

Mastering OTA's



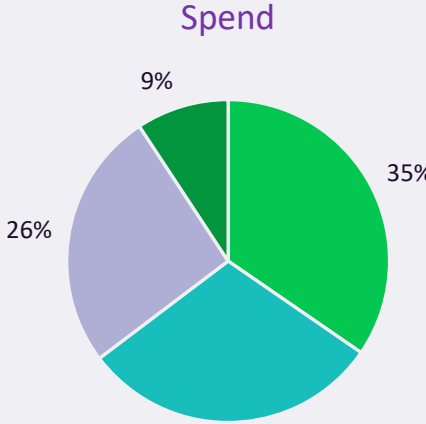
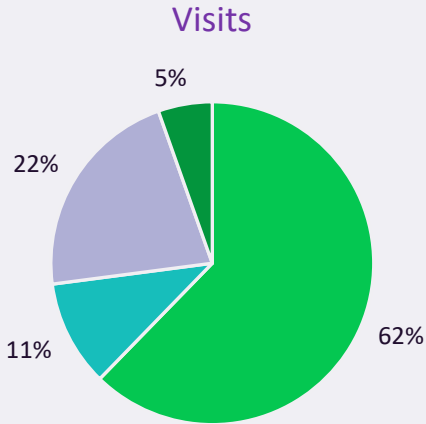
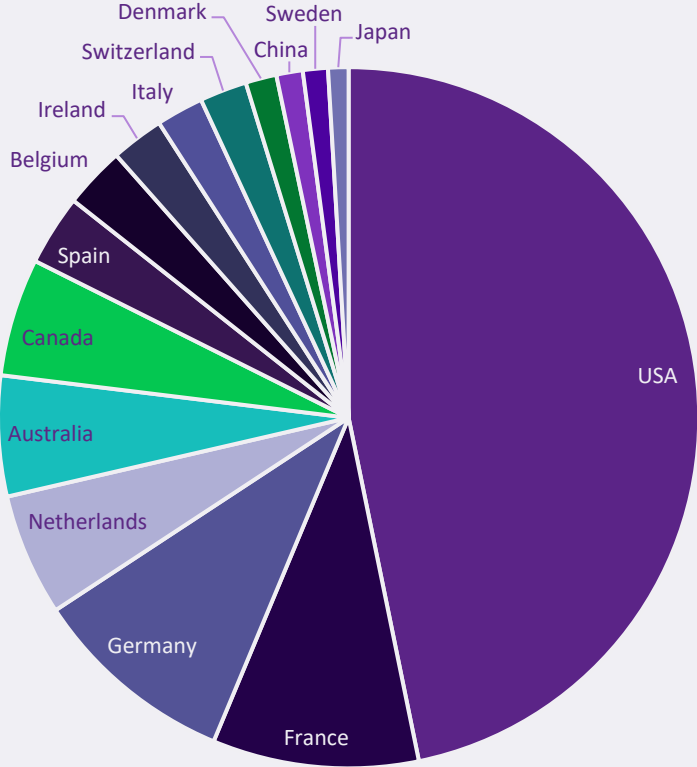
Agenda

- Insights
- Which Channel
- Top Tips for success



Who visited Scotland in 2023?

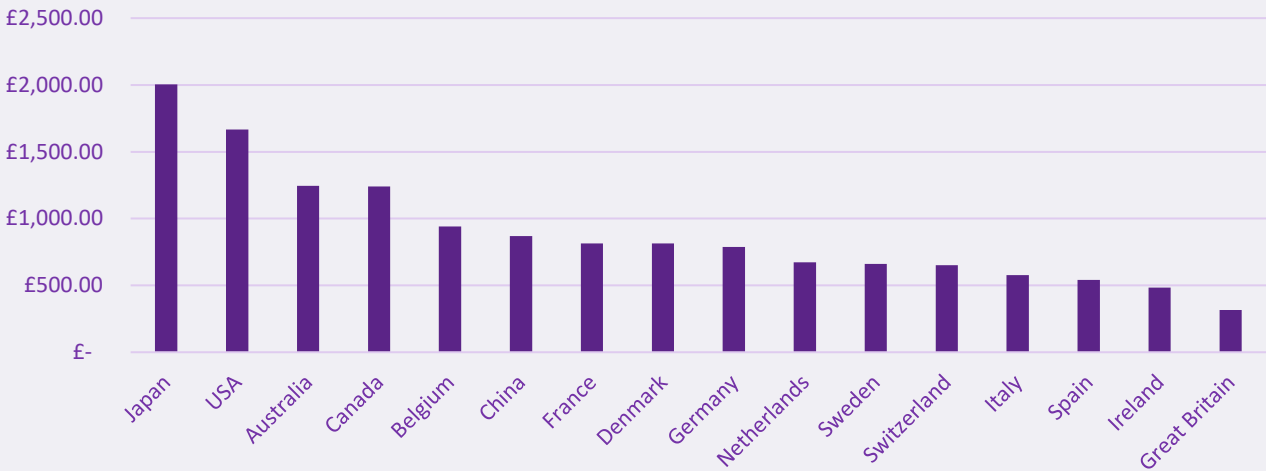
Spend by Top 15 Countries (88% of Int'l spend)



■ GB ■ North America ■ Europe ■ Rest of World


GB accounts for 62% holiday visits and 35% holiday spend


Average spend per visit





Source: GBTS 2023, International Passenger Survey 2023 – Leisure holiday visits

The path to purchase is full of twists and turns

 Inspiration

 Research

 Planning

 Booking

48% of experiences bookings
are happening once travellers
arrive at their destination

Sources

Image: Expedia

Stat: Google/Greenberg, Global, Travel Tours and Activity survey and Behavioural Study, Dec 2018

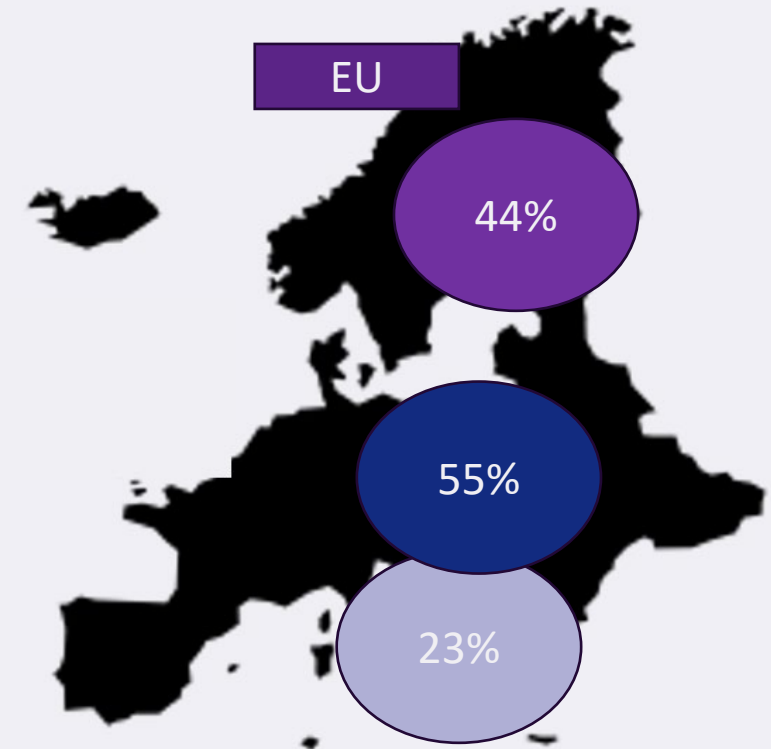
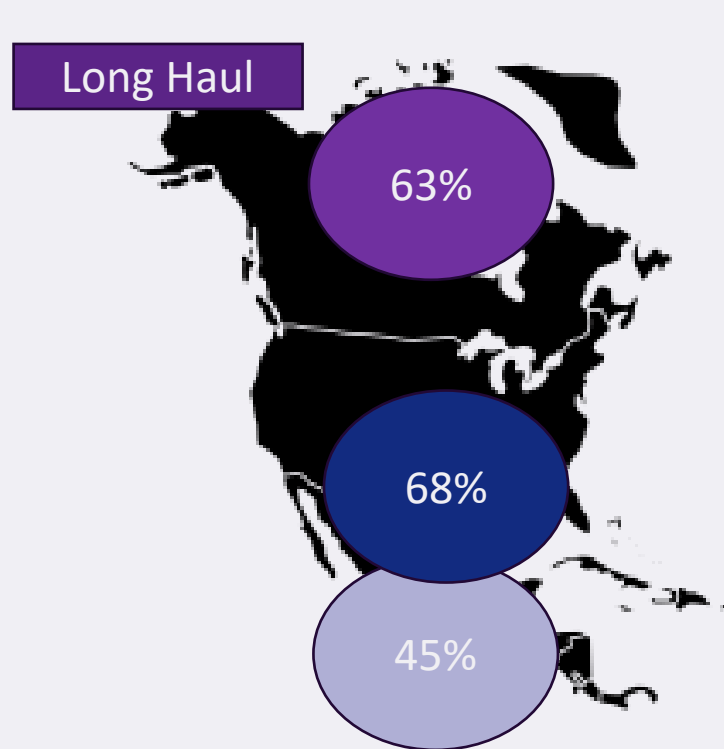
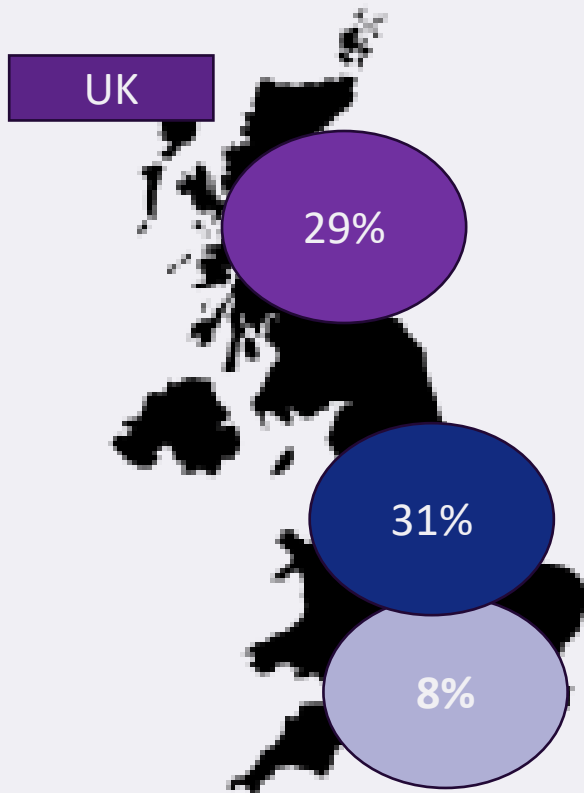
Boost your bookings

Booked in Advance Data

Pre –arrival Booking Habits

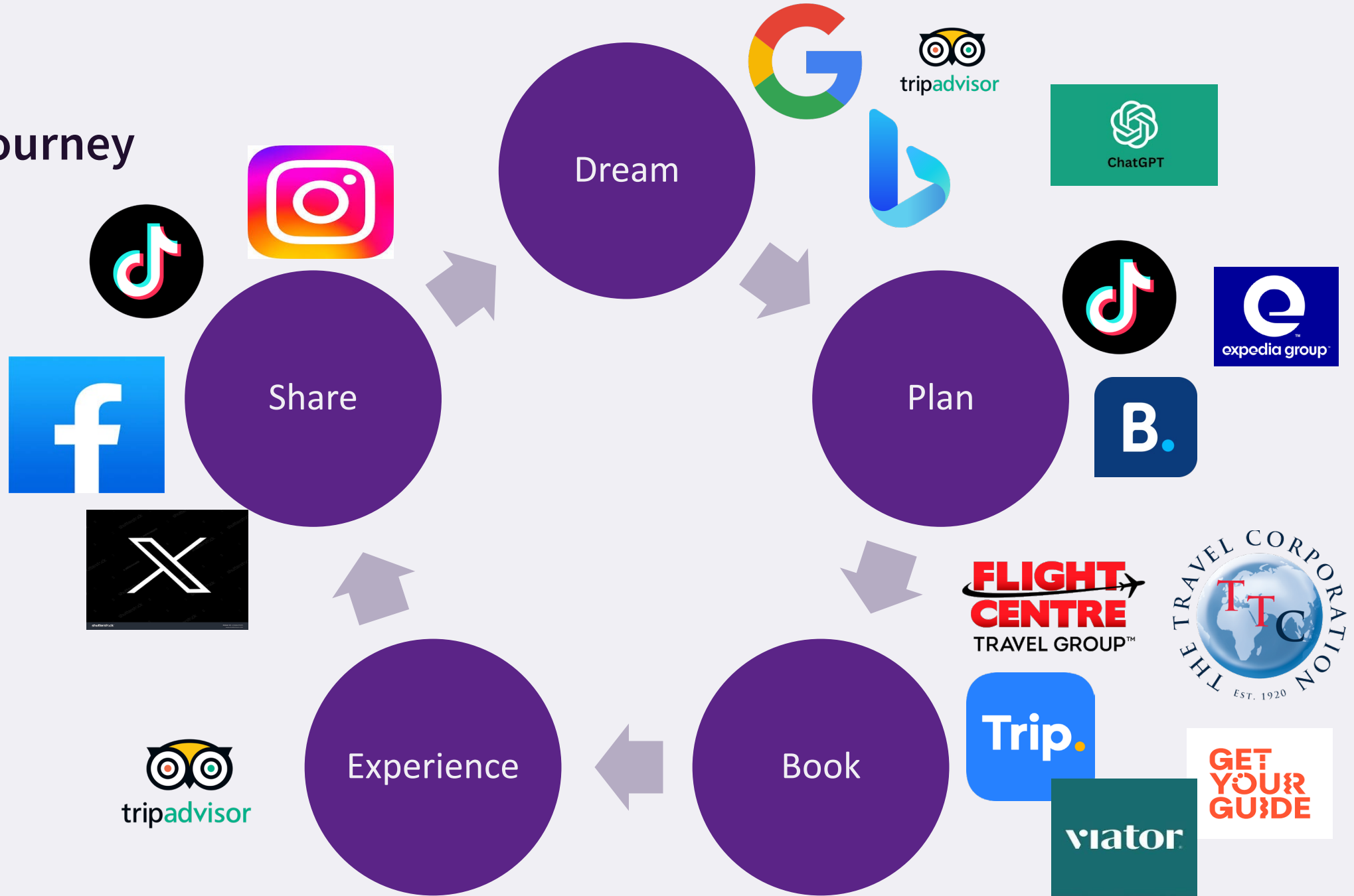
Used an intermediary when booking

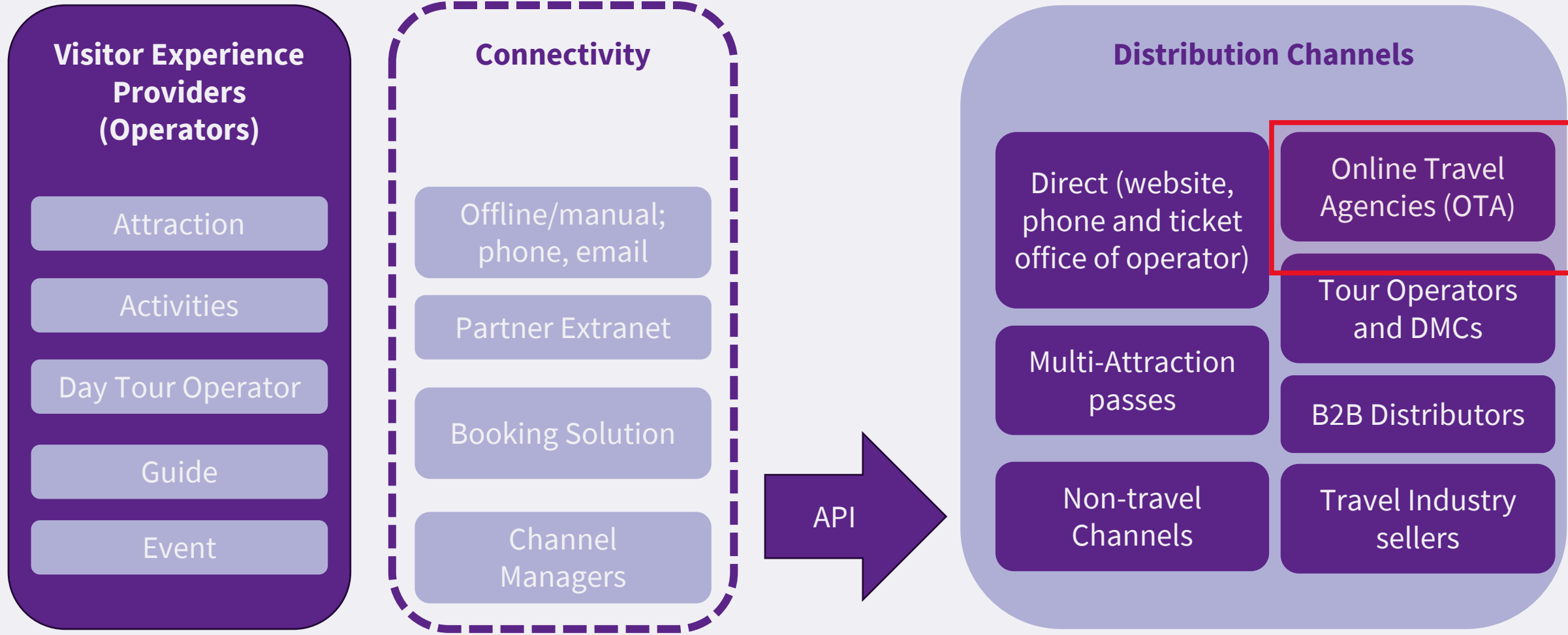
Used an intermediary when planning



Boost your bookings

Customer journey



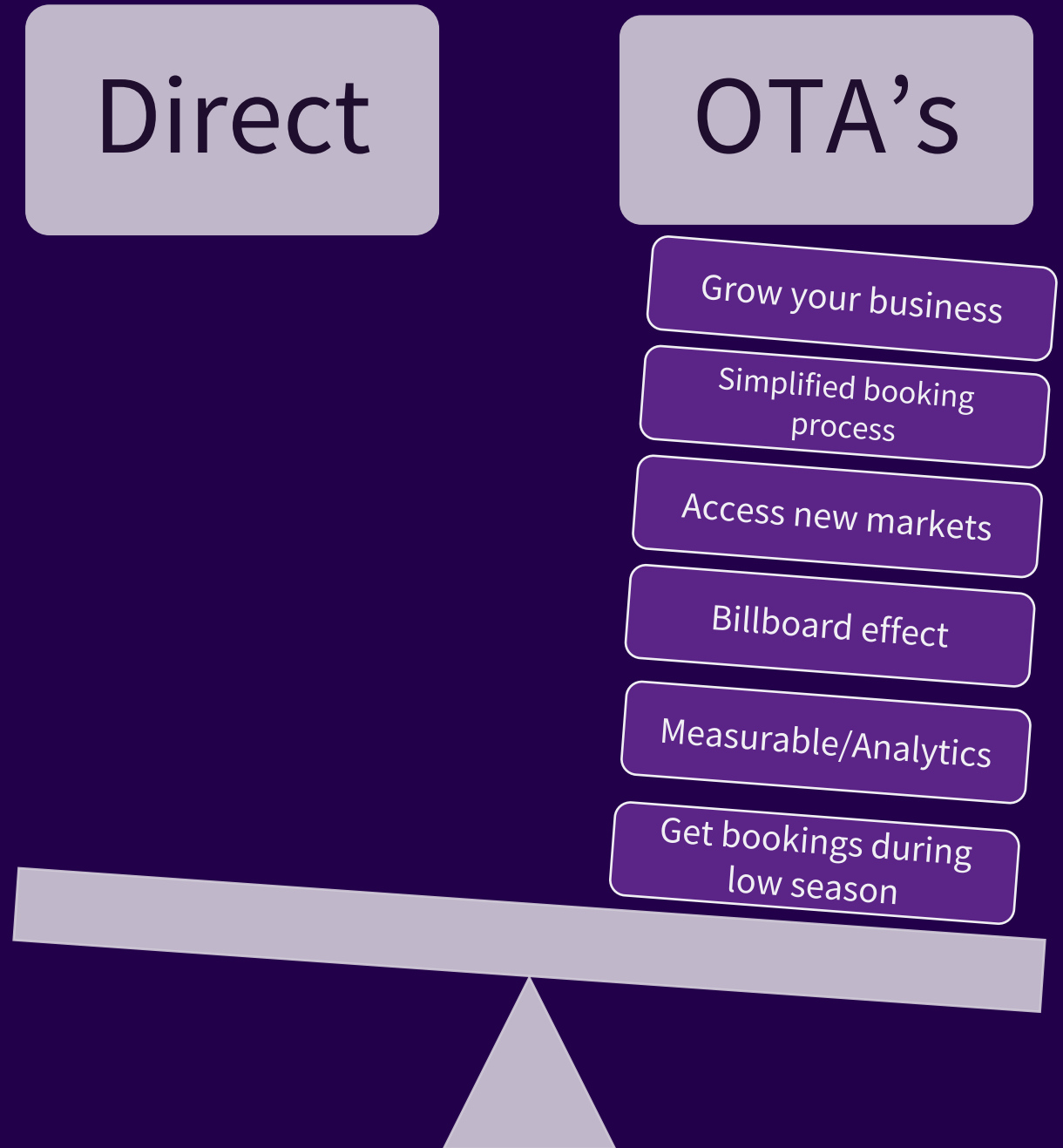


Online Travel Agents Growth



6 benefits

Intermediaries bring new bookings and customers



Explorers are the biggest spenders, and likely the drivers of this trend

While consumer spending is down overall, there are still 'super-spenders' who have kept traveling despite the economic environment — and that's likely to continue.

That's because they're avid adventurers. Explorers take the most trips and do the most activities when they get there.

It's estimated that they represent 60% of the entire spend of the leisure travel market.

EXPLORER STATS

18%

spent more than the average traveler

51%

of all travelers are Explorers


60%

of the travel experience market is consumed by Explorers

How to appeal to a Modern Explorer

- Modern Explorers are defined by psychographics (a set of values)
- They seek immersive travel experiences that connect them to the destination
- They want authentic, unique experiences, and hate the idea of being sucked into shallow tourist traps

 **Use lots of immersive, authentic imagery**

 **Provide engaging descriptions that explain what they will learn**

 **Surface what is unique to your activity or tour**

The things that most define Modern Explorers



They want to be immersed in the local way of life



They prefer to visit new places instead of places they already know



They find research fun, and an important part of the trip



They go on vacations to discover and explore new things

Which OTA's?

OTA's with Experience Division

Company Name	Geographical Focus (Customer)	Geographical Focus (Destination)
Booking.com	Global	Global
Expedia	Global	Global
Airbnb	Global	Global
Ctrip/Trip.com	China	Global

Tours & Activities OTA's

Company Name	Geographical Focus (Customer)	Geographical Focus (Destination)
GetYourGuide	Global	Global
Viator	Global	Global
Civitas	Med Europe, Latin America	Global
Headout	Global(India/North America)	Global
Klook	Asia	Global
Tiquets	Europe	Europe, North America

Adventure & Outdoor/ Discounts/Regional/Gifting OTA's

Company Name	Geographical Focus (Customer)	Geographical Focus (Destination)
Manawa	Global	Europe, North America ..
Groupon	Global	Global
Itison	Scotland	Scotland
LovetoVisit	UK	UK
Virgin Experience Gifts	UK	UK

Tips for Success

Tips

Product

Pricing

Reputation

Data

A large, stylized purple flower graphic is positioned on the left side of the slide. It features a central circular element with a three-lobed shape inside, surrounded by several curved petals and a stem with leaves. The entire graphic is rendered in a lighter shade of purple against the darker purple background.

*Visit
Scotland* | *Alba*[™]

Patrick O'Shaughnessy

Industry Manager (Development)