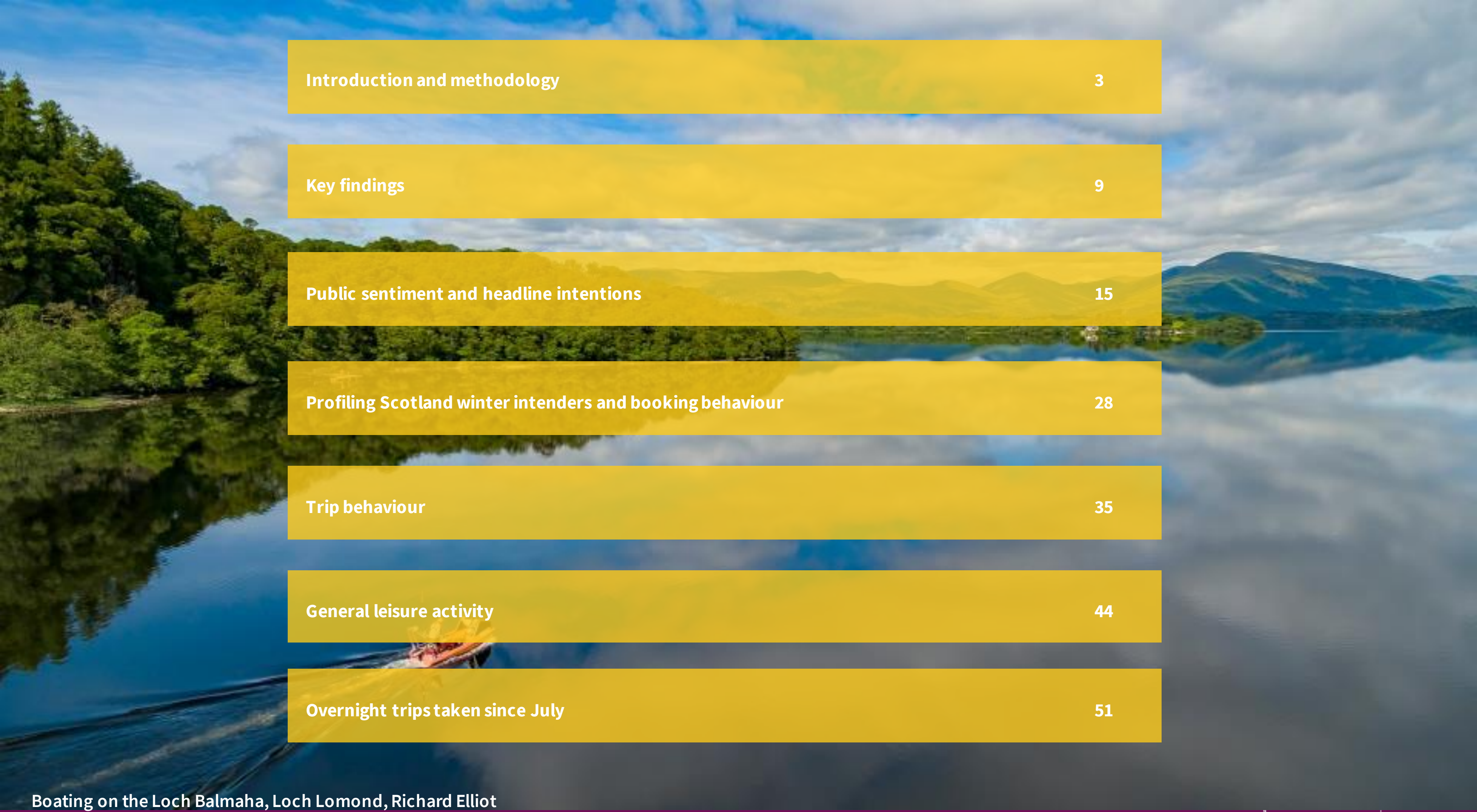
COVID-19 Consumer Tracking Report – Scotland Level Summary

31st August – 2nd October 2020

(Waves 14-16)

Published 16th October 2020

Sunrise on the Isle of Lismore, Lismore, Argyll and the Isles, Richard Elliot



Boating on the Loch Balmaha, Loch Lomond, Richard Elliot

Introduction and Methodology

The 144th Open, St Andrews, Kenny Lam

Introduction

- VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

- The survey addresses: the likelihood of U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

- The tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales residents to deliver robust weekly samples. The survey has been repeated weekly or fortnightly with the first week commencing 18th May

- **The findings in this report are broadly based on data from Waves 14-16.** This is based on fieldwork taking place during the following dates:
  - **Wave 14: 31 August – 4 September**
  - **Wave 15: 14-18 September**
  - **Wave 16: 28 September - 2 October**

In some cases, wave 14 has been excluded. This is typically to capture 'mood and sentiment', following the additional restrictions that were introduced in mid-September

Definitions used within this report (1)

The early chapters of this report are ‘forward looking’ and focus on trip intention in the upcoming months. Definitions used include:

- **UK ‘winter’ intenders:** Members of the public who intend to take a U.K. holiday or short break between November 2020 and March 2021
- **Scotland ‘winter’ intenders:** Members of the public who intend to take a U.K. holiday or short break in Scotland between November 2020 and March 2021
- **Scotland resident ‘winter’ intenders:** Members of the public who live in Scotland and intend to take a U.K. holiday or short break in Scotland between November 2020 and March 2021
- **Waves 9-13**: Throughout the report, comparisons are made to the reporting that reflected waves 9-13 of this research. The questionnaire and sample was identical to that used for this report (Waves 14-16) and reflects fieldwork conducted between late July and late August. The purpose of this comparison is to demonstrate how intentions and attitudes have changed over time, particularly in light of the re-introduction of restrictions

The final chapter of this report looks at trips *taken* from July to September in the U.K. and Scotland. There are four key definitions within this section:

- **All Scotland trip-takers:** All members of the public that have taken an overnight trip *exclusively* in Scotland since the start of July for any purpose (holiday, visiting friends or relatives, business or other)
- **All Scotland holidays-takers:** All members of the public that have taken an overnight *holiday* (not primarily visiting friends or relatives, business or other) exclusively in Scotland
- **Intended trips:** Members of the public that intended to take a trip exclusively in Scotland before lockdown restrictions were lifted. This data is taken from weeks 5-8 of the research which took place from Mid June to Mid July. We do not include ‘intentions’ for trip behaviour due to the response biases associated with projected and retrospective answers.

Definitions used within this report (2)

- To deliver clearer findings, we also profile by life stage. Life stages are preferable to 'age' as they better describe someone's life situation. For the purpose of this report, we have used the following:
  - **Pre-nesters:** Aged 16-34 without children in household
  - **Families:** Aged 16-64 with children in household
  - **Older independents:** Aged 35-64 with no children in household
  - **Retirement age:** Aged 65+.

- We also use 'social grades' within this report. Social Grade is a classification system based on occupation and broadly aligns with income. It has been used as a standard within market research for a number of decades to build an understanding of respondents alongside a number of other factors. In this report, social grade should be assessed alongside life stage, financial and attitudinal segments. Broadly, social grades are outlined as below:
  - **A** Higher managerial, administrative and professional
  - **B** Intermediate managerial, administrative and professional
  - **C1** Supervisory, clerical and junior managerial, administrative and professional
  - **C2** Skilled manual workers
  - **D** Semi-skilled and unskilled manual workers
  - **E** State pensioners, casual and lowest grade workers, unemployed with state benefits only

Definitions used within this report (3)

- For ease of analysis the following accommodation definitions are used:
  - **Hotel/Motel/Inn**
  - **Guest house/B&B/Farmhouse**
  - **Commercial self-catering:** Rental holiday flat/apartment or Rented holiday home
  - **Private home:** Second home/time share or Friends/relative's home or In someone else's private home on a commercial basis (e.g. Airbnb)
  - **Caravan/Camping/Glamping:** Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
  - **Other accommodation:** Hostel or other type of accommodation

Definitions used within this report (4)

This report also includes four attitudinal segments produced to understand how audiences differ attitudinally in relation to COVID-19. These are defined below:

- **COVID Impacted:** Anxious about the virus, the handling of the situation and society's behaviour, and suffering financially. As such, they are likely to take longer to resume 'normal' behaviour. 'Concerns about catching the virus', 'personal finances' and 'It's not responsible to travel' are the biggest barriers to taking a U.K. holiday or short break.

- **COVID Cautious:.** While they are less concerned about the impact of the pandemic on themselves, this segment fears that we may not yet be past the worst. They are likely to be cautious in their own behaviour as they continue to monitor the situation. They index highly on ''it's not responsible to travel' and 'restrictions on travel'

- **Pragmatic Policy Supporters:** Concerned about the impact of COVID-19, but trusting and supportive of the authorities' policies and most believe the worst is behind us. Most likely to cite 'concerns about catching COVID-19' as a barrier to taking domestic trips. Restrictions on travel also a factor.

- **Life Goes On:** Aching for normality to be restored, this segment is less worried about the risks associated with COVID-19 and are supportive of trying to maintain as normal a life as possible in order to protect the economy and get back to living their lives.

Key findings

Grey Mares Tail and Mamore Lodge Kinlochleven, Fortwilliam, Kenny Lam

Key findings (1)

Public sentiment and headline trip intentions

1. As of Early October, the majority of the U.K. public think that the 'worst is yet to come' in relation to COVID-19, a sentiment that grew significantly in Mid-September, as further restrictions were reduced and local lockdowns started to increase. Scotland residents are marginally more likely to think the worst is yet to come.
2. Despite the spike in pessimism, comfort levels conducting everyday activities have only dropped a few points since the summer amongst U.K. residents, and have stayed relatively stable amongst Scotland residents. They remain significantly higher than in May, June and July this year, suggesting the public have become relatively accustomed to the 'new normal'.
3. Although comfort levels remain stable relative to the summer, they are still low for certain activities. Only a minority are comfortable travelling by public transport and less than half comfortable shopping, or eating at a restaurant. When asked what activities they are likely to do more or less of than normal in the next few months, almost all indoor activities generate a 'net less' figure. Some outdoor activities generate a 'net less' score too – most notably 'visiting festivals', which suggests lower than usual footfall for potential Christmas events.
4. Increasing public pessimism is supported by a significant drop in confidence in the ability to take a U.K. holiday or short break in the next few months. A consistent 1 in 4 of U.K. and Scotland residents feel very or fairly confident a trip would go ahead between October to December, significantly lower than the 1 in 2 confident in an October to December trip back in August.
5. This drop in confidence is driven by 'government restrictions', which is now the number one reason for low confidence, compared to the fourth most popular reason in August. Scotland residents are more likely to cite 'government restrictions' than residents from the wider U.K. Concerns around catching COVID-19 are also influential, the second most important reason for Scotland and U.K. residents, and slightly more influential than in August.
6. The tangible impact of concerns around catching COVID-19 is evidenced by the 58% of U.K. residents stating that they would not visit a 'previously locked down' destination until at least 2 months after restrictions are lifted.
7. Travel confidence is higher amongst families and pre-nesters, who are also most likely to exhibit a rise in confidence as each month goes by. U.K. adults of retirement age remain the least confident and there are no signs of this recovering in 2021.

Key findings (2)

8. Despite flagging confidence, intention to take a trip between November and December remains relatively consistent with intentions in August, 13% of U.K. residents planning to do so, rising to 19% amongst Scotland residents. However, only 22% of these have started planning their trip, and just 15% have *booked* it. In the context of low confidence in trips going ahead, it's likely that basing trip projections on these intention figures would be an optimistic approach.
9. Scotland is the U.K. destination of choice for 13% of the 1 in 4 Britons planning a trip between November and March. Amongst Scotland *residents* planning a trip in this period, Scotland is the destination of choice for 50%. Based on intentions alone, Scotland residents would make up around 2 in 5 overnight trip-takers to Scotland – residents from London, the North East, Wales and the South East all indexing high with intentions. However, our research on 'trips-taken' to date demonstrates that during the pandemic, the proportion of trip-takers from Scotland tend to make up the majority of visitors, with many 'England and Wales-based' intenders not following through with their intention to visit Scotland. Given the increase in restrictions around travel, this trend is likely to continue.
10. October half-term day-trips are also victim to falling confidence levels – although 13% of Scotland residents intend to take one (30% of Scotland's families), they anticipate taking fewer day-trips than normal.

Profiling Scotland intenders

1. Reflecting their higher levels of confidence in the ability to take trips, pre-nesters and families are likely to be the largest audience for Scotland winter trips, both indexing higher than their representation in the general population. The high incidence of pre-nesters is driven by 25-34 year olds (as opposed to 16-24 year olds). Also consistent with confidence levels, 'retirees' are the smallest audience and index lower than any other life stage, although it's worth noting that they did index high for trips taken in September.
2. Scotland winter intenders are more likely than the U.K. population, U.K. intenders, and summer trip-takers to state that 'things are OK but I have to be careful' in relation to their finances, and also to be on a 'reduced income'. They are also more likely to fall into the cautious risk segments. Together these factors suggest a more risk-averse, financially compromised visitor than in the summer, for whom financial booking incentives (in particular 'free cancellation') and 'COVID-safe' measures (such as enhanced cleanliness) are important.

Key findings (3)

3. The need for booking incentives is reinforced by the low proportion that have booked their November to March trip (15%) and a tendency to book trips much closer to the travel date than normal (41% doing so).
4. Booking incentives will need to take into account the range of different platforms intenders use. Booking directly with the provider is the most common channel, followed by via an online travel agent. However there are differences by life stage – families are more likely to favour traditional travel agents, whereas pre-nesters index higher in booking with homestay websites.

Trip behaviour for November to March trips

1. Scotland winter trips are most likely to be short breaks, 62% of winter intenders choosing this trip length and with a 'holiday' purpose (also 62%). Both have higher representation amongst Scotland *resident* winter intenders.
2. Scotland winter intenders favour trips to the 'countryside or a village' followed by 'city or large town', although Scotland resident intenders tend to favour the coast.
3. Consistent with previous reporting, the Highlands remains the most favoured destination for winter intenders living within and outside Scotland – although reporting also demonstrates that the proportion who eventually end up going there is lower than intended. This may be driven by availability of accommodation, although equally could be a result of the high 'saliency' of the Highlands as a destination (visitors may come up with further options when they start to plan their trip further). The Edinburgh area continues to be the second most popular area overall – similar to the Glasgow area, preferred more amongst intenders from outside of Scotland than amongst Scotland residents.
4. Consistent with winter projections made in August, 'hotel/motel/inn' is the number one choice for accommodation. Other accommodation options are also consistent with August projections, with the exception of 'commercial self-catering' which has a lower incidence of intention. However, 'commercial self-catering' has increased in preference through September and October, as concerns around COVID-19 have also risen. With that in mind, the incidence of this type of 'self-contained' accommodation may be higher when bookings are actually made.

Key findings (4)

Trips taken since July

1. As of early October, 30% of U.K. residents had taken an overnight short break or holiday in the U.K. since July, 24% of Scotland residents. Both numbers are higher than the intended trips before restrictions were lifted in July. 3 in 5 U.K. trips were for a holiday, the majority of the remainder to visit friends or relatives (VFR). Overnight stays in Scotland were predominantly for a 'holiday' – 77% compared to 63% of all U.K. trips.
2. Consistent with predictions, the South West of England attracted the highest proportion of holiday trips from July to September, followed by the North West of England and Scotland. Trips taken to Scotland are in line with predictions.
3. Notably, the life stage with the highest representation for Scotland *holidays* from July to September was 'pre-nesters' (in particular 25-34 year olds) indexing significantly higher than amongst the wider U.K. population. This will in part be driven by the higher incidence of pre-nesters in the Scotland population than the wider U.K. population – Scotland residents dominating the visitor profile. It's worth noting that retirees were the largest age group for trips taken in September, highlighting there is still scope to generate some visits from this audience.
4. Nearly 8 in 10 (77%) of all Scotland residents that have taken an overnight trip since July did so in Scotland, rising to 86% of Scotland residents that took a *holiday*. Both figures represent a significant rise on intentions, perhaps reflecting the success of the VisitScotland's 'Only in Scotland' campaign, and likely accounting for the rise in 'pre-nester' representation amongst trip-takers. Conversely, only 4% of trip intenders from outside of Scotland visited Scotland on their trip, lower than the 10% that intended to do so. As a consequence, Scotland residents made up 60% of all overnight trip takers during this period, significantly higher than intentions. At an absolute level, this represents an increase in the *number* of Scotland residents overnight stays and decrease in the *number* of England resident overnight stays
5. 'City or large town' and 'countryside or village' were the two most popular types of destination for an overnight stay between July and September, followed by mountains or hills and traditional coastal/seaside towns - the Highlands, the Glasgow area, Edinburgh area and the West Coast the three most popular areas. Of the 35% that stated they visited a 'city or large town', two thirds visited the Edinburgh and Glasgow areas.

Key findings (5)

6. The vast majority of Scotland trip-takers were able to stay in the destination they had originally planned to. Of the 11% that didn't, worries 'there'd be too many people there' was the main reason, followed by the expense of accommodation options. Notably, 1 in 5 (2% of all trip-takers) weren't confident the venue was COVID-safe.
7. Hotel/motel/inn was the most popular choice for an overnight Scotland holiday, followed by caravan/camping and commercial self-catering. Unsurprisingly, private home indexed higher for all trips than holiday trips, driven by trips with a VFR purpose.

Public sentiment and headline intentions

Glentress Forest, Scottish Borders, David N Anderson

Perceptions of the situation in relation to COVID-19

- 58% of U.K. residents think ‘the worst is still to come’ in relation to COVID-19, rising to 61% of Scotland residents. The pessimist outlook grew significantly mid-way through September, as additional restrictions were put in place and local lockdowns increased in number. Further restrictions introduced in late September (such as no household visits and 10pm closing for hospitality) consolidated the negative outlook..

Figure 1. Perception of the situation with regards to COVID-19, Waves 15-16, Percentage, U.K. and Scotland

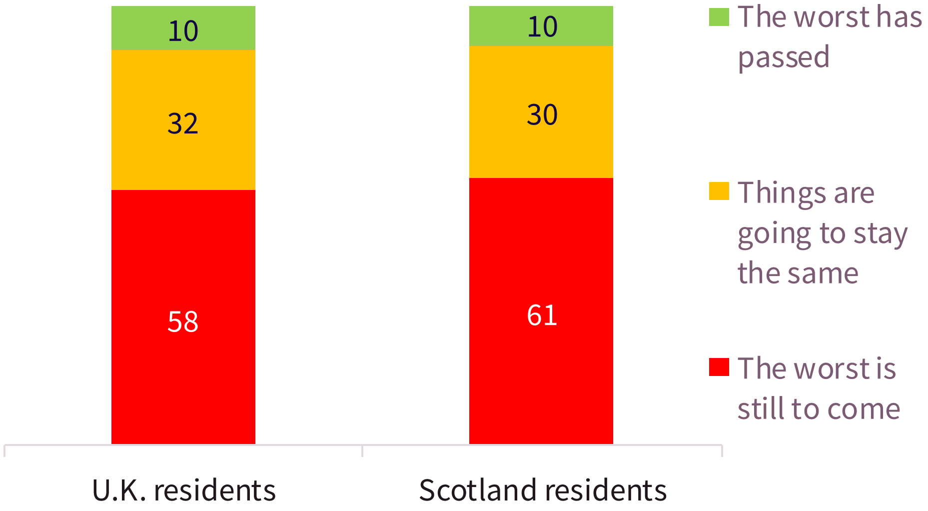
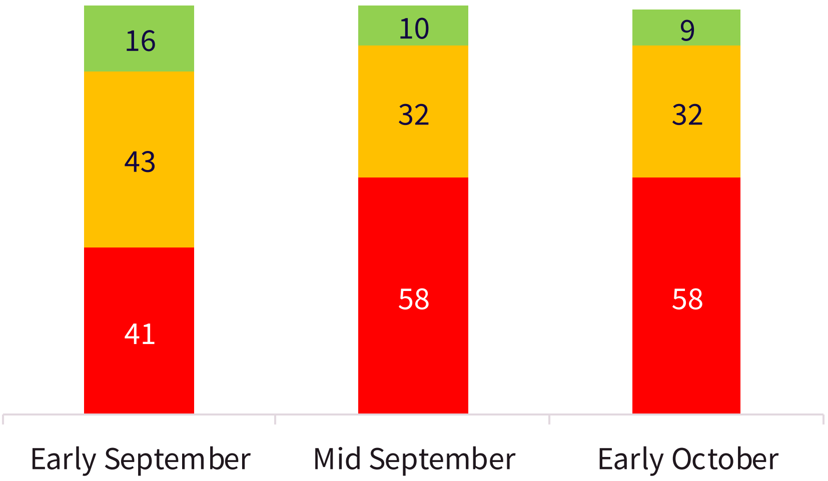


Figure 2. Perception of the situation with regards to COVID-19, Percentage wave-on-wave, U.K.



Q7: Regarding the situation of Coronavirus in the U.K. and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All U.K. residents n=3,498; All Scotland residents n=531

Level of comfort undertaking activities with a ‘comfort average’

- The U.K. public currently exhibit a ‘comfort average’ of 53%, slightly down on the average during August (56%) but still significantly higher than at the start of the national lockdown in May/early June (43%), and late June/early July (49%). Despite being more pessimistic in relation to COVID-19, Scottish residents exhibit higher levels of comfort with everyday activities, than residents of the wider U.K.
- ‘Going for a walk in a country park/local trail’ remains the activity the public are most comfortable doing, ‘travelling by public transport’ the least.

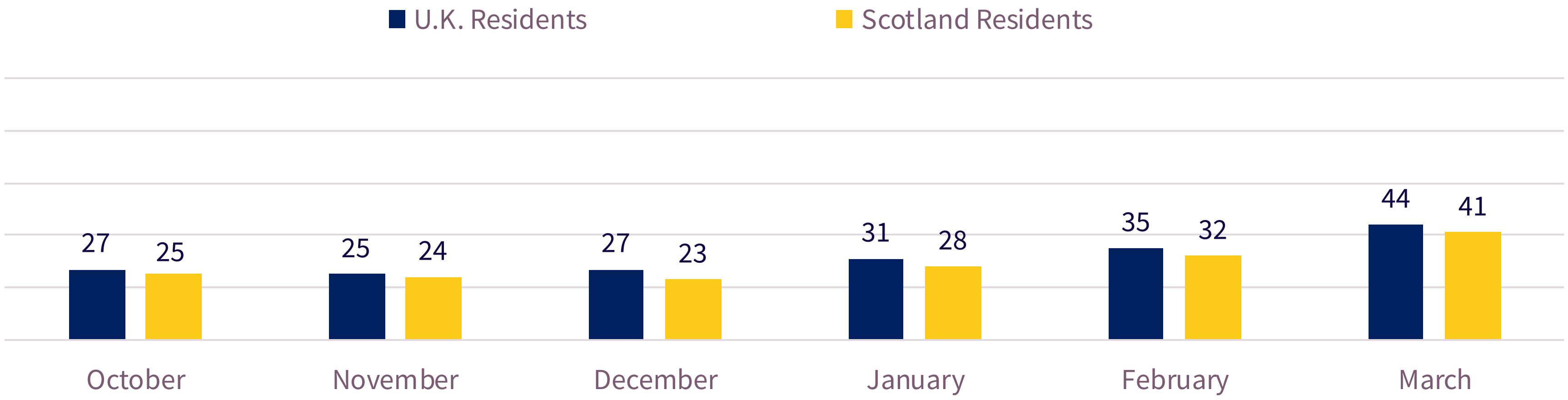
Figure 3. Level of comfort conducting a range of activities separately and combined, Net very and fairly comfortable, Percent, Waves 15-16, U.K. and Scotland

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. residents n=3,498; All Scotland residents n=531

Confidence in the ability to take a U.K. short break or holiday

- Although comfort conducting everyday activities has not declined, *confidence* in the ability to take a U.K. holiday or short break in the near-term has dropped significantly since early September. A consistent 1 in 4 of U.K. and Scotland residents feel very or fairly confident a trip would go ahead between October to December, significantly lower than the 1 in 2 confident in an October to December trip back in August.
- Unlike previous reporting waves, there is little sign of medium term confidence – only a minority confident up to March 2021.

Figure 4. Confidence in taking a U.K. short break or holiday across a range of different months, Net percentage very and fairly confident, Waves 15-16, U.K. and Scotland

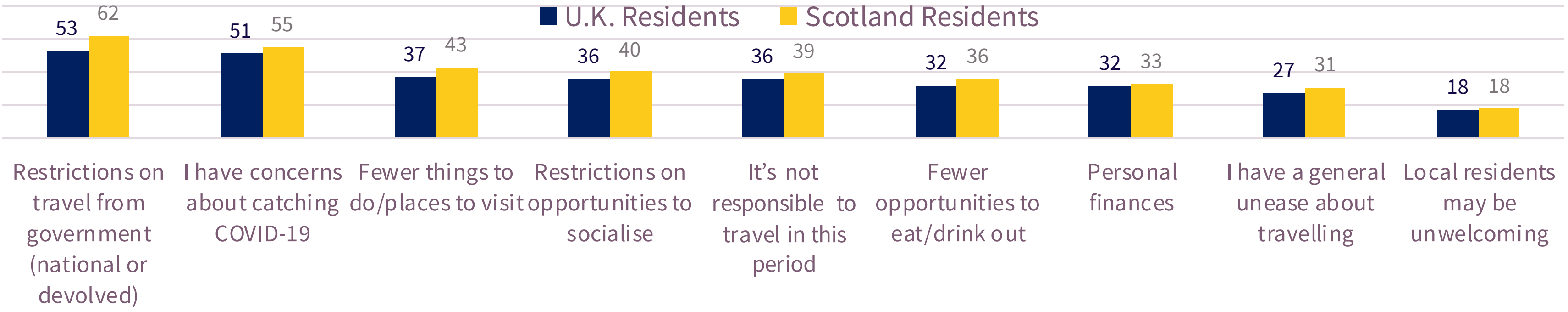


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All U.K. residents n=3,498; All Scotland residents n=531

Reasons for not feeling confident taking winter trips in the U.K.

- Perhaps unsurprisingly, lack of confidence about being able to take a UK winter holiday or short break is driven by 'restrictions on travel from government', 53% of U.K. residents saying this compared to 40% in August* when it was the fourth most influential reason. Consistent with previous waves, Scotland residents are more likely to cite 'government restrictions' than the wider U.K. population.
- Concerns around catching COVID-19 are also important, the second most important reason for Scotland and U.K. residents, and slightly more influential than in August.

Figure 5. Reasons for not being confident about travelling from November to March, Percentage, Waves 15-16, U.K. and Scotland

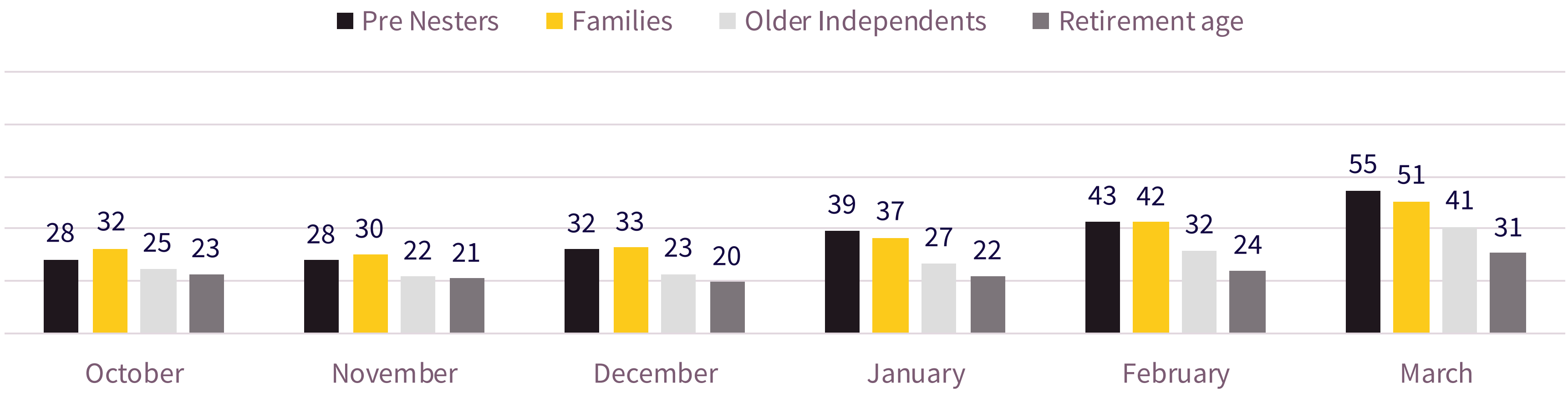


QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday between September and September? Base: U.K. residents n=2041; Scotland residents n=309 *August lack of confidence was in relation to July-September trips

Confidence to take U.K. short break or holiday – by life stage

- Confidence is higher amongst families and pre-nesters, who are also most likely to exhibit a rise in confidence as each month goes by. U.K. adults of retirement age remain the least confident and there are no clear signs of this confidence increasing in 2021.

Figure 6. Confidence in taking a U.K. short break or holiday across a range of different months by life stage.
Net percentage very and fairly confident, Waves 15-16, U.K.

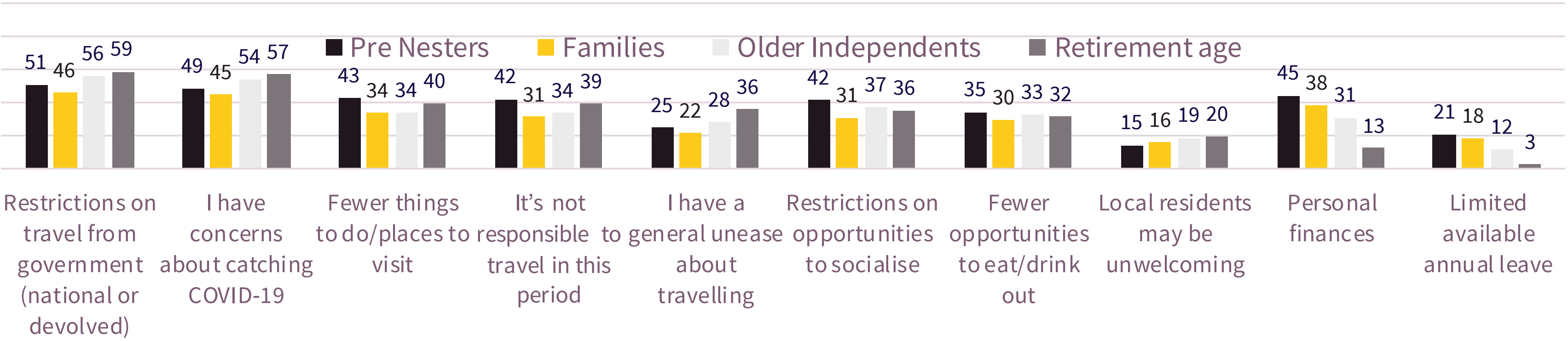


QVB7anew. We'd like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below.
In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips?
Base: U.K. Pre-nesters n=736, Families n=1054, Older Independents n=1072, Retirement Age n=636

Reasons for not feeling confident taking winter trips in the U.K. – by life stage

- Government restrictions and concerns about catching COVID-19 are the most mentioned reasons for lack of confidence about travel across all life stages. However, the incidence of other reasons differ – ‘personal finances’ is a leading reason for ‘pre-nesters’ but one of the least influential for ‘retirees’. Conversely, ‘concerns around catching COVID-19’ and ‘a general unease about travelling’ tend to index highest among ‘older independents’ and ‘retirees’, but are less influential amongst ‘families’ and ‘pre-nesters’.

Figure 7. Reasons for not being confident about travelling between November to March by life stage, Percentage ranked on retirement age, Waves 15-16, U.K.



QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday? Base: U.K. Pre-nesters n=334, Families n=506, Older Independents n=473, Retirement Age n=264

Anticipated number of U.K. trips this year compared to normal

- Compared to normal, 39% of U.K. residents anticipate taking the same amount or more domestic short breaks by the end of the year, with 37% anticipating the same or more holidays of 4+ nights. Both figures are lower than when reported in August. Although this report refers to a shorter time period, the drop correlates with reduced confidence in taking trips
- Scotland residents tend to anticipate net fewer trips than UK residents – consistent with the picture from previous waves.

Figure 8. Number of U.K. short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Waves 15-16 , U.K. and Scotland

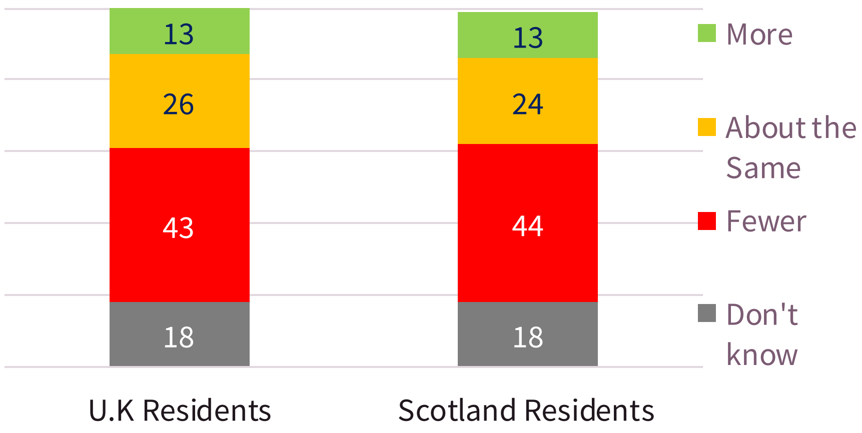
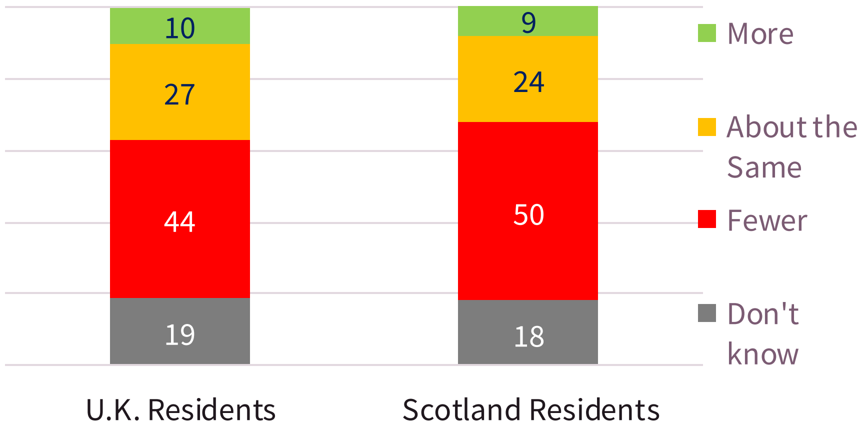


Figure 9. Number of U.K. holidays (4+ nights) over the rest of this year compared to normal, Percentage Waves 15-16, U.K. and Scotland



QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of U.K. holidays/short breaks between now and the end of the year? Base: All U.K. residents n=3,498; All Scotland residents n=531

Anticipated number of Overseas trips this year compared to normal

- As in previous waves, U.K. and Scotland residents also anticipate a large 'net decrease' in short breaks and holidays *overseas* this year. The net decline in overseas trips is significantly larger than the net decline in anticipated U.K. trips.

Figure 10. Number of OVERSEAS short breaks (1-3 nights) over the rest of this year compared to normal, Percentage Waves 15-16 , U.K. and Scotland

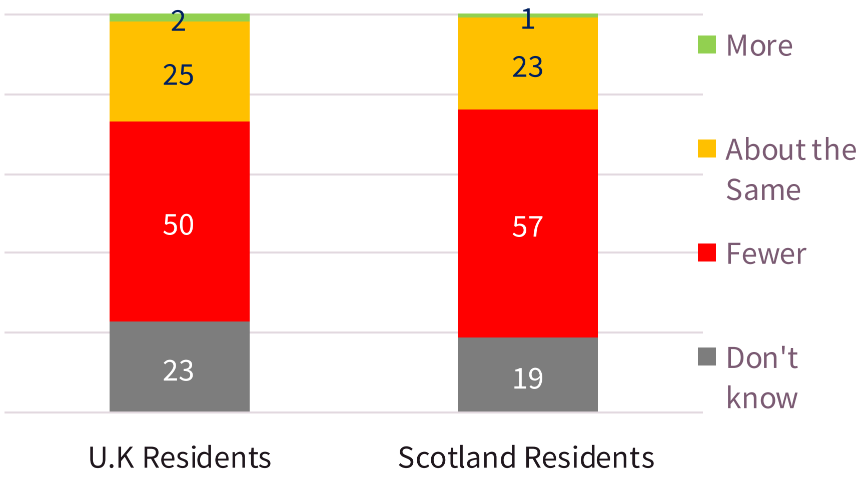
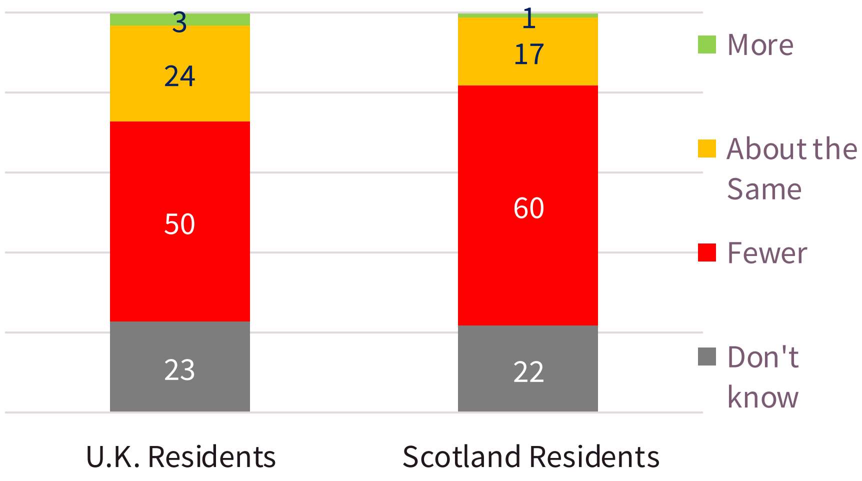


Figure 11. Number of OVERSEAS holidays (4+ nights) over the rest of this year compared to normal, Percentage Waves 15-16, U.K. and Scotland

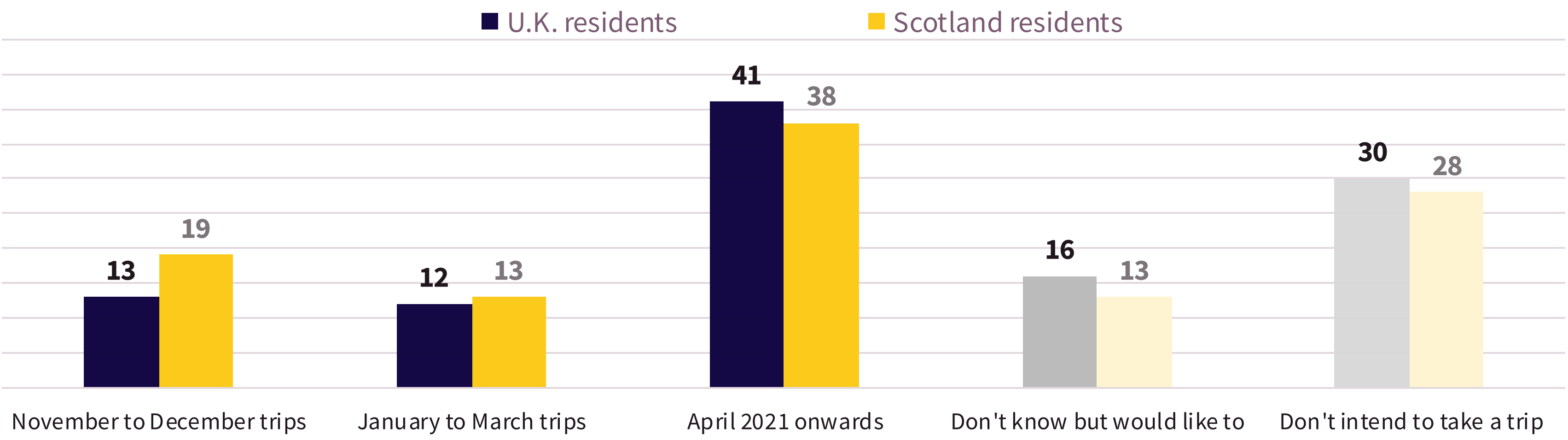


QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of U.K. holidays/short breaks between now and the end of the year?
Base: All U.K. residents n=3,498; All Scotland residents n=531

When anticipating going on a U.K. short break or holiday

- 1 in 7 (13%) U.K. residents anticipate taking a U.K. holiday or short break between November and December, rising to 1 in 5 (19%) of Scotland residents. Intention to take a trip in this time period has not declined since the start of September, although with declining confidence and low bookings, it's likely that a significant proportion of trips will not go ahead.
- Notably, since August, the proportion of U.K. residents *not intending* to take a trip in the future has increased from 22% to 30%. Given that 'the future' refers takes residents up to October 2021, this is further evidence of low travel confidence.

Figure 12. Proportion anticipating a trip in each time period , Percentage, Waves 15-16, U.K.

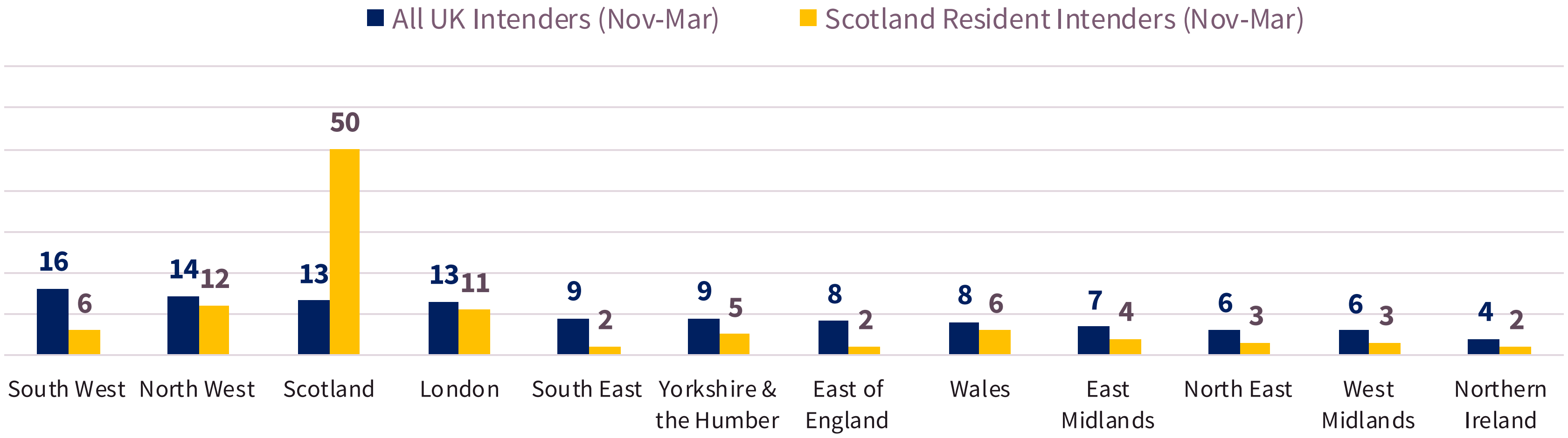


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
Base: All respondents. Waves 15-16 U.K. population n=3,498; Scotland population n=531

Where planning on staying on next U.K. *winter* short break or holiday

- The South West of England remains the most popular region of the U.K. for an overnight short break or holiday, 16% of November to March intenders anticipating to take a trip there. The South West is followed by the North West (14%), Scotland (13%) and London (also 13%).
- 50% of Scotland residents planning on a November to March trip, are intending to take it in Scotland, although previous waves suggest this proportion is likely to increase.

Figure 13. Where planning on staying on next U.K. overnight trip between November and March , Percentage Waves 14-16, U.K. and Scotland Residents



QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break between November and March. All UK intenders n=808; All Scotland resident intenders n=145

Intentions to stay in Scotland by region of residence

- In addition to the 50% of Scotland-based intenders, 18% of London intenders, 15% of Wales and North East intenders and 11% of South East intenders are planning on a visit to Scotland this winter. Taken as a total, 3 in 5 (61%) of Scotland intenders live outside of Scotland. However, previous waves suggest that, in reality, the balance is likely to shift in favour of Scotland residents

Figure 14. Proportion of intenders planning on staying in Scotland on Nov-Mar U.K. holiday or short break by region of residence, Percentage Waves 14-16, U.K. sample

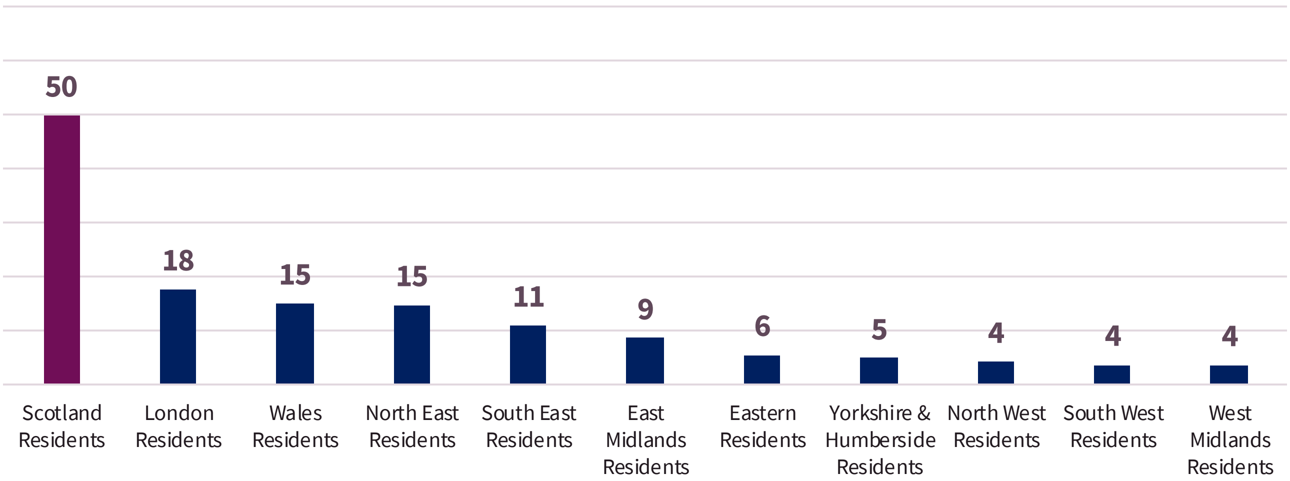


Figure 15. Breakdown of Scotland Nov-Mar intenders by region of residence, Percentage Waves 14-16, U.K.

Base: All residents planning on taking a holiday or short break in the U.K. in the winter (Nov to Mar). Residents in each region South West n= 59 Scotland n=145; North West n=81; London n=132; Yorkshire and The Humber n=49*; South East n=86; West Midlands n=59*; East Midlands n=51*; East of England n=36*; North East 34* Wales n=62

Destination consideration amongst Scotland intenders

- Around 1 in 4 Scotland winter intenders are also considering visiting other places for their domestic trip. Yorkshire, Wales, London, Northern Ireland and South West England are the main alternatives.
- Amongst Scotland residents considering Scotland for a winter break, the vast majority are *only* considering Scotland.

Figure 16. Consideration of Scotland and other places, Percentage Waves 14-16, U.K. and Scotland

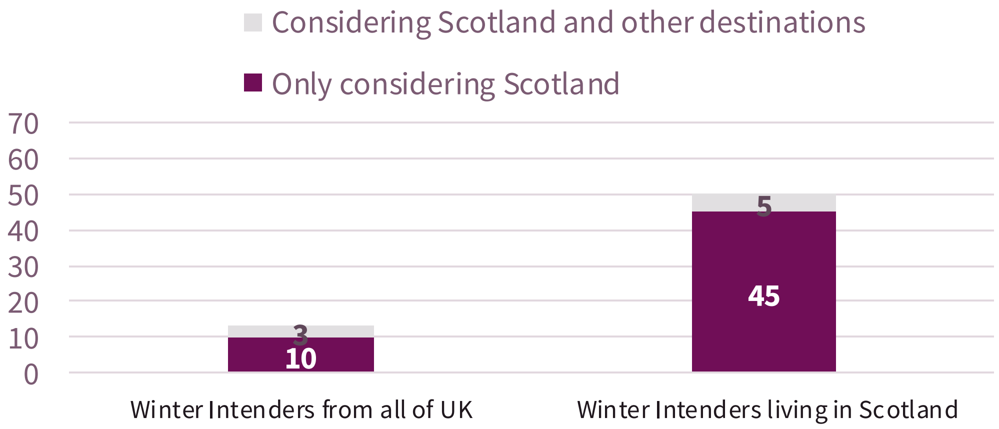


Table 1. Top 5 alternative destinations for Scotland intenders

Scotland winter Intenders (% of Scotland intenders)	
Yorkshire & the Humber	9%
Wales	7%
London	6%
Northern Ireland	6%
SW England	6%

QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break between November and March. All UK intenders n=808; All Scotland resident intenders n=145

Profiling Scotland winter intenders and booking behaviour

Glentress Forest, Scottish Borders, David N Anderson

Demographics of intenders compared to the general population

- Reflecting their higher levels of confidence in the ability to take trips, pre-nesters and families are likely to be the largest audience for Scotland winter trips, both indexing higher than their representation in the general population. Also consistent with confidence levels, 'retirees' are the smallest audience and index lower than any other life stage.
- In line with previous waves, Scotland winter intenders are most likely to belong to higher social grades.

Figure 17. Breakdown of populations and intenders by life stage, Percentage Waves 14-16, U.K.

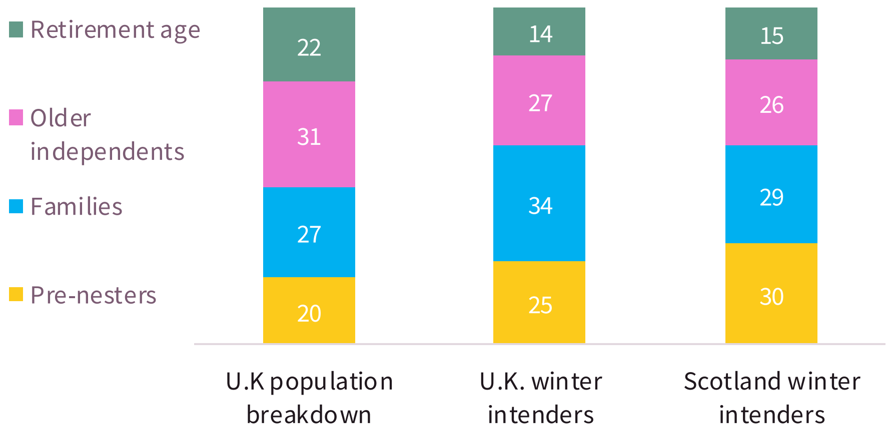
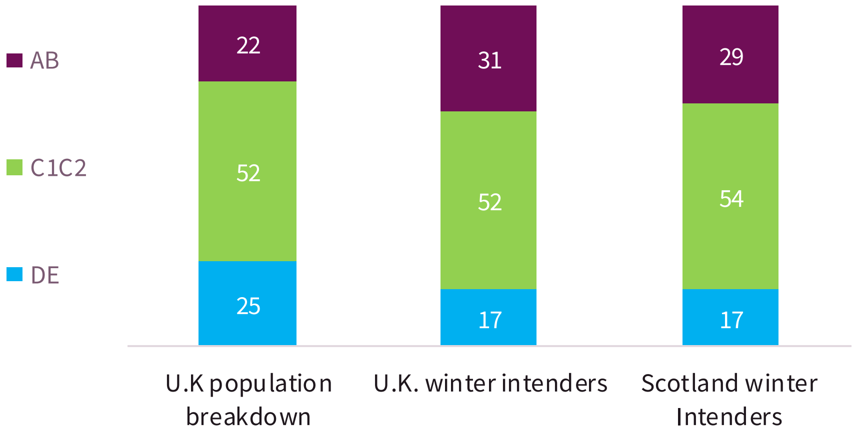


Figure 18. Breakdown of populations and intenders by social grade, Percentage Waves 14-16, U.K.



Source: Demographics. Base: All respondents. U.K. population n=5260; UK winter intenders (going on next UK trip between Nov-Mar) n=808; Scotland winter intenders (going on next Scotland trip between Nov-Mar) n=136

Financial segments and financial impact of COVID-19 on intenders

- Scotland winter intenders are more likely than the U.K. population and U.K. intenders to state that 'things are OK but I have to be careful' in relation to their finances, and also to be on a 'reduced income'. This relates to the higher incidence of 'pre-nesters' (and people in employment) amongst intenders, but suggests a need for 'good-value' options, as well as the option to cancel or transfer accommodation bookings (see slide 32).

Figure 19. Breakdown of intenders by financial segments, Percentage Waves 14-16, U.K.

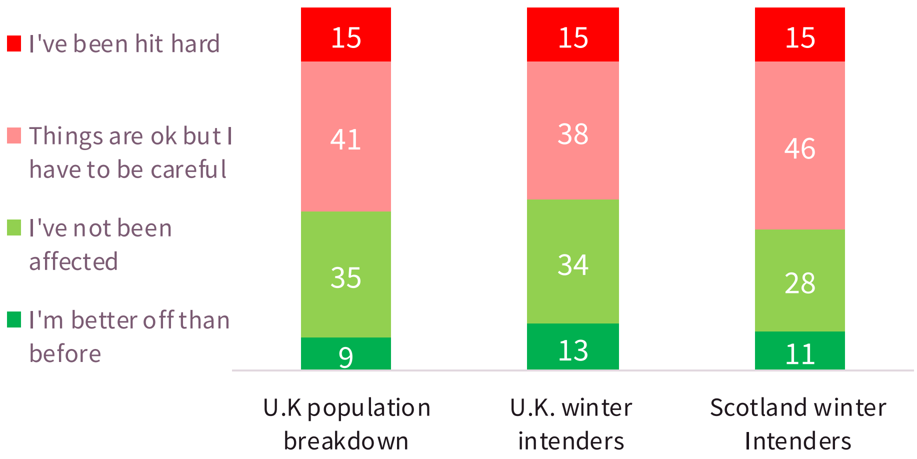
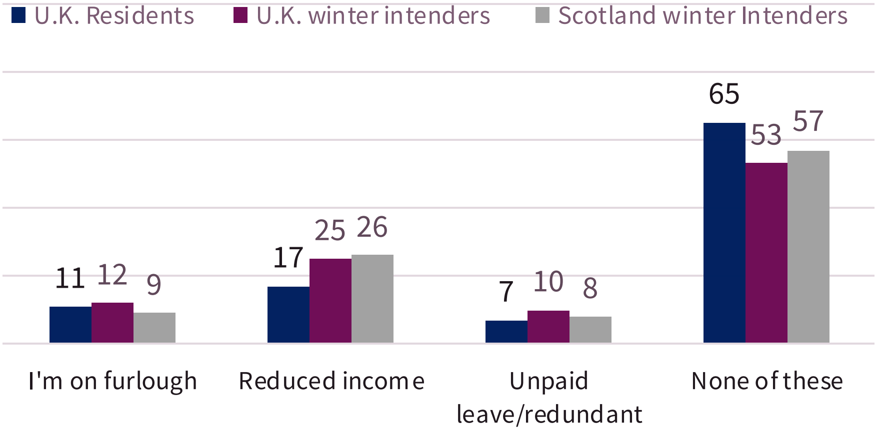


Figure 20. Employment impact on intenders, Percentage Waves 14-16, U.K.



Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All respondents. U.K. population n=5260; UK winter intenders (going on next UK trip between Nov-Mar) n=808; Scotland winter intenders (going on next Scotland trip between Nov-Mar) n=136

Attitudinal segments (see definitions page for more information)

- Scotland winter intenders are most likely to fall into the 'life goes on' risk segment, although 'COVID cautious' make up a similar proportion. 'COVID cautious' has higher representation than in August and U.K. intenders on the whole, reflecting the increasing influence of 'government restrictions' and 'concerns about catching COVID-19' on travel confidence, particularly amongst Scotland residents. Potential visitors will need a range of reassurances to go ahead with their trips

Figure 21. Breakdown of trip-takers by risk segment, Percentage Waves 14-16, U.K.

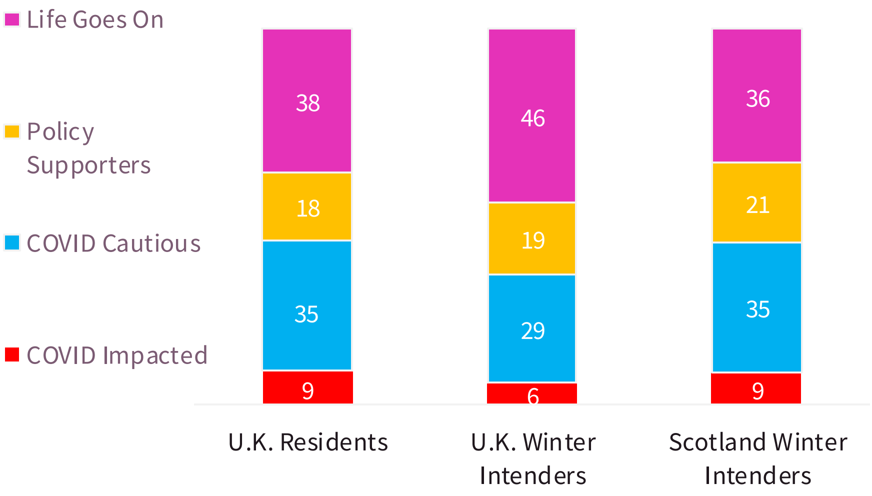
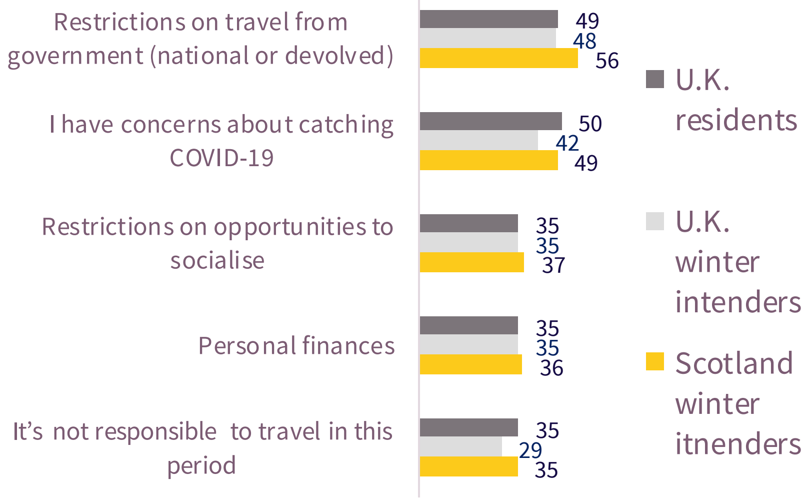


Figure 22. Reasons for not being confident about travelling from November to March by trip-takers, Percentage, Waves 14-16, U.K.



Source: Attitudinal segments: QVB8a. Which of the following factors are contributing to you being 'not very confident' or 'not at all confident' about taking a U.K. short break or holiday? UK winter intenders (going on next UK trip between Nov-Mar) n=808; Scotland winter intenders (going on next Scotland trip between Nov-Mar) n=136

Attitudinal segments (see definitions page for more information)

- Segments that are less concerned about catching COVID-19 make up around half of Scotland Winter Intenders, with the other half being particularly worried. Segments that are financially constrained, driven by a sense of responsibility or that are put-off by limited social opportunities all make up the mix of intenders. This highlights the need to communicate a range of reassurances, and financial incentives wherever appropriate.

Figure 21. Breakdown of trip-takers by risk segment, Percentage Waves 14-16, U.K.

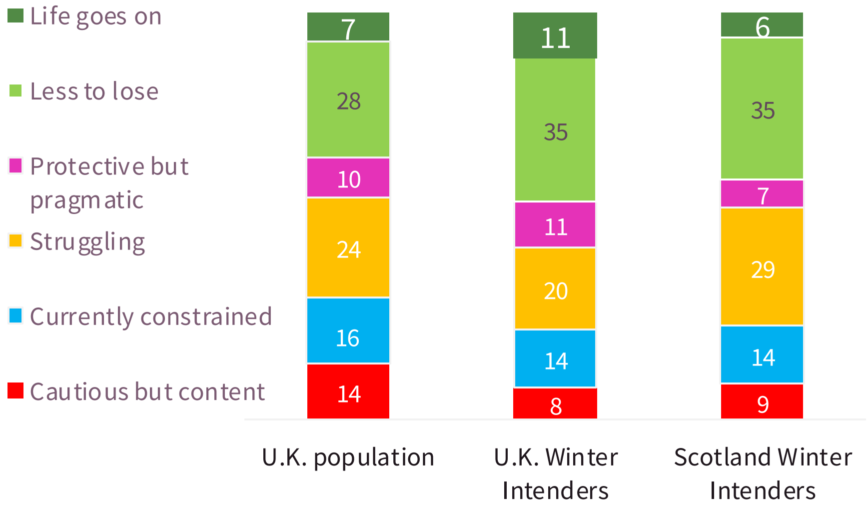
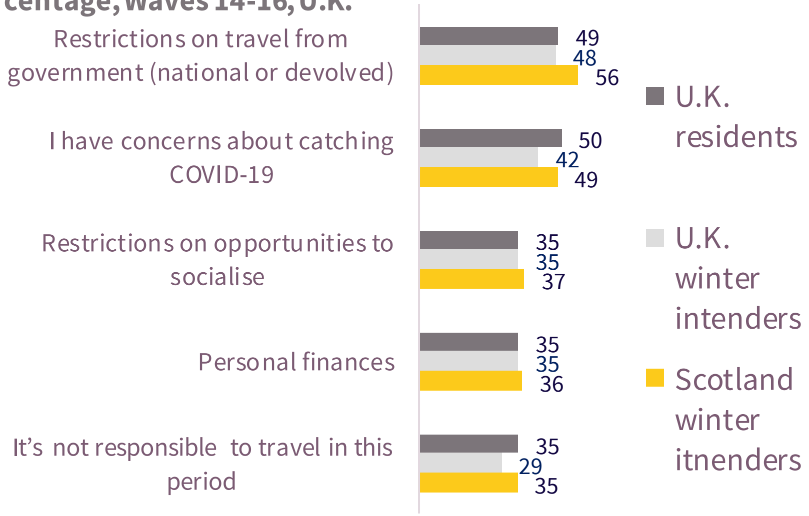


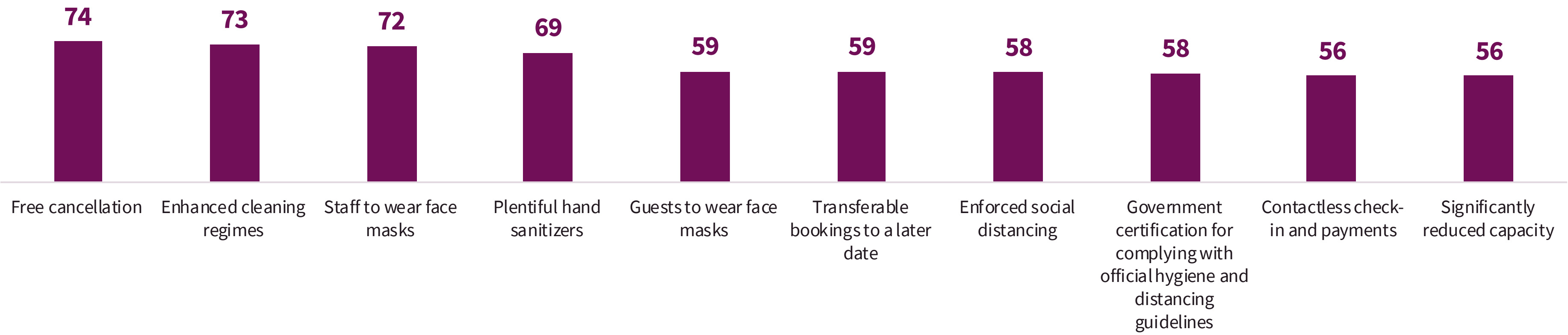
Figure 22. Reasons for not being confident about travelling from November to March by trip-takers, Percentage, Waves 14-16, U.K.



Conditions that are essential for a stay in accommodation

- ‘Free cancellation’ is the number one condition Scotland winter intenders require to stay in accommodation this winter, 74% stating this. A similar proportion require ‘enhanced cleaning regimes’ (73%) and ‘staff to wear masks’ (72%). ‘Government certification’ is an important condition for around 3 in 5 (58%). The need for all conditions is particularly high amongst ‘retirees’.

Figure 22b. Top 10 conditions that are essential for a stay in accommodation for Scotland <u>winter</u> intenders, Percentage and Net Percentages Waves 14-16, U.K.



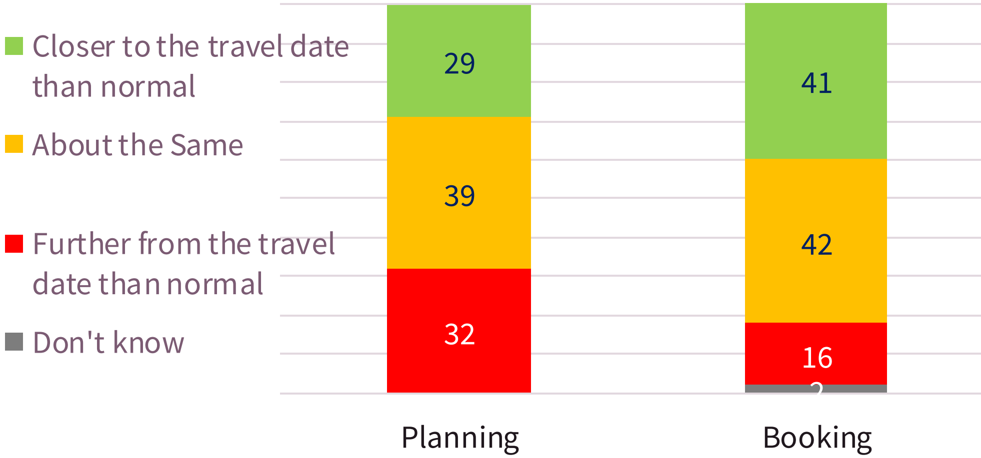
QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip in <insert month>? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland winter intenders n=136

Whether planned or booked U.K. holiday or short break

- Only 22% of Scotland winter intenders have started planning their trip and just 15% have already booked it. Notably, planning lead times are relatively consistent with 'normal' but *booking* is more likely to occur 'closer to the travel date than normal'. This clearly suggests there is likely to be more last-minute bookings, and perhaps provides an opportunity for early-booking incentives.

Figure 23. Proportion that have already planned/booked their next Scotland winter trip, Average, Waves 14-16, U.K.

Figure 24. Planning and booking lead times compared to normal, Percentage Waves 14-16 , U.K. and Scotland

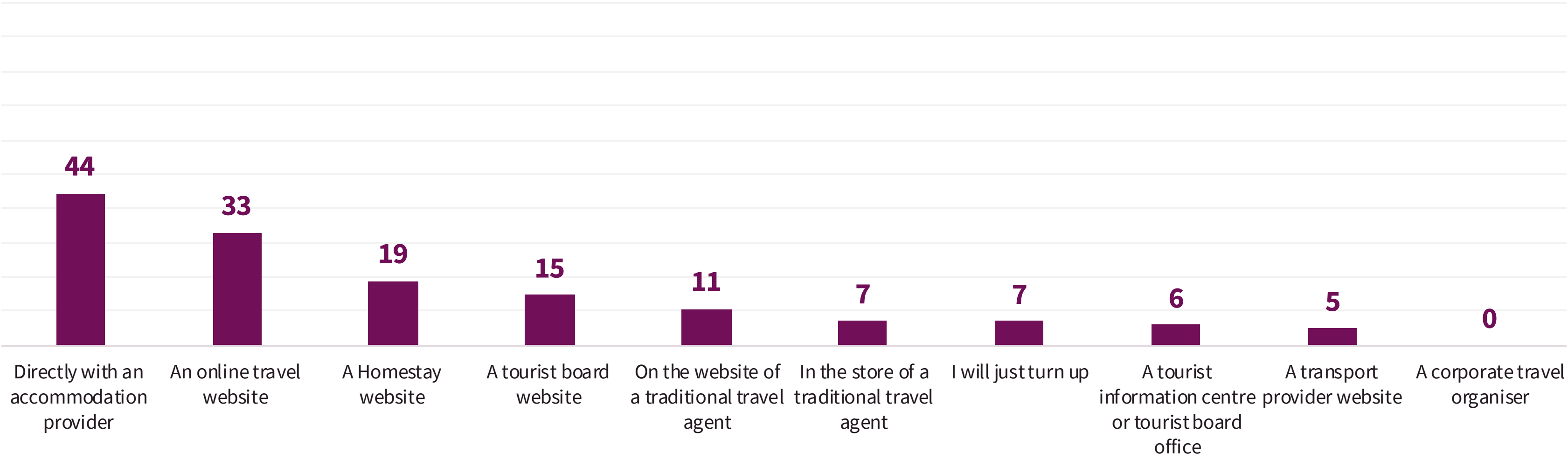


QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB6diic. Compared to normal, when did or will you plan and book your next UK trip in Scotland? Base: All respondents. Week 14-16; Scotland winter intenders inclusive n=136

Preferred booking channel for next Scotland short break or holiday

- Winter intenders are most likely to book their trip to Scotland directly with the provider, followed by an online travel agent. However there are differences by life stage – families are more likely to favour traditional travel agents, whereas pre-nesters index higher in booking with online travel agents and homestay websites. Accommodation types will want to tailor the booking channel to its audience.

Figure 25. Accommodation booking channel for Scotland winter intenders, Net percentage Waves 14-16, U.K.



VB6d. How would you ideally book or have you already booked your accommodation for your U.K. trip
Base: All respondents planning on taking a holiday or short break in Scotland. Scotland Inclusive winter intenders n=260; Scotland Inclusive winter intenders n=205

Trip behaviour

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam

Anticipated length of Scotland holidays and purpose

- Scotland winter trips are most likely to be short breaks, 62% falling into this category and with a 'holiday' purpose (also 62%). Both have higher representation amongst Scotland winter intenders who live in Scotland.

Figure 26. Length of next winter holiday or short break in Scotland, Percentage Waves 14-16, U.K.

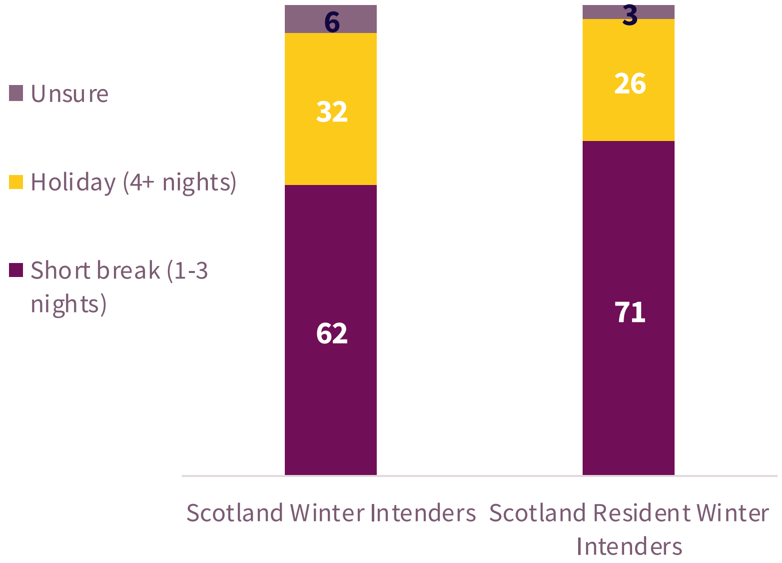
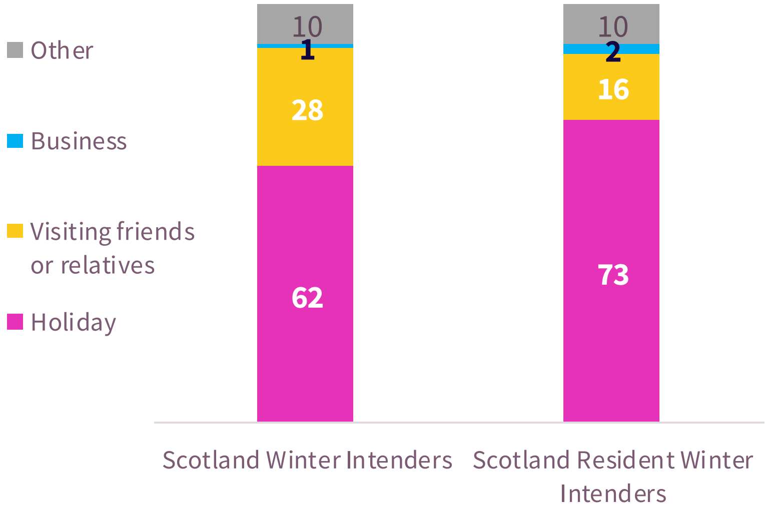


Figure 27. Purpose of next winter trip in Scotland, Percentage, Waves 14-16, U.K.

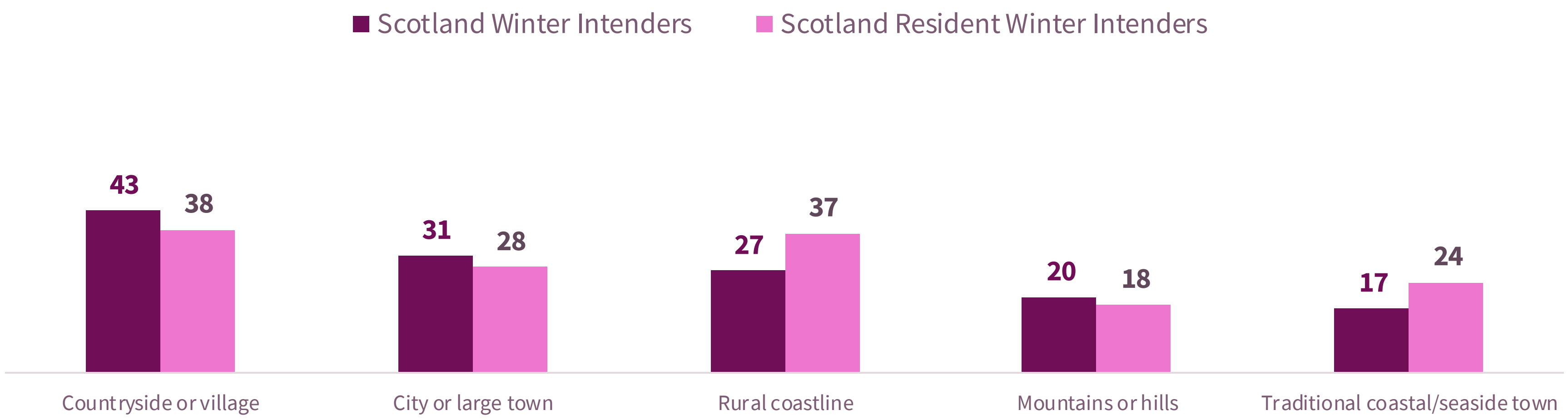


QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? VB6f. And which of the following best describes the purpose of this trip? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland Exclusive winter intenders n=104; Scotland resident winter intenders n=65

Type of destination for next U.K. short break or holiday

- Scotland winter intenders are most likely to visit 'countryside or a village' on their Scotland trip, followed by 'city or large town'. Scotland residents broadly share the same preferences as Scotland intenders from elsewhere in the U.K., although are less likely to stay in a city or large town and more likely to stay on the Scottish coastline.

Figure 28. Main type of destination for Scotland winter intenders, Percentage Waves 14-16, U.K.

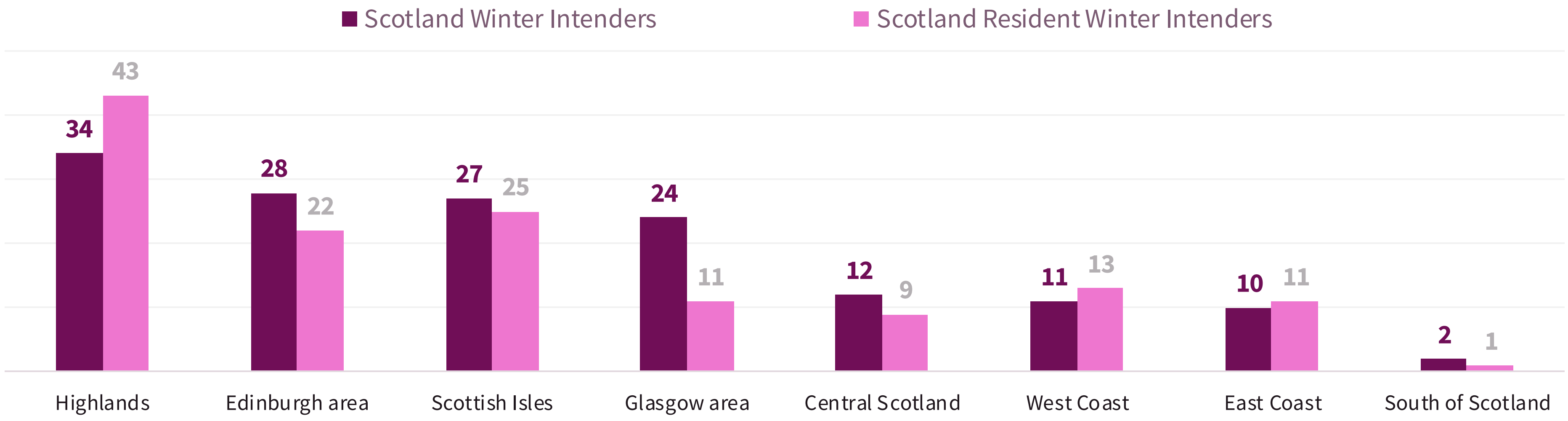


QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip?
Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland Exclusive winter intenders n=104; Scotland resident winter intenders n=65

Where planning on staying in Scotland on next Scotland winter trip

- Consistent with previous reporting, the Highlands remains the most favoured destination for winter intenders living within and outside Scotland. The Edinburgh area continues to be the second most popular area overall – similar to the Glasgow area, preferred more amongst intenders from outside of Scotland than amongst Scotland residents.

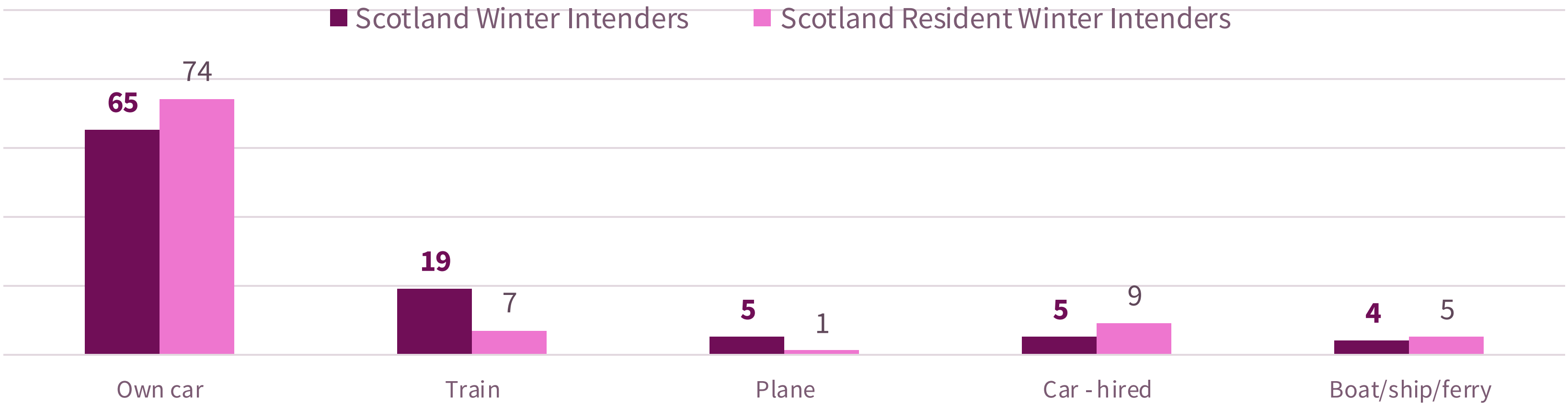
Figure 29. Planned destination for next Scotland trip for winter intenders, Percentage Waves 14-16, U.K. and Scotland



Main mode of transport for next Scotland short break or holiday

- 'Own car' is by far the leading mode of transport intended to be used on trips to Scotland, followed by train and plane.
- Scotland resident intenders are more likely to use their own car, and less likely to use train or plane, the former likely a reflection of lower intention to visit Scotland's cities or large towns.

Figure 30. Top 5 main modes of travel of destination for trip in winter Percentage Waves 14-16, U.K.



QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland Exclusive winter intenders n=104; Scotland resident winter intenders n=65

Make-up of visitor party for next Scotland holiday or short break

- Amongst both Scotland resident and non-resident intenders, ‘partner’ is the most common party member for a trip, 3 in 5 stating this. 1 in 6 of both groups intend to travel with friends.
- 23% of all Scotland intenders are likely to travel with a child or young adult, although this declines amongst Scotland residents. Scotland residents are more likely to take their trip with a pet – 1 in 7 planning to do so.

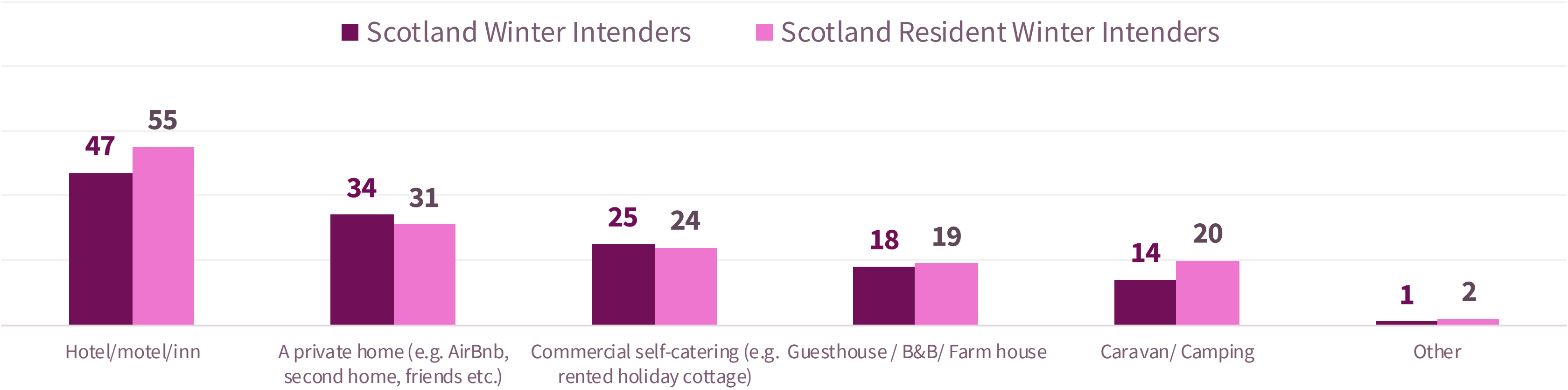
Figure 31. Visitor party make-up for Scotland winter intenders, Percentage Waves 14-16, U.K.

QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland Exclusive winter intenders n=104; Scotland resident winter intenders n=65

Type of accommodation for next Scotland short break or holiday

- Consistent with the winter projections made in August, 'hotel/motel/inn' is the number one choice for accommodation, an option preferred amongst Scotland resident intenders. Other accommodation options are also consistent with August projections, with the exception of 'commercial self-catering' which has a lower incidence of intention. However, 'commercial self-catering' has increased in preference through September and October, as concerns around COVID-19 have also risen. With that in mind, the incidence of this type of accommodation may be higher when bookings are made, particularly if concerns around catching COVID-19 continue to increase.

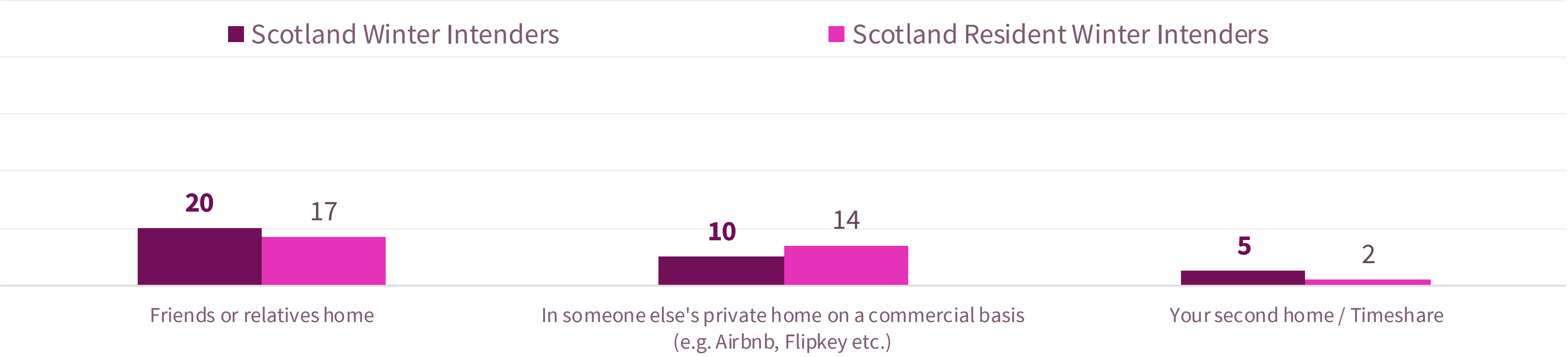
Figure 32. Accommodation planning on staying in on next U.K. overnight trip for Scotland <u>winter intenders</u>, Net percentage Waves 14-16, U.K.



Type of ‘private home’ for next Scotland short break or holiday

- ‘Friends or relative’s home’ make up the majority of ‘private home’ stays amongst Scotland winter intenders, followed by ‘someone else’s home a on a commercial basis’.

Figure 33. Type of private home accommodation planning on staying in on next overnight trip for Scotland <u>winter intenders</u>, Percentage Waves 14-16, U.K.



QVB6a. What type/s of accommodation do you expect to be staying in during your U.K. trip in <insert month>? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland Exclusive winter intenders n=104; Scotland resident winter intenders n=65

Anticipated spend on next Scotland holiday or short break

- Scotland intenders expect to spend £700 on average on their winter holiday or short break, higher than the U.K. intender average (£672). Scotland residents are likely to spend less, driven by lower travel costs and a higher incidence of short breaks

Figure 35. Anticipated spend for Scotland winter intenders, Percentage Waves 14-16, U.K.

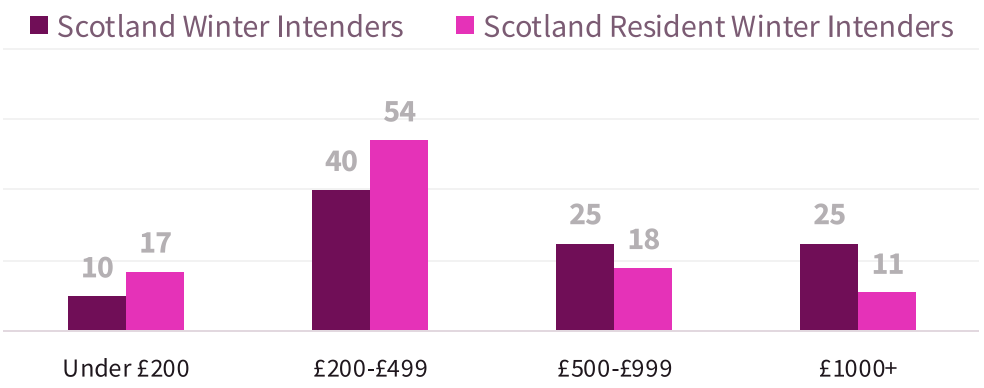
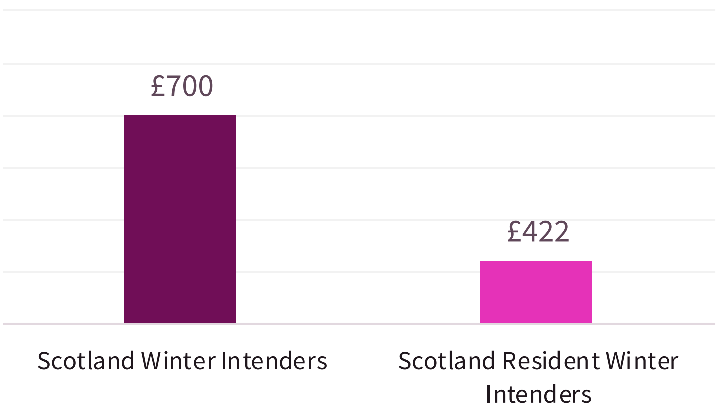


Figure 36. Anticipated average spend for Scotland winter intenders, Average, Waves 14-16, U.K.



QVB6e. Approximately how much do you think this trip will cost in total? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland Exclusive winter intenders n=104; Scotland resident winter intenders n=65

General leisure activity

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam

October half-term travel and comfort travelling to a previously locked down U.K. destination

- 14% of U.K. residents and 13% of Scotland residents anticipate taking a day-trip in October half-term, rising to 30% amongst Scotland-based families, and dropping to 6% for Scotland-based older independents and 10% for Scotland-based retirees. Amongst those anticipating taking a day-trip, there is an anticipation of taking fewer than normal.
- Notably, the majority of UK and Scotland residents would *not* feel comfortable travelling to a previously locked down area within 2 months of restrictions being lifted, suggesting that day trips may be restricted to local areas.

Figure 37. Proportion anticipating a day trip in October half-term, Percentage, Waves 15-16, U.K. and Scotland

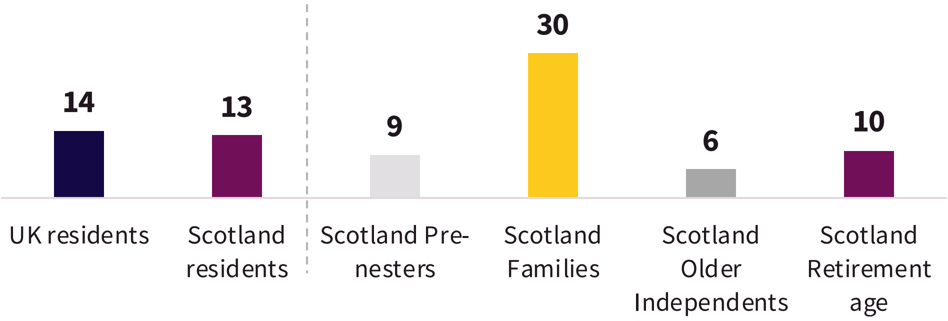


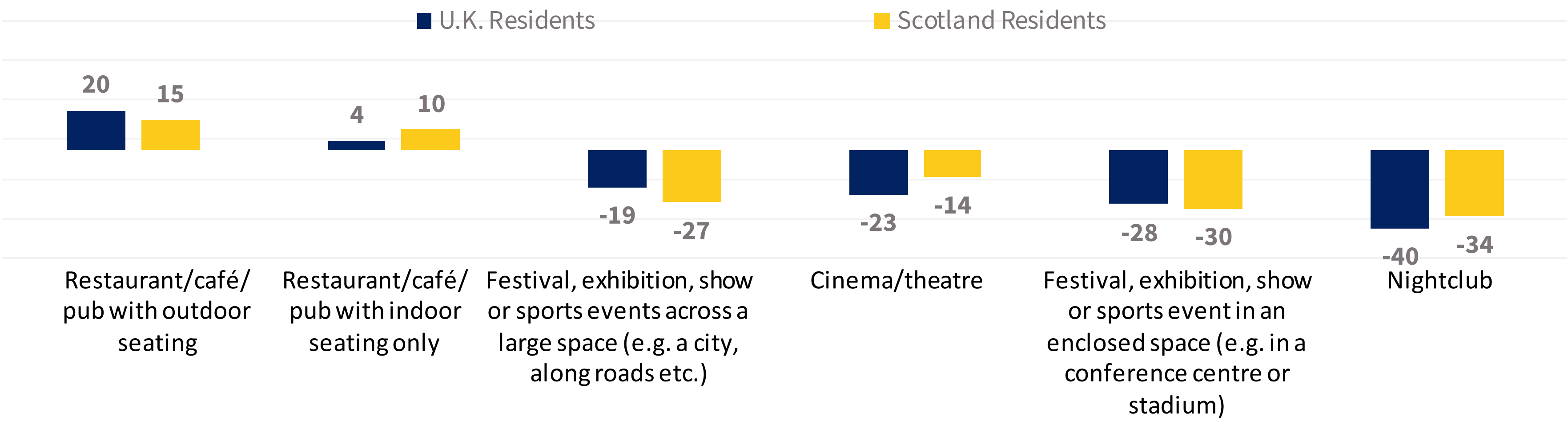
Figure 38. When would feel comfortable travelling to a previously locked down U.K. destination Wave 16 , U.K. and Scotland

VB15a. Are you intending to go on any day trips during the October school half-term period? VB9ci: When would you be comfortable taking a trip to a previously locked down UK destination? Base: All U.K. Residents n=3498; Scotland residents n=531; Scotland pre-nesters n=125; Families n=160; Older independents n=181; retirement age n=65

General leisure activity intentions in next few months

- Consistent with previous reporting, both U.K. and Scotland residents anticipate visiting more 'restaurants/cafes or pubs with outside seating' than normal in the next few months. There is also a higher likelihood of visiting indoor restaurants, indexing higher amongst Scotland residents than U.K. residents on the whole (consistent with their higher comfort levels conducting this activity).
- Aligned with all historic reporting, there is an expectation of visiting fewer 'festivals/exhibitions/shows', 'cinema/theatre' and 'nightclubs' less than normal

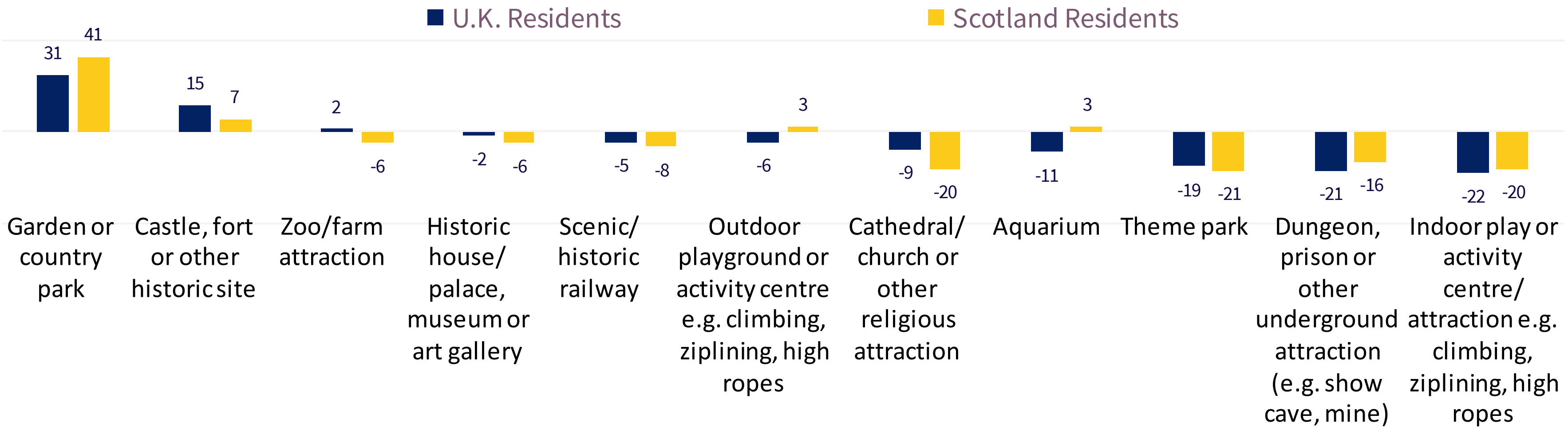
Figure 39. Catering, entertainment and events more or less likely to visit compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Scotland



General leisure activity intentions in next few months

- Again consistent with previous waves, Scottish and wider UK residents anticipate doing conducting net more visits to 'gardens or country parks' and to 'castles/forts or other historic sites'. Visits to zoos/farm attractions are neutral with normality, whilst the majority of indoor attractions generate net fewer visits.
- There are continued signs that Scotland residents are marginally more comfortable with some everyday activities, unlike U.K. residents exhibiting small net increases in visits to outdoor playgrounds, and aquariums.

Figure 40. Visitor attractions more or less likely to visit compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Scotland

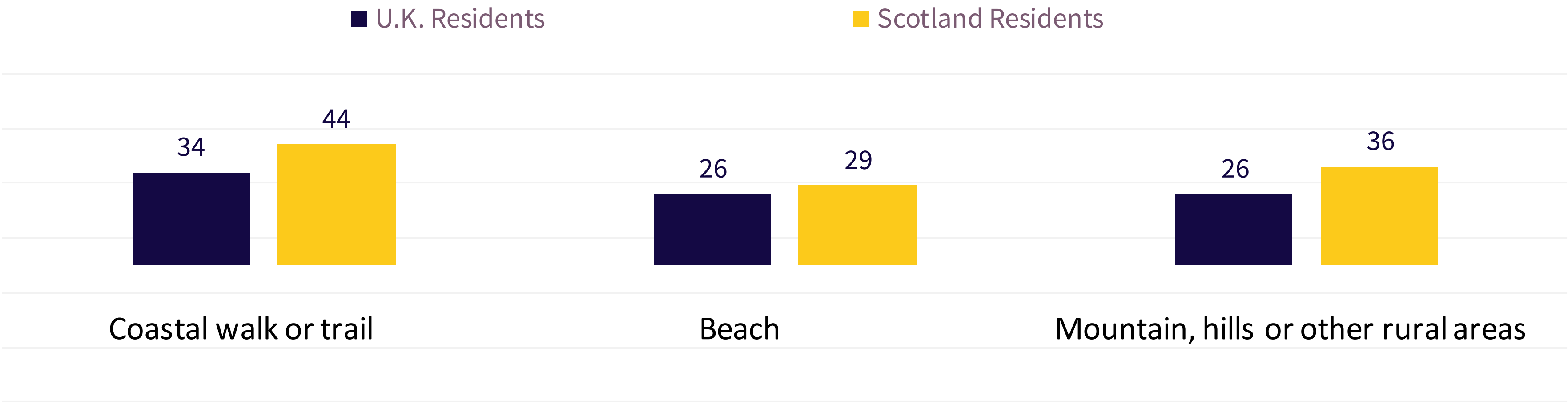


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months? Base: All U.K. residents n=3,498; All Scotland residents n=531

General leisure activity intentions in next few months

- Again consistent with previous waves, both U.K. and Scotland residents exhibit a net increase in anticipated visits to all outdoor areas. Scotland residents remain more likely to do so.

Figure 41. Outdoor areas more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 14-16, U.K. and Scotland

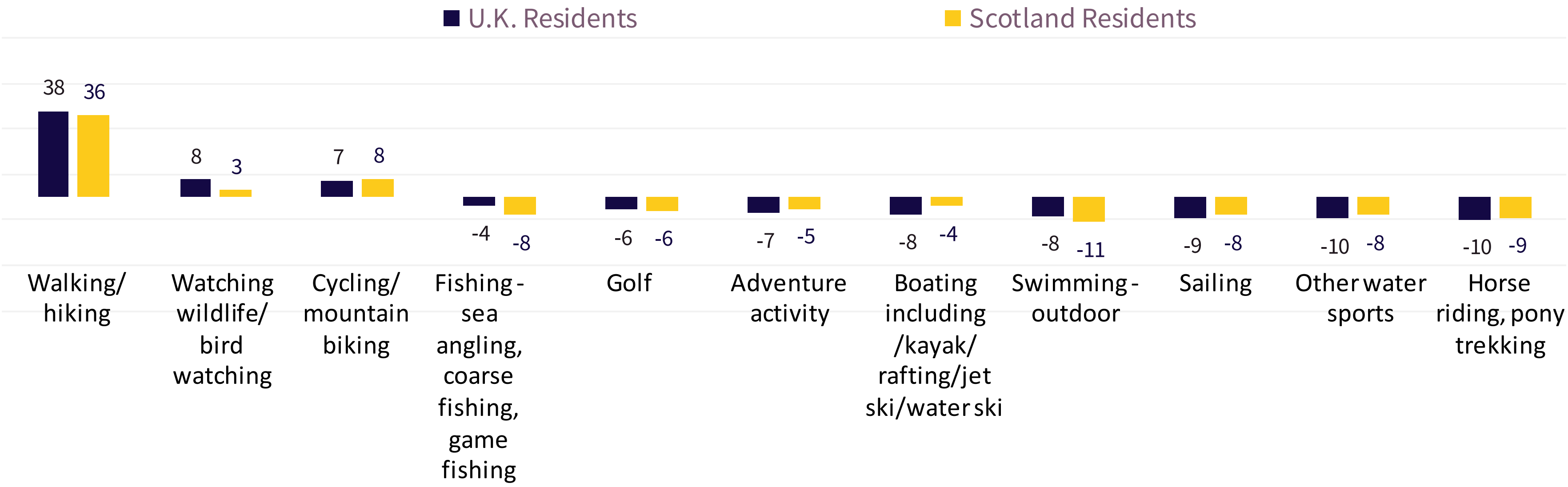


QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months? Base: All U.K. residents n=3,498; All Scotland residents n=531

General leisure activity intentions in next few months

- Tied to a rise in visits to outdoor areas, there is an expectation of more outdoor *activities* in the next few months, including walking/hiking, watching wildlife and cycling/ mountain biking.
- There is likely to be a small net decrease in anticipation to undertake most other outdoor activities, particularly when they tend to rely on support from an organisation

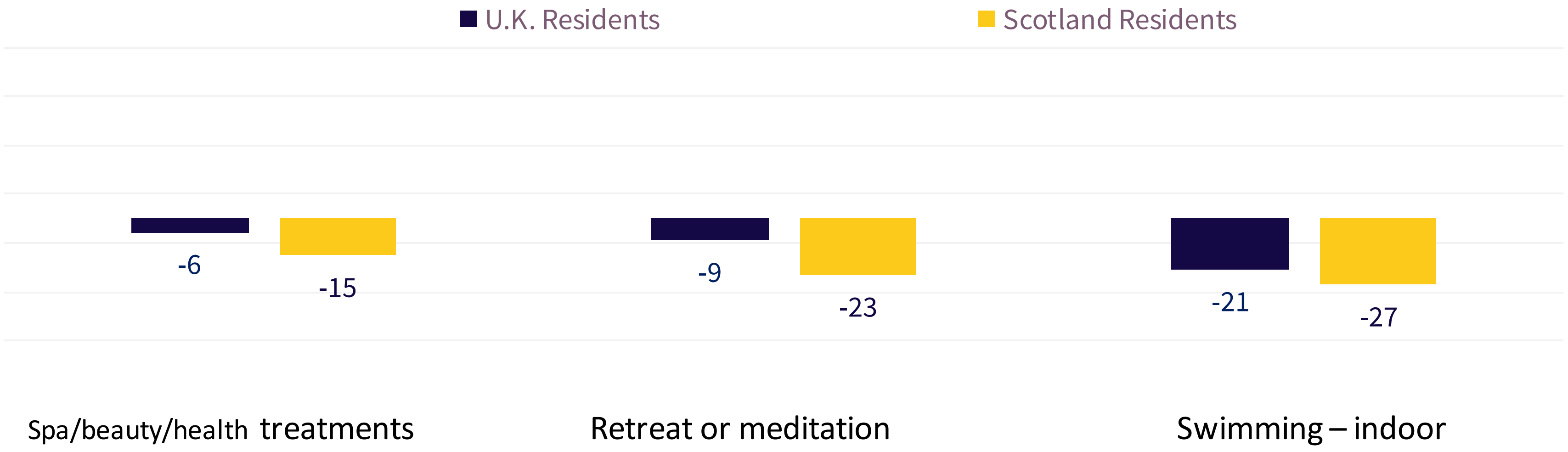
Figure 42. Outdoor activities more or less likely to do compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Scotland



General leisure activity intentions in next few months

- In general, residents continue to exhibit a lower than normal expectation to undertake indoor swimming or health and beauty treatments as restrictions are lifted, reflecting continued anxiety around close personal contact

Figure 43. Indoor activities more or less likely to do compared to normal in next few months, Net: 'more likely' minus 'less likely' Waves 14-16, U.K. and Scotland



Overnight trips taken since July

Glentress Forest, Scottish Borders, David N Anderson

Trips taken and purpose of trips since July

- As of early October, 30% of U.K. residents had taken an overnight short break or holiday in the U.K. since July, 24% of Scotland residents. Both numbers are higher than the intended trips before restrictions were lifted. 3 in 5 U.K. trips were for a holiday, the majority of the remainder to visit friends or relatives (VFR). Overnight stays in Scotland were predominantly for a 'holiday' – 77% compared to 63% of all U.K. trips.

Figure 44. Proportion taken an overnight trip in the U.K. July to September, Percentage Wave 16, U.K.

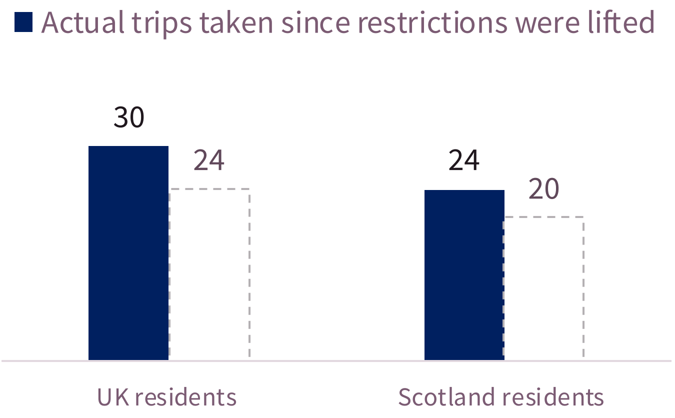
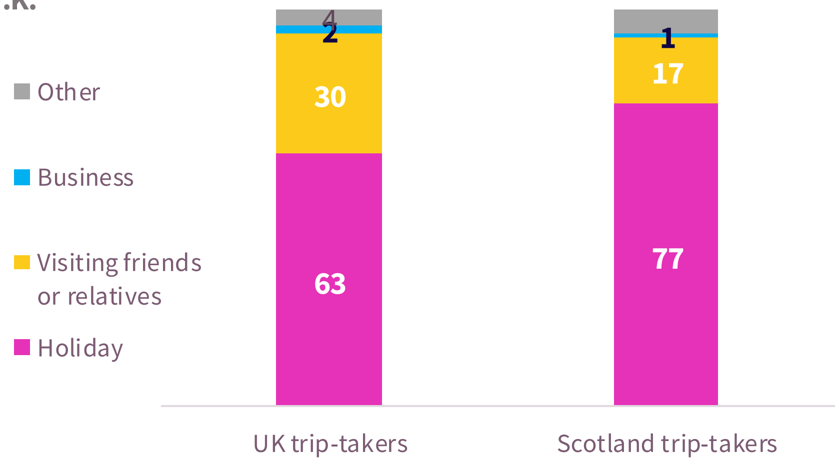


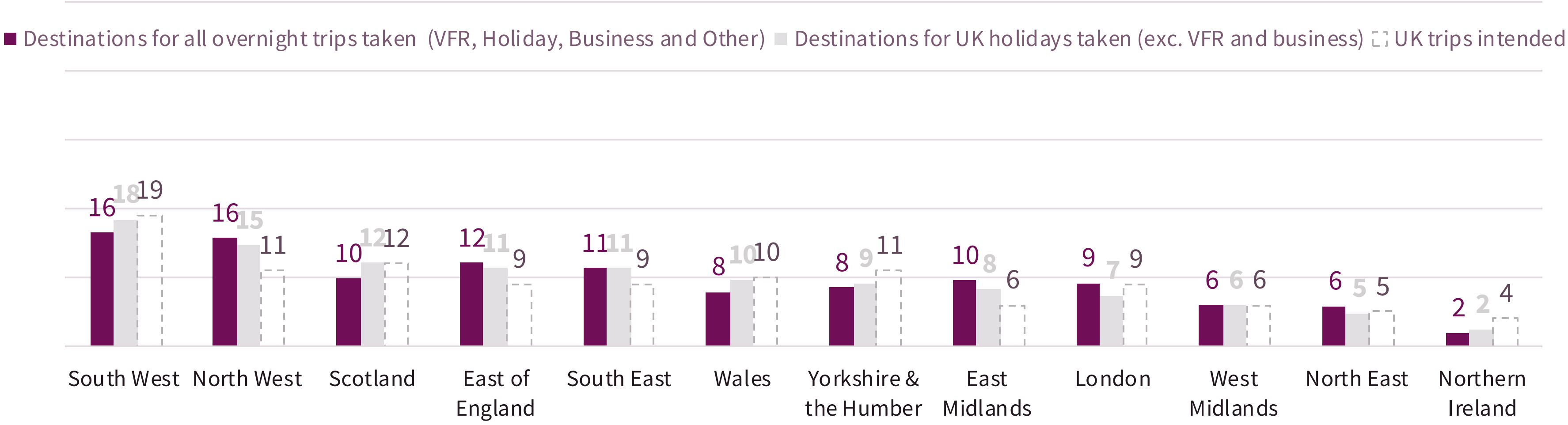
Figure 45. Purpose of UK and Scotland trips taken compared to UK trips intended, Percentage Waves 14-16, U.K.



Where stayed on trips since July

- Consistent with predictions, the South West of England attracted the highest proportion of holiday trips from July to September, followed by the North West of England and Scotland. Predictions to visit Scotland are in line with actual trips taken, although the mix of visitors did change (see following slides).

Figure 46. Destinations that U.K. July-September trip-takers and holiday makers stayed on their trip, Percentage Waves 15-16, U.K., Ranked on holidays

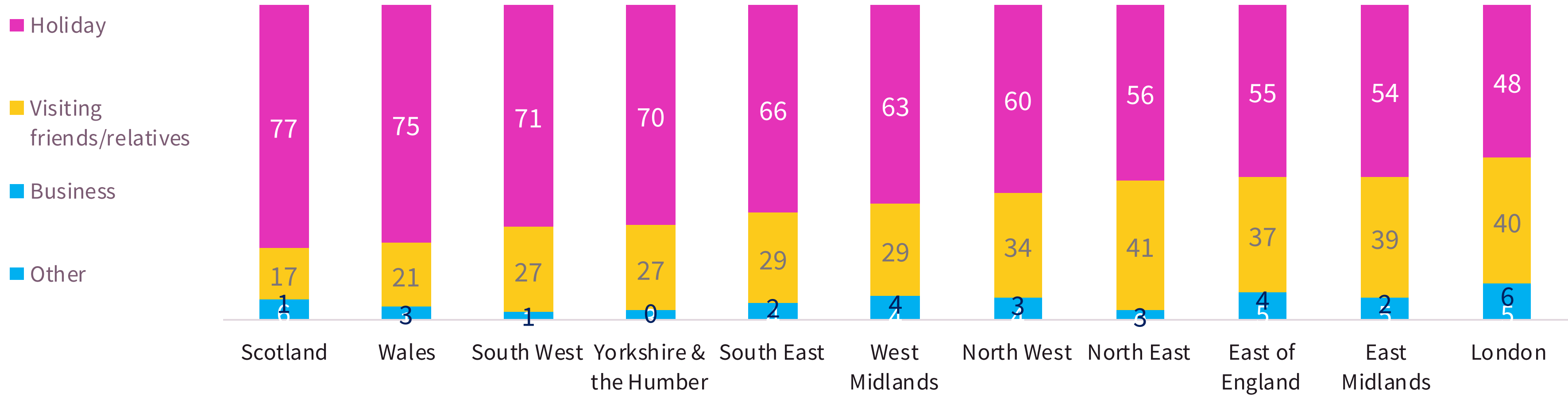


VB13c. Where in the U.K. did you stay on this trip since July? Base: All respondents that took an overnight trip in the U.K. All U.K. trips n=1501; All U.K. holidays or short breaks n=939 Note: All overnight trips and holidays are both shown to account for respondent response bias – respondents are less likely to include VFR and business trips in intentions than they are in retrospective behaviour so *intentions* are biased towards holidays. The filtered 'holiday taken' figures (shaded grey) therefore provide a closer comparison to intended trips.

Purpose of trips since July by *destination*

- Scotland was the destination where the highest proportion of overnight trip-takers were visiting for a 'holiday', 77% falling into that category compared to 48% of London trip-takers at the other side of the scale.

Figure 47. Purpose of July-September U.K. short break or holiday by destination, Percentage Waves 14-16, U.K.



Vb13e. And which of the following best describes the purpose of the trip you took since July? Base: All that took a trip to exclusively to each destination Scotland n=143, East of England n=157; East Mids n=146; North East n=98; North West n=203; South East n=153; South West n=224; West Mids n=88; Yorkshire and The Humber n=123;London n=110; Scotland n=143

Demographics of trip-takers

- Notably, the life stage with the highest representation for Scotland *holidays* from July to September was 'pre-nesters' (in particular 25-34 year olds) indexing significantly higher than amongst the wider U.K. population. This will be partly driven by the higher incidence of 'pre-nesters' in the Scotland population than the wider U.K. population. All 'non-family' life stages have increased their representation since the previous report (which covered early August to mid-August fieldwork). Although families have lower representation than intention, as a *proportion*, the higher *incidence* of Scotland visitors than intended means they have similar representation in *absolute numbers.* It's also worth noting that retirees were the largest life stage for trips in September, highlighting there is still scope to generate visits from this audience.

Figure 48. Breakdown of population and July-September trip-takers by life stage, Percentage Waves 15-16, U.K. and Scotland

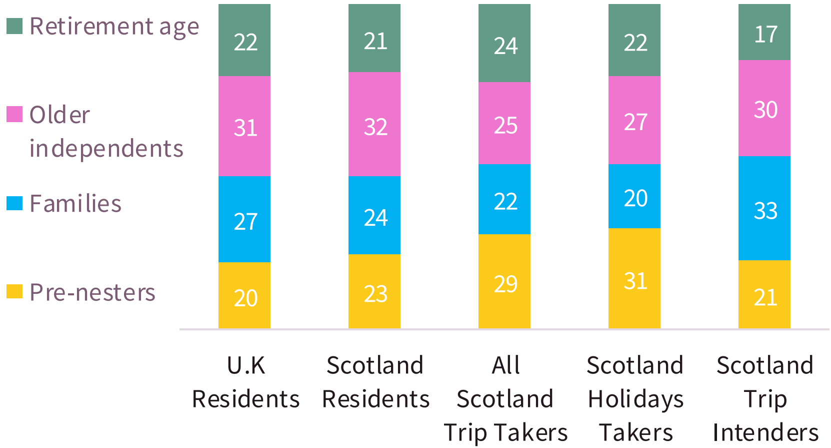
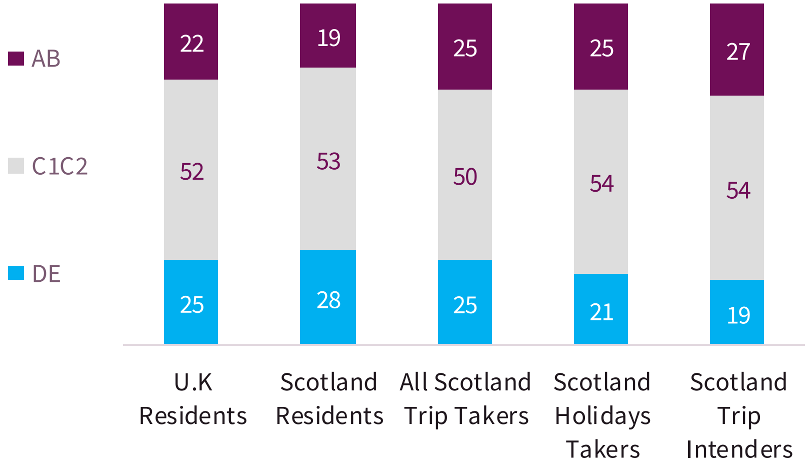


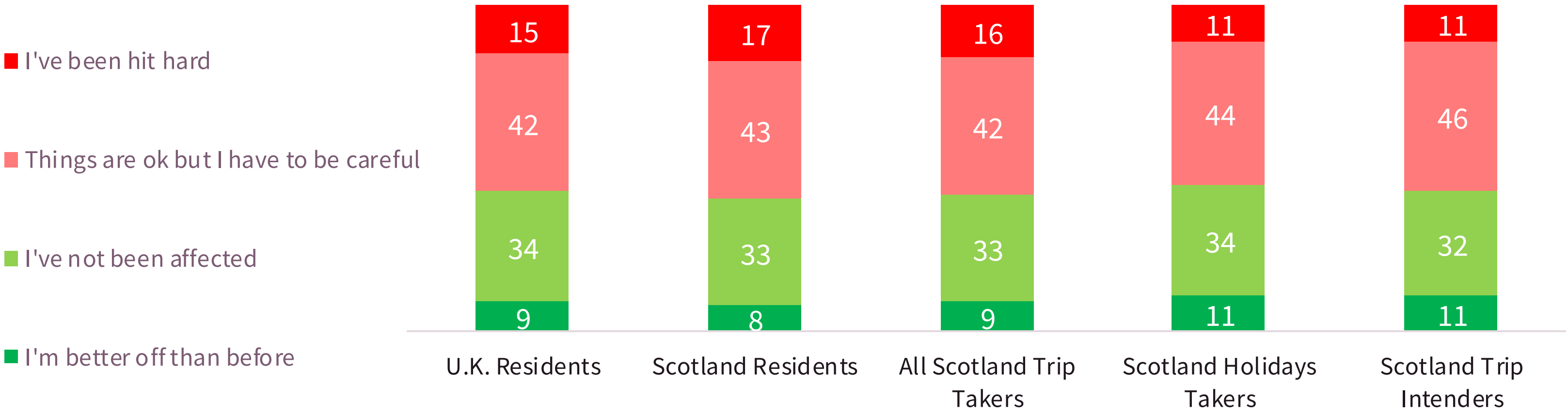
Figure 49. Breakdown of population and July-September trip-takers by social grade, Percentage Waves 15-16, U.K. and Scotland



Financial impact of COVID-19 on trip-takers

- Scotland holiday-takers are less likely to classify themselves as having been hit hard by COVID-19 than the wider U.K population and marginally more likely to state they are ‘slightly better off’ than before the pandemic

Figure 50. Breakdown of July-September trip-takers by financial segments, Percentage Waves 15-16, U.K. and Scotland

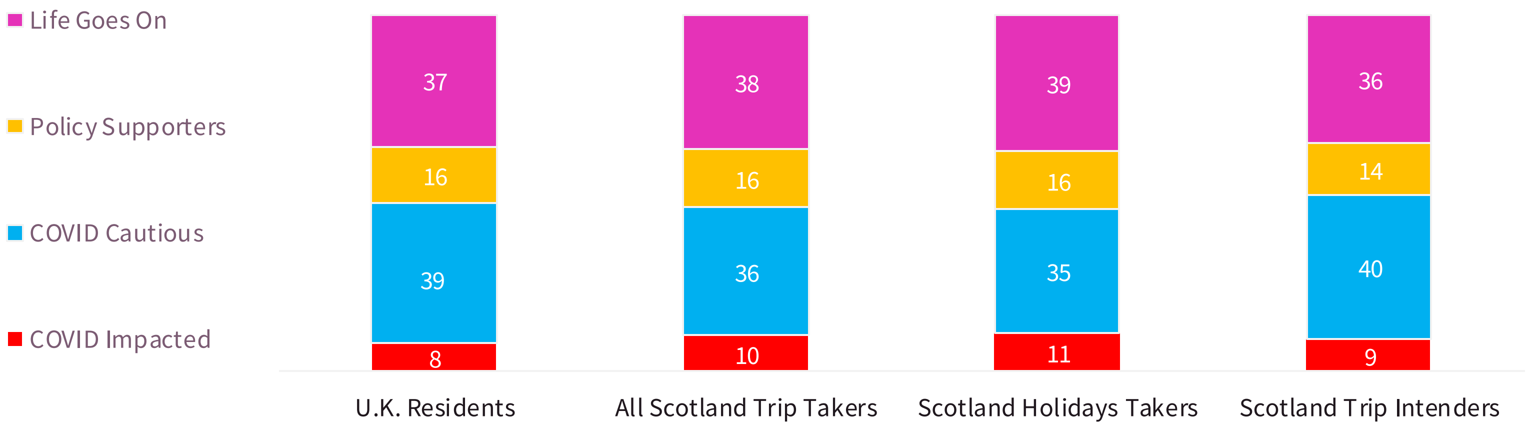


Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All respondents. U.K. population n=5260 All Scotland trips n=143; Scotland holidays n=110; Scotland intenders n=251

Attitudinal segments (see definitions page for more information)

- Consistent with intentions, Scotland trip-takers are most likely to fall into the Life Goes on and COVID cautious segments.

Figure 51. Breakdown of July-September trip-takers by risk segment, Percentage Waves 15-16, U.K.



Proportion of overnight stays in Scotland by region of residence

- Nearly 8 in 10 (77%) of all Scotland residents that have taken an overnight trip since July took this trip in Scotland, rising to 86% of Scotland residents that took a *holiday*. Both figures represent a significant rise on intentions, perhaps reflecting the success of the VisitScotland's 'Only in Scotland' campaign, and likely accounting for the rise in 'pre-nester' representation amongst trip-takers.
- Conversely, only 4% of trip intenders from outside of Scotland visited Scotland on their trip, lower than the 10% that intended to do so. As a consequence, Scotland residents made up 60% of all overnight trip takers during this period, significantly higher than intentions. At an absolute level, this represents an increase in the *number* of Scotland residents overnight stays and decrease in the *number* England resident overnight stays

Figure 52. Proportion of overnight trip-takers that took a trip to Scotland by region, Percentage Waves 15-16, U.K. and Scotland, ranked on holiday

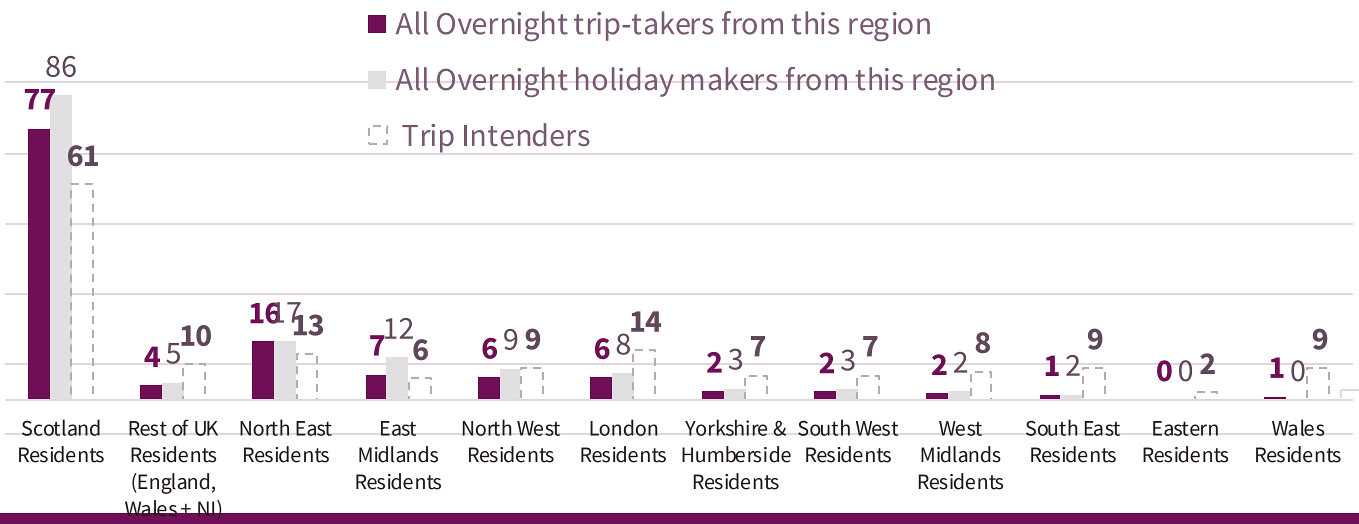
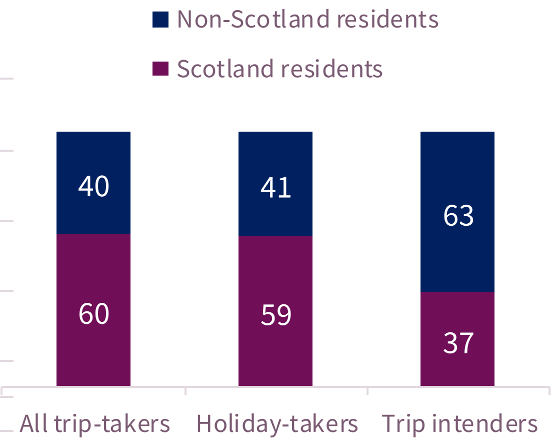


Figure 53. Breakdown of Scotland trip-takers by region of residence, Percentage Waves 14-16, U.K.

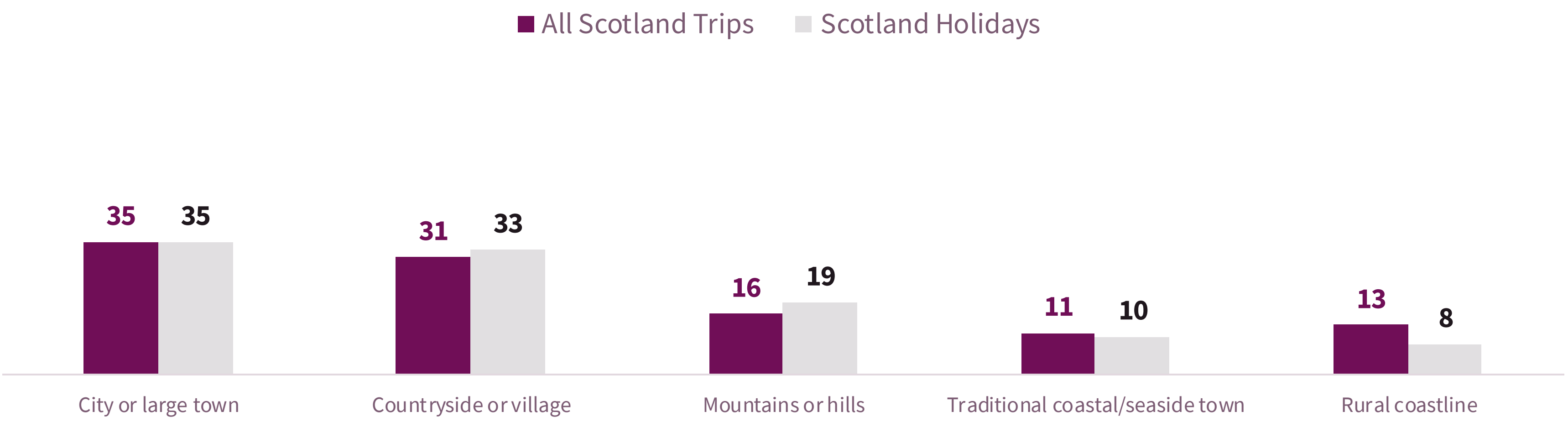


VB13c. Where in the U.K. did you stay on this trip since July?
Base: All residents planning on taking a holiday or short break in the U.K. in the winter/winter. Residents in each region Wales n=132, East of England n=45; East Mids n=81; North East n=42; North West n=99; South East n=124; South West n=152; West Mids n=202; Yorkshire and The Humber n=90;London n=186; Scotland n=161

Types of trips taken*

- ‘City or large town’ and ‘countryside or village’ were the two most popular types of destination for an overnight stay between July and September, followed by mountains or hills and traditional coastal/seaside towns.

Figure 54. Main type of destination for Scotland July-September overnight trip, Percentage Waves 15-16, U.K.



Where Scotland trip-takers visited in Scotland*

- Holiday-makers to Scotland visited a range of places on their stay - the Highlands, the Glasgow area, Edinburgh area and the West Coast the three most popular areas. Of the 35% that stated they visited a 'city or large town' (previous page), two thirds visited the Edinburgh and Glasgow areas.

Figure 55. Destination for Scotland overnight July-September trip, Percentage Waves 15-16, U.K. and Scotland

VB13cii. Where specifically in these areas did you stay? ? *Note that the question asks about most recent stay so will be biased towards later trips
Base: All respondents that took a trip exclusively to Scotland since July All Scotland trips n=143; Scotland holidays n=110

Trip choice compared to original plans

- The vast majority of Scotland trip-takers were able to stay in the destination they had originally planned to. Of the 11% that didn't, worries 'there'd be too many people there' was the main reason, followed by the expense of accommodation options. Notably, 1 in 5 (2% of all trip-takers) weren't confident the venue was COVID-safe.

Figure 56. Number staying in the destination type initially planned for July-September trip, Percentage, Waves 15-16, UK

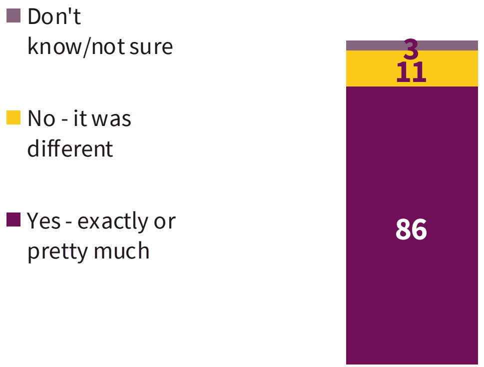
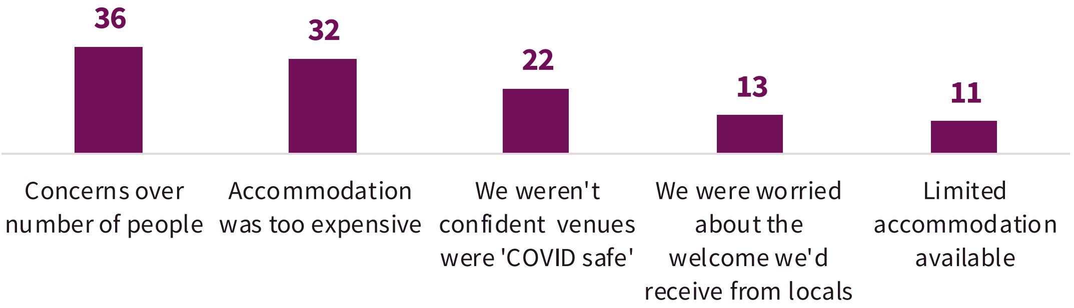


Figure 57. Top 5 reasons for not staying in the planned destination type, Percentage, Waves 15-16, UK

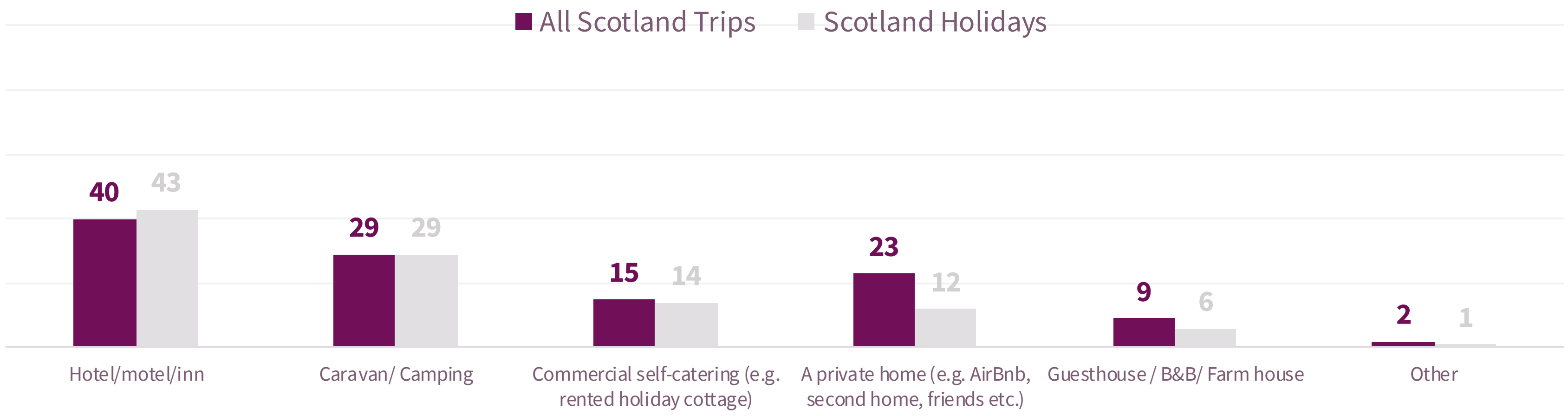


VB13fi. Did you end up staying in the type of destination you had originally planned to during your most recent trip? VB14. Why didn't you end up staying at the destination type you originally planned to?
Base: All Wave 15+16 respondents that have taken a U.K. trip since the start of July n=1028. Those that weren't able to stay at the planned destination type n=123

Accommodation stayed in trips taken*

- Hotel/motel/inn was the most popular choice for an overnight Scotland holiday, followed by caravan/camping and commercial self-catering. Unsurprisingly, private home indexed higher for all trips than holiday trips, driven by trips with a VFR purpose.

Figure 58. Accommodation stayed in on Scotland July-September trip, Net percentage, Waves 15-16, U.K.



Methodology

Glentress Forest, Scottish Borders, David N Anderson

Methodology

- The findings in this report are based on a weekly online survey conducted amongst a nationally representative sample of the U.K. population.
- The sample is representative of U.K. adults aged 16+ by gender, age, government region and social grade.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' in Scotland and Wales to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.
- This report aggregates the results taken from Waves 14-16 of the COVID-19 consumer weekly tracker.