



IMPORTANCE OF INTERNATIONAL MARKETS - Vis iTSCOTLAND

Stephen Trainor – INDUSTRY RELATIONSHIP MANAGER

Recovery objectives and strategy

Help Scottish
Tourism recover as
quickly as possible
in a responsible way
– value driven

Maintain / grow
our share of the
domestic market

**Increase
awareness &
consideration of
Scotland
internationally**

Position Scotland as
a responsible,
welcoming & safe,
year-round
destination

Objectives

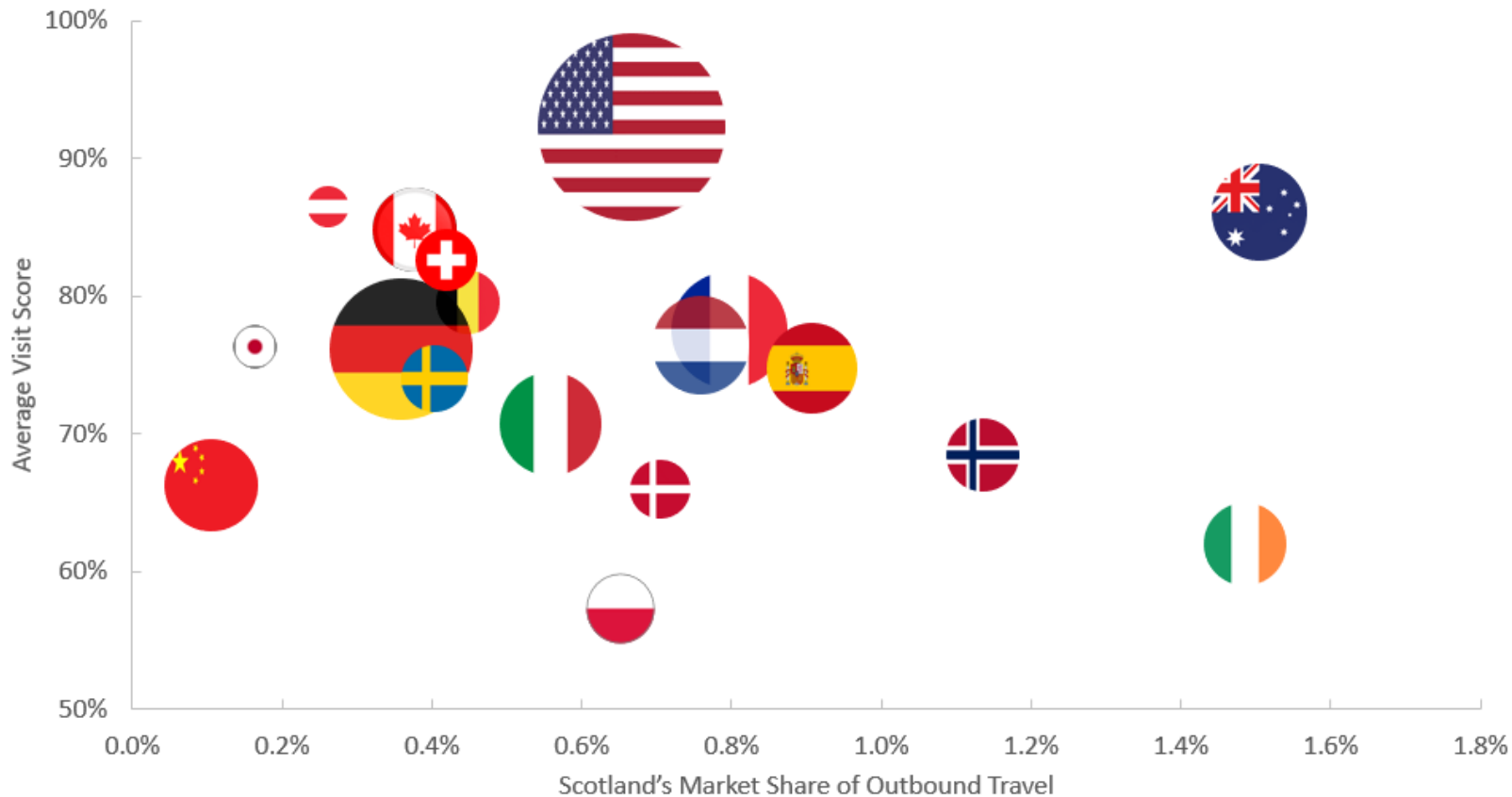
- Support recovery of Scottish tourism industry by keeping Scotland **top of mind** with high spending international visitors
- Make Scotland the **first-choice destination** when international travel is possible again – encouraging forward bookings for 2022 and beyond
- Restore **Scotland's connectivity** with key markets working in partnership with transport providers



Why build international demand

- International visitors critical to Coronavirus recovery – to build back tourism sustainably
 - On average US visitors spend **4x** more than a UK visitor; and EU visitors spend twice as much
- Promoting internationally to a range of key markets will mitigate against fluctuating travel guidance / restrictions reducing risk for future bookings
- Working with intermediaries (travel trade) to selling Scotland – so they can act as our in-market voices
- Scotland has a relatively low share of total outbound tourism from our key international markets, so opportunity for significant growth

The opportunity: MARKET VALUE & SCOTLAND'S SHARE

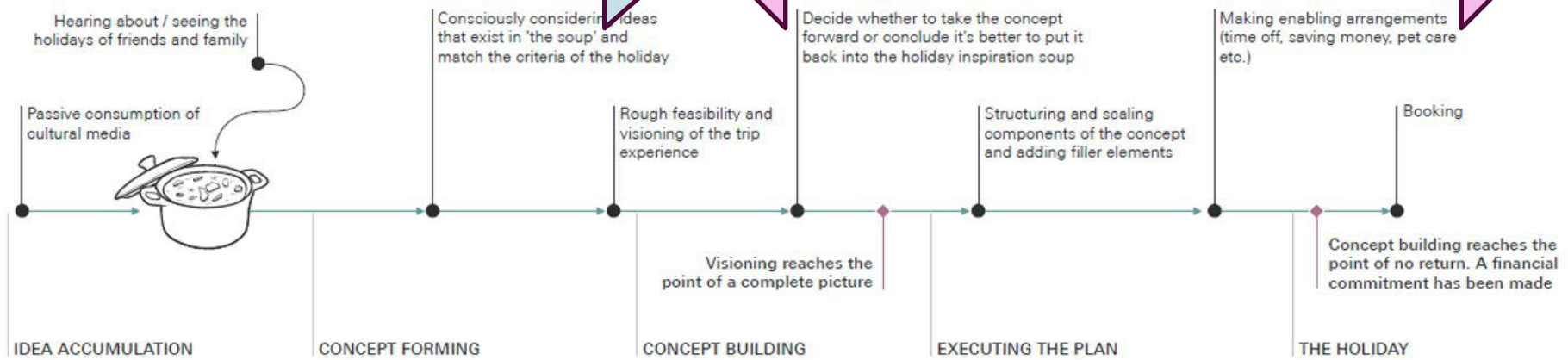
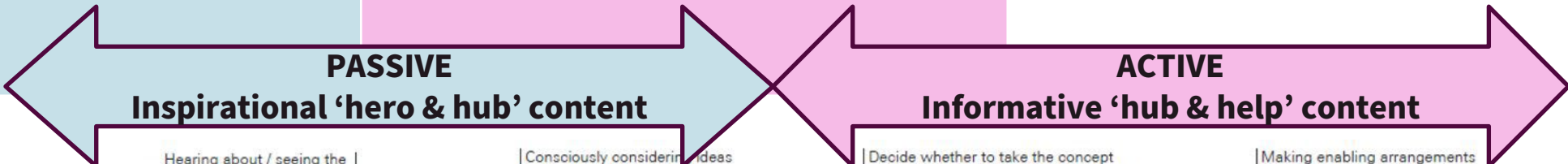


- Less than 1% of US international holidaymakers come to Scotland
- Even that tiny percentage makes them our most valuable market
- And when they get here, they love us!

Summary of current value of market to Scotland (size of sphere); average spend, regions visited & out of season trips (average visit score); and our share of outbound travel

BUT IT'S A LONG PROCESS..DREAMING, PLANNING & BOOKING CYCLES

	5 years +	2- 5 years	18-24 months	12-18 months	6-12 months	4-6 months	1-3 months	Trip
DE:	<i>Idea Accumulation / Concept Forming</i>				Plan		Book	
FR:					Plan		Book	
US:			Plan				Book	
CA:				Plan			Book	
CN:				Plan			Book	
AUS:			Plan				Book	

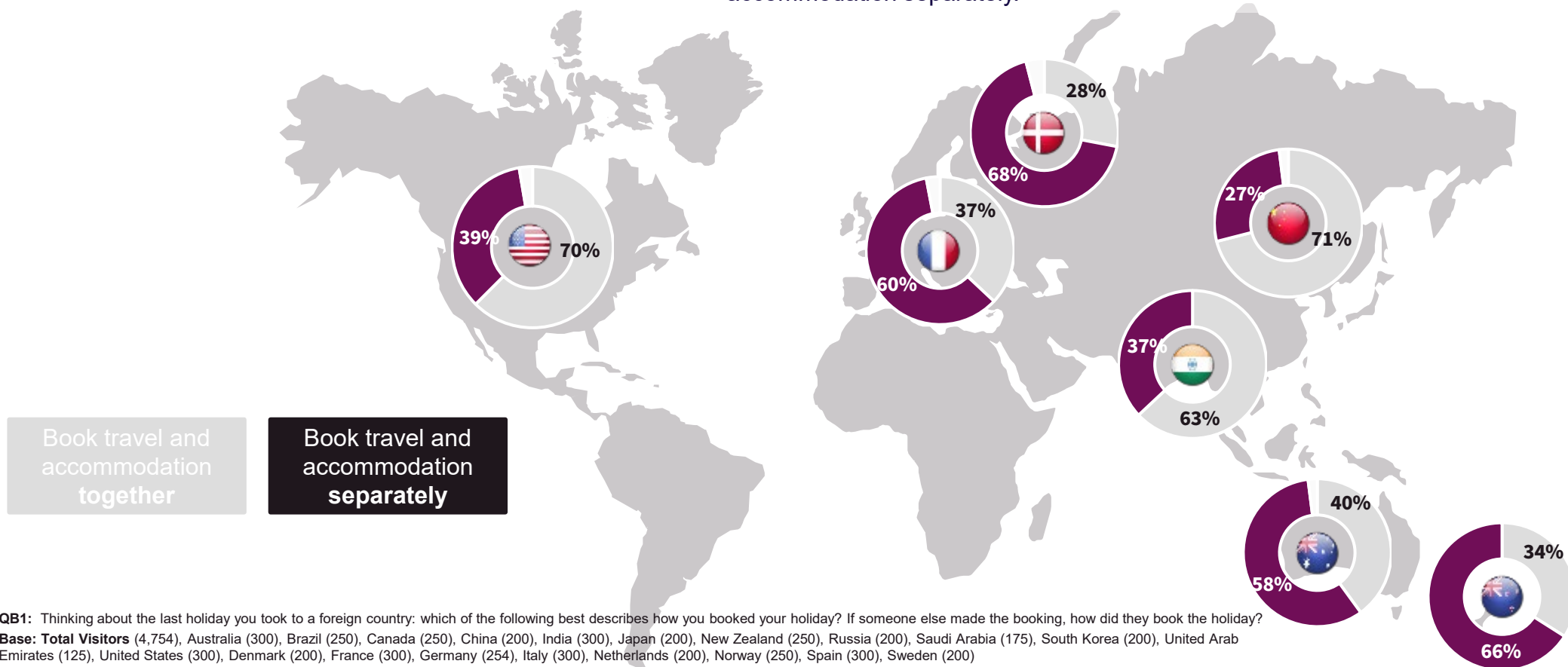


Travel and accommodation booking

Key market differences

Previous **visitors** to Britain

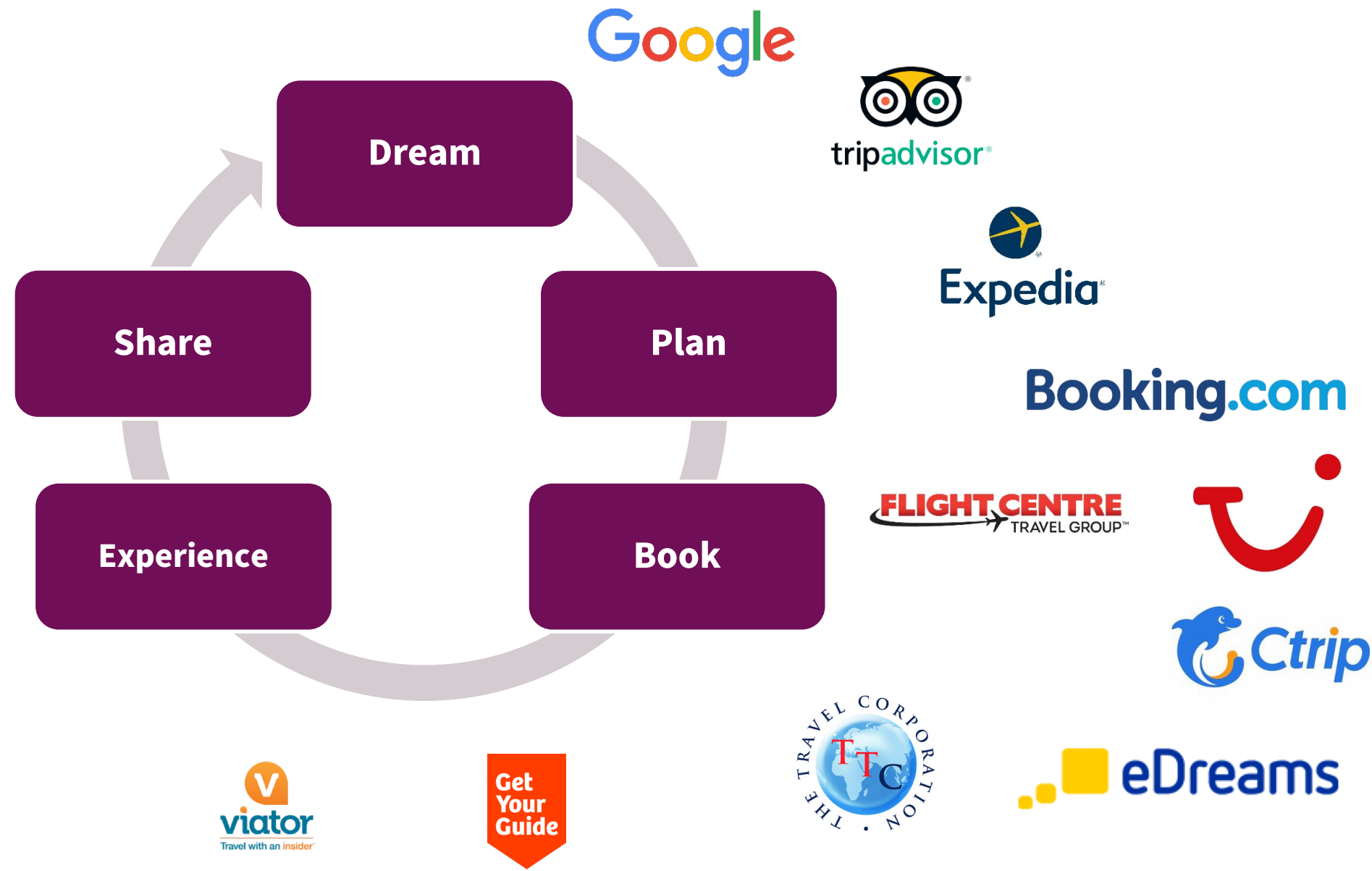
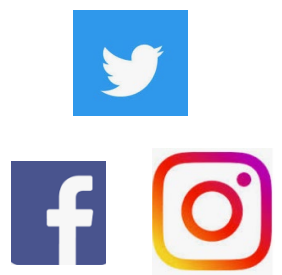
Most individual markets follow the same trend as long haul/short haul with the exception of Australia and New Zealand, who are more likely to book travel and accommodation separately.



QB1: Thinking about the last holiday you took to a foreign country: which of the following best describes how you booked your holiday? If someone else made the booking, how did they book the holiday?

Base: Total Visitors (4,754), Australia (300), Brazil (250), Canada (250), China (200), India (300), Japan (200), New Zealand (250), Russia (200), Saudi Arabia (175), South Korea (200), United Arab Emirates (125), United States (300), Denmark (200), France (300), Germany (254), Italy (300), Netherlands (200), Norway (250), Spain (300), Sweden (200)

The visitor journey



WHAT'S INFLUENCING THE TOURISM CONSUMER?



How the IRM Role supports your Travel trade journey

- **VisitScotland Free Web Listing** – *Activated and updated/reviewed regularly. Businesses can have multiple listings for different market sectors and properties*
- **Digital Support** – *Optimising your online presence, helping you towards online bookability*
- **Quality Assurance** – *Impartial and externally-assessed industry standard, bringing enhanced confidence to international markets*
- **VisitScotland Free Travel Trade Listing** – *Become visible to our international buyers*
- **Sign up for our Reconnect/Discover Scotland digital events** – *Replacing physical events in 2021/22*
- **Future opportunities to attend face to face international Expo events from 2023 onwards** – *Either by hiring a stand yourself, or working in partnership with VMS and other bodies on joint stands*
- **Familiarisation Trips/Trade Missions** – *Help to host international VIP buyers and potentially travel internationally with our Trade Teams to represent Scotland around the globe*

STAY IN TOUCH AND STAY CONNECTED

- **Sign Up for E-Newsletter on www.visitscotland.org homepage**
- **Discuss with your IRM current VisitScotland activities/campaigns/Themed Years – *How to become involved and the toolkits available to you. Current joint activities with Visit Moray Speyside***
- **Use our Hashtags on Social Media and share content**
- **Share your feedback – *Positive and negative information still being fed back regularly to Scottish Government***
- **Let us know what you are working on – *We may be able to incorporate any exciting new developments in our communications activity or perform a case study***

Contacts

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FURTHER INFORMATION AND LINKS

Travel trade links

VisitScotland.org | Visit our dedicated Travel Trade advice pages, including:

- [Trade jargon buster](#)
- [Understanding Travel Distribution](#)
- [How to work with the Travel Trade](#)
- [Preparing to work with the Travel Trade](#)

INDUSTRY SUPPORT

VisitScotland.org | Visit our dedicated advice page at www.visitscotland.org/supporting-your-business/advice/coronavirus for up to date information and advice on Coronavirus (COVID-19) for tourism businesses.

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.

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](#)

MARKETING INFORMATION

VisitScotland.org

- [Market intelligence report](#) – weekly data and insights into how Covid-19 is impacting tourism globally and our key markets – and links to our activity
- [Marketing response to Covid-19](#) – regularly updated information on VisitScotland's marketing#
- [Research and Insights](#) – about our visitors

USEFUL CONTACTS

- Travel trade enquiries: traveltrade@visitscotland.com
- Information on new experiences you're developing: marketing@visitscotland.com
- Advice regarding insights: research@visitscotland.com
- Send updates & story ideas to the PR team at: travelpr@visitscotland.com

Useful travel trade links

- VisitBritain - www.visitbritain.org
- UKInbound - www.ukinbound.org
- European Tour Operator Association (ETOA) - www.etoa.org
- Coach Tourism Association (CTA) – www.coachtourismassociation.co.uk



Any Brief Questions & Comments?