



# A monthly tracker of Scottish tourism intentions during COVID-19

Wave 1 – early May 2020

A Research Report  
from 56 Degree Insight Ltd



**56°**  
DEGREE  
INSIGHT

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# The Scottish Tourism Index - Introduction

- Online Survey of 500 Scottish adults
- Representative sample of the Scottish population, weighted by age, gender, socio-economic grouping and region of origin
- Survey will be conducted during the first week of each month
- Wave 1 fieldwork undertaken over three days from Monday 4<sup>th</sup>- Wednesday 6<sup>th</sup> May 2020
- Sample and fieldwork provided by Populus Data Solutions



## A monthly monitor of how the Scottish population feel about tourism and leisure during the COVID-19 Pandemic

- As we reach the end of the seventh full week of lockdown in Scotland following the strict measures taken by the Scottish Government on social distancing, holidays and breaks may seem a long way off. They are certainly not an option we can take at the moment.
- However, as we enter the summer months, there is hope that lockdown restrictions may start to be lifted gradually over a period of time. This week, the First Minister has removed the restriction on outdoor exercise – more than one trip from home is now permissible. And in England, further restrictions are gradually being lifted.
- But as we stay at home, many of us are thinking about the types of holidays and leisure trips we might want to make as soon as we are able.
- As a result, 56 Degree Insight have launched a new survey designed to monitor the tourism and leisure desires and concerns of the Scottish population – **The Scottish Tourism Index**. Where will they want to go first when conditions allow, and what will they take into account when planning that trip?
- This report represents the results from the first wave of research – undertaken in early May 2020. We will monitor changes in opinions and likely behaviours by repeating the survey on a monthly basis over the summer and possibly beyond.

56 Degree Insight defines who we are and where we come from. Our home turf, the Edinburgh area, sits on the 56 Degree North line of latitude and we provide precise direction and insights looking at your business issues from every possible angle.

*Duncan Stewart and Jim Eccleston*





# Key Headlines May 2020



# This early May wave of the Scottish Tourism Index provides some early *food for thought* on what Scots will look for in holidays as restrictions begin to be eased....



- **Although there are some clear variations by lifestage, for most Scots, COVID-19 is forcing a reconsideration of attitudes and opinions about holidays and breaks in the future: four key changes in attitude are emerging:**
  - Avoiding public transport and/or choosing to travel only in a private car
  - Avoiding international travel often due to fears of travelling by air
  - Avoiding busy places and being very aware of social distancing
  - Being more aware of the cleanliness and hygiene standards
- **Scots holidaying horizons when restrictions are lifted are generally likely to have been reduced in scale. Initially at least, the domestic tourism industry is likely to be a particular potential beneficiary:**
  - Day trips have highest appeal followed by Scottish breaks and holidays then holidays elsewhere in Britain then holidays overseas – for many it’s one step at a time as there will be an initial desire to not stray too far from the safety of home.
  - But there will be differential benefits to the Scottish tourism industry, at least initially. The countryside is of greatest appeal, followed by the seaside and then towns and cities.
- **We are likely to return to a new world of attitudes and choices when it comes to holidays in Scotland. Destinations, accommodation and what to do on holiday are all likely to change in the immediate term:**
  - At the moment, the Highlands, rural parts of the south of Scotland and the islands all have higher levels of appeal than has been the case over recent years – this will require careful management to ensure honeypot sites in these areas do not become overwhelmed
  - In terms of accommodation choice, self-catering accommodation and own caravans and tents will have greater appeal whereas serviced accommodation and hostels/bunkhouses will have reduced appeal. In early May, looking ahead, a key focus was likely to be on hygiene/cleanliness and minimising social contacts by choosing accommodation which is sufficiently self-contained and often rural.
  - Choosing what to do on a Scottish holiday is also being changed by COVID-19 with an increased desire to visit the natural outdoors and take part in more active pursuits. On the other hand, indoor activities such as visits to arts and cultural venues, and purpose built attractions will have reduced appeal. Scots are also less likely to wish to eat out – with a move towards cooking their own meals.
  - And attendance at events and festivals and mixing with locals both have much less appeal now than previously. Given the importance Scotland’s ‘friendly welcome’ messaging, navigating around this will require a lot of thought.
- **Through future waves of the Scottish Tourism Index, we will monitor how these opinions and views change over the next few months as restrictions begin to be eased.....**





# Scots' feelings about travel in general



## HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND TRAVEL GENERALLY:

Scots have a wide range of feelings about future holiday taking, ranging from fear to travel again to a desire to quickly get back to normal....

There is a wide spectrum of opinion towards holidays and breaks amongst Scots at the moment with polarisation between COVID-19 having minimal impact on future travel to a real nervousness about the prospects of travelling in the future – and many views in between.

- A significant proportion of Scots (17%) provided responses suggesting that they didn't feel different to before COVID 19 and as soon as they could, they would get back to travelling as before. Indeed a proportion (5%) indicated that the lockdown had increased their appetite to travel so they hoped to do more in future. Men were more likely than women to provide these more confident responses.
- In contrast others stated they were feeling scared of travelling in future, some stating they wouldn't take any holidays until a vaccine had been found or that it was too early for them to even think about future plans. Women and those with children were more likely to express these opinions.
- However, the largest share of the population anticipated travelling in future but with some significant changes to their behaviours. These include:
  - Avoiding public transport and/or choosing to travel only in a private car
  - Avoiding international travel – due to fears of travelling by air and fears of becoming 'stuck' overseas.
  - In general avoiding busy places and being very aware of social distancing – places named included transport hubs, town centres and events.
  - In general being more aware of the cleanliness and hygiene standards at places visited.

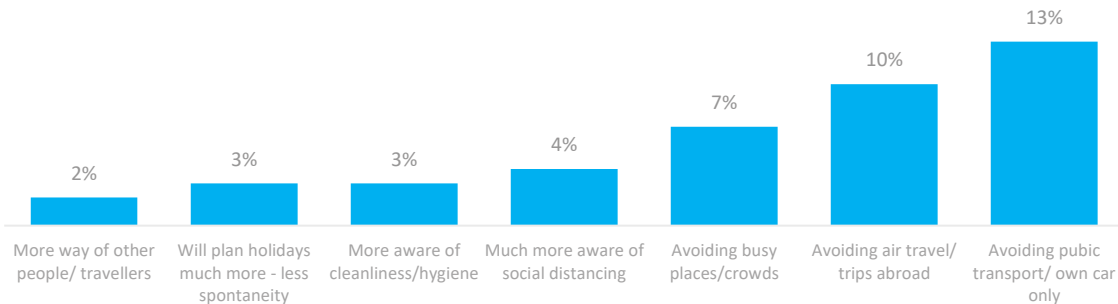
*"Thinking about holidays and breaks generally how has the current set of restrictions altered how you feel about travel generally - your attitudes, likely behaviours?"*



**SCARED – NERVOUS  
ABOUT TRAVEL, FEELING  
VERY WARY (11%)**

**EXPECT TO TRAVEL IN FUTURE BUT  
WITH ADDITIONAL CAUTION,  
PLANNING AND SOME CHANGES**

**NOTHING'S CHANGED  
– EXPECT TO CONTINUE  
AS BEFORE (17%)**



....and this wide range of feelings about future holiday taking is often best illustrated by their own words.....



**SCARED – NERVOUS ABOUT TRAVEL AND FEELING VERY WARY (11%)**

**EXPECT TO TRAVEL IN FUTURE BUT WITH ADDITIONAL CAUTION, PLANNING AND SOME CHANGES**

**NOTHING'S CHANGED – EXPECT TO CONTINUE AS BEFORE (17%)**

*Feel nervous, going to avoid travel till its settled*

*Very, very wary*

*I am in the shielded group of people. I will be very cautious of going away anywhere until I know covid19 has passed*

*Cannot see how air travel will be possible for a while - busy airports and full aircraft are one of the best situations for the spread of disease. Same with public transport.*

*Scared to be with a lot of people*

*I would use our own transport. Keep away from crowds or restricted spaces.*

*I would try to avoid public transport, buses, trains and planes and would ensure I had plenty of hand sanitiser and wipes.*

*It has not decreased my motivation or ambition to travel, However it has made me think about how I can travel more conscientiously and safely. This is in reference to both COVID and global warming.*

*Makes me desperate to go travelling*

*I am still not scared to go places as I think if you take care you should be ok. It's like the cold or the flu. If you don't pick up the virus you cant get sick.*

*My opinion on travel hasn't changed at all.*





# The desirability of different types of tourism



# What is the Tourism Desirability Score?

The ‘Tourism Desirability Score’ is a measure of the relative appeal amongst Scots of different types of day and overnight trips to Scotland, elsewhere in Britain or overseas, to a range of different environmental locations when such trips become possible again when COVID-19 Lockdown restrictions begin to be lifted.

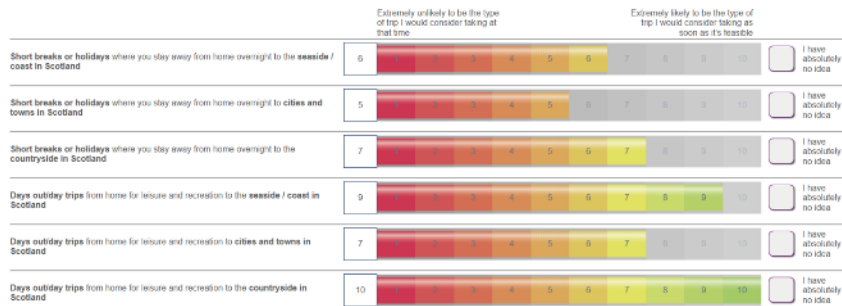
Analysis identifies what and where Scots might do first – and where tourism recovery may happen first.

This analysis is based on Scottish consumer views in early May 2020; tracking will be undertaken monthly to determine how views evolve as the nature of lockdown changes.

- A randomly rotated set of destinations and types of environment were shown to respondents to eliminate order bias and they were asked to rate each option on a scale from 1 (*Extremely unlikely to be the type of trip I would consider*) to 10 (*Extremely likely to be the type of trip I would consider as soon as it is feasible*). See opposite.
- In the analysis on the following pages, average scores have been obtained for each trip type and converted into a score between 1 and 100. The higher the number, the greater the desirability to take that type of trip when conditions allow.
- The score can be calculated for any group of respondents (e.g. lifecycle segments) to identify how desirability varies by subgroup (see later in this report). We can also combine the responses to obtain an overall score irrespective of destination.

Firstly, let's focus on leisure and tourism within Scotland. At the moment, because of COVID-19, it is not possible to take any non-local leisure or tourism trips. Thinking about the time when such trips become possible again, please rate each of the following trip types on a scale from 1 to 10, where 10 is 'Extremely likely to be the type of trip I would consider taking as soon as it's feasible' and 1 is 'Extremely unlikely to be the type of trip I would consider taking at that time'

Please move your mouse over the scale(s) and click to select your answer



Now, let's focus on overnight trips you might take outside of Scotland – to England and Wales, and also overseas. Again, thinking about the time when such trips become possible again, please rate each of the following trip types on a scale from 1 to 10, where 10 is 'Extremely likely to be the type of trip I would consider taking as soon as it's feasible' and 1 is 'Extremely unlikely to be the type of trip I would consider taking at that time'

Please move your mouse over the scale(s) and click to select your answer





## TOURISM DESIRABILITY SCORE – SCOTLAND V OTHER GB V OVERSEAS:

# In early May, Scots' overall desire for holidays and breaks when lockdown restrictions are eased is only 49/100

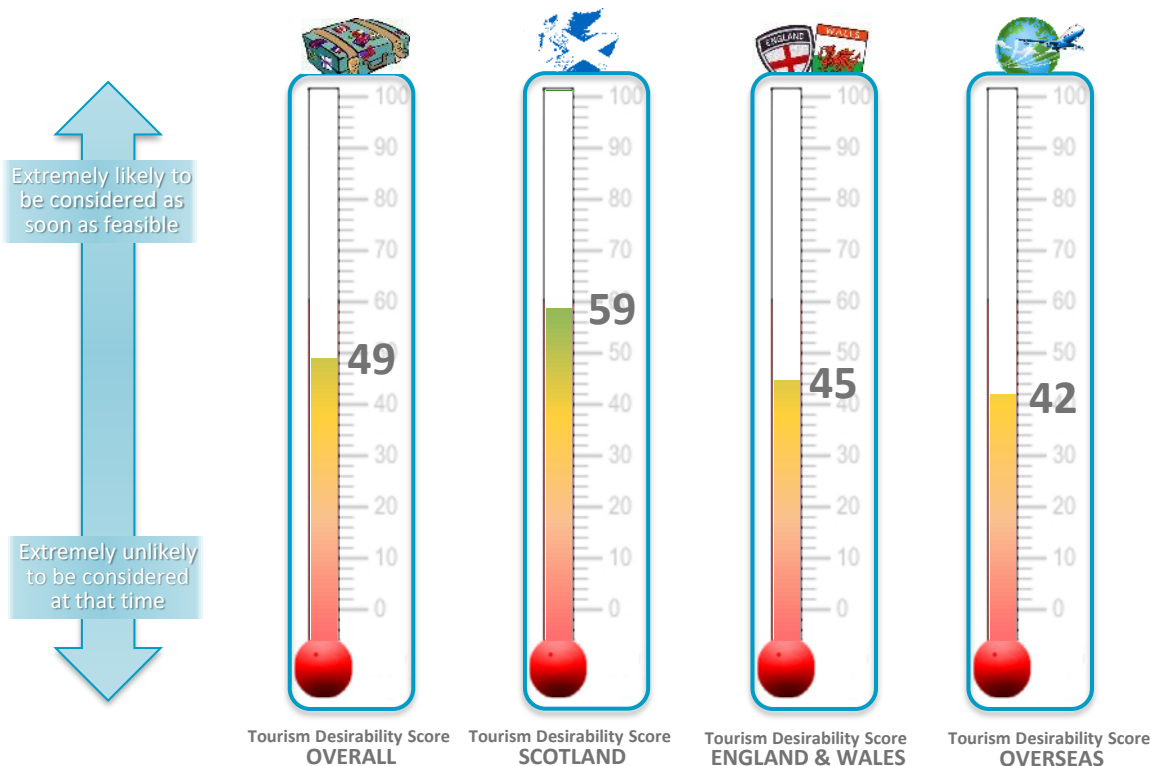


However, the desire for overnight tourism increases when we come closer to home:

- With an score of 59/100, as soon as conditions allow, overnight holidays and breaks in Scotland hold the greatest appeal
- Travelling further afield has significantly less immediate appeal:
  - Overnight holidays elsewhere in Britain has a score of 45/100
  - Travelling overseas has even lower immediate appeal: 42/100

At this very high level, it is clearly most likely that the domestic tourism market will benefit first for overnight tourism by Scots.

At this point, the desire for holidays elsewhere in Britain is only slightly ahead of holidays in overseas destinations



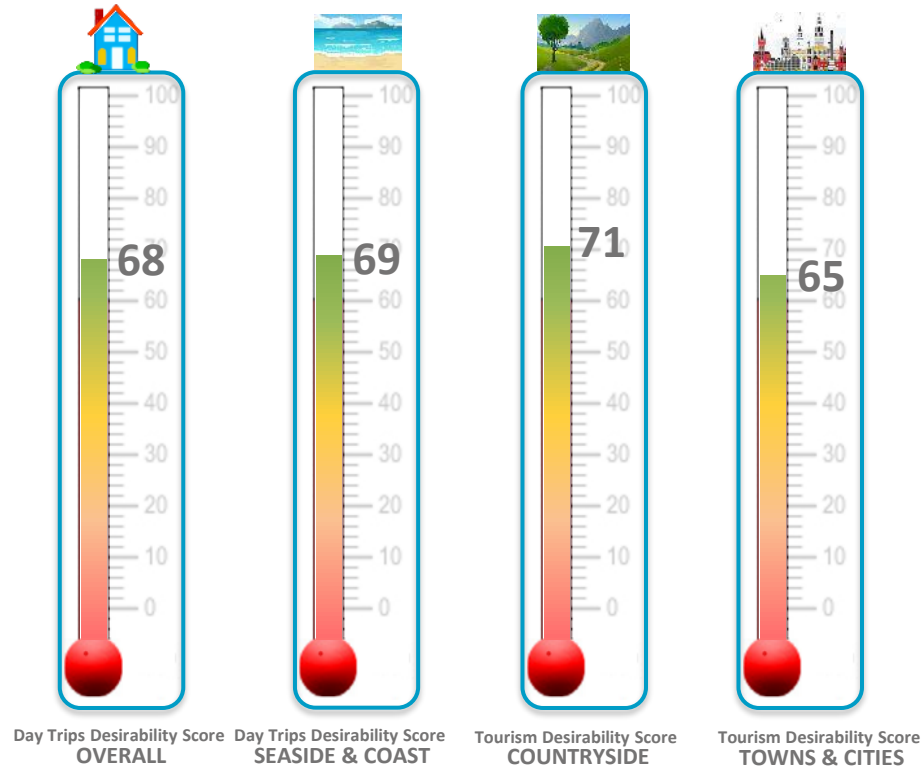
## TOURISM DESIRABILITY SCORE – DAY TRIPS IN SCOTLAND:

# Scots' desire for day trips in Scotland as soon as lockdown restrictions permit, is higher than overnights at 68/100 overall

### Interest in day visits varies slightly by type of location:

- Highest appeal is for day trips in the Scottish countryside with a desirability score of 71/100
- Day trips to the Scottish coast and seaside has next highest desirability at 69/100
- Day visits to towns and cities have lower appeal – though as we'll see, a score of 65/100 is still higher than for any overnight trips.

Clearly, day visits have the highest immediate appeal for Scots at the moment reflecting the fact that although away from their immediate environment, they are still accessible within a day out. Seaside and countryside have slightly higher levels of desirability than towns and cities at this stage.





## TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN SCOTLAND:

# Falling behind day trips, Scots' desire for short breaks or holidays in Scotland when lockdown restrictions permit has a May Desirability Score of 59/100



### Interest in short break and holiday environments in Scotland varies in a similar way as day trips:

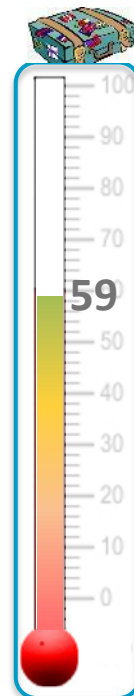
- Highest appeal is for overnight trips to the Scottish countryside with a desirability score of 62/100
- Holidays and Breaks to the Scottish coast and seaside has next highest desirability at 59/100, just ahead of overnight breaks to towns and cities (57/100)

The prospect of an overnight trip in Scotland once lockdown restrictions are lifted is slightly less appealing than the prospect of a day trip – but as we'll see, overnight tourism in Scotland has significantly higher desirability for Scots at the moment than any trips further afield.

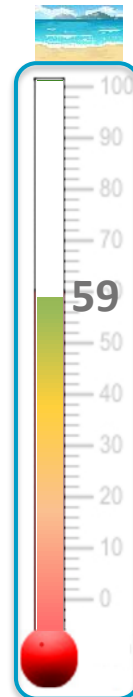
Extremely likely to be considered as soon as feasible



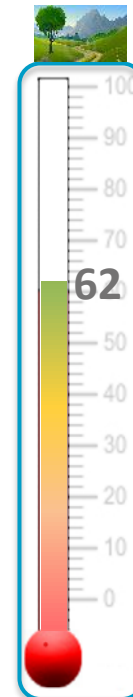
Extremely unlikely to be considered at that time



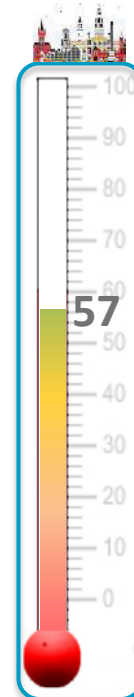
Holiday Desirability Score  
**SCOTLAND  
OVERALL**



Holiday Desirability Score  
**SCOTTISH  
SEASIDE & COAST**



Holiday Desirability Score  
**SCOTTISH  
COUNTRYSIDE**



Holiday Desirability Score  
**SCOTTISH  
TOWNS & CITIES**



## TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN ENGLAND AND WALES:

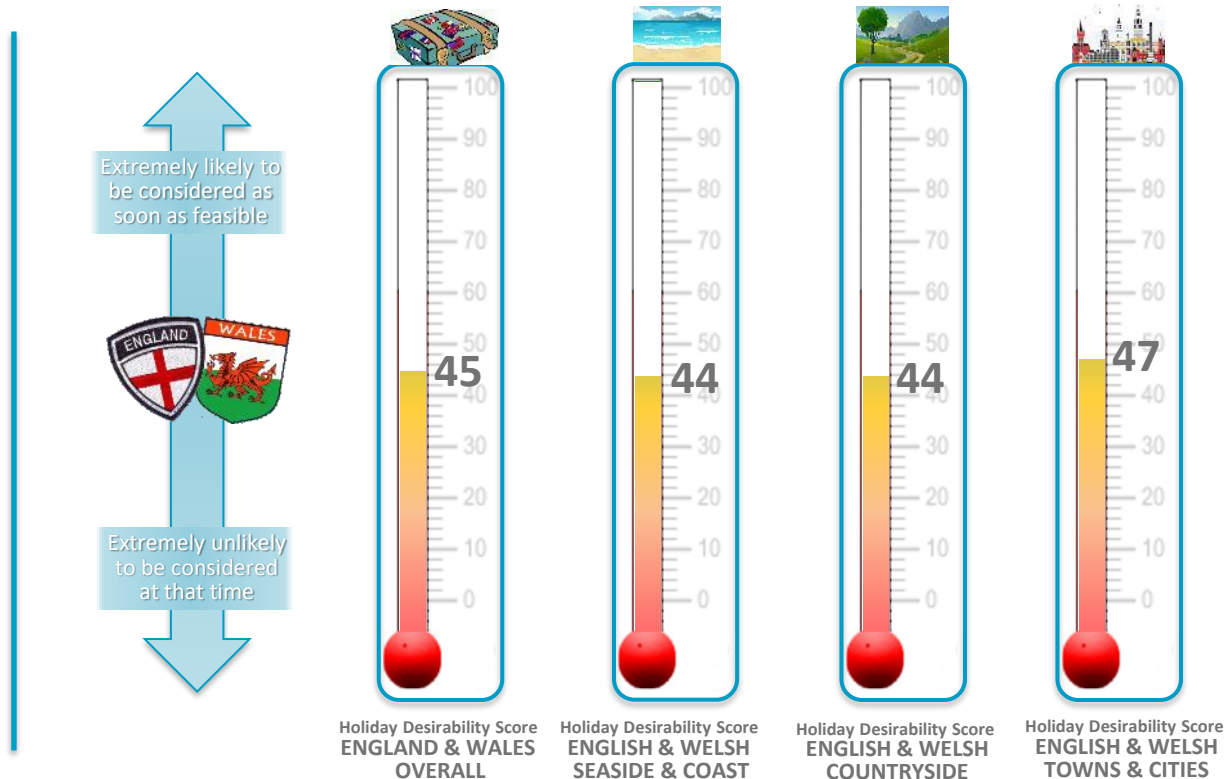
And significantly lower than overnight holidays in Scotland, short breaks and holidays in England and Wales has a May desirability of 45/100



The appeal of holidays and short breaks outside of Scotland to either England or Wales is a lower desire at the moment – though breaks to towns and cities are of higher appeal than the coast or countryside:

- Breaks to English/Welsh towns/cities - desirability score of 47/100
- Breaks to the English/Welsh countryside or coast – 44/100.

For Scots, although travelling overnight elsewhere in Britain once lockdown restrictions are reduced has lower appeal than staying in Scotland, at this stage it looks as though city breaks outside of the country have slightly more appeal than trips to the coast or countryside.





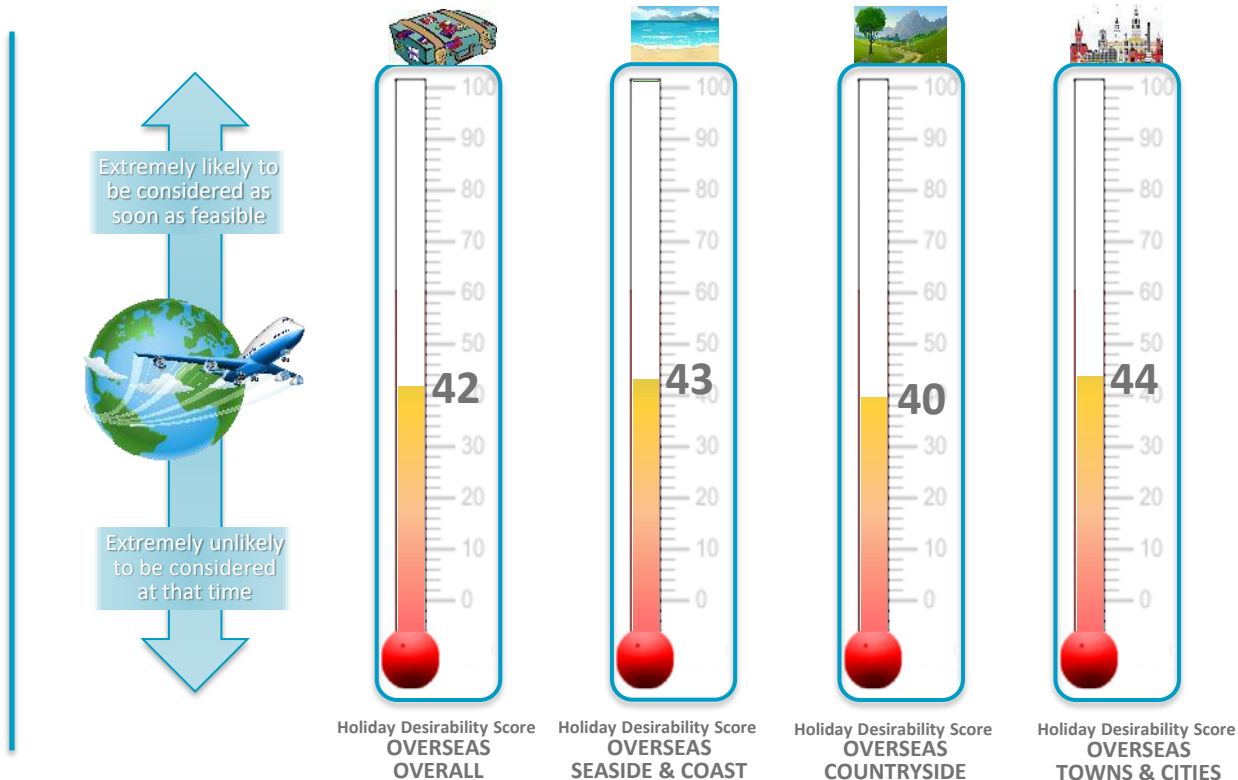
## TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS OVERSEAS:

# And just behind overnight trips to England and Wales is the desire to travel overseas for holidays and breaks with an overall Score of 42/100



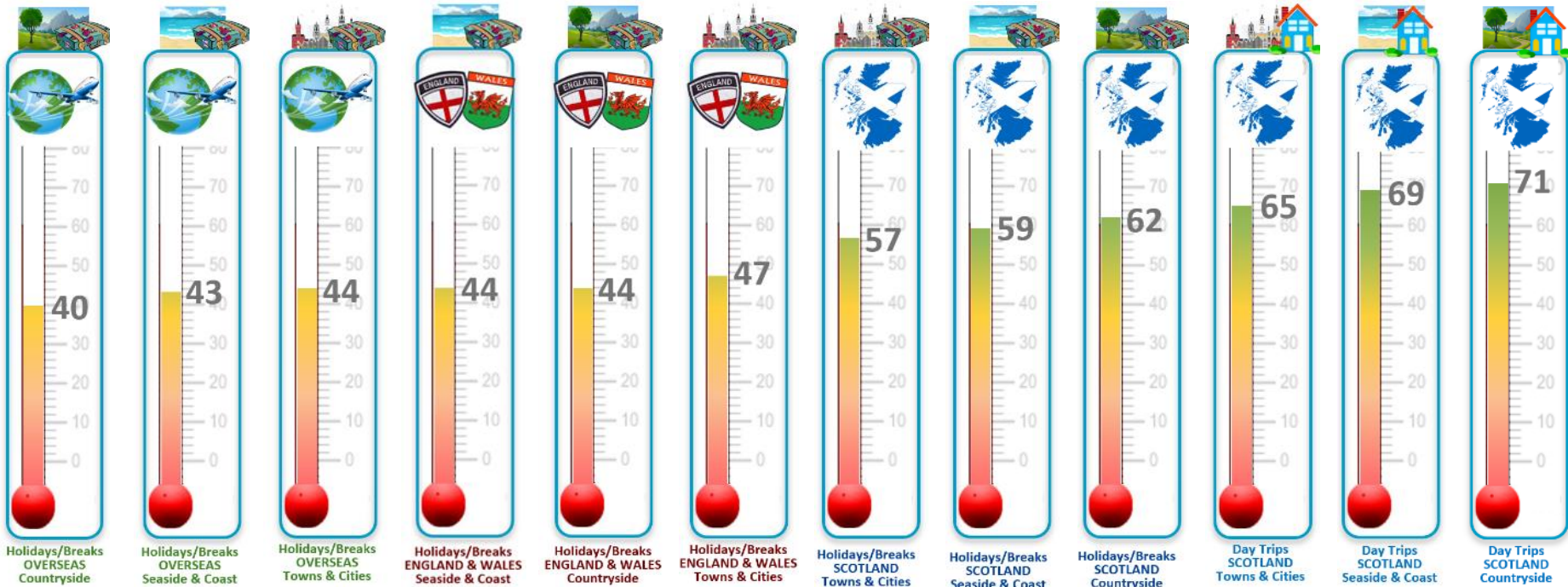
Although overseas holiday desirability is lower again, there is less of a distinction among Scots between travelling abroad and travelling to England/Wales than there is to stay in Scotland for overnight trips

- Overseas city breaks (44/100) and beach holidays (43/100) are marginally more appealing than overseas countryside trips.



# TOURISM DESIRABILITY SCORE In Summary.....

At the moment, the highest desirability for tourism and leisure among Scots post lockdown is for day trips from home, followed by overnight trips in Scotland with elsewhere in Britain and overseas some distance behind. The countryside and coast are the most desired environments in Scotland but cities have higher relative appeal further afield.







# The Appeal of Scottish holidays



# Identifying the possible impacts of COVID-19 on Scottish tourism

## Three key areas of potential impact on the Scottish tourism industry have been examined and the results are presented over the next few pages

- The parts of Scotland most likely to be considered for overnight trips when this becomes possible (analysis focuses on VisitScotland’s regional breakdown)
- The impact on accommodation – which types are more likely to be considered post-lockdown and which are less likely to be considered
- The impact on activities and things to do – which activities have greater appeal post-lockdown and which have lower levels of appeal

Next, we would like to focus again on Scotland, and what is likely to be important to you going forward as and when the COVID-19 restrictions start to be relaxed.....

- Firstly, let’s think about the types of accommodation you would choose in Scotland as overnight holidays and breaks become possible again. For each of the following types of accommodation, please indicate the extent to which your preferences are likely to change on a Scottish holiday (if at all) compared with what you might have chosen before the COVID-19 outbreak.

Please select one only per row

More likely to consider

Less Likely to consider

No difference from before

Would not have considered before and still would not do so

- Large hotels
- Small hotels
- Guesthouses / Bed and Breakfast
- Self-catering accommodation
- Room in a private home (e.g. Airbnb)
- Own caravan/tent
- Stay with friends
- Stay with relatives
- Hostels/bunkhouses

- In your own words, explain a little more about the factors that will be important when choosing accommodation in Scotland when overnight holidays become possible again?

Please enter your answer in the box below. Please ensure your response is full and relates to the question being asked; otherwise we may not be able to use any of your survey data.

- Now let’s think about the activities you might undertake on overnight holidays and breaks in Scotland when this becomes possible again. For each of the following, please indicate the extent to which your preferences are likely to change on a Scottish holiday (if at all) compared with what you might have chosen before the COVID-19 outbreak.

Please select one only per row

More likely to consider

Less Likely to consider

No difference from before

Would not have considered before and still would not do so

- Visiting the natural outdoors
- Visiting purpose-built attractions (e.g. heritage centres, zoos)
- Eating and drinking out (e.g. in restaurants and bars)
- Buying takeaway food during your holiday
- Buying groceries and cooking your own meals while on holiday
- Active outdoor pursuits (e.g. hill walking and cycling)
- Rest and relaxation – e.g. spas, solitude
- Shopping for gifts, souvenirs
- Visiting historic sites and properties (e. castles, stately homes etc.)
- Outdoor sports (e.g. golf, tennis)
- Meeting and mixing with locals
- Attending events and festivals
- Cultural activities (e.g. visits to theatres, galleries, museums)

- In your own words, explain a little more about the factors that will be important when choosing the activities and things you do on holidays and breaks in Scotland when this becomes possible again?

Please enter your answer in the box below. Please ensure your response is full and relates to the question being asked; otherwise we may not be able to use any of your survey data.

- And again, thinking about these overnight holidays and breaks, which parts of Scotland are you most likely to consider visiting first when this becomes possible again? Please list the names of any places that will be high on your list of choices to visit as soon as possible.

Please enter your answer in the box below. Please ensure your response is full and relates to the question being asked; otherwise we may not be able to use any of your survey data.

## THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS - DESTINATIONS:

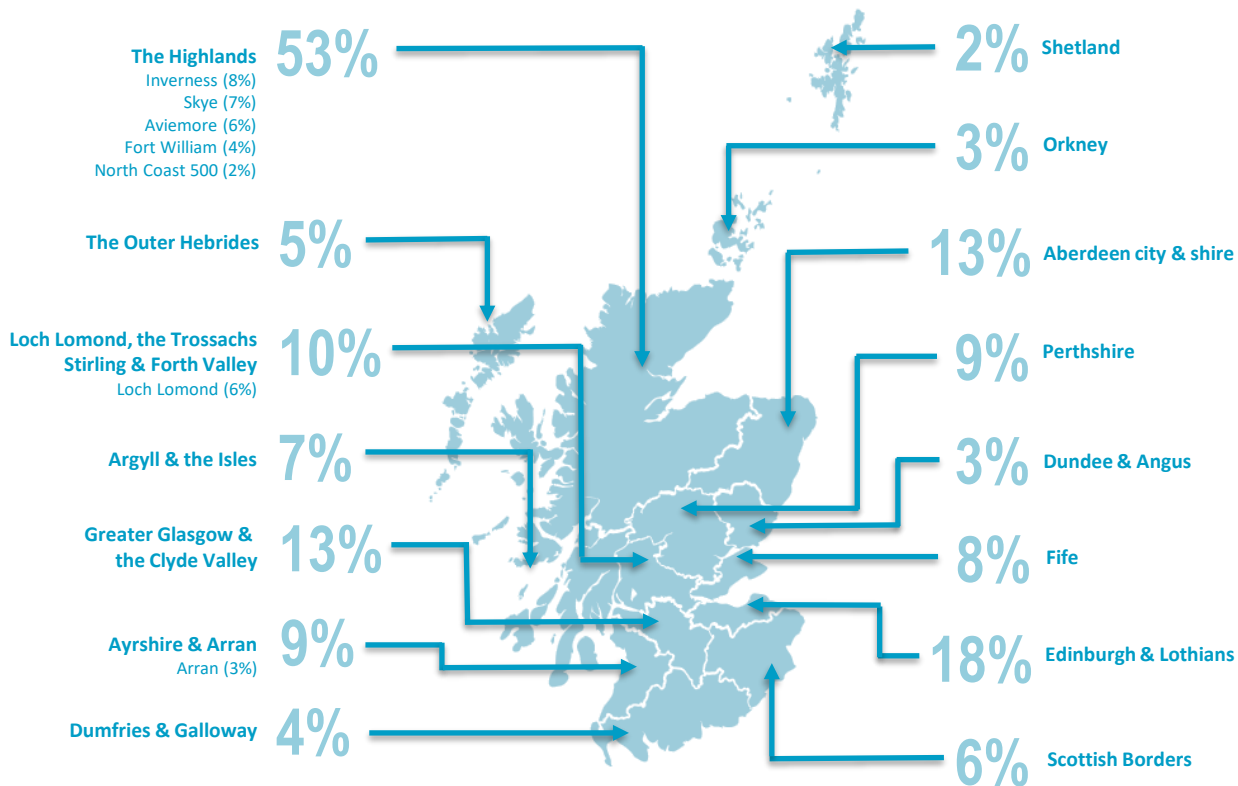
# The Highlands has the greatest appeal as a place to take a short break or holiday post-lockdown – over half of Scots want to visit



### Rural areas have greatest appeal for Scots as destinations for holidays and breaks post-lockdown:

- The Highlands have greatest appeal – 53% of Scots want to holiday there – with Inverness, Skye, Aviemore and Fort William mentioned most frequently
- Other predominantly rural areas mentioned included Loch Lomond and the Trossachs (10%), Ayrshire and Arran (9%), Perthshire (9%) and Fife (8%)
- The islands also have relatively high appeal – as well as Skye (7%), Argyll and the Isles are mentioned by 8% and the Western and Northern Isles by 10% in total

This is not to say that cities have low appeal – though the proportions mentioning Edinburgh (18%) and Glasgow (11%) are lower than in a typical year. On the other hand, there is much higher interest than in a typical year for visits to the Highlands and Islands.



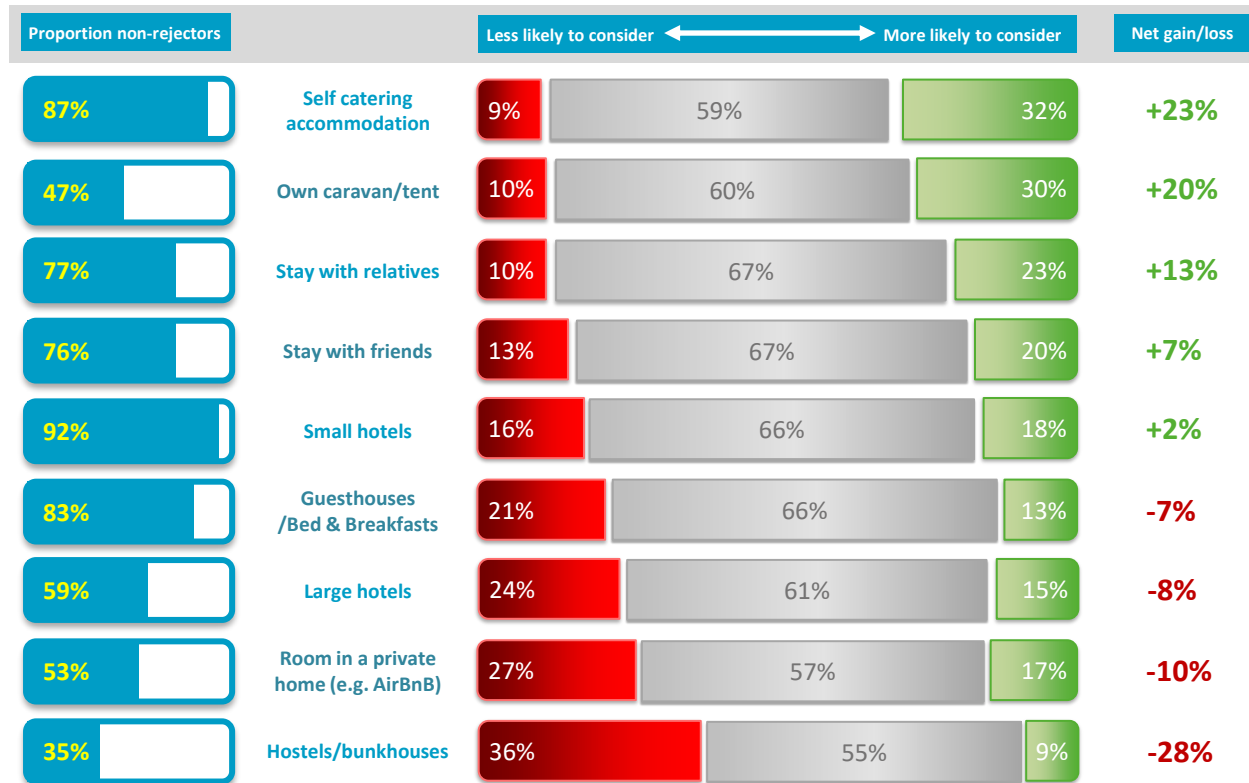
## THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS – ACCOMMODATION CHOICES:

# Self-catering accommodation and own caravans/tents will have greater appeal post-lockdown; serviced accommodation and hostels/bunkhouses will have reduced appeal



### Changes in preferred accommodation choice suggest there will be a move towards more self-service away from serviced accommodation:

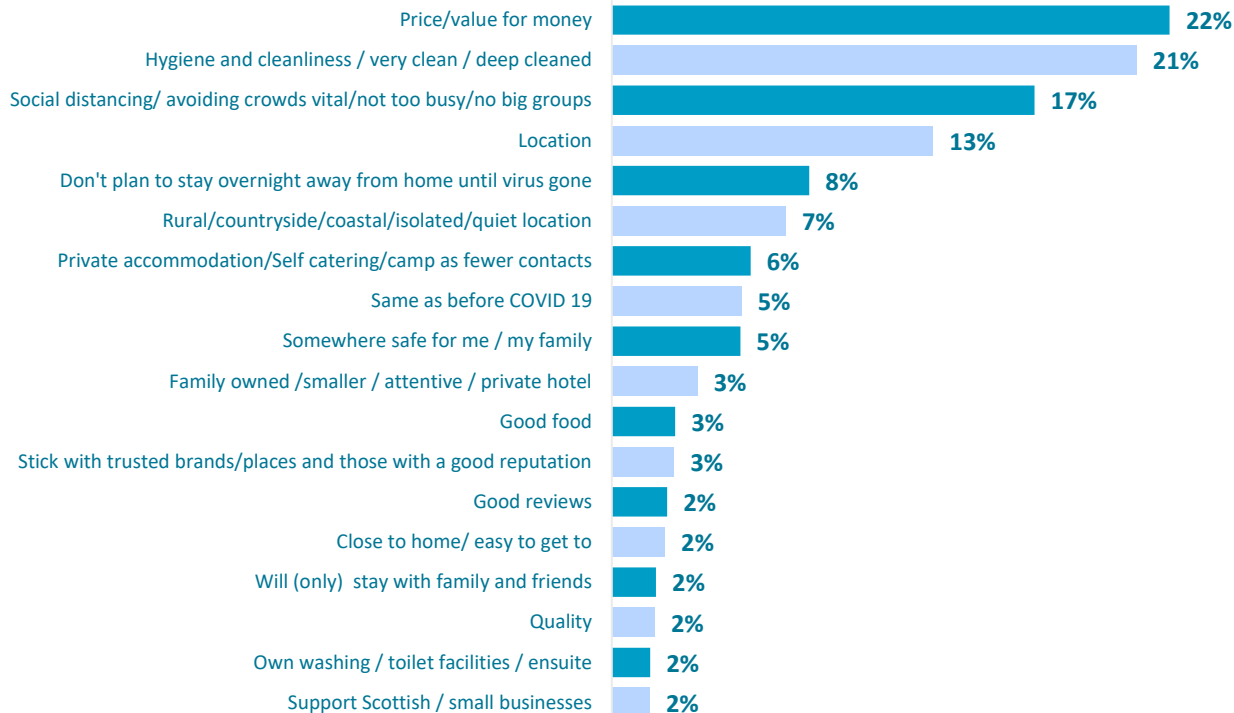
- Self catering accommodation demand is likely to show a net increase of 23 percentage points, just ahead of owned caravans and canvas (+20%).
- A desire to stay with friends and relatives in particular also shows a net increased appeal of this type of accommodation
- With the exception of small hotels, serviced accommodation is likely to have reduced appeal: guesthouses and B&Bs (-7%), large hotels (-8%) and rooms in private houses (-10%) show lower levels of consideration compared to pre-COVID.
- Hostels and bunkhouses have lowest levels of appeal now – 36% are less likely to consider this type of accommodation and only 9% are more likely to do so.



# Price/value has always been a key driver of accommodation choice – and remains so, however hygiene and cleanliness is now as important a consideration

## It is clear that COVID-19 will play a key role in influencing accommodation choice as lockdown restrictions are relaxed:

- Price and value is joined by hygiene and cleanliness as key drivers of accommodation choice – each mentioned by one in five Scots
- Minimising social contacts will also be key for 17% although this is reinforced by the 7% who cite a rural/isolated location and the 6% who would base accommodation choice on the types of accommodation where there will be fewer contacts (self-catering, camping etc.)
- Trust is also important – both in terms of brands (3%) and private hotels which are family-owned and deemed to be more attentive (3%).
- General safety is also key (5%) and 2% would choose the homes of family or friends for that reason
- Only 5% said that accommodation choice would remain the same as it did pre-COVID-19



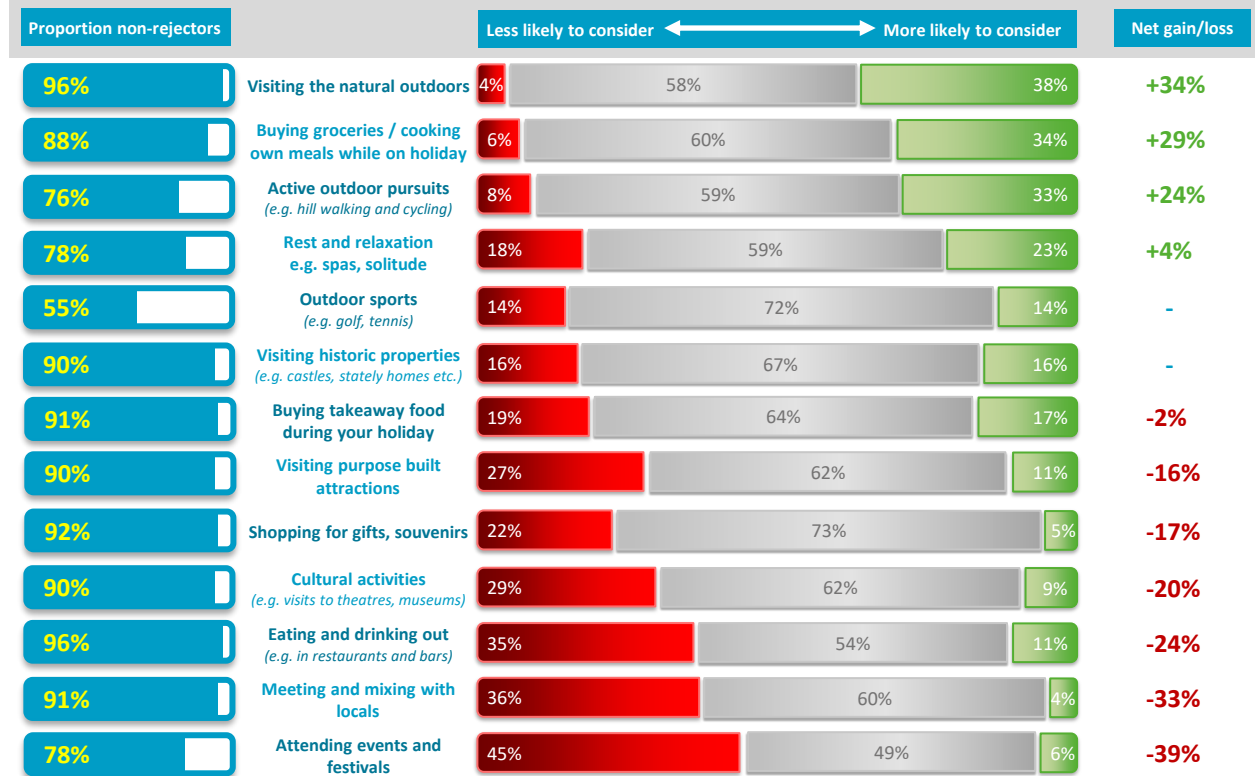
## THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS – CHOICE ON THINGS TO DO ON HOLIDAY:

The natural outdoors and outdoor pursuits generally will have greater appeal on a Scottish holiday; events & festivals and meeting locals have much reduced appeal



### The choice of things to do on holiday suggests moves towards outdoor spaces as opposed to indoor activities – with eating out an obvious casualty:

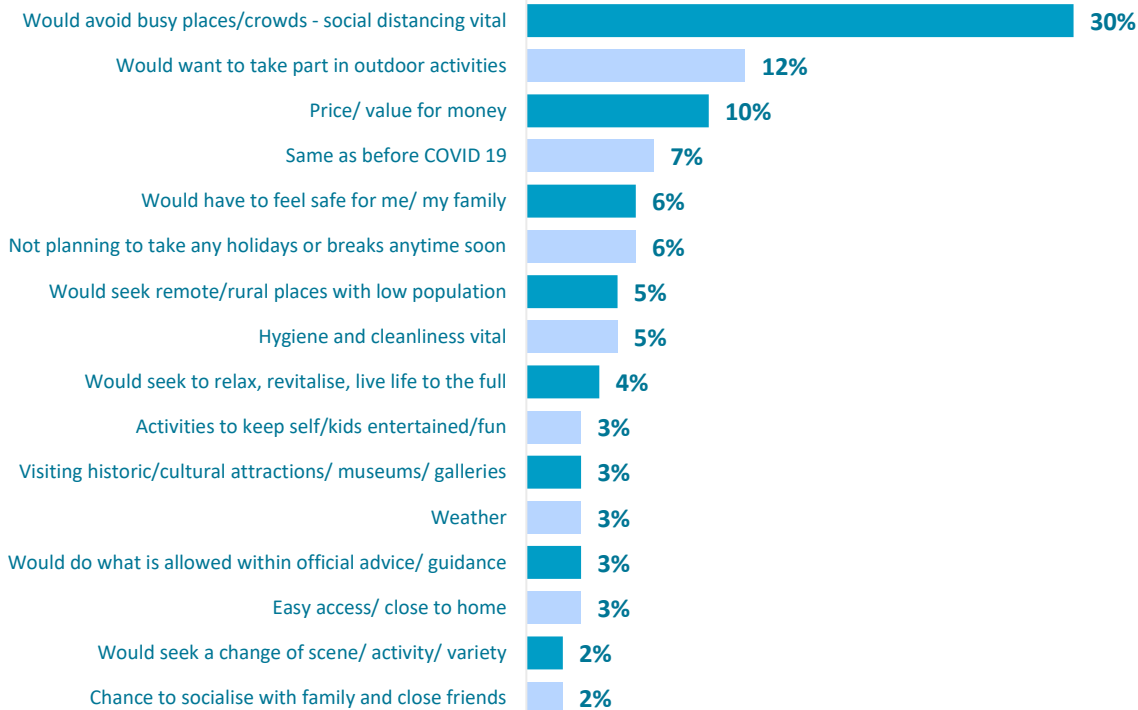
- Some 38% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday immediately post-COVID-19, and 33% likely to consider more active pursuits such as walking and cycling. Rest and relaxation also has slightly greater appeal.
- Indoor activities such as visits to arts and cultural venues, and purpose built attractions will have reduced appeal. Visits to historic properties and sites show mixed opinions, reflecting their varying outdoor and indoor natures.
- Food and drink is an important element of a holiday – and the nature of this consumption is also likely to change with a move towards cooking own meals as opposed to eating out
- The big potential ‘losers’ in the immediate aftermath of COVID are attendance at events and festivals and mixing with locals. Given the importance of the latter in Scotland’s ‘friendly welcome’ messaging, navigating around this will require a lot of thought.



# Key for Scots when holidays at home become possible again are activities away from busy places and crowds where social distancing can be maintained

As with its affects on accommodation choice, the impact of COVID-19 on the activities Scots tourists will undertake on a Scottish holiday in the future are clear:

- The social distancing message is clear – and the desire to avoid crowds is an important consideration to three in ten Scots. As such, outdoor activities were mentioned specifically by one in eight (12%) and 5% would seek remote rural places with low resident populations.
- Safety concerns generally were mentioned by 6% whilst hygiene and cleanliness would be key factors in activity choice by 5% of Scots. Proximity to home was also mentioned by 3%.
- More traditional considerations were also mentioned. Price and value for money remains a key driver of choice for 10%, and for families, things to keep the kids entertained, general relaxation, visits to attractions etc. and 7% specifically said they would do the same as they would pre-lockdown.





# Variations by Lifestage





# While many people share similar concerns, how Scots feel about future holiday taking in general varies by lifestage



## SCOTTISH PRE-FAMILIES (under 35, no kids at home)

More likely to feel...

- No change in attitude to travel
- An increased appetite to travel and experience the world

*It's not changed my attitude and has encouraged me to want to explore more*

*Want to travel more, missing our usual camping holidays and nice weather.*



## SCOTTISH FAMILIES (kids still at home)

More likely to feel...

- Frustrated and sad about missing travel
- Worried/ very wary about future travel
- Conscious of avoiding busy places
- Conscious of hygiene and cleanliness

*It made me very anxious when thinking of travelling especially about airports, flights, trains and buses.*

*I'm more conscious of germs now. I wash my hands much more regularly and make sure the kids do too.*



## SCOTTISH EMPTY NESTERS (55+, no kids at home)

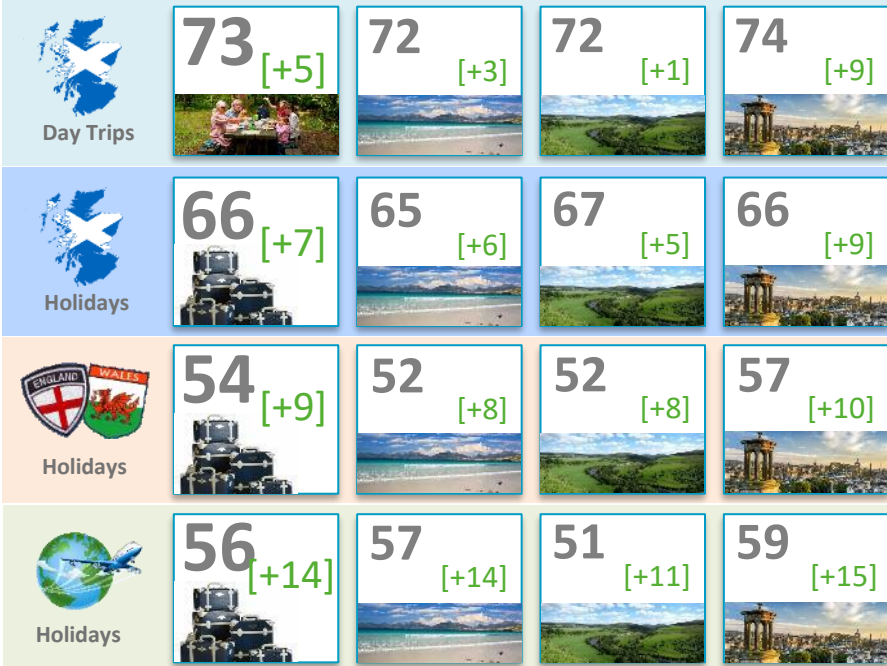
More likely to feel...

- Unwilling to travel abroad, on flights or cruises
- More aware of social distancing
- Wary of the actions of other people
- Generally more cautious

*No thoughts of holidays at this time I will wait until it is safe enough to travel before I decide*

*Very unsure about travelling abroad until a treatment or vaccine has been developed.*

## Tourism Desirability Scores



## Pre-Families – How their Tourism Desire Score differs

[Definition: Aged under 35 with no dependent children]

- Higher desire to travel to all destinations. Although Scotland still likely to gain first due to proximity, the differential with further afield is lower than the overall average.
- Holidays to overseas destinations show higher levels of desire than trips elsewhere in Great Britain.
- Trips to cities have higher appeal than the seaside or the countryside.

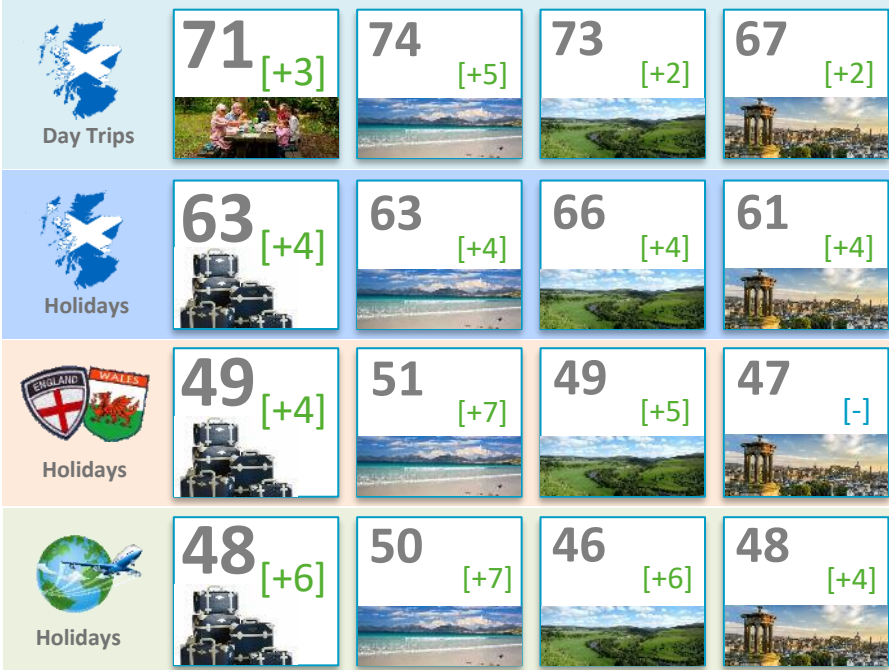
### Accommodation choices

- Self-catering accommodation again stands to gain most post-lockdown, however there is a greater likelihood to consider staying with friends or with relatives.
- There is less negativity around considering serviced accommodation (hotels, large and small and AirBnB)
- More frequently mentioned considerations relate to price and value.
- Although risks associated with COVID-19 exist (hygiene, distancing etc.), they are slightly less of a concern for this group in accommodation choice

### Activities choices

- Visiting the natural outdoors is also the biggest beneficiary in terms of increased consideration for this segment. But reflecting their younger nature, taking part in active outdoor pursuits is also likely to have much increased consideration
- Meeting and mixing with locals is the activity most likely to be negatively impacted for this group – and although events and festivals are also much less likely to be considered, this is to a lesser extent than the population overall. This is also the case for eating out.
- Price is rather more important for this group – and a higher proportion say they would make the same choices as prior to COVID-19.

## Tourism Desirability Scores



## Families – How their Tourism Desire Score differs

[Definition: All with dependent children in the household]

- Slightly higher desire to travel to all destinations. Again, Scotland likely to gain first due to proximity, although the differences between elsewhere in Britain and overseas are lower than the average across the population with higher relative appeal for overseas destinations.
- Trips to the seaside generally have higher appeal than cities or the countryside.

## Accommodation choices

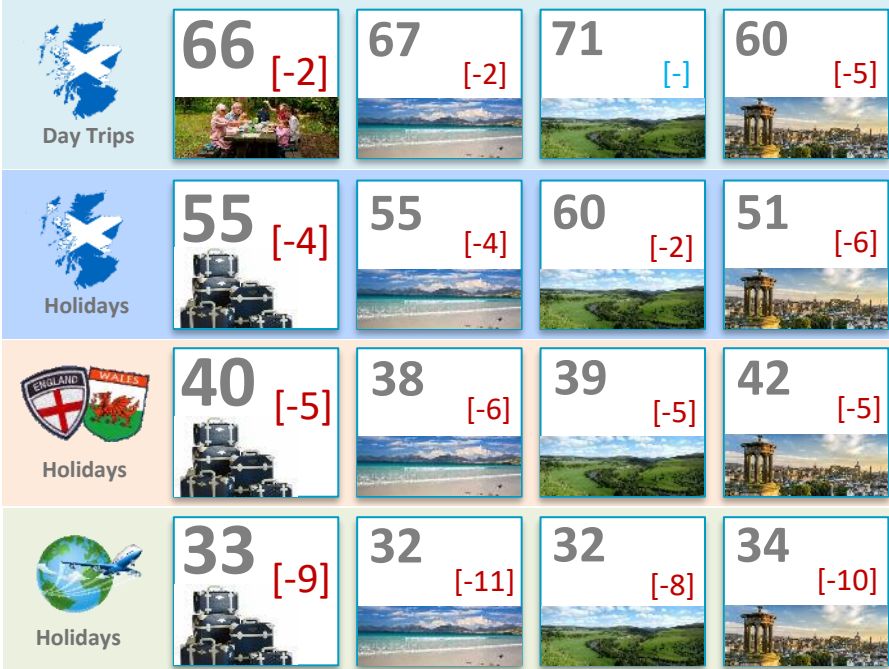
- For families, only three types of accommodation are now more likely to be considered since the Coronavirus outbreak:
  - Own caravan or tent
  - Self catering accommodation
  - The homes of relatives
- In terms of accommodation choice, families are most risk averse with all other forms of accommodation less likely to be considered now than before. They are especially likely to mention the need to take into account social distancing when considering their accommodation choices post-lockdown.

## Activities choices

- Families are even more likely than average to consider a range of activities on future Scottish holidays – especially those with an outdoor theme. However reflecting the need to ‘keep the kids entertained’, there is more of a willingness to chose built attractions than average post-COVID.
- Buying groceries to cook themselves and takeaway options have higher appeal amongst this group whilst eating out has very low appeal.
- Driving choice of things to do for this group is similar to the overall picture, however ensuring it is safe for the family is of particular importance (in terms of COVID impacts).

# Scottish Empty Nesters – interest in Scottish tourism

## Tourism Desirability Scores



## Empty Nesters – How their Tourism Desire Score differs

[Definition: Aged 55+ with no dependent children in the household]

- Significantly lower desire to travel to all destinations. However, Scotland is much more likely to benefit from trips by these older Scots age groups than elsewhere in the UK or overseas.
- Day trips to the Scottish countryside have highest appeal.
- The desire to travel overseas is much lower than across the population as a whole

### Accommodation choices

- For empty nesters, self-catering accommodation, the homes of friends, the homes of relatives and small hotels are now more likely to be considered than before – and all are more appealing to this group than the average across the Scottish population.
- Empty Nesters are most likely to say that they don't have any plans to stay away from home overnight any time soon. But for those who would consider a holiday in Scotland, the same safety, hygiene and social distancing factors will clearly influence their choice of accommodation.

### Activities choices

- Empty Nesters are less likely to want to undertake most of the activities post-lockdown than they would have been prior to COVID-19 – again illustrating a greater degree of risk aversion. Only two activities now have greater appeal than before – visiting the natural outdoors and outdoor pursuits such as walking.
- With lower appeal to undertake activities generally for this group, the drivers of consideration are not too dissimilar to the overall picture.



In summary.....



# The COVID-19 pandemic has caused Scots to think long and hard about their future travel and the holidays they'll be seeking when restrictions begin to ease

## For most Scots, COVID-19 is forcing a reconsideration of attitudes and opinions about holidays and breaks in the future:

Some 17% said that they didn't feel different to before COVID 19 and as soon as they could, they would get back to travelling as before. Indeed 5% indicated that the lockdown had increased their appetite to travel so they hoped to do more in future. Men were more likely than women to provide these more confident responses.

In contrast, 11% are feeling scared of travelling in future, some stating they wouldn't take any holidays until a vaccine had been found or that it was too early for them to even think about future plans. Women and people with children were more likely to express these opinions.

In between these polarised views are just under three quarters of Scots who anticipate travelling in future but with some significant changes to their behaviours:

- Avoiding public transport and/or choosing to travel only in a private car
- Avoiding international travel – due to fears of travelling by air and fears of becoming 'stuck' overseas.
- In general avoiding busy places and being very aware of social distancing – places named included transport hubs, town centres and events.
- In general being more aware of the cleanliness and hygiene standards at places visited.

## When lockdown restrictions are eased sufficiently to make holidays and breaks a possibility again, for most Scots, the initial desire will be to stay close to home with diminishing appeal to travel further afield:

Day trips within Scotland hold the greatest appeal as soon as this becomes a possibility – the desire to move out of the local area, but to be able to return to the security of home exhibits the highest Desirability Score amongst Scots – 68/100. Taking overnight breaks in Scotland is 'next on the list' with an appeal of 59/100. Overnight trips elsewhere in Britain is next in the pecking order although significantly lower, with a desirability score of 45/100. And for now, trips overseas have lowest initial appeal at 42/100.

Clearly therefore, this supports the arguments that domestic tourism will recover first; however it is unlikely to be a consistent picture of recovery. In Scotland, rural locations have the greatest appeal (71/100 for day trips and 62/100 for overnights). The Highlands were mentioned by 53% of Scots as the part of the country they most want to visit post-lockdown. The seaside and coast isn't far behind, but Scottish towns and cities have the lowest immediate appeal at 65/100 for day trips and 57/100 for overnights). The desire for open space and to continue to maintain social distancing is undoubtedly playing a part. Consequently, different strategies and careful messaging will be required by the industry when we get to this point.

And of course, the population is diverse and the appeal of different destinations and environments varies by different segments of the population. In all cases however, it is important to state that Scotland holds an advantage and is likely to gain first before horizons are extended. Those who are younger and in the *pre-family* lifestage have a higher desire to travel anywhere. The differential with further afield is lower than the overall average and indeed, holidays to overseas destinations show higher levels of desire than trips elsewhere in Great Britain. And city breaks have higher appeal for this segment.

*Families* also have a slightly higher desire to travel to all destinations and the differences between elsewhere in Britain and overseas are lower than the average across the population with higher relative appeal for going further afield. Trips to the seaside have higher appeal than cities or the countryside for this group, irrespective of location.

Scottish *empty nesters* have significantly lower desire to travel anywhere – especially outside Scotland which is much more likely to benefit from trips by these older Scots age groups than elsewhere. In particular, day trips to the Scottish countryside have highest appeal.

## When planning Scottish holidays post-lockdown, Scots are likely to change their behaviours significantly as a result of the impacts of COVID-19:

In terms of accommodation choice, self-catering accommodation and own

caravans and tents will have greater appeal whereas serviced accommodation and hostels/bunkhouses will have reduced appeal. At the time of the survey, self catering accommodation demand suggests a net increase of 23 percentage points, just ahead of owned caravans and canvas (+20%). A desire to stay with friends and relatives also shows a net increased appeal. With the exception of small hotels, serviced accommodation has reduced appeal: guesthouses and B&Bs (-7%), large hotels (-8%) and rooms in private houses (-10%) show lower levels of consideration compared to pre-COVID.

When asked what is driving these choices, price/value (which has always been a key driver of accommodation choice) remains key, however COVID-19 induced impacts are clear as it is now joined by hygiene/cleanliness (both driving choice among over 20% of Scots). Minimising social contacts will also be key for 17% although this is reinforced by the 7% who cite a rural/isolated location and the 6% who would base accommodation choice on the types of accommodation where there will be fewer contacts (self-catering, camping etc.) Crucially, only 5% said that accommodation choice would remain the same as it did pre-COVID-19.

Choosing what to do on a Scottish holiday is also being changed by COVID-19. Some 38% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday and 33% are likely to consider more active pursuits such as walking and cycling. Rest and relaxation also has slightly greater appeal. On the other hand, indoor activities such as visits to arts and cultural venues, and purpose built attractions will have reduced appeal. Food and drink is an important element of a holiday – and the nature of this consumption is also likely to change with a move towards cooking own meals as opposed to eating out. The big potential 'losers' in the immediate aftermath of COVID are attendance at events and festivals and mixing with locals. Given the importance of the latter in Scotland's 'friendly welcome' messaging, navigating around this will require a lot of thought.



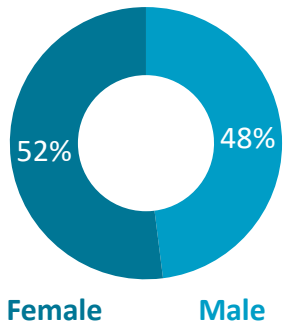
# Appendix:

## Who did we speak to?

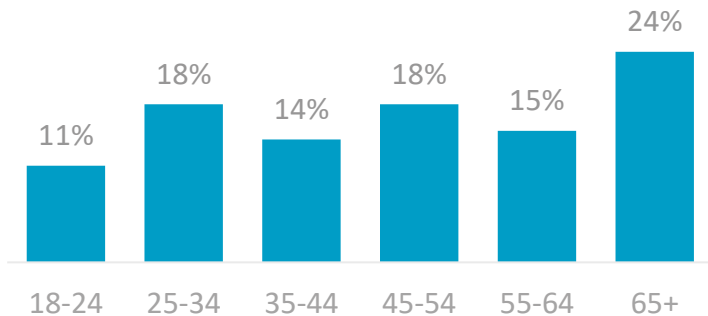


# Who did we speak to?

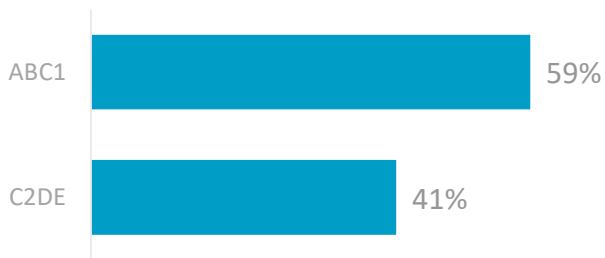
## Gender



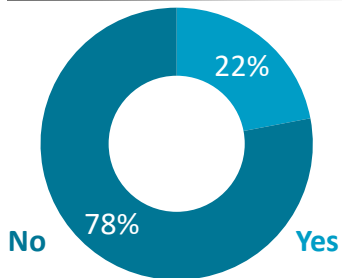
## Age



## Social Class



## Kids at home



## Origin

Region	%
<b>West</b> (City of Glasgow, North Lanarkshire, South Lanarkshire, Renfrewshire, North Ayrshire, East Ayrshire, South Ayrshire, East Dunbartonshire, East Renfrewshire, West Dunbartonshire, Inverclyde)	45%
<b>South</b> (Scottish Borders, Dumfries and Galloway)	5%
<b>East</b> (Perth & Kinross, Angus, Stirling, Fife, Falkirk, Dundee, East Lothian, Mid Lothian, West Lothian, Clackmannanshire, City of Edinburgh)	35%
<b>North</b> (Highland, Argyll and Bute, Moray, Aberdeenshire, Aberdeen City, Orkney, Shetland, Western Isles)	15%





**Any questions? A follow-up discussion?**

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