

# REMOTE WORKING, WORKCATIONS, DIGITAL NOMADS - WHAT DOES THE BLURRING OF THE LINES BETWEEN BUSINESS AND LEISURE TRAVEL MEAN FOR SCOTTISH TOURISM?

**Workcations** are a work and travel trend that combine working and taking a vacation. They're on the rise, thanks in a large part to the increased location flexibility and rising worker burnout. They have gained prominence due to the convergence of remote work, a desire for work-life balance, and the adaptability of the travel industry. This trend has reshaped the way people think about work and leisure, allowing them to explore new places while staying productive in their careers. We get different varieties of workcations - from the lowest impact which are part business, part leisure travel where a work trip is combined with an extended vacation before or after the work event to more extreme combinations of work and leisure as practiced by **Digital nomads** - people who are location-independent and use technology to perform their job, living a nomadic lifestyle. Digital nomads work remotely, telecommuting rather than being physically present at a company's headquarters or office. But for many of us, where we have flexibility around our work arrangements, it's about the possibility of extending our ability to enjoy different destinations and activities by working while away - without eating into our annual leave entitlement.

It's a relatively new trend in the UK but one which has exploded since COVID-19 forced many of us to work remotely and more and more businesses realised that having their staff on-site at all times was not necessary and indeed could be beneficial. But as it's a relatively new trend, we don't know a lot about it - what is the potential scale and how can the tourism industry benefit? Jemma Reid, a food tourism ambassador for Scotland and owner of **JR Events, Sales & Consultancy**, is leading a project to explore how attracting remote workers can contribute to growing the international reputation of Scottish food tourism and drive economic benefits. She is working with Yvonne Wagoun of **White Stag Tourism**, and they have identified opportunities for Scotland through the remote worker market. **56 Degree Insight** incorporated a range of questions in the Summer 23 wave of the **Scottish Tourism Index** to better understand the workcations trend as it applies to the Scottish adult population. Key results are summarised in this report and illustrate the potential of workcations for Scottish tourism - 650,000 Scots have already taken this type of trip (21% of workers) and half of them have been in Scotland (320,000), but there is even more growth potential. 1.2 million Scots claim working remotely is an option for them and they would be interested in doing so (40% of the working population) - with Scotland itself of interest to almost 700,000 working Scots across the population. The characteristics of these trips - taken and anticipated - are described below, along with the motivations and barriers.....

Scottish population who work

3.1m  
73% of adults



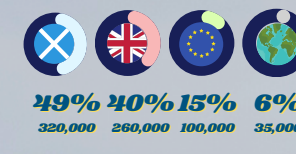
Scots who can potentially work remotely

1.6m  
52% of workers



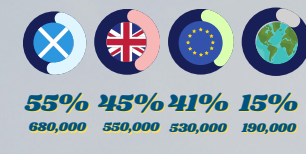
Scots who have already taken workcations

0.65m  
21% of workers



Scots interested in taking workcations

1.2m  
40% of workers



## WORKCATIONS TAKEN ALREADY

Across the working population in Scotland, 49% claim that working remotely - away from home and their normal place of work - is not feasible. However, 31% have some limited flexibility in terms of where they work and a further 21% have a lot of flexibility.

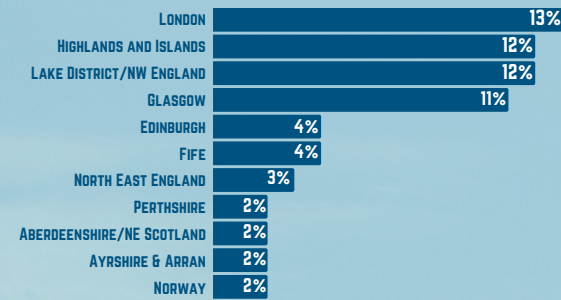
And across the working population, some 21% have already worked remotely - amounting to 650,000 Scottish workers.

For the most part, these trips have been domestic in their nature - 49% of them within Scotland itself (320,000 workers, though 40% have been elsewhere in the UK (260,000). Only 15% have travelled into Europe for a workcation (100,000) and 6% have gone further afield (35,000).

Scots who have already taken workcations

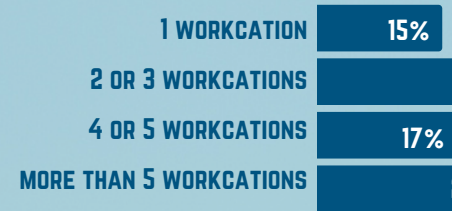
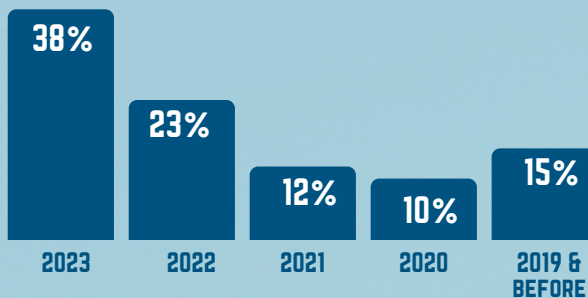
0.65m

21% of workers



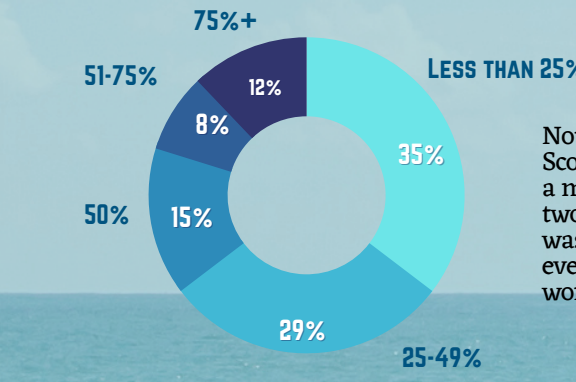
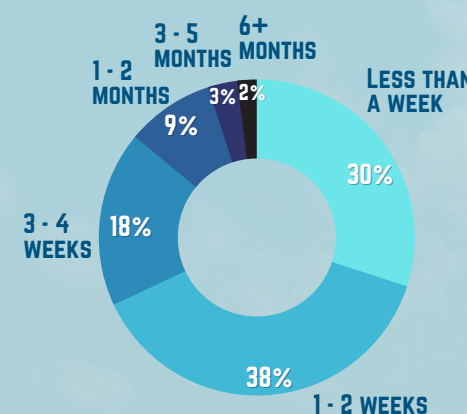
When we look below the national levels, four destinations have been particularly popular so far for this type of trip; London (13% of workcations), the Highlands & Islands (12%), the Lake District and other parts of North West England (12%) and Glasgow (11%). As can be seen opposite, the suite of potential destinations for future workcations is much broader and more extensive

Amongst those 21% who have already taken workcations, the majority have been in the post-COVID era - 83% since 2020, with the largest proportion having taken place this year (38%). Only 15% had taken this type of trip prior to COVID - in 2019 or earlier.



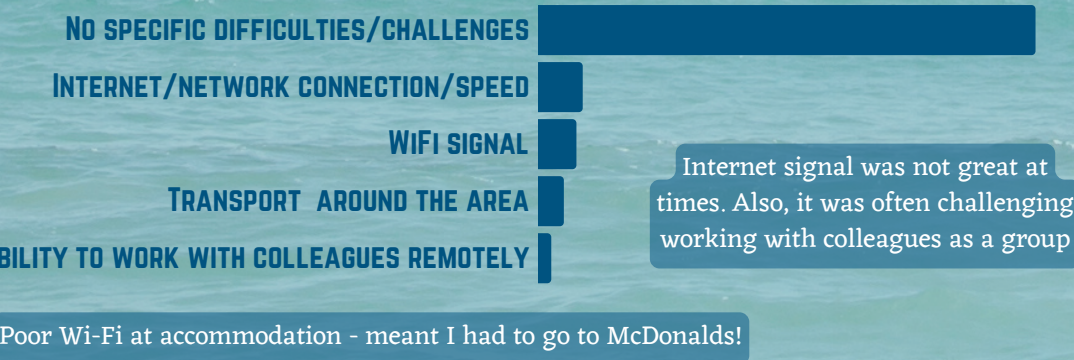
And if you've taken any workcations, the chances are you have taken them on more than one occasion: 40% have taken them on 2 or 3 occasions, and a similar proportion have taken them 4 or more times previously (40%). Only 15% have only taken such a trip once before

Whilst Digital Nomads often spend months at a time moving from one work location to another, for the vast majority of Scots, workcations are much shorter and 'lighter touch': for three in ten it was for less than a week (30%), and for 38% they were away for 1-2 weeks. Only 5% had experienced workcations of 3+ months' duration.



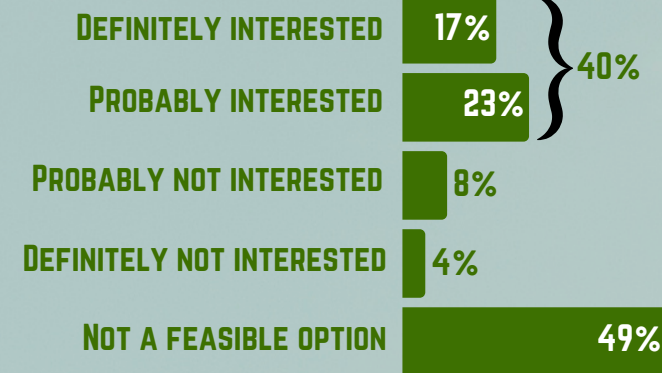
Not only have they been of a short duration, Scots workcations have so far also tended to be a mix of less work, and more play - on almost two thirds of such trips, less than half the time was spent working (64%) - only one trip in every five involved over half of the time working (20%).

In terms of the practicalities of working remotely away from home and the normal place of work, it is encouraging that four in five who had done so had not experienced any specific difficulties (79%). Getting a reliable connection is obviously key however - and 13% did mention issues around network connections, the speed and WiFi signals - the most commonly mentioned issues experienced, and ones where reassurances for future workcations would be sought.



Poor Wi-Fi at accommodation - meant I had to go to McDonalds!

## THOSE INTERESTED IN THE POTENTIAL TO TAKE WORKCATIONS



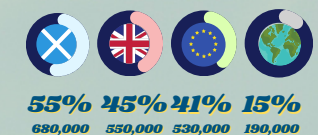
We have seen already that across the working population, 49% say that working remotely is not a feasible option for them. However, 17% of working Scots are definitely interested in doing so, and a further 23% are probably interested - 40% of the working population which equates to 1.2 million Scots adults. We saw opposite that around half this number have already taken some form of workcation, but we have also seen that they have been largely quite 'light touch' - short durations, relatively close to home, and with only relatively small percentages of the time spent working. We will see here that many Scots have more ambitious aspirations in this regard.

Firstly, in terms of where they would consider, although Scotland itself remains the most popular likely destination (55% would consider a Scottish location - with the potential to more than double the number of staycations), the biggest increase in appeal is to European destinations with 41% of Scots claiming they would go there - over half a million people.

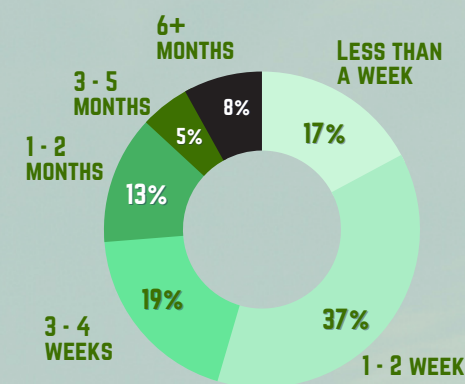
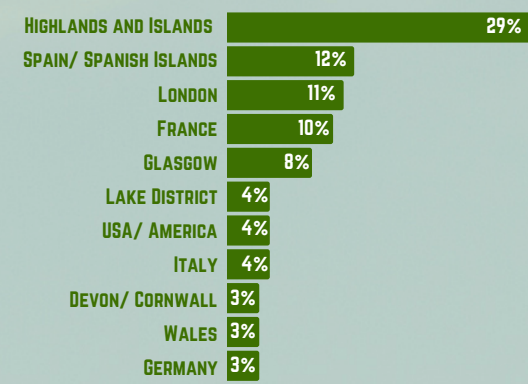
Scots interested in taking workcations

1.2m

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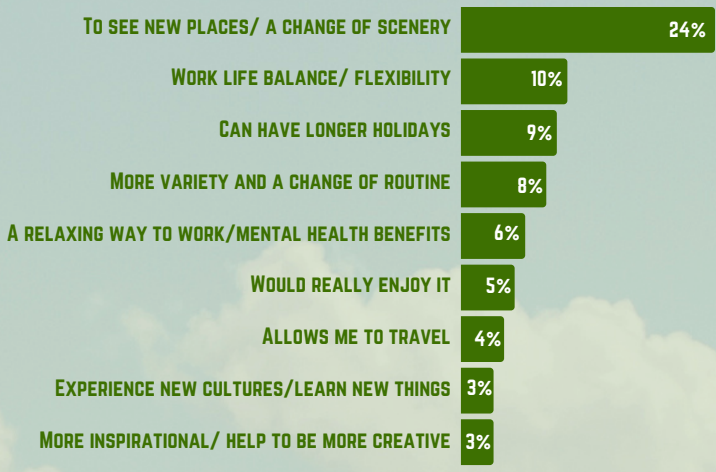


Whilst the vast majority of workcations taken so far have been to domestic destinations, Scots who would consider a future workcation show slightly broader horizons. That said, the Highlands and Islands clearly has real potential in this regard as this is the most commonly mentioned potential destination - by almost three in ten considerers (29%). London accounts for 11%, Glasgow 8% and the Lake District 4%, but most other potential destinations are overseas with Spain and its islands (12%) and France (10%) showing greatest appeal.



Whilst future workcations are likely to involve destinations slightly further afield, they are also likely to be longer in duration than those taken so far: although just over half are anticipated to be up to two weeks in duration (54%), over a quarter would prefer to be away for over a month (26%), and 8% for at least six months

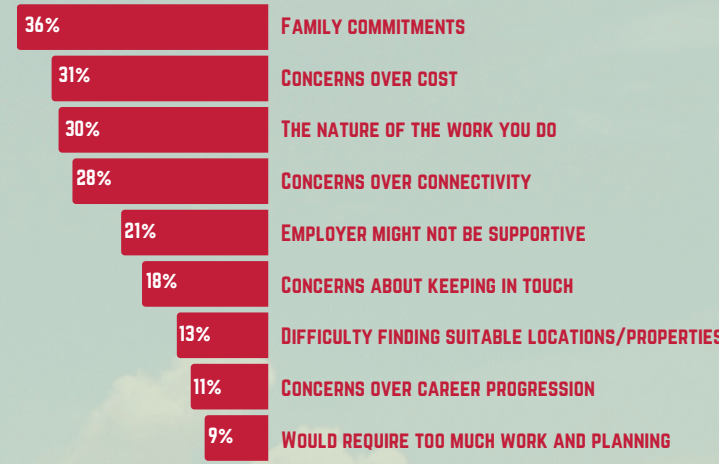
### POTENTIAL BENEFITS OF A WORKCATION



Of course there are potential benefits but also some barriers to taking a workcation: a quarter of Scots see the benefits afforded by visiting new places and a change of scenery (24%), whilst for 10% it will help address work-life balance issues, and 9% see it as a way to extend the number and length of holidays.

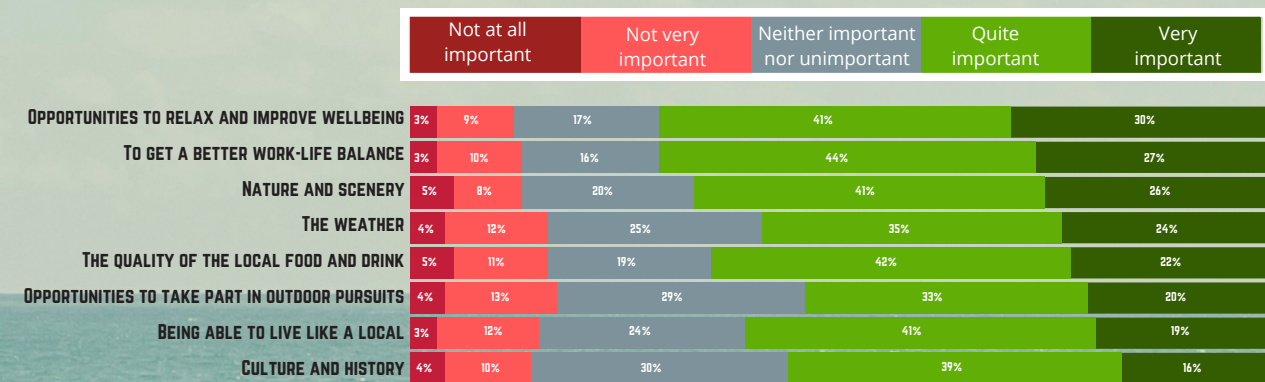
On the other hand, family commitments would have to be overcome by 36% of those who would otherwise be interested, whilst 31% would have concerns about the cost, and 30% would have to be convinced that the type of work they do would make it possible. And of course connectivity concerns could act as a barrier for 28% of Scots.

### POTENTIAL BARRIERS OF TAKING A WORKCATION

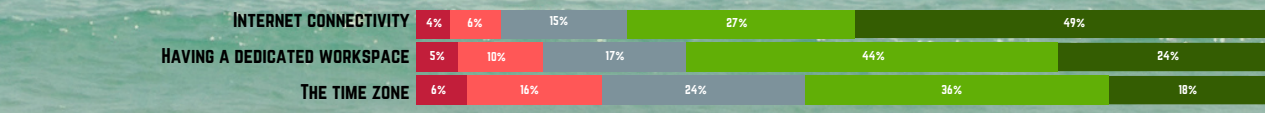


So, what are the primary motivations for taking a workcation? As is evident below, a whole host of motivations and benefits have been cited. For the largest proportion of Scots, it's mainly about an opportunity to relax and improve their wellbeing - 30% said this was very important and a further 41% described it as quite important. Getting a better work-life balance was a very important consideration and motivation for 27%, whilst 26% felt it was a very important opportunity to get closer to nature and experience nice scenery whilst working.

For just under a quarter, working in nicer weather is a very important consideration (24%), whilst 22% see the potential to enjoy the local foods and drinks at the destination as being very important. Being able to take part in more outdoor pursuits, living 'like a local' and experiencing different cultures and the history of destinations are also motivating for many.



But of course, to achieve all of these benefits, there are key pragmatic considerations which must be in place. Internet connectivity is a hygienic - it simply must be there - for most who would consider this type of trip. Almost half describe it as 'very important' (49%) and a further 27% say it is 'quite important'. A dedicated workspace is also of great importance for many - 24% very important and 44% quite important, and the timezone is also an important consideration for some (18% very important). All of these factors need to be borne in mind by destinations and establishments considering how best to tap into this emerging opportunity.



I would require a quiet place with WiFi connection and a good laptop. A nice place with no distractions. That the weather was nice so I could enjoy the rest of the day after I finish work. Essential that we had Internet connection that was sufficient for our work needs and that we could get outdoors and enjoy the landscapes around us. That the prices locally were affordable and that communication services were good enough to be able to continue to work effectively.

