

Region	Sessions -	% Δ
1. Scotland	24,100	-74.4% ↓
2. England	22,881	-73.1% ↓
3. Wales	685	-64.9% ↓
4. Northern Ireland	423	-71.5% ↓

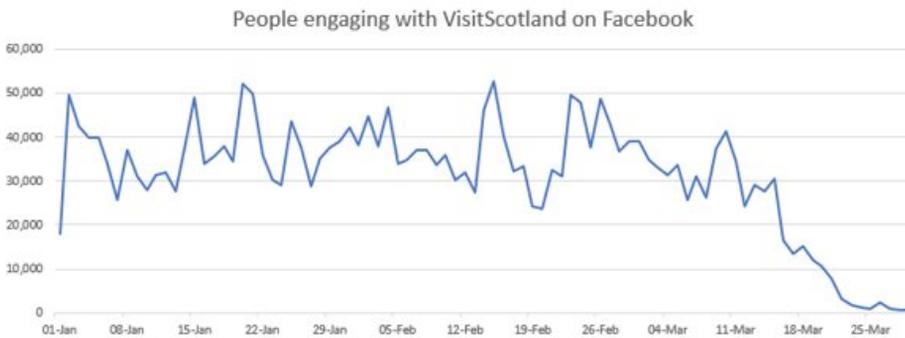
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DIGITAL INSIGHTS – OWNED CHANNELS

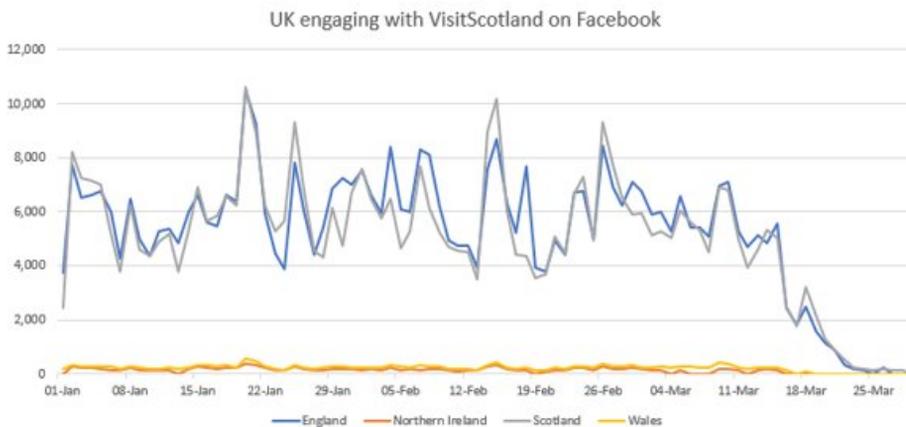
SOCIAL MEDIA

VisitScotland’s Social Media channels have enormous global reach, and it was encouraging to see how well that reach and engagement were initially able to withstand the COVID-19 crisis. Social Media offers escapism and holiday inspiration at a time most cannot travel, and Scotland has continued to be warmly received.

However, we are now seeing a decrease in engagement, with a marked decline following the [PM Statement on coronavirus](#), 16th March 2020.



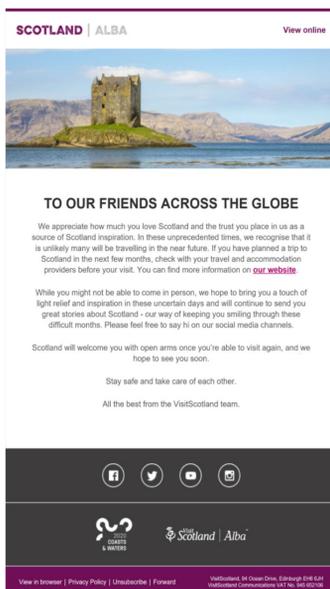
People engaging with VisitScotland on Facebook over past 7 days compared to previous 7 days:



VISITSCOTLAND ACTIVITY – PHASE 1 OF RESTRICTIONS

CONSUMER

- Consumer Social channels were paused on March 21st due to concerns visitors were still travelling and not following the 'stay home' message from government.
- During w/c 23rd March, we sent a message to “*Our Friends Across The Globe*”, an emotive email to reassure visitors that, once they can travel again, we will be ready to welcome them once more. The response to this has been overwhelmingly positive, with examples of feedback below.
- Consumer email communications have been scaled back to one per month, focussing on inspirational future travel ideas but with no immediate booking call to action
- Consumer PR activity has been all but paused, responding to reactive enquiries with longer lead times & intel-gathering via key global media contacts. Key insight take aways from our global media contacts are that we must acknowledge the situation head on whilst sharing any destination stories; desire for escapism; be responsible; human & personal stories to the fore & be hopeful. Proactive pitching assets being developed in synch with wider content plan, with an inspirational ‘keep dreaming of Scotland’ message to keep the destination front of mind among travel media.
- Following Phase 1 of restrictions, our content team developed and produced a new video within one week ‘*Absence Makes The Heart Grow Fonder*’ to be shared on our owned channel and through partners – inviting everyone to share their favourite memories of Scotland
- Further content assets in development to keep Scotland top of mind and encourage engagement, without specifically promoting travel and starting with new section on .com to encourage people to dream about Scotland. Content includes blogs on webcams in Scotland, origami you can make of Scottish icons such as Nessie and a unicorn, downloadable PDFs to colour in and Sounds of Scotland where you may not be able to see us but you can still see us



“Stay safe and well! Our trip in April is cancelled but we will be back later this year. Your emails and website have been bright spots!”

“Thank you for your message, thank you for your images, for your information which makes us dream from a distance. Thank you for allowing us to keep in touch with this land that we love so much and the Scots who are so human and generous. Take care of yourself and see you in New Year at Edinburgh”



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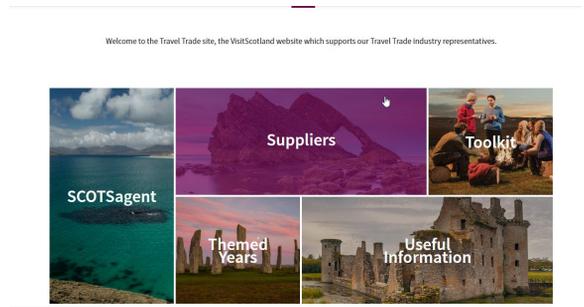
VISITSCOTLAND ACTIVITY – PHASE 1 OF RESTRICTIONS

INTERMEDIARY

- Work continues to support travel intermediaries at home and around the globe as they develop and adapt their Scotland programmes for 2021 and beyond.
- Following on the cancellation of VisitScotland Expo, our trade marketing teams, have continued to engage with the buyers who were planning to attend, providing product information and connections to the products they are seeking for clients

A series of industry webinars is being piloted and will complement existing VisitScotland Destination Training webinars and online education programme

- New trade assets are being developed on visitscotlandtraveltrade.com, including inspirational itineraries, product planning guides and videos.



VISITSCOTLAND ACTIVITY – PHASE 2 NEXT STEPS

- All market teams are preparing recovery plans individually for each market, including intermediary, consumer and PR activity
- Further content assets in development, including video promoting specific regions of Scotland and virtual tours / podcasts
- Creation of assets for Phase 3 including Staycation film and supporting assets, recognising that UK will likely be the first market to drive visits

INDUSTRY SUPPORT

VisitScotland.org | Visit our [dedicated advice page](#) for up to date information and advice on Coronavirus (COVID-19) for tourism businesses, including:

- Latest COVID-19 information and resources
- Practical advice on sharing content
- Tourism industry FAQs
- VisitScotland's response to COVID-19

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/coronavirus-advice

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](#)

DISCLAIMER:

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