INTRODUCTION

Dear all

Welcome to the latest edition of our weekly roundup of market intelligence and updates from the VisitScotland team and our networks. This week, we’ve included:

• global insights from UNWTO and thoughts about how Scottish industry can adapt content;
• examples of some of the innovative activity other National Tourism Organisations are undertaking, as well as home grown examples from Scottish industry;
• further insights and intelligence from our key markets
• Indepth reporting on our digital and social channels
• new STERG Recovery phasing and proposed messaging and activity from a VisitScotland perspective

As ever, if you have any feedback, or further information you would like us to include, please do get in touch.

Vicki

TRAVEL INDUSTRY INSIGHTS

The scale of disruption caused by COVID-19 to global tourism is shown in a comprehensive new report on travel restrictions from the World Tourism Organization (UNWTO). It shows that almost all global destinations have imposed restrictions on travel since January 2020, including complete bans on all travel as they worked to contain the pandemic. (Source: UNWTO)

According to research carried out for the new report, as of 6 April, 96% of all worldwide destinations have introduced travel restrictions in response to the pandemic. Around 90 destinations have completely or partially closed their borders to tourists, while a further 44 are closed to certain tourists depending on country of origin. The UNWTO global review shows that the global regions are largely consistent in their response to COVID-19. In Africa, Asia and the Pacific and the Middle East, 100% of destinations have adopted COVID-19-related restrictions since January 2020. In the Americas, 92% of destinations have taken similar steps, while in Europe, the proportion is 93% (as of 6 April).

With the start of nations relaxing restrictions from lockdown to restricted movement and social distancing, consumers are still consuming media through a variety of channels. Being home-bound is leading to a marked increase in the amount of content being watched globally.

What could Scottish tourism businesses be asking themselves in this consumer climate?

- Can we tailor content to reach new audiences? Domestic visitors are predicted to be the first market to start travelling.

- Can we build brand loyalty? Can businesses show they are making an impact in the community – Costa and Hilton have recently shared recipes for their in-house muffins and cookies. Bold Washing Detergent have provided kids craft ideas aware playing outside is now restricted.

With the expectation of a phased recovery awareness of opportunities around the limitations on your customers and being innovative is more vital than ever.
AN INTERNATIONAL PERSPECTIVE

During lockdown, many destinations continue to use virtual experiences to engage consumers, promote product and brand. These experiences also reflect an increasing focus on showcasing natural product, rural experiences, wellness, food and community. Examples include:

Visit Faroe Islands – working with locals to create new virtual tours with a difference – enabling consumers across the world to control where residents on the island walk. The tactic has engaged the local community and creates a personal connection to the digital tour.

Barcelona Tourist Board – has changed its iconic #VisitBarcelona to #BarcelonaVisitsYou as part of a campaign to bring the culture and product of the city into homes across the world.

Visit California – online winery tours popular while, from an industry perspective, local food businesses are being supported with the #CATakeoutTuesday, a campaign encouraging Californians to order takeaway from their favourite restaurants every Tuesday.

Slovenian Tourist Board – promoting a new 166-mile hiking loop via virtual reality, including an online zipline experience.

Visit Asturias – promoting the Spanish region’s agritourism product and rural escapes via virtual visits to dairy farms and showcasing how some of the region’s cheeses are made.

Visit California

Visit Faroe Islands
Inspirational stories from our tourism industry:

In light of the COVID-19 situation we continue to be amazed at the resilience and innovation of our tourism industry across Scotland. We wanted to share a few examples of the great work that we know is being replicated across the country.

- Speyside Wildlife has started a live #dailybirdsong every day on Facebook, bringing the local area to followers.
- Orkneyology, the storytelling site, is posting stories by storyteller Tom Muir under Tales for Troubled Times.
- Pitlochry Festival Theatre has launched an entertainment programme for all ages. #PFTLightHopeJoy aims to entertain audiences in isolation with demonstrations and performances.
- While all Invisible Cities tours have been suspended, the team at Invisible (Edinburgh) has created a virtual tour for you to enjoy from the comfort of your home.
- Mackintosh at the Willow is adding weekly historic blogs to its website and created a new Home Sweet Home page sharing different Mackintosh recipes each week.
- The Coig, touring routes around the Clyde coast and islands, has started a #SaveYourFaves campaign to provide future visitors with inspiration to make plans once the travel restrictions are eased. If your business is based in the area and offering any offers or vouchers you’d like to share please email them to sally.gale@thecoig.com.

For more inspirational stories from our tourism industry visit: visitscotland.org

Pinterest's trending searches for April (https://business.pinterest.com/en/blog/trending-searches-for-april-2020) found that lockdown has identified three unsurprisingly familiar areas.

Health & Wellness – Searches for physical fitness and mental wellbeing were both popular. Home body workouts and programmes increased by 200%-300%. Investing in mental health including meditation and self-care were also popular. Can Scottish tourism businesses contribute to national well-being by providing engaging content? We have seen fitness studios and gyms move to streamed live classes. Can restaurants provide healthy menu plans? For well-being, it is well known that the outdoors contributes to wellness. The recent #AWindowOnScotland campaign are providing inspiring views of Scotland for everyone during this time of restricted movement.

Parenting – With the closure of schools and working from home families have had to develop a new dynamic. Searches for games and activities online has also trended. For attractions and other tourism providers with exciting historic or unusual stories is their opportunities to provide child friendly content to connect with them currently?

Food – is a consistently popular topic online. Are you able to be a shop window for your local artisan food suppliers? Supply local recipes or stream cookery demonstrations?

Scottish Tourism Industry

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MARKET INSIGHTS

UK

• On 16 April the UK Government extended the current lockdown restrictions for at least 3 more weeks. Early indications are that the lockdown restrictions have resulted in a slowing down in the rate of community transmission of the virus.

• UK airline routes remain limited or grounded. (Loganair operating emergency flights only, BA operating a reduced schedule, Ryanair has grounded over 90% of flights and easyJet has grounded all flights. EasyJet considering keeping middle seats empty to follow physical distancing rules once coronavirus travel restrictions are lifted

• Rail operators in the UK are also operating reduced services. LNER has launched ‘LNER Reserves’ enabling its people to volunteer to help the NHS, emergency services and charities during the Coronavirus outbreak.

• The Coach Tourism Association continues to support UK wholesalers and coach operators with advice and have provided a legal helpline. Operators are now extending cancellations into May 2020 and looking to postpone tours where possible. Of the businesses still operating, we are noticing an increased interest in product development for future tours.

GERMANY

• The German government relaxed its lockdown measures from April 20, with schools and retailers, including high street travel agents (up to 800m² in size) allowed to re-open. Close contact businesses, e.g. hairdressers, to re-open from May 4. Large-scale events remain suspended until August 31. Bavaria’s “Oktoberfest”, usually attracting 6 million people in September and October, has been cancelled as a precautionary measure.

• Austria and Switzerland are working on a staggered approach to relaxing lockdown measures, with small shops opening from April 15 (Austria), followed by close contact businesses and hospitality in May, and small shops (Switzerland) from April 27, followed by state schools/all retailers on May 11 and universities/zoo/museums in early June.

• Airline carrier Lufthansa is extending its reduced flight operations until at least May 17. At present the airline is estimated to lose €1million per hour. Discussions around state aid are ongoing.

• TUI and DERTOUR are both not only encouraging travellers to re-book instead of cancel but will also give them a bonus towards their new trip if they choose the voucher option.

• DMCs important in the German-speaking markets are starting to develop destination training for staff. Many tour operators starting to work on consumer marketing activities for their 2021 sales.

FRANCE

• The French government is looking into relaxing its lockdown measures from May 11, with nurseries and schools reopening first. Universities remain closed until summer. There is also no exit strategy yet for restaurants, museums or theatres. Travels restrictions for non-EU citizens remain in place until further notice.

• Some French tour operators are still hoping to generate bookings for the winter season with departures in November/December. This goes in line with German operators predicting that the current situation might benefit off-season travel in 20/21.

• The SETO (a union of which 70 French tour operators are members of) are postponing trips until May 29 (extending from May 15 as previously worked towards).

• The Accor Hotel group joined forces with Bureau Veritas in developing a quality label designed to certify that new safety standards and cleaning protocols have been met in hotels and restaurants.
MARKET INSIGHTS

SPAIN & ITALY

• The Spanish government is preparing a new law to provide a minimum income to vulnerable families (to be implemented in May). The aim is to benefit around 100,000 single-parent families.
• The Italian government extended the country’s lockdown period until May 3. Domestic travel remains restricted to emergencies, essential needs or work requirements, for which permission is needed. From April 14, bookshops, baby clothing retailers as well as forestry and wood work companies resumed work. The government activated the circulation of up to $435 million in loans for companies, in addition to the €380 million it already provided in March. The total figure represents half of Italy’s GDP.
• Spanish tour operator Caledonian Special Tours started a new subsidiary dedicated to business events as they believe this sector will recover before the leisure; they already organise weddings and luxury tours.
• Many Spanish & Italian tour operators are asking for destination and product trainings, some have also started enquiring about hotel re-openings in 2020 & new accommodation providers for their 2021 programmes.

BENELUX & NORDICS

• The Dutch government extended its country’s lockdown measures to May 19, but will re-open primary schools on May 11, with other schools and universities to follow on June 2. Restrictions on large-scale events have been extended to September 1.
• Sweden’s government is not imposing federal lockdown measures but continues to appeal to its citizens’ own judgment and self-regulation of social distancing.
• Some Dutch tour operators expressed interest in destination and product trainings, many have also expressed an early interest in attending Expo 2021 and other VisitScotland trade events, such as Business Development Missions.

USA

• The US Government’s current travel ban to UK and Europe to stop the spread of the coronavirus in the US (enacted 16 March) is still in operation.
• President Trump has unveiled guidelines for reopening the US economy ‘Opening Up America Again’ which focuses on a three-phased approach: https://www.whitehouse.gov/openingamerica
• President Trump has signed the largest-ever US financial stimulus package, known as a CARES act, worth $2tn (£1.7tn) to tackle the impacts of the coronavirus pandemic.
• The US CARES act directed $58 billion to US airlines out of the $2 trillion economic stimulus package. US Airlines have announced their funding as:
  • American Airlines: Expects to receive $5.8 billion in aid from the federal government and it also plans to apply for an additional loan of $4.75 billion.
  • Delta Air Lines: confirmed it reached a deal with the Treasury Department for $5.4 billion, including a 10-year, $1.6 billion, unsecured-loan.
  • United Airlines: Reports indicate that United Airlines is getting $3.5 billion as a direct grant and a $1.5 billion loan.
• Delta Air Lines has further extended its change fee waiver policy to include existing bookings or cancelled travel through September 2020, as well as extending the expiration date for tickets into September 2022.
• Continued interest from some US operators on re-focusing their content to feature dreaming of future travel, virtual travel and providing future inspiration.
MARKET INSIGHTS

CANADA

• Update CA – US land border: A deal has been agreed between the Canadian and US Governments which will extend the closure of the Canada – US land border for a further 30 days (from 21 April – the current expiry date).
• Update: Ontario Premier announced extension of lockdown until 31 May however, here are signs British Columbia may be about to ease restrictions.
• Update – Airlines: Transat has reached a deal with the Government’s Emergency Wage Subsidy (CEWS) to reemploy 4,000 staff. This means all 3 main airlines have now reached deals to reemploy staff back onto payroll.
• Update – Airlines: Although WestJet will be rehiring staff, the airline has also announced that it will be letting 1700 pilots go which will be rolled out in 2 stages. This will affect pilots across the company’s 3 brands; WestJet, Swoop and Encore.
• Update – Airlines: The Federal Government is considering financial aid options for airlines as operations continue to be grounded. News from Ottawa is that credit availability may be required as a bridge to recovery. No further details have been announced. Reminder: a support package of $331m has already been announced for 21 airports.
• Reminder: Tours Operators/Agents are continuing to rebook/cancel client bookings. One operator indicating that consumers still want to travel in 2020 with many currently rebooked for autumn.
• Reminder: ongoing disputes between passenger groups and transportation agency regarding Refunds/credits & travel vouchers/chargebacks.

AUSTRALIA

• Australia continues to record low levels of infection across the whole country, with numbers in the single digits for each state and territory. Despite this the government continues to caution about an early reduction in lockdown and social distancing regulations, which, along with international and domestic travel restrictions remain in place.
• Qatar Airways continues to fly predominantly assisting with repatriation flights whilst Emirates are currently planning to re-commence international flight schedule on 1 July 2020, including all Australian routes.
• Australian government has pledged $165m to underwrite domestic key flight routes for at least 8 weeks. Due to the low levels of infection there is potential that domestic travel will be possible sooner than anticipated, no update on wider support packages for aviation. One of the key domestic carriers Virgin Australia has entered into voluntary administration and looking for new buyers and investors.
• 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. Tour Operators are offering increasingly flexible cancellation or postponement options including rebooking travel up until 2022.
• Australian Government has introduced its largest ever government support package – A$130billion to support the salaries of 6 million workers for 6 months. So far in total Government aid to support businesses is approaching A$200bn or around 10% of the country’s GDP.
Market Update
• Outbound travel is projected to decrease by 42.6% in Q1 2020, with a 17.6% drop overall in 2020
• Digital Health Codes are being used to track the health and movements of citizens who are issued a personal QR code which once “green” (for example, after completing 14 days of quarantine), people can move freely. The code is required for travel, accessing office buildings, entering museums, etc.
• China is tightening up management of domestic tourist attractions including admitting just 30% of their maximum visitor capacity. Indoor venues will remain temporarily closed.

Traveller Sentiment
• In research carried out by Kantar in China in February into Chinese Travel Spending, it was found that 75% of survey respondents cancelled all travel spending, and 17% reduced it. But 78% said they would resume all cancelled travel spending when the virus was over. 45% of respondents chose “travel” as the answer to the question: “What do you most want to do when the outbreak is over?”
• In another survey by a Digital Tourism Marketing company, travellers born in the 1990s were the most optimistic about speed of recovery, and likely to travel sooner than older respondents
• It showed that this crisis has changed travel priorities in China and there is now increased appeal for less populated areas, with high interest in nature tourism, small towns, and self driving.
• The crisis has made many respondents closer with their families, and they plan to prioritize spending leisure and travel time with family in the future – we expect an increase in family travel.
• Among the most significant reasons preventing Chinese from traveling in the future are fears about health and safety, as well as lack of money and time due to the crisis.

Ctrip plans to introduce a scheme to help hotels protect guests and staff and may include promoting hotels who take such measures as reporting no confirmed or suspected coronavirus cases in the past 14 days, disinfecting rooms daily and public areas regularly, and temperature checking guests on arrival and staff daily.

Airlines
• Air China’s domestic capacity levels have now dropped approximately 40% on levels in 2019 — an improvement from the 70% reduction in Feb-20. Domestic schedules for the week-long May holiday offer similar capacity to 2019 levels, a remarkable sign of planned domestic flight recovery.
• The CAAC are reporting that 95% of Chinese airline loading is from domestic routes
• Juneyao and Finnair have signed an MOU to establish a joint venture on the Helsinki – Shanghai route. This will allow both carriers to offer more destinations, schedules and fare options via their main hubs – Helsinki and Pudong.
• China Southern and China Eastern are planning to sell ‘coronavirus control bonds’ to help them survive. These bonds - requiring participating companies to spend at least 10% of the proceeds raised by the sale of bonds on virus control measures – give access to very low-cost capital.

Travel Trade
• Fliggy, one of China’s OTAs, has partnered with their top 100 suppliers to run a May National Holiday campaign to promote domestic products with discounts worth up to £70 million.
• China Travel Group (CTS and CITS) shifted their international outbound business to domestic business – focusing on luxury focused and bespoke products, plus products related to natural scenery, children’s education, and wellbeing.
VISITSCOTLAND COVID-19 UPDATE

DIGITAL INSIGHTS – THIRD PARTY

ADARA

These charts show the booking volume of flight and hotel bookings relative to January 2, 2020 for the EMEA area tracked by Adara through their flight and hotel provider partners. Volumes remain with peaks and troughs following weekly trends.

BRANDWATCH

• We identified 7K relevant conversations about Coronavirus and Scotland between 14th and 20th April. This is a 15% decrease compared to the previous 7 days.
• The main conversations topics were:
  • “stay safe” messages from the wider online community,
  • People sharing their life on lockdown, from daily walks, pictures of landscapes, to their hobbies etc.
  • Usually, these experiences are shared online using the hashtags #COVID-19 and #lockdown.
Most of the conversations take place on social media sites (Twitter 42% and Instagram 56%).

Online sentiment remains consistent week on week with more than 50% of positive chatter. Positive conversations are driven by user sharing images of closed by landscapes and sceneries or on their daily walks as well as “stay safe”, “stay home” and “clap for our carers” conversations.

Negative sentiment (8%) is mainly driven by people complaining about not being able to go outside or missing certain areas/spots. Other negative chat was driven by online threads and debates about the government measures in place, number of deaths in Scotland and other news related topics.

For the same period, we then analysed conversations focused on travelling to Scotland or holiday plans in Scotland that mentioned “Coronavirus” or “COVID” or “Covid-19”.

270 relevant mentions were identified for this period. 30% less than in the previous week.

A decrease in conversations about travelling is expected as the lockdown was extended in the UK.

The main conversation topics were people:

- sharing images of their previous trips to and around Scotland;
- complaining their upcoming trips have been cancelled due to the COVID crisis;
- expressing their desire to travel to Scotland once the situation normalises;
- few users are looking for advice on what to do about their summer trips to Scotland and sharing pictures of their daily walks in scenic areas.

As it happened with the wider Coronavirus conversations, chats about travelling to Scotland or visiting Scotland are mostly taking place on social media sites (Twitter 35% and Instagram 56%).

A small percentage of conversation take place in reviews sites and forums, as users seek advice about their upcoming trips/cancellations or share their experiences.

Online sentiment remains positive as users share pictures of previous holidays, talk about planning next holidays and share ideas of things to do in Scotland during lockdown.
Traffic was 111% higher over the past 7 days than the same period last year, continuing the trend from the past few weeks. Long-haul markets are generating 3x more traffic than last year and 5x more pageviews. Excluding Coronavirus content pageviews are double the same time last year, though a news article on Consumer PR Easter activity is accounting for half this traffic. Short-haul markets are generating double the traffic than last year and 2.5x more pageviews. Excluding Coronavirus content pageviews are 10% down on last year.

Traffic was 64% lower over the past 7 days than the same period last year, continuing the trend from the past few weeks. Long-haul markets are generating 62% less traffic than last year and Short-haul markets 67% less traffic. Outlander, Skyfall and history-related content has managed to maintain their pageviews since last year, while the homepage, maps, activities and attractions have understandably bore the brunt of the drop in pageviews.

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

<table>
<thead>
<tr>
<th>Region</th>
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Organic Traffic over last 7 days (excluding today) compared to same dates last year as absolute figures:

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

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<td>England</td>
<td>37,407</td>
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<tr>
<td>Scotland</td>
<td>30,154</td>
<td>-75.4%</td>
</tr>
<tr>
<td>Wales</td>
<td>1,051</td>
<td>-55.3%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>744</td>
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Consumers are responding normally to our reactivated social posts, welcoming destination content and the continued source of inspiration for their travel concept forming. The recent spike reflects engagement on a #Coosday post that saw a record-breaking level of reach and engagement on Facebook.

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

- UK: +93%
- USA: +56%
- Canada: +77%
- Australia: +99%
- Germany: -6%
- France: -2%
- Spain: +1%
- Italy: +36%
- Netherlands: +51%

- Scotland: +81%
- England: +87%
- Ireland: +102%
- Northern Ireland: +91%
MARKETING ACTIVITY RESPONSE

Visit our dedicated marketing response page on visitscotland.org, which will be updated regularly.

Find information on:

- A range of dedicated new content, encouraging visitors to dream now, travel later
- Social activity to engage visitors and keep Scotland top of mind
- Regular email communications to our Scotland fans across the world
- Our PR activity and recent coverage we’ve achieved
- Our activity with key intermediaries in relevant markets

RECOVERY PHASES

<table>
<thead>
<tr>
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<th>RESET</th>
<th>RESTART</th>
<th>RECOVERY</th>
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<tr>
<td>Objective: Keep yourself and Scotland safe</td>
<td>Objective: Keep Scotland top of mind, build advocacy &amp; trust</td>
<td>Objective: Reconnecting Scots with Scotland</td>
<td>Objective: Increase demand for short notice Scotland holidays</td>
</tr>
<tr>
<td>Activity: All paid and social activity paused Messages of support to intermediaries Industry support priority – new pages on VisitScotland.org</td>
<td>Activity: Absence video / social Armchair travel – virtual tours on VisitScotland.com Activity to engage / inspire Intelligence gathering VisitScotland.org extended Market/audience insight webinars for industry</td>
<td>Activity: Domestic day trip inspiration Intermediary destination training &amp; content sharing PR inspiration Video distribution via YouTube (UK)</td>
<td>Activity: UK &amp; Intl inspiration Virtual intermediary workshops / webinars Destination training events Media fam trips / PR Video distribution (YT) Campaign activity Content partnerships</td>
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Objective: Increase demand for 2021 Scotland holidays

Messaging: ‘Only in Scotland’ Book your trip to Scotland Market prioritisation

Activity: Virtual intermediary workshops / webinars Destination training events Media fam trips / PR Video distribution (YT) Campaign activity Content partnerships
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
- VisitScotland's response to COVID-19
- We have been working with key Online Travel Agents including Expedia, Booking.com and Air BNB to support postponement for bookings to Scotland, rather than cancellation and refunds. See our new section on visitscotland.org for the latest update on support and flexibility from these OTAs.

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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