

# VISITSCOTLAND COVID-19 UPDATE

## INTRODUCTION

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Dear all

This is the second in our 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 to help inform our plans as we move through different phases of this Covid-19 pandemic. From lock down into an early recovery phase and then longer term recovery planning, this will help us all be fleet of foot in responding to audience intent, interest and future travel planning.

While the focus of our collective efforts in this current lock down phase is to ensure we get the right support to businesses, we are also planning for early recovery marketing activity.

We know that the domestic market will be extremely important to us in the phase post lock down and very likely for the remainder of 2020, so in the coming weeks we will have more of an update around our thinking and plans and I am keen also to get your views on this too.

Market teams at VisitScotland are continuing to keep in touch with UK & international travel trade and there is an update of current and planned activity at the end of this report.

Stay safe everyone and if anyone would like us to cover anything specifically in future updates please drop me an email.

Kind regards

Vicki



**Vicki Miller**  
Director of  
Marketing & Digital

## TRAVEL INDUSTRY INSIGHTS

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Preliminary OECD estimates on the COVID-19 impact point to 45% decline in international tourism in 2020. This could rise to 70% if recovery is delayed until September.

Domestic tourism is also heavily affected by containment measures; however a quicker recovery is expected with an important role to play during the recovery phase.

Tourism is a significant part of many national economies -directly contributing, on average, 4.4% of GDP and 6.9% of employment in OECD countries.

Many governments have and are introducing tourism specific measures to address the immediate impacts on the sector and facilitate recovery.

Beyond the immediate responses, the OECD advocates policy makers will need to learn from the lessons of the COVID-19 crisis, to improve crisis management strategies, strengthen co-ordination mechanisms and better prepare destinations and the sector more broadly to respond to future shocks. (Source: [OECD](#))

OAG estimated 11.1 Million seats were removed globally by week beginning 6<sup>th</sup> April by scheduled airlines around the globe. That's an equivalent to a 22.7% reduction week on week. Weekly capacity is now just above one-third of that originally scheduled for the week and further cuts are being advised by airlines through to the end of May.

It is noted however, that with European and North American capacity cuts expected, this should mark the bottom of the curve. (Source: OAG)

# VISITSCOTLAND COVID-19 UPDATE

## SPECIFIC DESTINATIONS

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- Algarve Tourism is supporting the industry with their #DontCancelPostpone Instagram campaign
- Visit Albuquerque has [repurposed its usual hashtag](#) to share 'True Acts of Kindness', highlighting local tourism partners that are giving back, like those donating food to shelters
- Similarly, in rural California, the Mammoth Lake area is currently taking the position that 'Your Adventure Can Wait'. Until it is safe to travel and visit, and instead of investing money from local tax into marketing, they are helping fund initiatives in the community .

## BROADER INDUSTRY TRENDS

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- UK holiday social networking app Hangout on Holiday is recruiting locals in popular destinations to provide travellers with reliable information. They are looking to recruit volunteer travel ambassadors to give responsible local updates about where they live when the recovery in travel begins, to counter any possible fake news and give local insight. Hangout on Holiday believe that "once things slowly start to return to normal, there will be a natural thirst for information, from locals about what's happening, what's open and whether life is returning to normal."
- Consensus among commentators is towards domestic tourism and staycations being the driving force behind recovery strategy. Interestingly there are global hoteliers that are forecasting business travel will be part of the leading signals for growth in serviced hospitality and are looking at the OTA's as the channel this market will be booking through.
- Domestic leisure travel may start with day trips, as restrictions loosen with outdoor activities seen as potentially popular. Media reports predict direct bookings with providers are likely in an act of support to tourism businesses. To respond to this providers need to look to loyalty schemes, regular communication and conversation with their customer base and engaging content through social media channels. Furthermore developing digital skills, investment in new technology for online bookings and visitor engagement will be required to be ready to capitalise on these trends.

## SCOTTISH TOURISM INDUSTRY

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Key issues raised in the recent VisitScotland COVID-19 survey (20-30 March) include loss of income compounded by seasonality, support as grants not loans, business Interruption Insurance not paying out, support needed for self-employed including those falling between the cracks in support measures announced i.e. new start-ups, those using their own home and still having to pay existing bills, those renting and those who do not qualify for grant under current rules.

Further analysis may be found at <https://www.visitscotland.org/research-insights/about-our-industry/impact-covid19>

# VISITSCOTLAND COVID-19 UPDATE

## MARKET INSIGHTS

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### UK

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- UK is in week 3 of initial 3-week period of restricted movement (from 23<sup>rd</sup> March–13<sup>th</sup> April) with UK government advising against all but essential travel and enforcing work from home measures. Scientific insight is that UK is in high growth phase.
- The UK Government announced a package of temporary, timely and targeted measures to [support](#) public services, people and businesses.
- The Coach Tourism Association continues to support UK wholesalers and coach operators with advice and have provided a legal helpline. Operators have cancelled all tours until 30 April 2020 and focus is dealing with cancellations, refunds and postponing tours where possible. Several businesses have furloughed staff. Of those still operating, there are signs of interest in product development for future tours.
- 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. Flybe went into administration (5 March).
- Rail operators (such as LNER and ScotRail) are operating reduced services.

### GERMANY

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- The German government will wait until 20 April to decide whether current travel restrictions remain necessary and in place. Discussions around moving summer holidays into autumn are ongoing. This provides an opportunity for families, who are home schooling now, to invest in travels abroad later in the year.
- The German economy, although suffering a potential decrease of the GDP by 2.8 – 5.4% this year, is expected to recover quickly and significantly in 2021 – not only up to the pre-corona status quo, further growth is expected.
- Frankfurt Airport is set to close one of two terminals from 7 April, as <10% of normal passenger numbers are expected. Airlines have not yet published any recovery plans. Passenger operations at DFDS in Hamburg have been furloughed, with Amsterdam-Newcastle sailings paused until 28 April.
- Many tour operators are in short-time work, but interest in product development is slowly coming back.

### FRANCE

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- The French government extended the country's lockdown for another 2 weeks until 15 April.
- It is estimated that the impact of confinement measures on France's GDP will be between 2.6 and 3 points. Financial loss for households due to furlough/short-time work is estimated at 1.2 billion in a month.
- On 1 April, the Ministries of Transport & Ecology agreed on a plan to postpone taxes and aviation fees due between March and December 2020 to 2021/2022 to support airline operations.
- The Destination Management Company Best of Tours will be offering 10% discount on all their destinations including Scotland to all public health workers from 01/09/20 for a year.
- Supported by VisitScotland, the travel trade media l'Echo Touristique (which was meant to attend the European Expo press trip) published an inspirational [article](#) about Scotland as part of their 'Travel from your sofa' series.

# VISITSCOTLAND COVID-19 UPDATE

## MARKET INSIGHTS

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### SPAIN & ITALY

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- The Spanish government extended its country lockdown until 11 April. The Italian government extended lockdown until 13 April.
- Italy is supporting its economy with a further €400bn investment, of which half is to be made available to export businesses with revenue losses in the past weeks. This is in addition to the €340bn fund the government made available in March.
- Airlines have not yet published any recovery plans.
- Some Italian tour operators expressed an interest in product development, with one expressly asking VisitScotland staff to help review their new Scotland programme.

### BENELUX & NORDICS

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- Denmark plans to reopen day care centres and schools on 15 April as a first step to gradually relaxing a three-week lockdown. All remaining restrictions, including a ban on gatherings of more than 10 people, are staying in place until 10 May. The ban on larger gatherings remains in place until August.
- Sweden's government, which has pursued a light-touch approach to lockdown so far, is preparing to increase its powers to potentially lock down the country in late April.
- The Netherlands started border controls to North Rhine Westphalia in Germany in order to reduce non-essential travel between countries.
- Airlines have not yet published any recovery plans.
- Many tour operators are still handling cancellations and re-bookings of tours. Product development is not yet a priority.

### USA

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- 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 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.
- American Airlines, Delta Air Lines and United Airlines have all applied for support from the CARE stimulus which had a deadline of 3 April. The US Treasury is now reviewing all applications and will begin negotiations in due course.
- US Government is open to reviewing whether additional support is required so we may see more government support packages over the next few weeks to extend the support of the CARE stimulus.
- Some US operators have re-focused their content to focus on dreaming of future travel, virtual travel and providing future inspiration.
- Consumer media interest in 'armchair travel' stories continues & editors are stressing the importance of promoting wanderlust, because travel will return.
- Media anticipating a rise in visiting places where people 'feel better about themselves' - transformational travel will be back and also 'post-gloom honeymoon' when couples cooped up with children want to get away with only each other.

# VISITSCOTLAND COVID-19 UPDATE

## MARKET INSIGHTS

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### CANADA

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- Reminder: Borders remain closed to non-citizens and Canadian/US land border closed for a period of 30 days (from 20 March).
- Reminder: WestJet and Transat will ground all International flights for April with the majority of staff placed on 'off duty' status or furlough. Air Canada have reduced to only 3 key destinations: London, Paris and Frankfurt between 1 – 30 April with staff placed on 'off duty' status and managers on furlough.
- Tours Operators/Agents are continuing to rebook/cancel client bookings.
- A lot of media coverage regarding the provision of vouchers as a fair replacement for refunds as well as credit card chargebacks. One issue of vouchers has been if there was a failure on the registrants' part. The Association of Canadian Travel Agents (ACTA), IATA, and The Travel Industry Council of Ontario (TICO) have all waded into the conversation.
- Govt support UPDATED: Stimulus package up to \$107 billion now passed in law (previous \$82billion). Direct support for airports (approx. \$331m) but as of yet no support directly offered to airlines despite calls from the industry.

### AUSTRALIA

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- Australia continuing with strong social distancing policies across all states which include restrictions on international and domestic travel, and all non-essential businesses closed. There are currently no timescales on how long these will be in place but the impact of these on infection rates is being closely monitored.
- Currently hugely reduced capacity from Australia from all airlines, with majority of international departures predominantly assisting with repatriation flights. Airlines have applied to the Australian Government for support, no current update on this.
- Tour Operators currently focused on managing cancellations for 2020 bookings, they are seeing temporary and permanent redundancies across the industry as well as a number of travel agent store closures.
- The Australian Government has indicated that the raft of financial support packages available for businesses will be available for 6 months.

### CHINA

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- From Jan to Mar the civil aviation market in China dropped by 80% - load factors hit a low of 40% on heavily reduced operations. They are now climbing (to around 60%) with more routes. China's return to work + domestic travel restrictions relaxed = slow resumption of domestic air services.
- China is a cargo heavyweight and key to the global supply chain. On 24 Mar the Chinese government declared it would make it a priority to support "unimpeded" cargo flights and urged the rest of the world to do the same. Passenger aircraft carry about 50% of the world's air cargo (so suspension of passenger routes is majorly disruptive).
- The Ministry of Culture and Tourism signed an MOU with the Industrial & Commercial Bank of China offering tourism business credit worth £11.36 billion to help market recovery.
- Some provinces have reduced the working week to 4.5 days to boost short haul domestic tours
- Huge sales events are leading domestic recovery – TikTok, Mafengwo and Ctrip launched their market recovery campaigns with the focus on domestic products with huge discounts
- Last weekend, a national holiday long weekend, some domestic attractions offered free entry to boost visits. Yellow Mountain, which comprises 29 attractions, had to close its site when 200,000 visitors came in one day

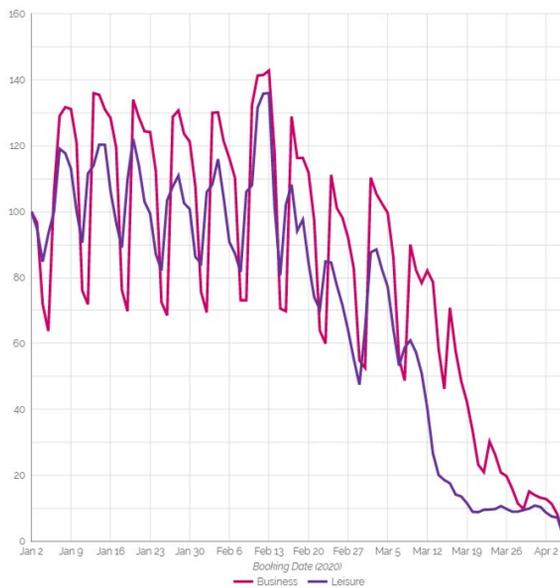
# VISITSCOTLAND COVID-19 UPDATE

## DIGITAL INSIGHTS – THIRD PARTY

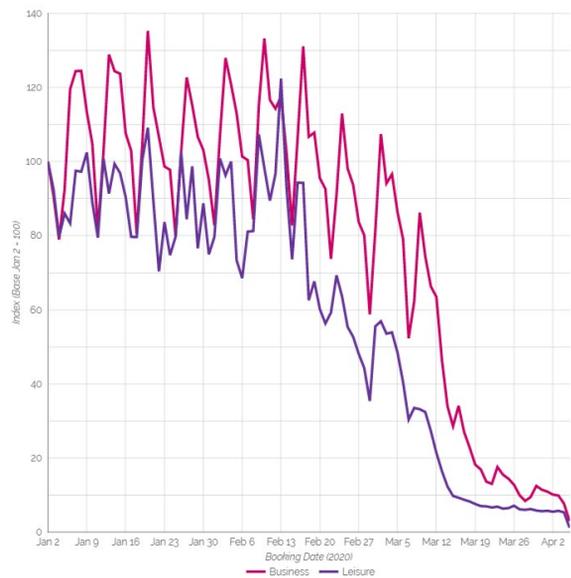
### ADARA

ADARA provide insights to accommodation and flight search patterns, and also booking behaviours. The charts below represent all EMEA activity within Adara's ecosystem, and the trends are reflective of visitscotland.com patterns, with a rapid decrease in activity over February / March.

Flight Volume by Purpose



Hotel Volume by Purpose



### BRANDWATCH

Our social listening analysis looks 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. Online conversations are gathered from public facing sites. This includes public sites like Twitter, blogs and forums. Facebook is out of scope.

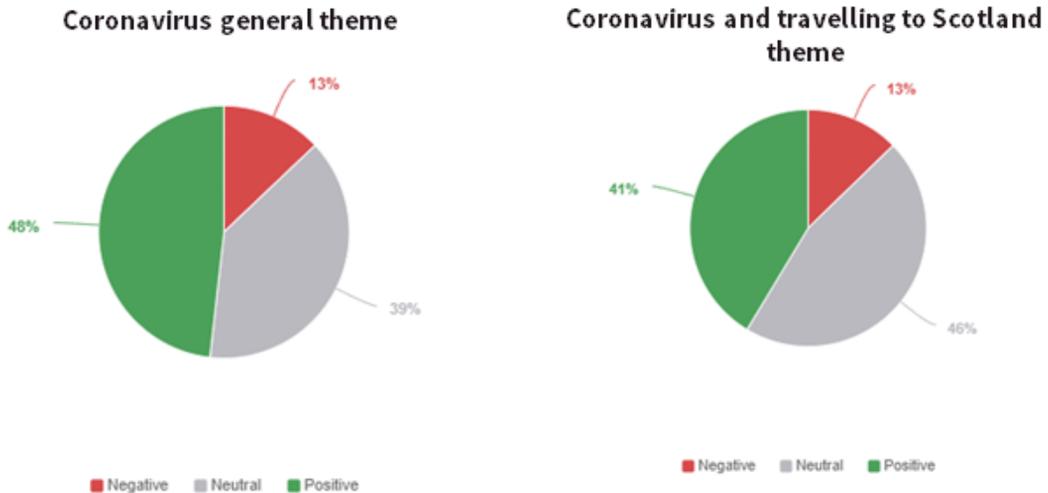
- We identified 4k relevant conversations about Coronavirus and Scotland during the last 7 days. Conversation volumes decreased by 33% compared to the previous week.
- Narrowing the search on conversations about COVID-19 and “travelling to Scotland”, volumes of mentions decrease to 2.4k relevant mentions.
- In both instance, the **highest volumes** were driven by the news of Scotland’s CMO resignation on **5 April**.
- Conversations are taking place mostly **on Social Media**: Twitter 76% and Instagram 22%. “Travelling” themed conversations shift slightly from Twitter to Instagram (62% on Twitter vs 38% on Instagram). This is expected as Instagram is a better channel to share images and to gather holiday inspiration.

# VISITSCOTLAND COVID-19 UPDATE

## DIGITAL INSIGHTS – THIRD PARTY

### BRANDWATCH

- Online sentiment is positive to neutral in both instances (Covid-19 general and travelling specific conversations).
- Negative sentiment is driven by users' reactions to news and updates about COVID-19, such as Scotland's CMO actions and the cancellation of Test Kits for Wales.



- There were a total 2,357 relevant mentions about “travelling to Scotland” in the context of COVID-19 within the past week. Volumes decreased by 30% compared to the previous week. This is expected as travelling is not possible now or in the nearby future, therefore people are not actively looking or planning for it.
- The main themes of conversations were:
  - The lockdown
  - News of Scotland's CMO resignation
  - General encouragement and positive message: stay home, stay safe
  - Travelling plans: a small percentage of mentions from users who had to cancel their trips, seeking for refund information from businesses, talking about past trips to/around Scotland or mentioning when they'll be able to travel again.
- Social media\* remains the main channel for online conversation about COVID-19. Twitter (62%) and Instagram (38%).
- Online sentiment is positive to neutral.
  - Neutral conversion is driven by users sharing local updates and news.
  - Positive conversations encourage people to stay safe during the lockdown period, as well as sharing pictures of landscapes and nature, jokes and memes.
  - Negative sentiment is driven by news on COVID-19 and people sharing their feelings about the situation.

# VISITSCOTLAND COVID-19 UPDATE

## 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

- Traffic has fallen significantly over the past week again, with Scottish and RoUK markets seeing the largest YoY drops, retaining only ~30% of their traffic.
- The US and French markets have retained a little under 50% of their traffic, while Italy, Germany and Spain have managed to retain ~60% of their traffic.

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:

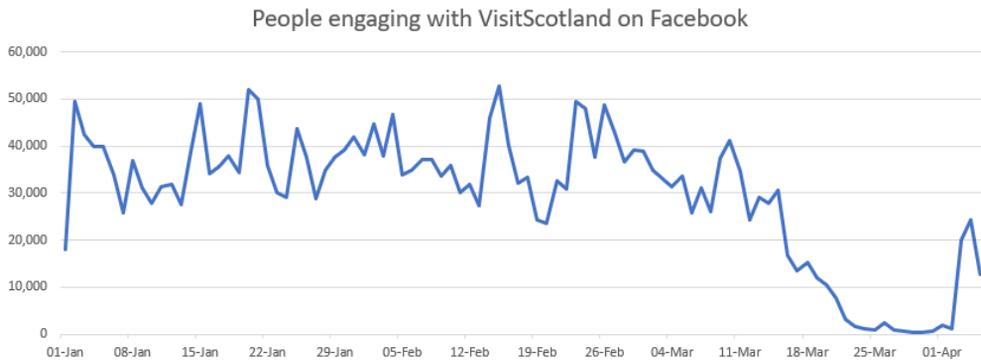
| Region              | Sessions | % Δ    |
|---------------------|----------|--------|
| 1. England          | 29,596   | -67.1% |
| 2. Scotland         | 27,187   | -72.0% |
| 3. Wales            | 975      | -52.9% |
| 4. Northern Ireland | 689      | -55.4% |

# VISITSCOTLAND COVID-19 UPDATE

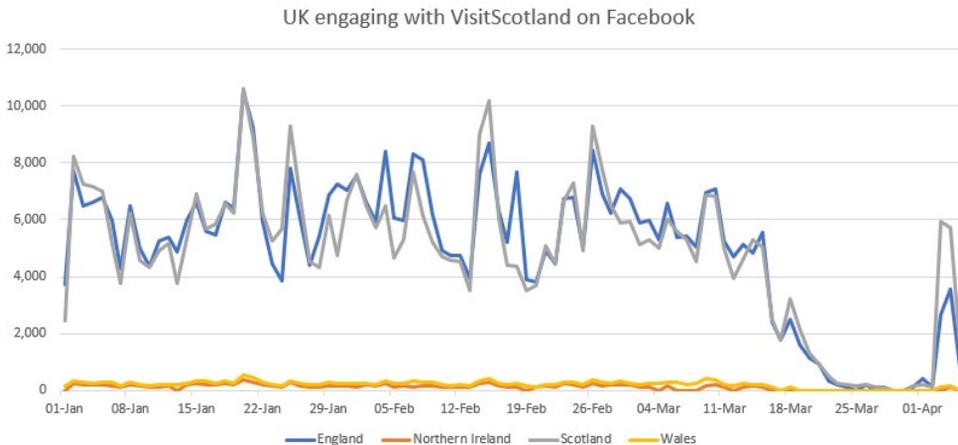
## DIGITAL INSIGHTS – OWNED CHANNELS

### SOCIAL MEDIA

After a period of suspended posting in response to the lockdown announcement and visitors still arriving at Scottish tourist destinations, posting was reactivated on Friday 3 April with the Absence video which saw great performance and revitalised engagement on our channels. However, with posting planned to be less frequent, engagement will unavoidably be lower, and a clearer understanding of this will be available next week.



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

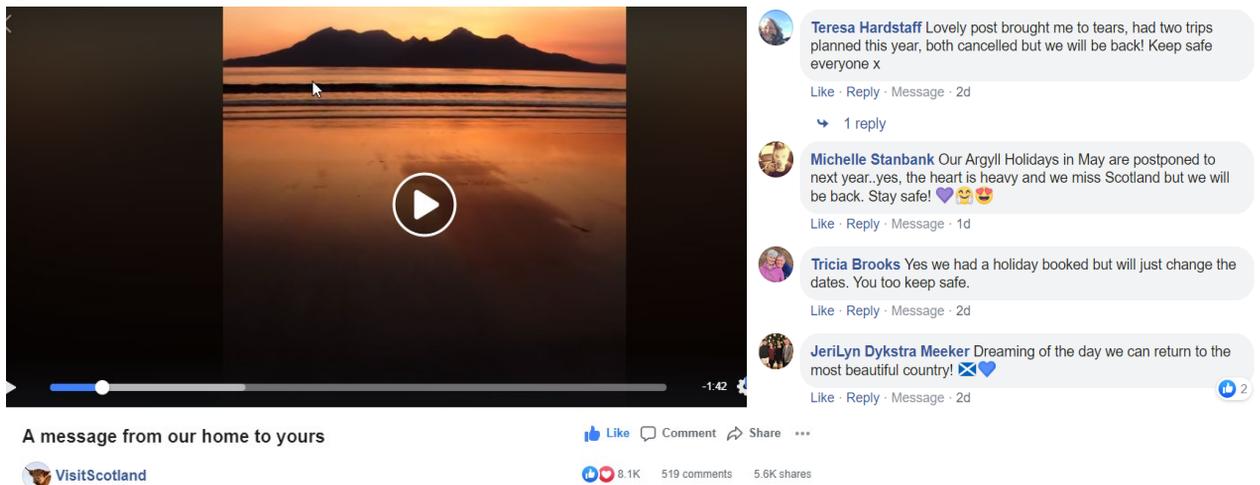


# VISITSCOTLAND COVID-19 UPDATE

## VISITSCOTLAND ACTIVITY – PHASE 1 LOCKDOWN

### CONSUMER

- Consumer Social Media posting was restarted on Friday 3 April, launching with our new "Absence makes the heart grow fonder" film across all channels and markets. We continue to reach out to our followers and encourage them to enjoy from their own homes the Scotland they love.
- VisitScotland's Content and Multimedia team scripted, developed and edited the new film (whilst working from home), sending a virtual hug to all fans of Scotland at home and across the globe.



- Distributed across all VisitScotland's social channels and shared across our networks, the film has had a phenomenal response:
  - 1.6m people were reached in the first 4 days
  - 530k people viewed the video (definition of "view" varies between channels)
  - 19x more views on YouTube than typical videos on the channel do in their first 4 days
  - 69% more reach on Facebook than the average VS video this year
  - 188% more reach on Twitter than the average VS video this year
  - 14% more reach on Instagram than the average VS video this year
- The film has also been shared with VisitScotland's media and strategic partners, a number of whom are sharing it on including Matador network (US), Lonely Planet, DFDS, Stena Line Ferries, Family Traveller (UK) and Afar (US).
- As a follow up to the *Our Friends* email, which promised customers a touch of light relief, inspiration and stories about Scotland, on 3 April we sent an *Experience Scotland from home* email to all markets which included the video message from the team that *Scotland will be waiting for you*, image gallery and video playlist of iconic views plus audio content including podcast, Tour Guide tales and Sounds of Scotland.
- A press release entitled 'Enjoy a virtual hop around Scotland this Easter' was compiled and distributed to consumer media across our target markets this week. The release highlighted all the ways that visitors can use the wonders of technology to transport themselves to a virtual Scotland, whilst staying safe at home.

# VISITSCOTLAND COVID-19 UPDATE

## VISITSCOTLAND ACTIVITY – PHASE 1 LOCKDOWN

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### INTERMEDIARY

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- On 1 April – the date that VisitScotland Expo had been due to start, an email was sent to all registered buyers, re-iterating that the VisitScotland teams are here and ready to help - reinforcing no travel, dream now, travel later messaging.
- Market teams are now continuing their key account management, reinforcing no travel, dream now and travel later messaging, and offering a range of targeted support (depending on the needs of the intermediary) including:
  - Suggested itineraries, including cancelled Expo fam trips
  - Content, including imagery and video, including the new Absence film
  - Virtual tours, where available
  - Introductions to specific Scottish businesses, where appropriate
  - The VisitScotland team is here with assets and inspiration to help with product development and planning when time is right.
  - Ongoing intelligence gathering from tour operators, travel associations, consortia and OTAs to feed into marketplace reports

## VISITSCOTLAND ACTIVITY – PHASE 2 EARLY RECOVERY PREP

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- Investigating opportunities for virtual BDM activity plus scenario planning for in-market events later in the year (Oct 2020 – March 2021)
- A series of industry webinars is being piloted to complement existing VisitScotland Destination Training webinars and online education programme
- New trade assets are being developed on [visitscotlandtraveltrade.com](https://visitscotlandtraveltrade.com), including new inspirational itineraries, product planning guides and videos

## INDUSTRY SUPPORT

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**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](mailto: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](https://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](https://visitscotland.org/news)

**Social media** | Stay in touch with the latest from VisitScotland on [LinkedIn](#) or [Twitter](#)

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### CONTACT US:

VisitScotland  
Ocean Point One  
94 Ocean Drive  
Edinburgh  
EH6 6JH  
T: 0131 472 2222  
[business.communications@visitscotland.com](mailto:business.communications@visitscotland.com)  
[www.visitscotland.org](https://www.visitscotland.org)