

MOMENT FOR CHANGE

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**Latest Research on the
Scottish Tourism Landscape
For Perthshire Tourism Group**

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Impact of COVID-19 on global tourism

- Between January and May, international tourist arrivals were 85% below 2019 levels (or a 65% drop on 2020)
- UNWTO data shows. Despite a small uptick in May, the emergence of COVID-19 variants and the continued imposition of restrictions are weighing on the recovery of international travel.
- Meanwhile, domestic tourism continues to rebound in many parts of the world.
- The UNWTO forecast a mixed outlook for remainder of 2021 with international tourism is slowly picking up, though recovery remains very fragile and uneven.

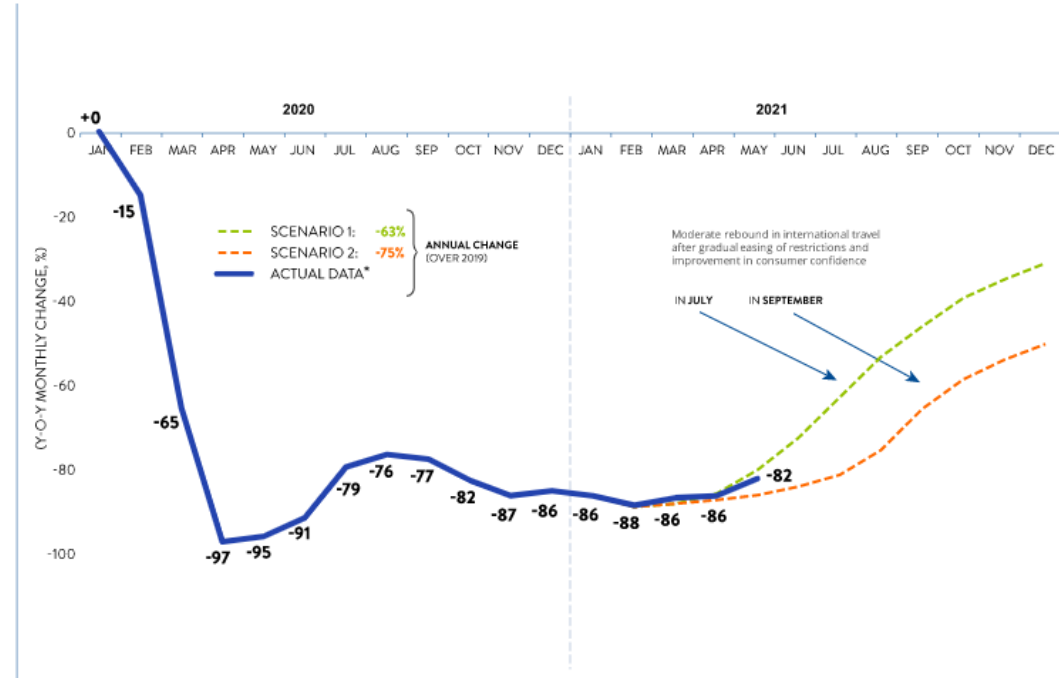
INTERNATIONAL TOURIST ARRIVALS: SCENARIOS FOR 2021

(Y-O-Y MONTHLY CHANGE OVER 2019, %)

* Actual data for 2021 is preliminary and based on estimates for destinations which have not yet reported monthly results.



SOURCE: UNWTO (DATA AS OF JULY 2021)



Consumer Sentiment – Mood of the Nation (UK)

The latest UK consumer tracker reports on survey results as of 3 September (covering 23- 27 August 2021)

- 55% of adults anticipate taking more or the same number of overnight domestic short breaks between now and end of the year compared to normal, and 50% think they will take more or the same number of overnight domestic longer breaks in the same period. *This compares with 33-36% of adults with similar intent regarding overseas trips.*
- 60% are confident a September trip would go ahead as planned, similar to 61% last wave.
- Among those who are intending to take a trip this autumn, 39% have reached the planning and 29% the booking stages of their trips, on par with the last wave.
- The south west (20%) remains the lead region for autumn trips, with Yorkshire and the Humber the next most popular region (14%). Scotland is in third equal place for Autumn trips alongside London (12% of intenders)

Consumer Sentiment – Mood of the Nation (Scotland)

The latest Scotland report looks at survey results for 31 May to 2 July 2021.

- Scotland is the second preferred destination choice for UK intenders this summer (13%) and third for the autumn (October-December). For Scotland residents, 60% intended a summer break in Scotland (increase on previous report).
- Older independents (35-54, no children) are likely to be the largest life stage spending an overnight stay in Scotland this summer, with higher representation than in the wider UK population. Families are likely to be the second largest group, in line with the population.
- **The Highlands remains the most favoured destination** for Scotland summer intenders living within and outside Scotland – particularly the former. **Edinburgh is the second most preferred destination** for summer intenders, **but significantly less so for Scotland residents** (who are likely to make up the majority of trip takers).
- Although 'hotel, motel, inn' is the number one specific type of accommodation for summer trips (40%) and autumn trips (58%), **'non-serviced' accommodation has a clear lead in terms of where people want to stay** i.e. commercial self-catering

What is the next normal? – Consumer Trends

- *“Reclaiming lost time, the lost period in our lives”*
- Keeping it safe and simple with staycations
- Convenience of serviced self catering and “luxury” serviced accommodation
- Personalisation and Premiumisation
- Deferred Gratification – deriving happiness from expectation
- Travel with purpose – acknowledging past impacts
- Rewilding and Reward
- Wellness, Fitness and Health Enhancement

The outlook for Tourism in the next normal

- Time was once a precious commodity – now it will become an asset
- Slow Tourism will see travelling less but travelling better
- Need for trust between consumer and provider
- Concern for social distancing, hygiene and safety
- *Small group travel and private tours*
- *Personalisation and bespoke products*
- *Planned and curated travel*
- **Innovation and Adaptation**

How Best to position for sustainable recovery

Marketing Scotland Internationally

- Scotland is Calling is our upcoming international marketing campaign.
- We're aiming to make Scotland the first-choice destination when international travel is possible again – encouraging forward bookings for late 2021 through to 2022 and beyond – and delivering sustainable long-term growth.
- Industry Webinar on Wednesday 15th September 11am – 12pm
- There will be practical advice on why online booking is important,
- How to make the most of your social media channels
- Q&A to find out how your business can make the most of the campaign.

<https://www.visitscotland.org/news/2021/marketing-webinar>

How Best to position for sustainable recovery

Marketing Scotland Domestically

- 'Now is your time' is our latest campaign, part of Only in Scotland, designed to showcase exactly what Scotland has to offer this summer and beyond to UK visitors.
- We're focusing on the key offerings and diversity we know Scotland has in abundance – days out, short stays, city breaks, escapes and family gatherings.
- Consumer insights show that there's still a hesitancy about booking holidays this summer. This is mixed with a strong desire to take a much-needed break, especially for those still working from their homes. So, this campaign will focus on why now is the time for visitors to take a break in Scotland.

<https://www.visitscotland.org/supporting-your-business/marketing/toolkits/only-in-scotland>

Scottish Tourism Observatory

What is a Tourism Observatory?

Tourism observatories might vary in structure, but they all share a common goal - to gather and analyse data to support and inform policy, strategy and decision-making.

Aims

The aim of this project is to create a knowledge resource for Scotland's tourism and events industry which will make necessary, relevant and valuable data, analysis and insight easily available and usable by all.

Research

To ensure that the resource is designed and developed to meet the needs of Scotland's tourism and events industry, there will be research conducted in September 2021. We have contracted external agencies Optimat and True North Innovation to conduct some user research on our behalf, via expert interviews, focus groups and an industry survey.

Thank You



 Pink Footed Geese at Loch Levens