



MBTAG

**SNAPSHOT OF OUR TARGET
MARKETS**



Increasing tourism footfall in
the Scottish Borders and
Midlothian.

OUR AUDIENCE

Who are we targeting?



MARKET BREAKDOWN

BREAKDOWN BY TRAVELLER TYPE

Market focus:

- Extend visitors' overnight stays and stimulate more visitor spend on 'land' activities.
- Drive year-round visitation, with a focus on capacity utilisation during shoulder and off-peak months.
- Attract more high-networth visitors (UK & overseas) to stay longer and repeat more frequently.

Our Opportunity markets:

- International: North America (USA & Canada) & Germany
- Domestic: UK (Scotland, England, Wales)

MARKET BREAKDOWN

BREAKDOWN BY TRAVELLER TYPE

	WHEN THEY PLAN 	WHEN THEY VISIT 	LENGTH OF STAY 	BOOKING BEHAVIOUR 	TRAVEL TRADE 
UK	3 months & less	All year with highest visitor numbers in the summer	3.4 Nights	<ul style="list-style-type: none"> • Prefer to book through holiday booking website (48%) or directly with service providers (46%) • Seek information/inspiration via review sites (Trip Advisor) • Direct bookings through 3rd party sites (Booking.com) 	<ul style="list-style-type: none"> • 4/5 people book holiday online • Phone/in-store bookings remain steady • Well-off travellers book via travel company or agent
North America (US & Canada)	6 months + (40.9 weeks on avg. in advanced)	April- October	8.7 Nights	<ul style="list-style-type: none"> • Use websites, friends and family and printed travel guide books for planning trip • More likely to seek personal advice from a travel agent • More likely to purchase tickets for tourist attractions/guided sightseeing tours prior to trip 	<ul style="list-style-type: none"> • Increase in millennials booking FIT packages through travel agents • 70% of luxury segment still book with travel agent
Germany	6 months + (25.9 weeks on avg. in advanced)	May- September	7 Nights	<ul style="list-style-type: none"> • Rely on tourist boards, Trip Advisor, tour operator websites and word of mouth from friends and family when planning • Following advance research, will approach a travel agent or tour operator for booking 	<ul style="list-style-type: none"> • Booking through the trade continues to be strong • Brexit impacting booking numbers; many have delayed travel to UK • Increased sense of need for safety to discuss holiday plans with travel professional (due to recent terror attacks and political situations)

MARKET BREAKDOWN

BREAKDOWN BY TRAVELLER TYPE

	WHY THEY VISIT 	ADDITIONAL INTERESTS 	STONE OF VOICE 	CONTENT THEY ENGAGE WITH 
UK	<ul style="list-style-type: none"> No language barriers Easy access to booking tools Breathtaking scenery & landscape New / interesting things to discover Fascinating history & culture 	<ul style="list-style-type: none"> Open to explore off the beaten track destinations Range of outdoor activities Great food and drink experiences 	<p>Lots of new / interesting activities and scenery to discover</p>	<ul style="list-style-type: none"> Social media and PR activities 3rd party sites: Trip Advisor, Booking.com, Skyscanner, etc.
North America (US & Canada)	<ul style="list-style-type: none"> Film & TV (Outlander) Good flight connectivity Ancestral links prompt visitors to walk in their ancestors' steps & go off beaten track Round of golf / interest in history of golf Value for money 	<ul style="list-style-type: none"> Demand for authentic, local experience Soft adventures- kayaking along Scottish coast Multigenerational travel Culinary tourism Off the beaten track destinations Open to explore lesser known regions 	<p>Ancient lands of my ancestors</p>	<ul style="list-style-type: none"> Websites providing travellers' reviews Information from search engines Word-of-mouth influence Social media
Germany	<ul style="list-style-type: none"> Connection to Scottish landscapes Fondness of Scottish traditions Ease of access for weekend breaks 	<ul style="list-style-type: none"> Touring holidays by car/couch Open to exploring new areas Smaller group tours at a relaxed pace with hands on experience & activities Experiential travel (train journey, distillery visit with tasting) Connecting with locals (pubs) 	<p>Wilderness and friendly locals</p>	<ul style="list-style-type: none"> More likely to rely on printed travel guide books: Lonely Planet, Rough Guide, Fordors Social media

MARKET BREAKDOWN

BREAKDOWN BY TRAVELLER TYPE

	WHEN TRAVEL TRADE NEED CONTENT BY FOR BROCHURES/ NEW ITINERARIES	WHEN BROCHURES GO OUT	WHEN PEOPLE BOOK WITH TRAVEL TRADE
UK	<ul style="list-style-type: none"> Coach Operators: September 19 for year 2021 	<ul style="list-style-type: none"> Coach Operators: November 10 for year 2020 	Mainly direct bookings apart from coach tours or special interest, i.e. walking, cycling holidays
North America (US & Canada)	<ul style="list-style-type: none"> Group Operators: September 19 for year 2021 FIT Programmes: July- October 19 for year 2020 	<ul style="list-style-type: none"> Group Programmes: August 19 for year 2020 FIT: October/ November for 2020 Web: October-December 	December-March (main booking season)
Germany	<ul style="list-style-type: none"> Group Operators: September 19 for year 2021 FIT Programmes: July- October 19 for year 2020 	<ul style="list-style-type: none"> Group Programmes: August 19 for year 2020 FIT: October/ November for 2020 Web: October-December 	December-March (main booking season)

MOTIVATIONS

BREAKDOWN BY MARKETS

UK



- Scenery & landscape 46%
- Holidayed before & wanted to return 29%
- History & culture 26%
- Visit family / friends 25%
- Special event 12%
- Personal celebration 11%

NORTH AMERICA (US & CANADA)



- History & culture 56%
- Scenery & landscape 55%
- Always wanted to visit 41%
- Scottish Ancestry & Family Connection 24%
- Visit Cities 21%
- Film & TV 16%
- Golf

GERMANY



- Scenery & landscape 78%
- History & culture 53%
- Always wanted to visit 48%
- To visit cities 34%
- To get away from it all 30%

SEARCH OPPORTUNITIES

WHAT CONTENT ARE THEY LOOKING FOR?

(based on 1 month)

	US	Canada	Australia	Rest of Europe	UK
edinburgh	74000	14800	14800	21000	246000
scottish highlands	22000	2900	2400	12000	18100
scottish borders	320	110	110	320	3600
day trip from edinburgh	200	30	30	110	210
Activity specific					
Scotland tours	4400	1000	720	4400	2900
Scotland walks	210	70	140	2900	2900
Munros in scotland	260	50	50	1100	2400
Mountains in Scotland	720	110	140	1100	2400
Scotland adventure	210	20	90	720	390
Golf Scotland	1900	320	90	290	1300
Castles in Scotland	6600	1000	590	2900	5400

BARRIERS / CHALLENGES

OVERCOMING OBSTACLES

“How do we get people to stop in the Midlothian & Borders?”

Challenges:

- Low awareness / demand.
- International travelers choose cities and the Highlands.
- People don't know the difference between the Highlands and the Borders.

Opportunities:

- Holiday while you're on holiday – people looking to get two experiences for the price of one. Show them how they can get both a city and a scenic escape.
- The new Borders railway makes it easy for them to get there.
- International visitors crave landscape and history – the Borders & Midlothian have both!

BARRIERS / CHALLENGES

BREAKDOWN BY MARKET

	AWARENESS	COST	GLOBAL CRISES	MISC.
UK	Lack of knowledge of what Scotland has to offer	Weakening of the pound since 2016	Brexit uncertainty- yet to be proven assumption that domestic tourism will increase strongly in the current / coming years	Unreliable weather barrier to adventure seekers Dislike returning to the same destination
NORTH AMERICA	Lack of knowledge of multiplicity of locales / ranges of evening activities Locations closer to US often more top of mind	Some may perceive Scotland as being a more expensive choice	Terrorism and global crises concerns with reported short-term negative impact	Impact of Brexit is a short-term opportunity to offer consumers better value
GERMANY	Lack of awareness of different locales in Scotland	Some may perceive Scotland as being a more expensive choice	Unsure about Brexit procedures and requirements of entering the country, which have delayed decision to travel	Satisfaction of accomodation and food value for money being ranked below an 8 out of 10 within Scotland Visitor Survey



Please revert to the full toolkit on the MBTAG website for full information.

