



A monthly tracker of Scottish tourism intentions during COVID-19

Wave 1 – early May 2020 Segment variations

A Research Report
from 56 Degree Insight Ltd



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 4th- Wednesday 6th 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

- 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?
- The first wave of fieldwork – a representative survey of 500 Scots – took place in early May 2020.
- This report is an addition to the main report and focuses on six key segments of the Scottish adult population, and how their holiday aspirations vary:
 - **Pre-Families:** independents and couples aged under 35 with no children
 - **Families**
 - **Empty Nesters:** aged 55 and over with no dependent children in the household
 - **Recent Scottish Holiday Takers:** Those in the habit of taking holidays and breaks in Scotland
 - **Sun, Sea and Sand – but not Scotland:** Those who take overseas beach holidays and haven't holidayed in Scotland in recent years
 - **Financially impacted by COVID-19:** Those significantly impacted financially by COVID-19

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



There are some nuanced differences in how different groups of the Scottish adult population are viewing holidays and leisure when lockdown restrictions allow (1)

FEELINGS ABOUT TRAVEL GENERALLY:

CHART 1: COVID-19 is forcing a reconsideration of attitudes and opinions about holidays and breaks in the future:

- **Pre-Families** are more likely to claim to be unaffected - less change in attitude to travel and for some, an increased appetite to travel and experience the world
- **Families** are more likely to feel frustrated and sad about missing travel, worried/ very wary about future travel, be conscious of avoiding busy places and also conscious of hygiene and cleanliness
- **Empty Nesters** are generally the most cautious, more likely to be unwilling to travel abroad, on flights or cruises, more aware of social distancing and more wary of the actions of other people

THE DESIRE TO TRAVEL TO DIFFERENT DESTINATIONS:

CHARTS 2, 3 and 4: 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. This order of appeal is generally the same amongst all of the segments but the patterns are nuanced:

- **Pre-families** show a 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 and 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.
- **Families** have a slightly higher desire to travel to all destinations. Again, Scotland is 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.
- **Empty Nesters** have 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.
- **Recent Scottish Holiday Takers** have a higher desire to travel to all destinations however Scottish holidays have even greater appeal amongst this group. Highest appeal for a Scottish holiday is the countryside followed by seaside and coast.
- Those who traditionally take **Overseas Sun, Sea and Sand holidays** and haven't taken holidays in Scotland in recent years have much lower levels of interest in a Scottish holiday than average with slightly higher appeal remaining for overseas trips.
- Those who claimed to have been **significantly impacted financially by COVID-19** are not too dissimilar to Scots as a whole in terms of their holiday and leisure desires however the the overseas holiday is relatively more appealing than average suggesting it may be more likely to be ringfenced financially



There are some nuanced differences in how different groups of the Scottish adult population are viewing holidays and leisure when lockdown restrictions allow (2)



SCOTTISH ACCOMMODATION CHOICES:

CHARTS 5 & 6: We are likely to return to a new world of attitudes and choices when it comes to Scottish accommodation are likely to change in the immediate term:

- Across the Scottish population as a whole, 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.
- These concerns and choices are especially important for families for whom own caravans/tents and self-catering are the only accommodation types with greatly enhanced appeal. Staying with relatives does have a slight positive movement for this group as well – however this option has much higher appeal amongst Empty Nesters and Pre-families.
- Recent Scottish holiday takers are especially likely to consider their own caravan or tent whilst self-catering accommodation has higher appeal for the sun, sea and sand set as does staying with friends.

THINGS TO DO ON A SCOTTISH HOLIDAY CHOICES:

CHARTS 7 & 8: As with accommodation, considerations on what to do when on a Scottish holiday are likely to result in a different pattern of activities than was the case prior to the pandemic. Again however, there are nuanced differences across the different segments of the population :

- Across the population as a whole – and indeed across all segments, there is 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.
- This move to the outdoors is especially important for families and pre-families. For empty nesters, though the trend is the same, there is a greater general caution across all activities while on a Scottish holiday. Those in the habit of taking Scottish holidays are slightly more confident about what to do whereas for the sun, sea and sand set and the financially impacted, the biggest focus is on self-contained holidays in the outdoors doing active pursuits
- Scots generally are also less likely to wish to eat out – with a move towards cooking their own meals. This is especially the case for families who are also rather more likely to consider take away meals. This suggests that pubs and restaurants will have to seek creative solutions around providing food and beverage when this becomes possible again – with the takeaway option, and creative use of outside space being obvious possibilities wherever this is possible.



CHART 1 – FEELINGS ABOUT TRAVEL GENERALLY

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.

CHART 2 – TOURISM DESIRABILITY SCORE AMONGST ALL SCOTS

Highest immediate appeal for most Scots are for day trips from home – especially to the countryside, followed by the coast and then towns. Next on the horizon are overnight trips to these locations. More distant appeal to go elsewhere in GB or abroad.

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.

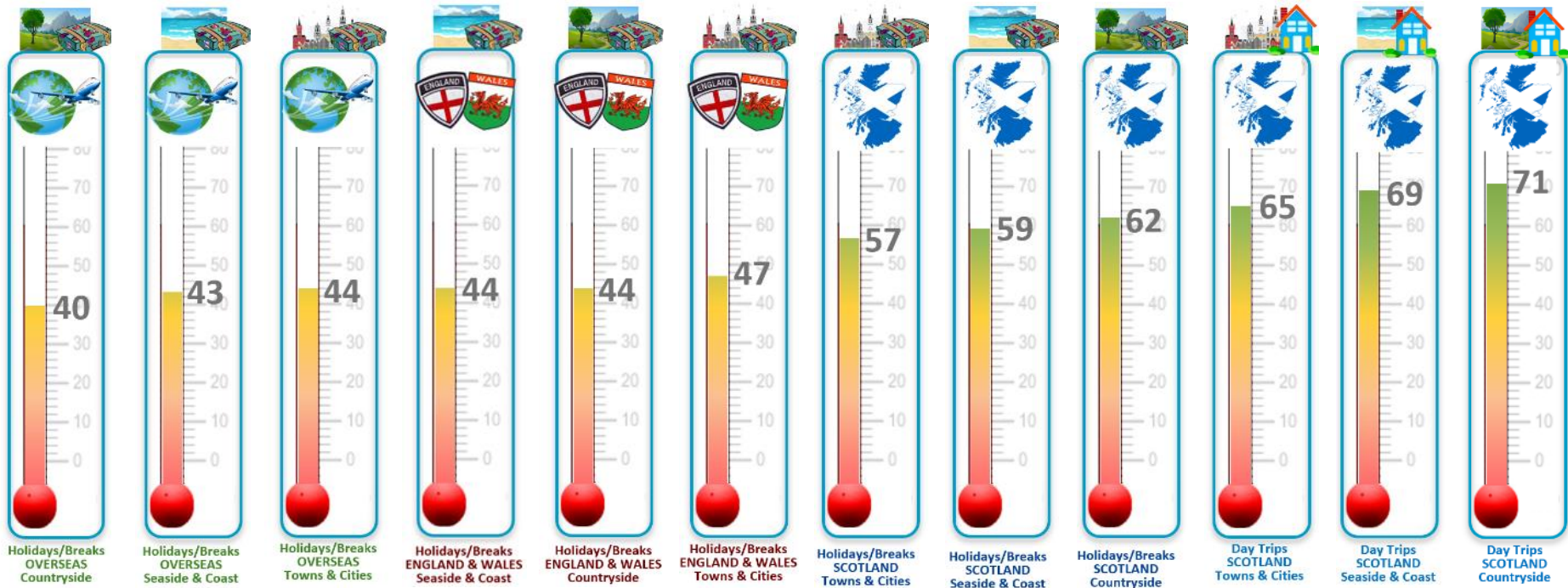


CHART 3 – TOURISM DESIRABILITY SCORE VARIATIONS BY LIFESTAGE

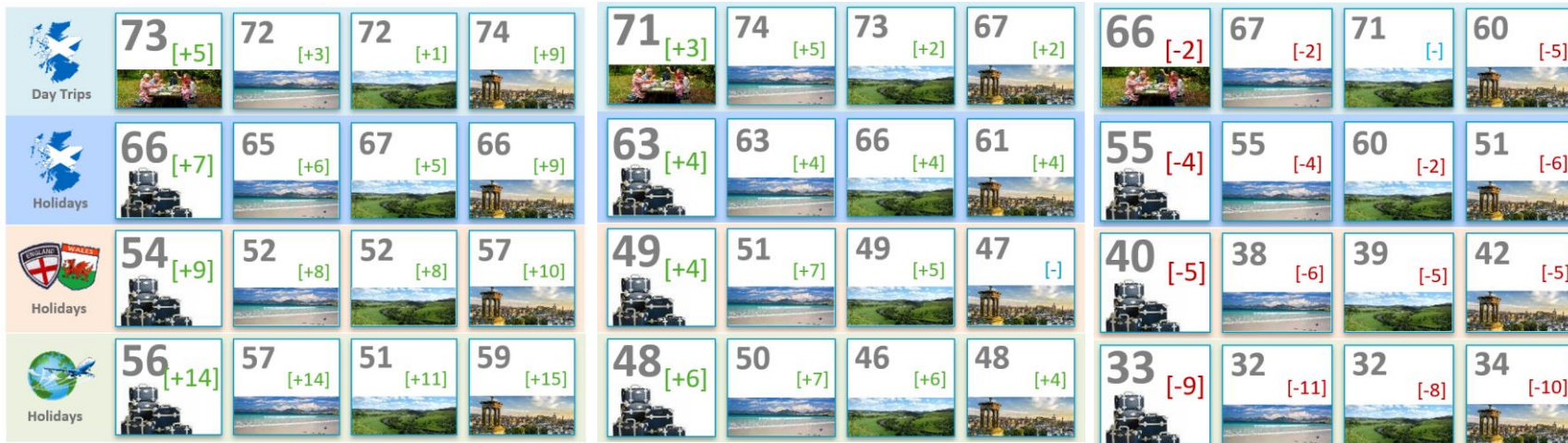
Scotland most likely to benefit from increased interest in overnight tourism among pre-families and families



Pre Families

Families

Empty Nesters



Pre-families – In summary.....

- 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.

Families – In summary.....

- 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.

Empty Nesters – In summary.....

- 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

CHART 4 – TOURISM DESIRABILITY SCORE VARIATIONS BY PREVIOUS vs NEW VISITORS AND THE FINANCIALLY IMPACTED

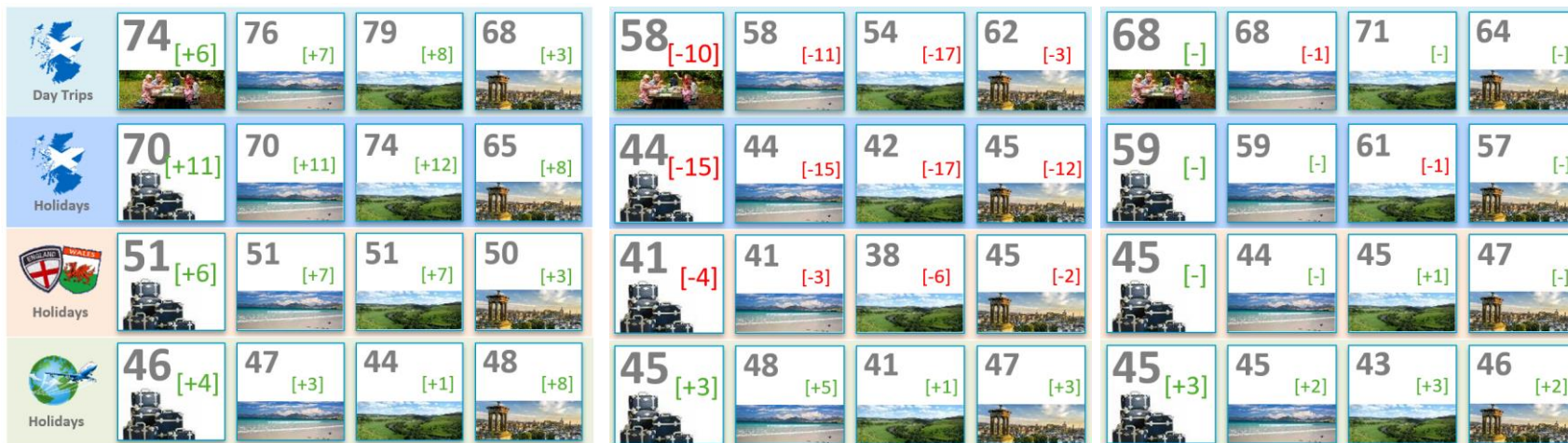
Those most likely to take holidays in Scotland first are recent regular Scottish holiday takers. Lower levels of desire amongst the sun-sea-sand set



Recent Scottish Holiday Takers

Sun, Sea & Sand – not Scotland

Financially Impacted by COVID-19



Recent Scottish Holiday Takers – In summary.....

- Higher desire to travel to all destinations however Scottish holidays have even greater appeal amongst this group
- Highest appeal for a Scottish holiday is the countryside followed by seaside and coast.

Overseas Sun, Sea and Sand who haven't taken recent Scottish holidays – In summary.....

- Much lower levels of interest in a Scottish holiday than average with slightly higher appeal remaining for overseas trips.
- Lower interest in Scottish day trips – though this is also the highest relative desire for this group on lockdown release.

Financially Impacted by COVID-19 – In summary.....

- Those who claimed to have been significantly impacted financially by COVID-19 are not too dissimilar to Scots as a whole in terms of their holiday and leisure desires
- Again, Scots day trips and breaks have highest appeal, however, for this group, the overseas holiday is relatively more appealing than average suggesting it may be more likely to be ringfenced financially

CHART 5: VARIATIONS IN ACCOMMODATION CONSIDERATION BY LIFECYCLE STAGE:

Greater caution among families in accommodation choice – especially compared to the pre-family group whose only real concern are hostels

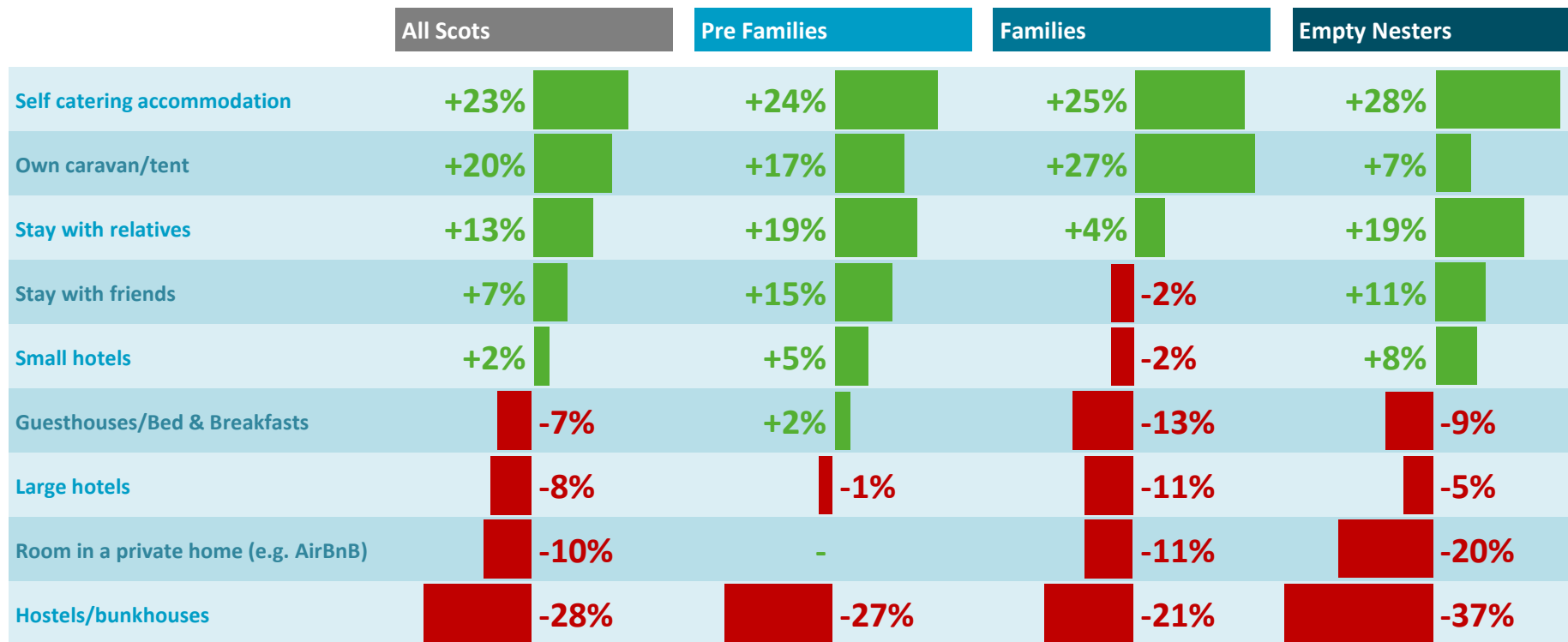


CHART 6 – VARIATIONS IN ACCOMMODATION CONSIDERATIONS BY PREVIOUS vs NEW VISITORS & FINANCIALLY IMPACTED



Recent Scottish holiday takers are especially likely to consider their own caravan or tent whilst self-catering accommodation has higher appeal for the sun, sea and sand set.

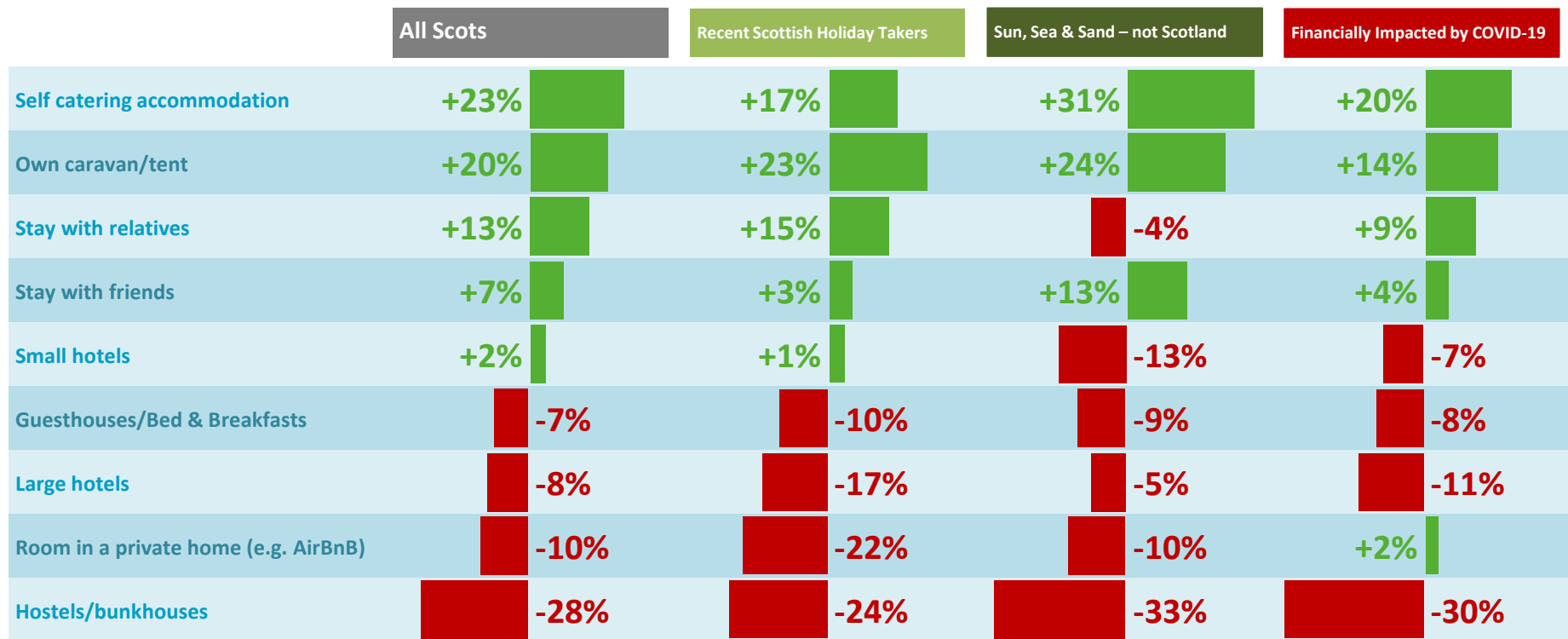


CHART 7: VARIATIONS IN WHAT ACTIVITIES TO TAKE PART IN CONSIDERATION BY LIFECYCLE STAGE:

Greater caution among empty nesters in terms of things to do. Families and pre-families still need to seek activities – but big shift towards the outdoors

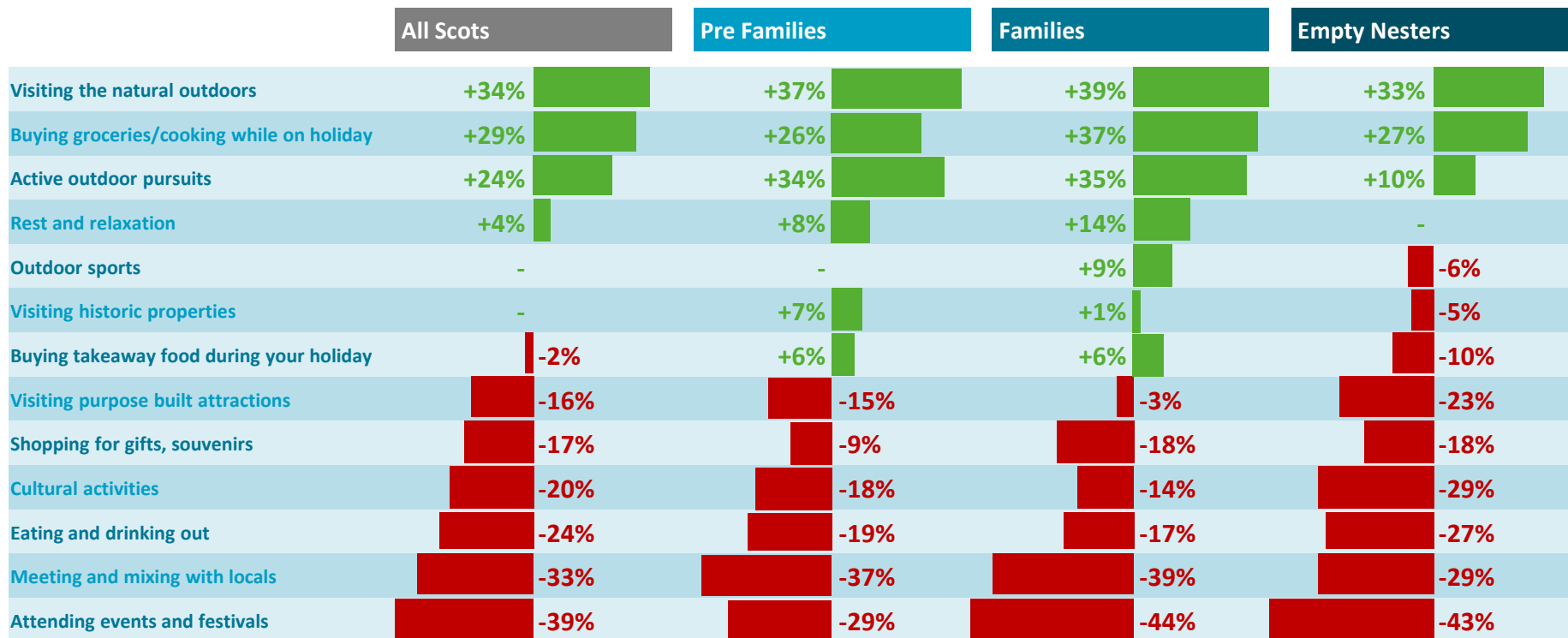
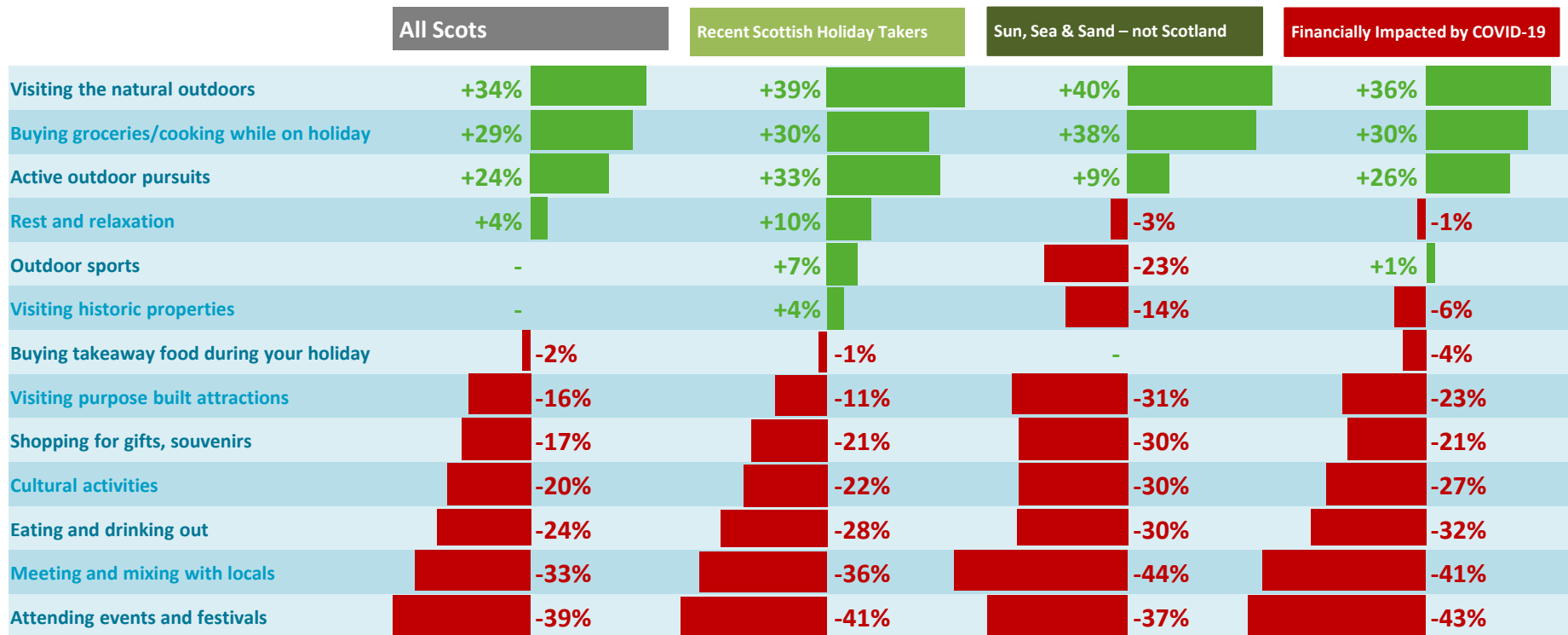


CHART 8 – VARIATIONS IN ACTIVITIES TO TAKE PART IN BY PREVIOUS vs NEW VISITORS & FINANCIALLY IMPACTED



Those in the habit of taking Scottish holidays are slightly more confident about what to do whereas for the sun, sea and sand set and the financially impacted, focus is on self-contained holidays in the outdoors doing active pursuits





Access the full report at

www.56degreeinsight.com/scottish-tourism-index

Any Questions?

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