

VISITSCOTLAND COVID-19 UPDATE

INTRODUCTION

Dear all

Welcome to this week's edition of VisitScotland's round up of insights and data from across our global network of contacts and sources. As we hopefully continue on track to reopening the tourism sector on 15 July, this will be last update in this current format. We will continue to provide insights and information via visitscotland.org, with pointers from VisitScotland's e-update, so please make sure you're signed up to receive these weekly.

VisitScotland will continue to share information about our plans as we work together to enable recovery for the tourism industry – if you missed my recent webinar, you can catch up [here](#). And Malcolm Roughead will be sharing how VisitScotland is working with the tourism industry in a webinar on Thursday 9 July at 9.30. Sign up [here](#), or as always, a recording will be posted on visitscotland.org next week.

There's no doubt that recovery from this pandemic is going to be a long haul, with bumps along the way, but working together, we can build a stronger, more sustainable tourism economy.

Stay safe

Vicki



Vicki Miller
Director of
Marketing & Digital

TRAVEL INDUSTRY INSIGHTS

With the ease of lockdown in many parts of the world, [ILTM](#) - the world's largest portfolio of luxury travel events - has revealed the results of international research among their travel industry network. The objective to understand the key drivers and trends of how, where and when wealthy consumers plan to start travelling again.

Since the outbreak of Covid-19, 64% of the 1000 private planners, individuals and agencies across all global regions surveyed said they had taken travel bookings from their clients; half of the bookings were to take place by December 2020. 72% of Concierge Companies have received substantial bookings and over half of all surveyed said they were confident the luxury travel industry will rebound within a year.

Always the trend setters, 59% of luxury personal travel advisors report their clients want information on executive automobile travel as their preferred first holiday choice reaffirming the trend for domestic travel as a priority on the return to leisure trips. 22% of clients were considering other forms of travel which included private options such as jets and yachts, among others.

As destinations start opening up; the ILTM research shows an insight in choices for international travel with Greece, Italy, Maldives, Caribbean, and Europe being the most popular destinations. The barriers to travel are unsurprisingly health concerns and quarantine rules (both at 64%) as being the core reasons that many clients felt unable or unwilling to travel.

The key trends from the survey of luxury travel highlight the importance of safety and security, being closer to home, the desire for shorter trips and private villas, the indication of family and small close groups connecting again. These are consistent with other sectors and segments of tourism consumers, reinforcing the approach the VisitScotland marketing and industry strategy is taking. One lesson that was clear by listening to the luxury market was the time spent strengthening client relationships, to touch base and just chat.

VISITSCOTLAND COVID-19 UPDATE

CONSUMER BEHAVIOUR HORIZON SCANNING

Please see below for a summary of the U.K. Covid-19 Consumer Tracker Report for week 6, based on fieldwork from 22-26 June. Full results can be seen here: <https://www.visitscotland.org/research-insights/trends/uk-holiday-intentions>

Given last week's announcement over the loosening of lockdown in England (but not in Scotland or Wales) the perceptions of when 'things will return to normal' shift ever further into the future, with just 39% expecting 'normality' by the end of the year. However, we are seeing confidence in the ability to take a domestic trip begin to climb and the proportion of those claiming they will go on a UK short break or holiday rising significantly to 24% (versus 20% last week)

Other points of note:

- The national mood edges up by +0.1 to 6.7/10, lifted by slightly more describing their mood within the 9-10 range (19% versus 15% last week).
- However, fewer people compared to last week believe the 'worst has passed' (27%) regarding Covid-19 while more consider the 'worst is yet to come' (35%) which are -3% and +2% respectively versus week 5.
- There continues to be little expectation things will be returning to normal anytime soon, with slightly fewer expecting 'normality' by September (17% versus 18% last week). Extending the period to December also exhibits a decline in expectations of 'normality' (39% compared to 41% in week 5).
- The 'Appetite for Risk' score continues to inch up, currently standing at 2.38/4. Levels of comfort are clearly related with proximity to people, with travelling on public transport remaining the activity people are least comfortable doing in the current circumstances.
- Confidence in the ability to take a domestic short break or holiday is beginning to exhibit some improvement compared to last week, at 14% for July (+2%), 29% in August (+4%) and 43% by September (+3%).
- The main reasons cited among those lacking confidence have tended to be led by structural limitations such as having 'fewer opportunities to eat or drink out' or 'restrictions on travel imposed by government' (45%). These remain key, but have been overtaken this week by 'concerns about catching COVID-19'.
- When asked to compare to last year, 39% of U.K. adults expect to be taking fewer domestic short-breaks and holidays respectively. These proportions remain stable week-on-week.
- The proportion expecting to go on a domestic short break or holiday by this September increased by a significant margin this week, to 24% (versus 20% in week 5).

CONSUMER BEHAVIOUR HORIZON SCANNING

- In terms of region/nation likely to be visited between now and September, the South West continues to dominate with 20% of those intending to go on a domestic trip during this period citing this as their destination. followed by Scotland at 13%. The South West and Scotland also lead for visits planned to be taken from October onwards.
- For the summer period, countryside/village and traditional coastal/seaside town destinations continue to lead with 34% and 33% shares respectively. Cities again receive a greater proportion of trips scheduled from October onwards, but continues to be ranked third.
- For the June-September period, there remains a broadly even split between the leading four accommodation types, although from October, hotels/motels/inns and commercial rentals (such as holiday apartments or cottages) are exhibiting a stronger preference.
- Of the reassurances people are seeking in order to feel comfortable staying in a hotel, measures to encourage social distancing narrowly leads over measures to reduce contamination (e.g. hand sanitisers and enhanced cleaning regimes). Offering free cancellations also remains important, being the second most cited reason.
- As restrictions lift, outdoor areas and activities (e.g. beaches, trails, theme parks) look set to attract higher than usual levels of visitors than normal, while predominantly indoor activities/venues (e.g. restaurants, spas, museums, galleries) are likely to face a lengthier period of subdued demand.

Specific analysis on 'Scotland intenders' will also be available on the website later this week

VISITSCOTLAND COVID-19 UPDATE

MARKET INSIGHTS

UK

- The 'R' rate in the UK is reported to be between 0.7 and 0.9 and in Scotland, reported to be between 0.6 and 0.8, consistent with the previous week. Covid-19 alert for the UK is level 3.
- The UK Government (England) moved into phase 3 of easing lockdown from 4 July with hospitality businesses like restaurants, pubs and accommodation re-opening.
- Reminder, a 'one metre plus' rule for physical distancing was introduced in England from 4 July and face coverings remain mandatory on public transport.
- Reminder, Scotland, Wales and Northern Ireland administrations have outlined their own phased plans to easing lockdown.
- Scotland is in phase 2 of recovery with restrictions easing in stages. On 3 July, the 5-mile travel distance restriction was relaxed, self-catering accommodation without shared facilities could begin to reopen and children 11 and under no longer need to physically distance. From 6 July, **outdoor** hospitality can reopen with physical distancing. Indicative dates for phase 3 include; 10 July, households can meet indoors with up to a maximum of two other households, 13 July, indoor shopping centres can re-open and 15 July, all tourism businesses can resume operations. All with physical distancing in place.
- Reminder, the Scottish Government has published [guidance](#) for tourism businesses, outlining steps to reopening safely and a UK-wide industry standard and consumer mark 'Good to Go' has been developed to provide confidence for visitors, communities and tourism businesses.
- The Scottish Government will retain 2 metres as the default physical distancing requirement for Phase 3 but introduce exceptions to this requirement if practicable mitigating measures can be implemented. Sectors considered appropriate for exceptions, pending agreed mitigations are; public transport, hospitality and retail.
- Face coverings are mandatory on public transport in Scotland and will be mandatory in shops from 10 July.
- Reminder, NHS Test and Trace service has been implemented in the UK allowing anyone who develops Covid-19 symptoms to be tested and contact tracing to be carried out.
- On 4 July the FCO updated its global advisory against 'all but essential' travel exempting destinations that no longer pose an unacceptably high risk for British travellers. Full list [here](#).
- Current Coronavirus regulations mean that you must self-isolate for 14 days if you return to the UK from a country outside the common travel area. The UK Government (England) has now introduced travel corridor exemptions. From 10 July you will not have to self-isolate when you arrive in England, if you are travelling or returning from one of the [countries with travel corridor exemption](#) and have not stopped in a country not on the list.
- OTA insight is showing increased domestic searches for Scotland for the coming months.
- UK airline routes (Loganair, Ryanair, BA and easyJet) continue to recommence.
- Increased hygiene measures are being implemented across transport operators (air, rail and ferry) including limited capacities, enhanced cleaning and mandatory face coverings.
- The Coach Tourism Association continues to liaise with UK wholesalers and coach operators with advice and support.
- UK travel media is focused on domestic travel and interested in Scottish businesses plans for reopening.

VISITSCOTLAND COVID-19 UPDATE

UK

Social Listening UK - Global English (predominantly UK)

VisitScotland is monitoring social media conversations using Brandwatch social listening tool. This gives us an understanding of discussion points, sentiment towards holidaying and view of holiday intentions. This tool does not monitor all social media conversations therefore insight should be understood as a guide or indication of main topics and trends on a subject.

- From 29 June - 5 July, we identified around **6.5K** relevant conversations about Holiday intentions from the UK. The main conversations were about **no quarantine period with airbridge countries; local lockdowns and the potential holiday booking implications**; whether it is risky to book a holiday this year and booking holidays in the UK instead of going abroad.
- Most of the conversations take place on Twitter (82%) where users write about their opinions and feelings about the current lockdown easing measures and express their desire to book a holiday for late 2020 or 2021 or go on a staycation in the UK.
- The trending hashtags are: **#staycation, #roadtrip and #staysafe**.
- 13% of chatter is on forums. Users turn to forums to ask questions and look for advice about refunds, whether to book a holiday with airbridge countries or whether to cancel holidays for later in the year.
- Online **sentiment** about holiday intention **in the UK is neutral (41%)**. Positive conversations (31%) are driven by users excited about **booking staycations in the UK** and summer holidays abroad going ahead; whilst negative chatter (28%) is driven by users **feeling it is too soon to open up to tourism**, expressing their disappointment over cancelled holidays and poor customer service from airlines and travel agencies.
- A zoom-in into online conversations about travelling to or holiday plans in Scotland showed people are talking about **booking a self-catering holiday in Scotland**. There is also concern about too many tourists coming to Scotland.

IRELAND

- Reminder, the Irish Government accelerated their roadmap to recovery plans from 5 phases to 4.
- Reminder, Ireland entered phase 3 of easing lockdown restrictions on 29 June. Cafés, restaurants, pubs and hotel bars can reopen with guidelines (e.g. must serve food), as well as hotels, hostels, caravan parks and holiday parks. The stay local message has been eased and residents can now travel anywhere in Ireland (including tourist travel to offshore islands). Museums, galleries, theatres and other cultural outlets can also open, subject to mass gatherings permitted up to 50 people indoors and 200 people outdoors.
- Messaging is now to 'Stay Safe' and people are urged to use judgement and take personal responsibility. 2m physical distance is still in place and it is now mandatory to wear a face covering on public transport.
- Phase 4, the final phase is planned for 20 July. Pubs, bars and hotel bars can re-open fully (no requirement for food service). If the presence of the virus remains low, mass gatherings will rise to 100 people indoors and 500 people outdoors.
- Reminder, the Irish Government advise against all non-essential travel overseas and a 14-day quarantine period is mandatory for all passengers arriving at Irish ports and airports (until 9 July).
- Ryanair's Dublin to Edinburgh/Glasgow routes resumed last week and Aer Lingus regional domestic routes are recommencing in July/August. Increased hygiene measures including mandatory face coverings, deep clean of aircrafts and contactless processes have been implemented.
- Travel media is focused on domestic trips/ holidays.

MARKET INSIGHTS

GERMANY

- Germany's R rate was reported at 0.97 on July 6.
- Lockdown restrictions to contain the local outbreak of new infections in North Rhine Westphalia have been lifted as the area is no longer classed as high risk.
- Regulations around physical distancing and events still vary between the different states. Contact restrictions in Saxony-Anhalt expired on July 2, and have since been replaced by recommendations. Private parties with up to 50 people as well as outdoor events and markets are now permitted up to 1,000 people.
- Serviced apartments in Germany are using a #Stay-Safe-Heart to show that they are complying with hygiene and safety standards. As opposed to the traditional hotel industry, the segment generated an average occupancy rate of around 40% in April and May. As early as June 2020, they returned to a level of 70 to 80%.
- At Frankfurt airport, departing and arriving passengers can visit a Covid-19 "Walk-in Test Centre" located near the terminal building and the main train station. The current capacity is around 300 tests per hour. This is probably going to be in place until the end of July 2021.
- From August onwards, airline carrier Lufthansa will be resuming flight operations from Frankfurt and Munich into Edinburgh.

Social listening – Germany

VisitScotland is monitoring social media conversations using Brandwatch social listening tool. This gives us an understanding of discussion points, sentiment towards holidaying and view of holiday intentions. This tool does not monitor all social media conversations therefore insight should be understood as a guide or indication of main topics and trends on a subject.

- Between 29 June and 5 July, we identified **934 relevant conversations** about holiday intentions from Germany. Chatter on the subject **increased by 0.2%** compared to the previous week.
- The main conversations were about people sharing their frustrations over cancelled trips/rebooking's/refunds, people looking for domestic and international holiday inspiration and sharing their travel plans for the summer and seeking advice for upcoming trips abroad.
- Online sentiment is neutral (34% of total chat) to negative (39% of total chat) as the conversation is dominated by users' concerns over future holidays and frustrations over cancelled trips and refunds.
- The trending hashtags are: #urlaub, #urlaubindeutschland, #supportyourlocals

MARKET INSIGHTS

FRANCE

- French authorities detected a small cluster of new infections in a school in Lyon: around 450 people (pupils and staff) were asked to get tested and self-isolate until July 13.
- Brittany Ferries resumed its sailings between France and England on June 29. New sanitary and safety measures are in place: masks are mandatory within the Port Terminal and on board at all times. Only cabins are available to limit contact between passengers. The ferries will operate with limited capacity (50% on most ferries – this measure will be in place until at least mid-July). Disembarkment will be staggered to avoid overcrowding in stairs, lifts and garages. Brittany Ferries forecasts a loss of turnover between March and the end of October of between €200 and €250 million. A video explaining the new measures on board is available [here](#).
- The Louvre re-opened on July 6 after a 16-week closure, but with nearly a third of its galleries still shut. The museum and art gallery has lost more than €40 million in ticket sales during almost four months of lockdown. Most of the museum's most popular drawings, like the "Mona Lisa", and its vast antiquities collection, will be fully accessible to visitors. Other galleries, where physical distancing is more difficult, will remain closed. All visitors will be required to book a time slot. Both staff members and visitors over the age of 11 will be required to wear a mask in the museum.. Independent tour guides are allowed to bring groups of up to 25 people. However, in order to respect physical distancing measures, they will be required to use headsets and a microphone.
- Following last week's announcement on quarantine easing in England, French travel trade contacts are increasingly enquiring about the situation in Scotland and when it will be safe for their clients to travel again. There are also increasing requests for 2021 historic and cultural events as well as responsible travel itineraries.

Social listening – France

VisitScotland is monitoring social media conversations using Brandwatch social listening tool. This gives us an understanding of discussion points, sentiment towards holidaying and view of holiday intentions. This tool does not monitor all social media conversations therefore insight should be understood as a guide or indication of main topics and trends on a subject.

- Between 29 and 5 July, there were over **2,000 relevant conversations** about holiday intentions in France. Conversations on the subject increased by 7% compared to the previous week.
- The main conversations were people talking about finally being able to plan holidays, beautiful scenery and the best holidays in their life.
- Online sentiment remains positive on a weekly basis. **Positive sentiment (62%) has increased by 15% compared to the previous period**, likely to be driven by the start of the summer holidays in France. Conversations are about the excitement of finally being able to plan holidays. Negative sentiment (25%) seems to have moved from cancellation frustrations, to the fact that holidays in France have replaced holidays abroad, which are described as not as exciting.
- The mentions about Scotland are from people **reminiscing about past holidays** or sharing their travel experience for inspirational purpose.

VISITSCOTLAND COVID-19 UPDATE

SPAIN & ITALY (& PORTUGAL)

SPAIN

- Spanish authorities re-imposed mobility restrictions in the areas of A Mariña, in Galicia, and Segrià, in Catalonia, following local Covid-19 outbreaks. The restrictions largely involve travel bans into and out of the affected areas (travel for essential purposes only), compulsory wearing of face coverings in outdoor spaces within the areas and limitations to maximum group sizes and capacities in bars and restaurants. The lockdown does not affect businesses, which can continue to operate, and people are allowed to leave their homes. The county of Segrià, home to a sizable number of abattoirs and agricultural firms, experienced a much higher increase in Covid-19 cases compared to the rest of Catalonia over the past week. Figures released by the Catalan health department on Monday revealed that the number of new infections discovered in Segrià doubled in one week, increasing from initially 266 up to 524 in the last seven days. Re-imposed lockdown restrictions will affect over 200,00 people.
- Booking.com launched a campaign to incentivize customers in Spain, who had to cancel a reservation within the country due to Covid-19 travel restrictions. To encourage customers to book the same accommodation again, Booking.com is offering a 15% discount (up to a maximum of €100), valid for reservations made until December 31, 2020 with a departure date prior to April 30, 2021. To provide further support to its partners, Booking.com is waiving the commission for reservations made as part of this campaign.

ITALY

- Owners of Italian tour operators Quattro Passi and Mister Holiday Vicenza Centro are going ahead with their plans of opening a travel agency in Scotland. The new company will ease payments in GBP to Scottish suppliers and will ensure business continuity after Brexit. With many Italians thinking about staycations this year, the new company is only expecting new bookings for Scotland to commence in 2021.
- Both Italian and Spanish tour operators are more and more eager to know whether existing bookings towards the end of July can go ahead without quarantine restrictions.

PORTUGAL

- The Portuguese government decided to further nationalise airline carrier TAP Air Portugal as shareholders did not vote in favour of the government's terms and conditions for the proposed €1.2 billion loan needed for the airline's recovery. As a result, Portugal's government decided to invest €55 million to increase its own shareholder value to 72.5%. The remaining 27.5% are owned by Brazilian-American businessman David Neeleman (22.5%) and the airline's employees (5%).

BENELUX & NORDICS (PART I)

BENELUX

- DFDS Seaways is resuming its sailings from Amsterdam on July 15 and from Newcastle on July 16. Passengers are advised to keep physical distance onboard and wear face coverings during boarding and in crowded areas.
- Airline carrier KLM resumed its daily flight connections from Amsterdam to Inverness on July 5.

NORDICS

- Some Nordic tour operators are still hopeful that their autumn tours can go ahead as planned, hence the rate of cancellations across the Nordic countries is relatively low.

MARKET INSIGHTS

BENELUX & NORDICS (PART II)

Social listening – Dutch speaking countries

VisitScotland is monitoring social media conversations using Brandwatch social listening tool. This gives us an understanding of discussion points, sentiment towards holidaying and view of holiday intentions. This tool does not monitor all social media conversations therefore insight should be understood as a guide or indication of main topics and trends on a subject.

- Between 29 June and 5 July, there were 647 relevant mentions about holiday intentions in the Dutch speaking countries. Online chatter increased by 15% compared to the previous week.
- The main conversation topics focus on users talking about going on holiday abroad, having a staycation and having some concerns about the safety of travelling abroad.
- Online sentiment is mainly neutral (45%). Positive sentiment (31%) is driven by users planning their holidays, either abroad or locally.
- Negative chatter (25%) is driven by travelers' frustration with travel and flight operators regarding cancellations, refunds and having to rebook planned holidays at a higher price and people who are worried about the risks of travelling abroad and visitors or returners to BE/NL bringing Covid-19 cases in.
- Belgian and Dutch holidaymakers prefer driving as opposed to flying for safety reasons (as to avoid or reduce contact with others).

VISITSCOTLAND COVID-19 UPDATE

USA

- Reminder: The US Government is still advising against all international travel.
- Citizens from the United States will continue to be banned from entering E.U. countries because of COVID-19 infection rates.
- All 50 US states have begun to reopen their economies however approaches vary on a state by state basis. Infection rates are increasing again for a number of states.
- Reminder: last week, the governors of New York, New Jersey and Connecticut signed orders requiring passengers flying in from states that are considered COVID-19 hotspots to quarantine for 14 days upon arrival.
- Analysis by Tourism Economics shows national weekly travel spending grew by 5% to \$10.6 billion last week (again marking its highest level since March), but growth is showing signs of tapering as some states slow the easing of lockdown measures.
- Reminder: MMGY Global has launched its new Travel Safety Barometer — a sentiment tracking tool created for the travel and tourism industry — to monitor American travellers' perceptions of how safe it is to engage in specific travel behaviours as the country embarks on its reopening and recovery efforts. International travel currently holds a score of 22/100.
- The leading tour operator associations in the US, Canada, and Europe have collaborated on a set of health and sanitization guidelines specifically for their tour operator members called TOURCARE Guidelines for Tour Operators. The guidelines establish recommended procedures for tour operators to provide protection for travellers against the transmission of COVID-19.
- Delta Air Lines is once again extended its change fee waiver for new flights purchased through July 31, so customers can change their plans without a fee for a year from the date of purchase. Those who booked travel between April 17 and Sept. 30, 2020, will be able to rebook through Sept. 30, 2022.
- Reminder: Major US airlines members in the industry group, Airlines for America, have announced they intend to more strictly enforce mask wearing aboard their planes, including potentially banning passengers who refuse to wear a mask.

CANADA

- Update: The UK Government announced a number of countries that are included in its air bridge border control however, have not included any countries from the Americas at this stage.
- Reminder: The EU has added Canada to their list of 15 countries they are allowing visitors to travel from and within freely. However, the Canadian Government has announced the 14-day quarantine ruling for travellers entering Canada will be extended until 31 August.
- Reminder: PM Trudeau announced on 16 June that the CA-US Border will remain closed for a further 30 days, until 21 July to all but essential travel. Those arriving in Canada must provide basic information using the ArriveCAN mobile app, an accessible web-based form or paper form and undergo screening by a border services officer or quarantine officer to assess symptoms.
- Reminder: It's estimated that Canada's R rate is currently below 1.
- Reminder: Transat progressing with plans to relaunch of Toronto – Glasgow service on 25 July but being reviewed in line with border restrictions.
- Reminder: Canada's four Atlantic provinces have confirmed a travel bubble that will begin on July 3; which has been announced by the Council of Atlantic Premiers on 24 June. This means that interprovincial travel will be allowed between Nova Scotia, New Brunswick, Prince Edward Island and Newfoundland and Labrador. Travellers will not be required to self-isolate. However, travellers from the other provinces and territories will have to abide to guidelines as outlined in each specific Maritime province. Other Canadian visitors to the Maritime provinces that have self-isolated for 14 days may travel within the Maritime region.

MARKET INSIGHTS

AUSTRALIA

- The Greater Melbourne area will return to stage 3 lockdown from midnight on 8 July for six weeks after Victoria recorded 191 new cases of Covid-19, the largest number of positive cases since the pandemic began. Under the lockdown residents cannot leave their home unless it is for care or medical reasons, shopping for essentials, work or study that cannot be done at home, and exercise.
- As previously during the lockdowns, retail stores can remain open subject to physical distancing but cafes will go back to takeaway only.
- The rise in cases in Melbourne will result in the closure of the border between New South Wales and Victoria for the first time in a century, with permits required for travel between the two.
- The new Covid cases will impact on the recovery of domestic tourism in Australia and the timetable for the potential Trans-Tasman Travel Bubble as both countries require a sustained period of zero infections before quarantine free travel can be allowed.
- Virgin Australia and other companies in the aviation sector have joined with unions to lobby for the Australian government to extend jobkeeper support for the industry to be extended beyond the end of September, currently the government has yet to announce any concrete plans for October and beyond.
- Middle East Carriers have started to fly direct into Scotland in July. Qatar Airways re-started their Edinburgh flight on 1 July, initially at 3 flights per week, whilst Emirates will begin operating to between Glasgow and Dubai with reduced schedules from 15 July.
- Qantas has announced they will axe 6,000 jobs due to the pandemic, this equates to around a fifth of the airline's workforce prior to Covid-19. With the Australian government increasingly indicating that the international border would most likely remain closed until next year this has prompted Qantas to cancel all international flights except those to New Zealand.

MARKET INSIGHTS

CHINA

Intermediary

In China we're seeing a shift away from the sale of group travel to independent travel. A number of key trade which previously focused on group travel are launching FIT travel brands and those which previously sold both have moved the majority of their staff across to FIT product development and sales. Grand China Express Chongqing, traditionally a group wholesaler, is transforming the business into a FIT destination and product wholesaler and pre-sales have begun. Suppliers offering more flexible cancellation policy and longer validation periods will benefit.

Aviation

Additional European airlines have been able to resume their schedules this week and in addition to the resumption of the Frankfurt – Shanghai Pudong route June 24, Lufthansa will resume their second Chinese route Frankfurt – Nanjing on 6 July on a weekly schedule.

Chinese airlines are introducing a raft of special deals, vouchers, coupons and competitions to engage their customer base, generate pre-sales and revenue.

In addition to China Eastern's "fly when you want" pass last week which was a huge success, China Southern Airlines are offering a special-offer ticket promotion, coupons, additional mileage bonus and lucky draw. Air China have launched their own "win gold corn" game to win coupons which can be redeemed for airmiles, flight tickets, seat selection. Hainan Airlines and Spring Airlines and are doing flash sales promotions and Xiamen Air are offering passengers discounts at airport hotels, bookstores and restaurants with their boarding passes

Ease of Travel

Visa Application Centres have reopened in China.

The UK Visa Application Centres in Changsha, Chengdu, Fuzhou, Hangzhou, Jinan, Kunming, Nanjing, Shenyang, Shenzhen, Wuhan and Xi'an have resumed operations.

Visa and passport services have resumed in Beijing, Shanghai, Guangzhou and Chongqing by prior appointment.

VISITSCOTLAND COVID-19 UPDATE

DIGITAL INSIGHTS – OWNED CHANNELS

VISITSCOTLAND.COM

- Over the past week traffic to visitscotland.com has continued to grow, driven predominantly by the English audience which is seeing a 12% increase Year on Year. Overall UK traffic is (at least temporarily) back to normal levels.
- International traffic is currently still suppressed, with the past week seeing only around half the traffic typical for this time of year.

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:

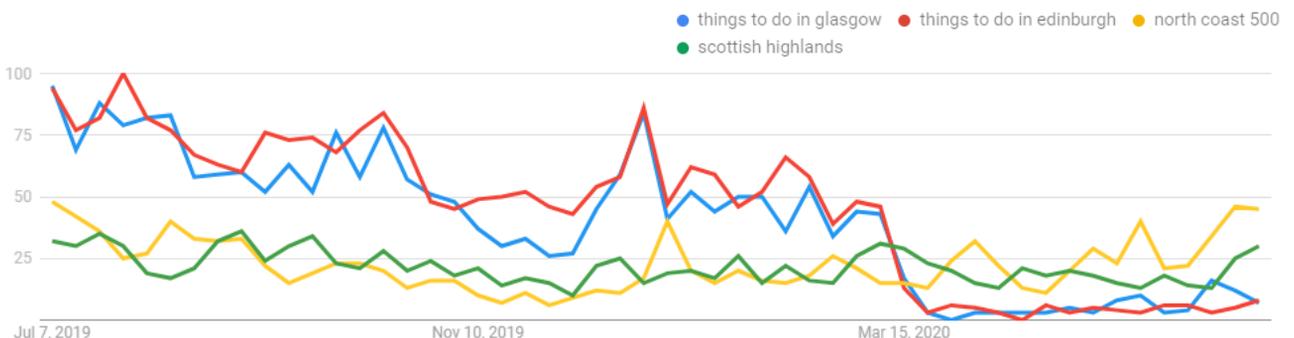


Organic Traffic by UK country over last 7 days (excluding today) compared to same dates last year as a %:

Region	Sessions	% Δ
1. Scotland	118,883	-10.9% ↓
2. England	107,844	12.5% ↑
3. Wales	2,698	34.2% ↑
4. Northern Ireland	1,643	-7.2% ↓

GOOGLE SEARCH

- Search queries from Scottish residents for “north coast 500” and “Scottish highlands” have almost returned to normal levels for this time on year.
- However, “things to do in Edinburgh/Glasgow” are still yet to move much since the start of the lockdown.



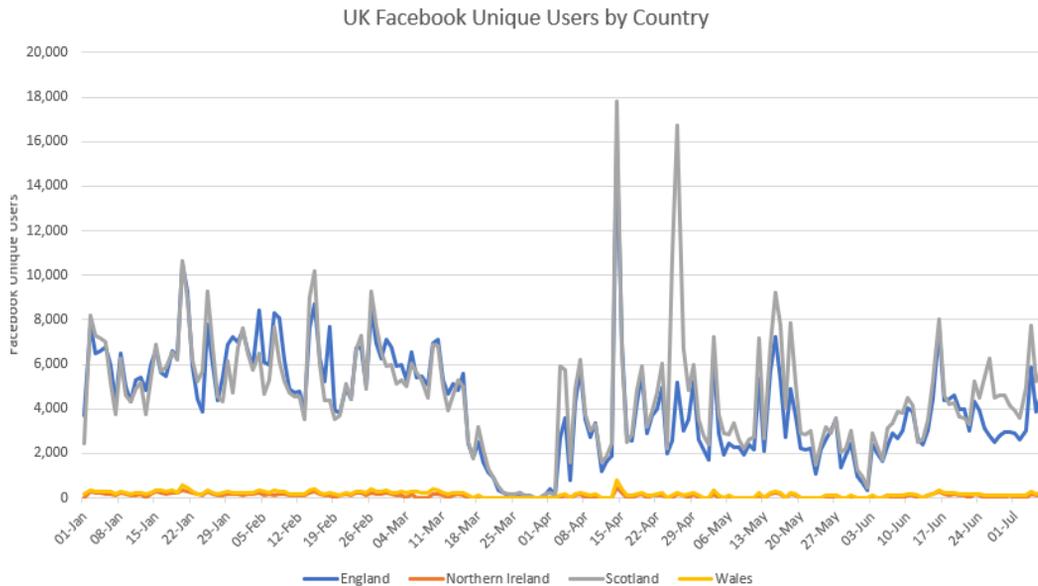
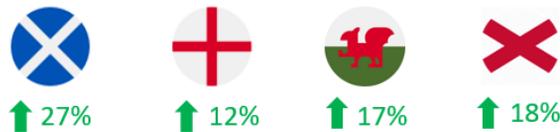
VISITSCOTLAND COVID-19 UPDATE

DIGITAL INSIGHTS – OWNED CHANNELS

SOCIAL MEDIA

- Over the last 7 days there has been 175k people engaging with our Facebook pages, which is a rise of 11% over the preceding 7 days. This also represents a rise of 8% compared with the average of the preceding 4 weeks.
- Though engagement is up across all UK countries, Scotland engagement has been particularly higher than England over the past week (they typically follow similar patterns and volumes).

People engaging with VisitScotland on Facebook over past 7 days compared to previous 28 days:



People engaging with VisitScotland on Facebook over past 7 days compared to previous 28 days:



VISITSCOTLAND COVID-19

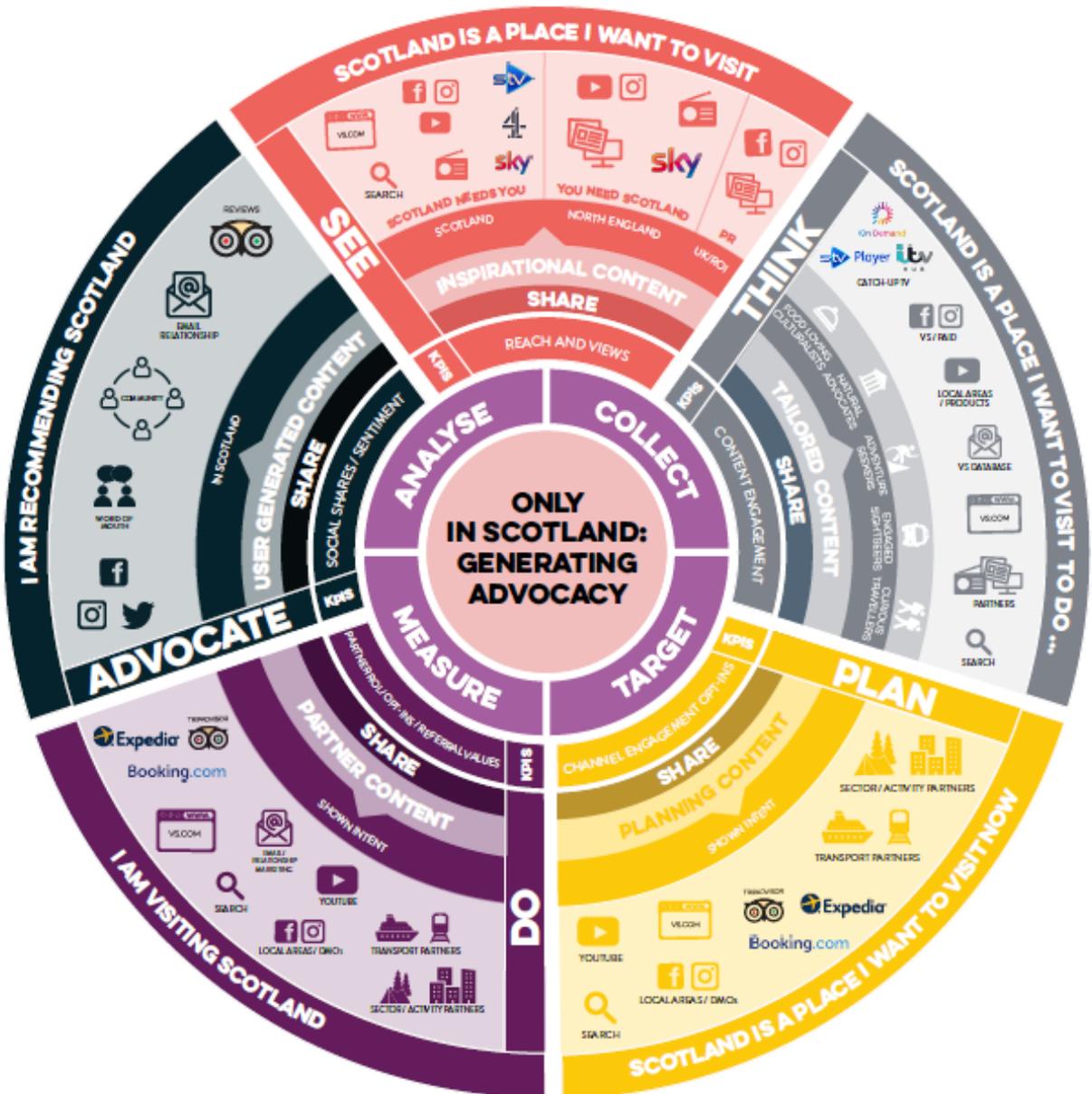
MARKETING ACTIVITY RESPONSE

As restrictions ease and we move towards the domestic recovery phase of our Covid-19 response, we launched our approach and media strategy last week. To complement this, we have fully updated our marketing activity pages on VisitScotland.org, where we will continue to update information about our planned activity.

Revised sections are as follows:

- [Marketing: Response to Coronavirus \(COVID-19\)](#)
- [Our marketing activity - Respond, Reset and Restart](#) – activity that has taken place across teams, with links to the PDFs
- [Domestic recovery](#)
- [International recovery](#) – this page will be added to as we finalise international activity
- [Your digital to-do](#) – a round-up of tips for businesses preparing to reopen

OVERVIEW OF DOMESTIC MEDIA STRATEGY & ACTIVITY



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
- 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](#)

USEFUL CONTACTS

- Contact business advice team: business.advice@visitscotland.com
- Travel trade enquiries: traveltrade@visitscotland.com
- Sharing virtual tours or web cams: content@visitscotland.com
- Information on new experiences you're developing: marketing@visitscotland.com
- Advice regarding insights: research@visitscotland.com

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