



VisitScotland Update

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AGENDA

1. Welcome and introduction – Mr Ewing
2. Work of Scottish Tourism Emergency Response Group – Riddell Graham, Director of Industry & Destination Development (10 mins)
3. Engagement with and support for businesses and groups – Riddell Graham (10 Mins)
4. Community Engagement – Ken Massie, Head of Regional Leadership & Development (10 mins)
5. Marketing recovery plans – Vicki Miller, Director of Marketing & Digital (10 mins)

STERG

- Composition of group – STA, SE, HIE, SoSE, SDS, COSLA, VS, SG

Action plan

- Respond – immediate provision of information and support to businesses
- Reset – support, planning and preparation to encourage restart
- Restart – support and guidance to begin safe reopening
- Recovery – direction and support for operating in a new post COVID 19 environment



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INDUSTRY ENGAGEMENT

- Research, data gathering, direct engagement with 3,500 businesses
- Communications – regular email contact with 12,500 businesses
- Global research and travel market intelligence
- 2020 quality assurance fees suspended - £1 million saving for 4500 businesses
- Destination/Sector fund – 83 supported, 10,000 businesses, £500k
- Support for applications to Hardship and PERF funding



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INDUSTRY SUPPORT

- SG CV19 guidance for tourism and hospitality
- Sector guidance – UKH, ASSC, ASVA, Wild Scotland, Sail Scotland, NCC, BH&HPA
- Good to Go
- Visitscotland.com listings – open/closed plus G2G
- Visitscotland.org – key information source
- Tourism Task Force



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COMMUNITIES

- In Scotland, the Scottish Government's Sustainable Tourism Growth Sector represents 4.5% of the Scottish Economy. This figure is greater in the **rural regions** of Scotland with Highlands, East Lothian, Argyll & Bute, South Ayrshire, Stirling and Perth & Kinross seeing **tourism represent between 8.5% and 9% of the local economy** and similar, if not larger, shares of employment attributed to tourism.
- The trends are becoming clearer and are evolving from signals observed over the past few years. The new normal post COVID-19 will find consumers seeking travel with purpose. **Visitors want to support a tourism industry that support communities.**
- The message of **responsible tourism** is more important now than it has ever been.

MEASURES OF REASSURANCE

- Clear **guidance** to allow for tourism businesses to open in a safe and responsible manner and ensure the wellbeing of staff and visitors. The tourism industry is taking a **responsible** attitude to ensuring opening is done in a safe way.
- The recovery of tourism will come in a **phased and gradual** approach and won't happen until we can start to **balance supply and demand**. We're working with partners, tourism groups and businesses to ensure visitors can access up to date information on VisitScotland.com.
- We won't be **marketing** areas until **confidence** has returned and the science says it's time to welcome back visitors. Our marketing activity gives further reassurance with holidaying locally a big part of it.

SENTIMENT

- **Tourism is a force for good**, providing economic benefits, jobs, and is an integral part of the community – helping to combat depopulation and creating a feeling of wellbeing across Scotland.
- The **ripple effect** of tourism is felt across lots of non-tourism businesses from the local butcher supplying meat to a hotel to the local florist providing table settings for an event.
- Being **kind** has really struck a chord and it really is at the heart of restarting tourism in Scotland. People praise the friendliness of our people. A **warm Scottish welcome** is crucial – it's one of the top reasons for visiting – and Scots are proud to open their arms to visitors.
- This is about **working together**, seeing the issues from all sides and reaching compromises to ensure that we can **restart tourism in a responsible way**. As a sector we are already on our way.

SPECIFIC ACTION

- Tourism destination and sector **support fund as a conduit**
- **Rural** Tourism Infrastructure Fund
- Highlighting **best practice** by groups and areas doing excellent work in their communities
- A programme of engagement to provide **reassurance** about national plans, consumer insight, guidelines, marketing plans and visitor pledges
- Building on strong **regional** and **local** engagement already in place



MARKETING RECOVERY

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VISITSCOTLAND: A STRATEGIC RESPONSE

RESPONSE	RESET	RESTART – FROM 15 JULY	RECOVERY FROM 27 JULY FOR UK INTERNATIONAL (TBC)	RENEW
ALL NON ESSENTIAL TRAVEL PROHIBITED		LOCAL EASING	DOMESTIC MOVEMENT LATER FOLLOWED BY INTERNATIONAL	REINVIGORATION OF MARKET
<p>Objective: Keep yourself and Scotland safe</p> <p>Messaging: Dream now, travel later</p> <p>Activity: All paid and social activity paused Industry support became priority</p>	<p>Objective: Keep Scotland top of mind, build advocacy</p> <p>Messaging: Dream now, travel later</p> <p>Activity: Inspiring and Entertaining content 'armchair travel'</p>	<p>Objective: Reconnecting Scots with Scotland</p> <p>Messaging: Stay local Only in Scotland</p> <p>Activity: Inspirational content to mobilise/engage; regional/ product/thematic content to drive bookings</p>	<p>Objective: Increase demand for, holidays and breaks</p> <p>Messaging: UK: Book your trip International: Plan your trip</p> <p>Activity: Inspirational content to engage; regional/product/thematic content to drive bookings</p>	<p>Objective: Support wide spread industry renewal and reinvigoration of tourism, whilst meeting the emerging needs of a changing visitor profile</p>

Community centred – safe & responsible messaging

UK CONSUMER INSIGHT SO FAR

- Need to reassure
- Indication of reduced spend on holidays/break this year
- Confidence for travel grows from September onwards
- Scotland showing strong intent from UK
- Scots currently more likely to stay in Scotland
- Coast, countryside, outdoor activities have a high appeal but many also saying cities & towns (latter not yet evidenced in summer bookings)
- Currently self-catering a stronger proposition
- 35% of Scots will book direct, 26% via OTAs, 12% Homestay websites (similar percentages for wider UK market)

OBJECTIVES FOR RESTART/RECOVERY

- Build national pride and stimulate local responsible travel within Scotland – day trips, holidays and breaks
- Reassure Scotland that we are taking a responsible approach to attracting visitors from else-where and encouraging safe and responsible behaviour
- Use supply side intelligence to inform messaging and media approach – full programme of engagement with industry and partners
- Capitalise on school holiday months for family market
- Promote wide range of types of holidays/breaks on offer in Scotland from summer, through autumn and into winter
- Make Scotland **DISCOVERABLE**
- Through story-telling & story-living drive **ADVOCACY**

Only in Scotland
captures what people
seek from holiday in
Scotland, and our
unique attributes

CREATIVE PROPOSITION



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Scotland ... your country needs you
It needs you to feel the sand between your toes, along our miles,
and miles and miles of sandy beaches
To follow in the footsteps of our ancestors and get lost in stories of our past
It needs you to enjoy the welcome we are famous for
In ways that can make us all feel more reassured
To get that much needed change of scenery
To dine in Or out
To taste our world famous produce as fresh as it comes
Or as fresh as you can find it for yourself
It needs you to get swept up .. And explore. And anywhere your dancefloor
To sing along, however badly
To get up early ... and catch a sunrise. And cosy up under a sunset
To connect with something other than wifi
And reconnect with the people you love
In the country you love
So all your country needs you to do .. Is enjoy all we have to offer
Because Only in Scotland, can travelling so little make such a big difference



REGIONAL (X15) & PRODUCT EDITS TO BE PRODUCED FOCUSED ON THE UNIQUE AND COMPELLING REASONS TO VISIT



AYRSHIRE & ARRAN



GLASGOW & CLYDE VALLEY



EDINBURGH & LOTHIANS



FOOD & DRINK



CITY BREAKS



FESTIVALS & EVENTS

WIDE RANGE OF FILM AND ADVERT INVENTORY BEING CREATED

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VISITOR PLEDGE

We want everyone to enjoy re/discovering Scotland: visitors, tourism businesses and communities alike. We're asking everyone to work together to help the visitor economy recover quickly

Plan ahead

- Check the business is open and if you need to pre book
- Follow business / attraction /community on social for latest 'open' updates
- Look out for businesses supporting 'Good to Go' scheme – Scottish businesses are working hard to ensure your safety and welcome

Enjoy the best of Scotland

- Join us in supporting the local tourism industry, discover new things and be flexible – if it's busy, try somewhere different
- Eat local, see local, buy local
- Enjoy 'slow' travel – visit fewer locations and really get to know the area – walk, bike or paddle

Protect others

- Do not travel if you have Covid-19 symptoms or have been told to isolate
- Observe physical distancing, wear face masks when in confined spaces and on public transport
- Regularly use hand sanitiser and wash your hands frequently
- Observe the Scottish Outdoor Access Code

respectprotectenjoy





Tell the people of Scotland their country needs them at scale



Persuade the right people that Scotland gives them a holiday at home



Match people with different geos and interests to the right places for them

WE HAVE BUILT A FRAMEWORK TO RESPONSIBLY KICKSTART TOURISM IN SCOTLAND

SCOTLAND NEEDS YOU

Broadcast

Mobilising

1. Targeting Scotland

public campaign that puts forward the case for supporting tourism as part of a cross industry recovery

Welcoming

2. Targeting ROUK&I

broadcast campaign which welcomes people to Scotland as a whole and shows it as a 'holiday away ... at home'

YOU NEED SCOTLAND

Targeted

Concept Forming

3. Targeting segments based on

- a) geo
- b) interest and
- c) living arrangements to match them to different places

Reassuring

4. Following up with the right information to

- a) ease anxiety and
- b) enable conversation

Where will you go first?
(paid social)
15/6 – 15/7

SCOTLAND NEEDS YOU

Broadcast

Mobilising

Scotland Awareness Launch
c. 15 July

Welcoming

ROUK & I Awareness Launch
Mid August

YOU NEED SCOTLAND

Targeted

Concept Forming

Reassuring

From end July onwards

You Tube and Social Media buy integrated throughout the plan



STV partnership
TV (C4, ITV, Sky)
Catch up TV
Radio: Bauer Partnership
Capital, Heart, First Radio,
Spotify
Paid Social
Partner/regions buy in

PR optimised

Sky TV
Catch up TV
Radio: Aire, Hallam, Viking,
Capital NE, Classic FM
North, Heart NW
Spotify
Paid Social
Press - Consumer interest
Brands
Partner/regions buy in
PR optimised

OTA/Tour Operator Partnerships

EXPEDIA
TRIP ADVISOR
BOOKING.COM

PR optimised