



A monthly tracker of Scottish tourism intentions during COVID-19

Wave 2: 1st - 4th June 2020

A Research Report
from 56 Degree Insight Ltd

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The Scottish Tourism Index - Introduction

- Online Survey of 503 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 2 fieldwork undertaken over four days from Monday 1st – Thursday 4th June 2020
- Sample and fieldwork provided by Populus Data Solutions



The results from wave two of our monthly monitor of how the Scottish population feel about tourism and leisure during the COVID-19 Pandemic

- COVID-19 lockdown began on 23rd March in Scotland. Now, some ten weeks on, and it is only in the last ten days that some of the lockdown restrictions have begun to be eased. From 29th May, family gatherings have become possible within the rules of social distancing, and amongst other things, some limited outdoor sports and recreation has become possible again. That said, the message remains clear – stay at home as much as you can. For many, holidays and breaks must still seem a long way off.
- 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, in early May, 56 Degree Insight 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 research was undertaken in the first week of May.
- We have now gone back out to ask Scots how they feel about holidays and tourism some 4 weeks' on – with 503 interviews undertaken between 1st and 4th June. The timing is important as it immediately followed that first significant easing of lockdown as we entered Phase 1 in the Scottish Government's route map. Has this resulted in any changes in attitudes and feelings towards travel and holidays? The results are reported here – a range of new questions have been included as well as repeats of questions asked 4 weeks previously to identify any emerging trends or changes in attitudes.

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 Findings June 2020



The June wave of the Scottish Tourism Index shows a trend towards Scotland over other destinations and some real fears about international travel

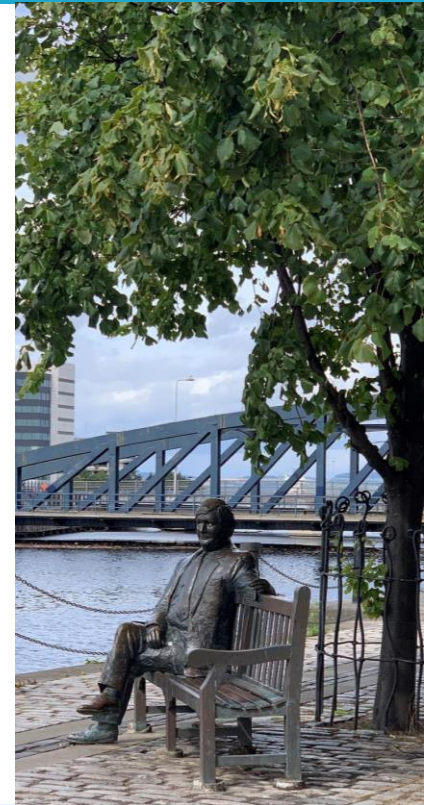
Some major impacts of COVID-19 on how Scots feel about travel generally are continuing to emerge and evolve:

- A third of Scots claim to have been significantly **impacted financially** by lockdown and this forms important context for their potential holiday choices and considerations. Also underpinning their views is an **increasing concern about how they will travel around** (83%): transport considerations will have a major impact on the types of trips they might consider – and where they will go. 4 in 10 Scots will **not set foot in a plane** for the foreseeable future and a further 27% will try to avoid unless they have no other options. This illustrates the difficulties the air industry will have in its road to recovery. Although there is also a large proportion of Scots who will not take **public transport** such as trains or buses in the near future (27%) and a further 36% will only do so if they have no other option, just under 4 in 10 would consider these modes of travel. This perhaps reflects the reality that many will be likely to travel by these means in everyday life at some point in the near future meaning that it will become less of a barrier for holidays. However the **biggest barriers undoubtedly face the cruise industry**. Over 7 in 10 Scots will avoid this type of holiday completely for the foreseeable future and a further 14% would only do so if no other options are available.
- The prospect of **travelling overseas** has very limited appeal for most Scots at this stage – with the new **14-day self-quarantine introduction a major barrier**: 7 in 10 Scots would completely shun foreign travel to avoid a 14-day quarantine on their return – and a further 20% would have major concerns and would be unlikely to put themselves in that situation. These prospects of quarantine are dampening desires to travel abroad generally: 63% would be very likely to avoid travelling to **continental Europe**, and an even larger proportion (75%) would be likely to reject **long haul travel**. But this could paradoxically provide some opportunities for the domestic tourism industry as it is encouraging even more Scots to **focus on home holidays rather than trips overseas**.

- The **health and safety impacts of COVID-19** will also play a role in shaping the nature of holiday choices in the months ahead. In particular, **cleanliness and hygiene**: 8 in every 10 Scots would avoid visiting places where no guarantees or assurances on hygiene were available. Also important will be choosing locations and destinations where **social distancing** can be achieved and where busy places can be avoided.

With increasing concerns about travelling, Scotland's appeal to Scots has held up over the last month whereas there is clear diminished appeal to go to other parts of Britain or overseas:

- **Day trips have highest appeal followed by Scottish breaks and holidays**. This reflects the findings 4 weeks ago which highlighted an initial desire to not stray too far from the safety of home. But again, there will be differential benefits to the Scottish tourism industry, with the countryside continuing to hold greatest appeal, followed by the seaside and then towns and cities: the appeal of this latter category has decreased in June compared to May.
- Whilst the appeal of Scotland for holidays has held quite firm, there have been **drops in interest to go south of the border or travel overseas**. As discussed above, the threats of quarantine will have played a role in dampening any enthusiasm to travel overseas, whilst larger drops in the appeal of seaside holidays elsewhere in Britain will have been fuelled by the many scenes of crowded English beaches in the media during May.
- There does however appear to be a move amongst the over 55s to be less likely to consider holidays to any destination in the near future – most of the potential for Scotland – in early June – appears to lie with younger Scots without children and the family market.



And it also demonstrates a willingness among Scots to discover new parts of the country, off the beaten track and to travel outside of the summer season – though the 2020 holiday will be built on a new set of parameters



In general however, there are a number of very positive messages coming from Scots about what a Scottish holiday or break may look like in 2020 which will provide a lot of heartening news for Scottish tourism:

- Recognising that a traditional ‘summer holiday’ may not be possible in Scotland in 2020, there is a willingness to consider **taking Scottish holidays and breaks later in the year** – three quarters would consider an autumn/winter break whilst only 30% would only consider a summer holiday. Over four in five are willing to go **‘off the beaten track’** to avoid tourist hotspots (82%).
- Encouragingly, over two thirds are keen to show their **support for Scottish tourism businesses** by taking a holiday in Scotland as soon as is feasible. And even more encouraging, 96% of Scots claim they would be extremely **respectful of local host communities’** concerns around health and wellbeing when visiting these areas.
- But there is clear evidence of the need for some form of **accreditation** to reassure them that the tourism facilities had been checked and endorsed as safe and following best hygiene practices.
- More specifically, when it comes to **planning a Scottish holiday**, some key elements are critical to Scots:
 - Most important is to know with certainty that the places visited, particularly accommodation, were definitely going to meet high cleaning and hygiene standards.
 - In general feeling safe, away from crowds and being able to travel safely and away from strangers were also important.
 - Also, with much of the population suffering financially, the price of a holiday was of most importance to many.

We discovered in the early May research that we are likely to return to a new world of attitudes and choices when it comes to holidays in Scotland. This evidence continues from the June wave of research:

- **Destinations to visit:** the desire to visit rural areas over town and cities continues to come through when specific places in Scotland are mentioned. If anything, the views are rather more nuanced than in May, with more mentions of specific locations. Despite that, the Highlands remains the most mentioned area – 54% want to visit, but all other rural areas have shown slight increases over May.
- **Accommodation:** there is a continued desire to choose self-catering accommodation over serviced accommodation. If anything, views have further solidified in June – with a greater switch to self-catering from serviced options.
- **Things to do:** as in May, there is clear evidence of an increasing desire for the outdoors and little desire to visit indoor attractions or events – the polarisation of this opinion is even greater in June than it was in May.
- **Eating and Drinking:** as in May, there is little ‘appetite’ for eating or drinking out on holiday – indeed the proportions likely to consider this have decreased from May with a greater desire for takeaways but especially buying and cooking your own meals – the tourist industry will need to find creative solutions to address these concerns.
- **Transport choices:** changes in considerations around transport choices both to and during their Scottish holiday suggest there will be a move away from public services such as trains, buses and ferries to greater use of private means of transport: Half of Scots are now more likely to use their own car than before to get to and during their Scottish holiday. Of major concern is the **coach tour market**. 57% are less likely to take a coach tour – most likely driven down by empty nesters who are the core market but less likely to be considering holidays at all.



Scots' feelings about travel in general



HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND TRAVEL GENERALLY:

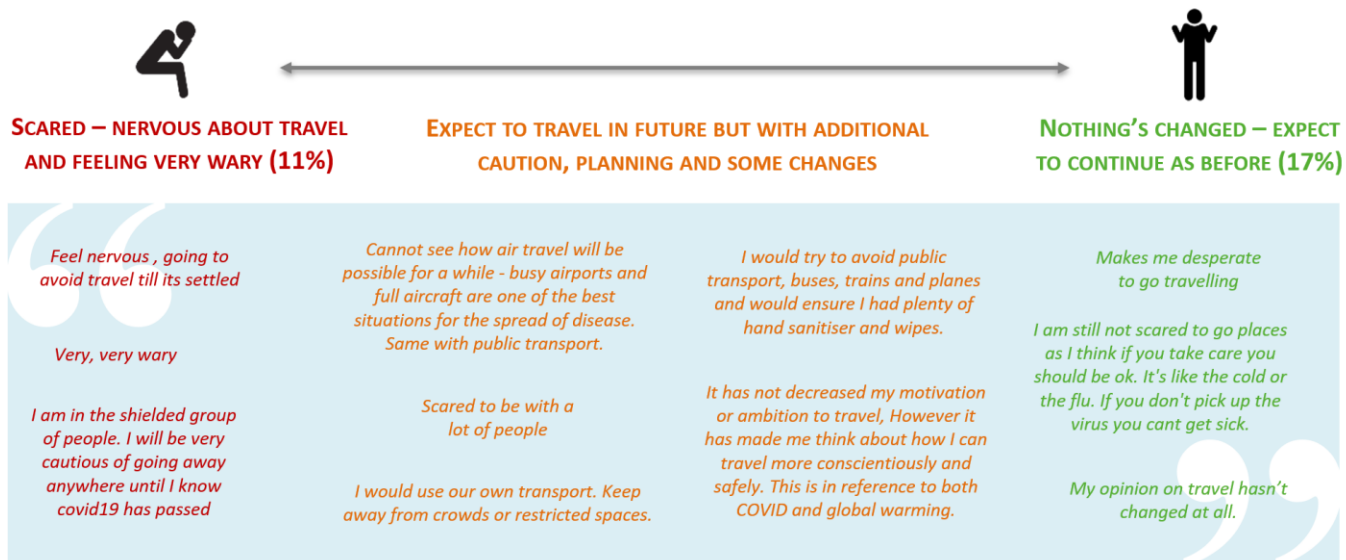
In early May, we saw that Scots have a wide range of feelings about future holiday taking, ranging from fear to travel again to a desire to quickly get back to normal



There is a wide spectrum of opinion towards holidays and breaks amongst Scots 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.
- In contrast 11% 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.
- However, three quarters of the population were between the two extremes - they anticipated travelling in future but with some significant changes to their behaviours.

One month on, and we have investigated how Scots feel about specific aspects of travel in more detail.....



Source: Wave 1 (May) Data

Two areas of concern underpin Scots' opinions around travel – the extent to which finances have been significantly impacted by lockdown, and the whole area of transport choices and how to get from A to B once lockdown restrictions are lifted

Both waves of our survey suggest that around a third of Scots feel that their personal finances have been significantly negatively impacted by the COVID lockdown. However, the June survey suggests that transport choices are now more front of mind and causing Scots to think long and hard on how they will travel around post-lockdown

- In terms of finances, a third of Scots have been significantly impacted financially. This has remained consistent over the last month however it is not uniform in the population. Our surveys suggests that C2DEs, families, and the under 35s are most likely to have been financially impacted.
- In June, 83% of Scots are now more focused on thinking about transport choices when lockdown restrictions are eased – some 9 percentage points higher than 4 weeks previously. Recent announcements about possible enforcement of the use of face coverings on public transport have helped to bring transport more front of mind – in particular, what it will mean to them as individuals. Those financially impacted by COVID-19, families and those for whom self quarantine is a major barrier to travel were especially likely to be thinking about travel choices.

So, personal finances and transport considerations form much of the context, however how do Scots feel about some more specific aspects of travel and holidays?



My personal finances are being impacted significantly by the current COVID-19 restrictions



I am going to be much more conscious of my transport choices once the COVID-19 restrictions start to be lifted



Groups most likely to agree

- C2DEs (39%)
- 35-54 year olds (39%)
- Children in household (38%)
- 18-34 year olds (38%)

- Financially impacted by COVID (86%)
- Children in household (85%)
- Self-quarantine a major barrier to travel (85%)

HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND TRAVEL GENERALLY:

The prospect of travelling overseas has little appeal for most Scots at this stage – with the new 14-day self-quarantine requirement a major barrier

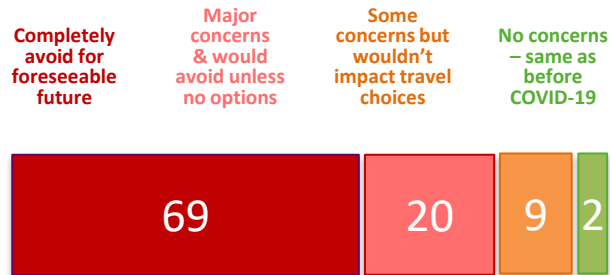
At the time of the survey, the introduction of 14-day quarantine on return to the UK following an overseas trip was headline news and discussion. Our survey shows the extent to which this could dampen most of the desire for a foreign holiday even when lockdown restrictions are reduced sufficiently to make it possible.

- The prospect of a 14 day self-quarantine period when returning from a trip abroad will have a major impact on reducing any desire for foreign holidays among Scots: 7 in 10 would completely shun foreign travel to avoid this necessity – and a further 20% would have major concerns and would be unlikely to put themselves in that situation.
- The prospects of quarantine are dampening desires to travel abroad generally 63% would be very likely to avoid travelling to continental Europe, and an even larger proportion (75%) would be likely to reject long haul travel. Empty Nesters are most likely to have concerns about each of these issues whereas there is lower concern among pre-families.

So, there is a clear unwillingness amongst most Scots to consider travelling abroad any time soon. The prospects of self-quarantine are clearly a major barrier – but could this paradoxically provide some opportunities for the domestic tourism industry? We'll see later the extent to which Scots continue to focus on the potential for home holidays rather than trips overseas.



Traveling to overseas destinations which required you to self-quarantine for 14 days on return to the UK



Groups most likely to completely avoid or have major concerns vs those least likely

- Empty Nesters (94%) vs Pre Families (77%)



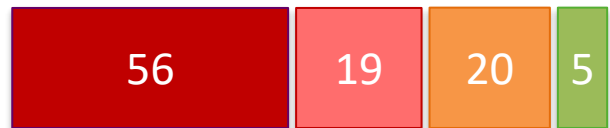
Travelling to a destination in Europe



- Empty Nesters (73%) vs Pre Families (40%)



Travelling to a long haul destination (6+ hours flight time)



- Empty Nesters (86%) vs Pre Families (54%)

HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND TRAVEL GENERALLY:

COVID-19 Health and safety concerns are still playing a major part

Three key health and safety impacts of COVID-19 will play a role in shaping the nature of holiday choices in the months ahead:

- Social distancing is talked about on a daily basis and is now part of our lives. Consequently, when it comes to holidays and travel, for most Scots there would be a lot of reticence in the prospect of visiting places where social distancing might be difficult – beaches, transport hubs, inside spaces. Almost three quarters of Scots would actively avoid or try to avoid visiting such places for the foreseeable future.
- Clearly social distancing is a priority, but many would also want to avoid places where there were lots of people. Over two thirds would avoid going to busy places.
- However in early June, the biggest COVID related health and safety concern for future travel would be around cleanliness and hygiene: 8 in every 10 Scots would avoid visiting places where no guarantees or assurances on hygiene were available. Again, for each of these health & safety issues, the greatest reservations are expressed by empty nesters.

This provides a number of key lessons for the travel and tourism industry. Destinations are most likely to appeal where there can be assurances around social distancing and reduced crowds and which can provide clear evidence of cleanliness and hygiene standards



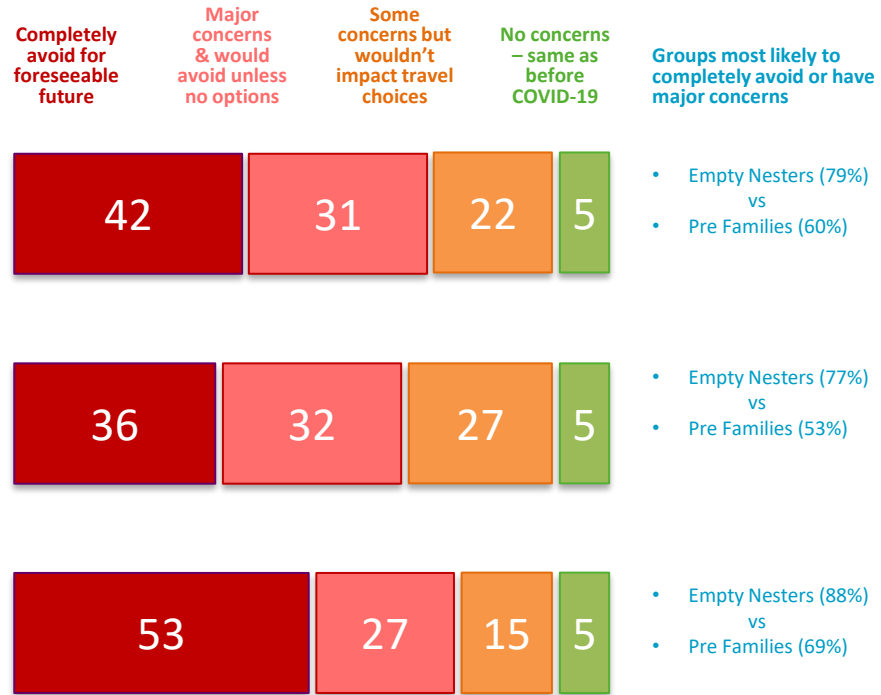
Visiting places where social distancing might be difficult (e.g. busy beaches)



Going to busy places or where there might be lots of other people



Visiting places where there were no certainties on COVID-19 standards around cleanliness / hygiene



HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND TRAVEL GENERALLY:

Transport concerns will play a key role in travel choices

We saw earlier that transport choices post-lockdown will be carefully considered by 83% of Scots. When we drill down to look at three particular modes, we begin to see where the barriers are likely to be largest.

- 4 in 10 Scots will not set foot in a plane for the foreseeable future and a further 27% will try to avoid unless they have no other options. This illustrates the difficulties the air industry will have in its road to recovery as demand is likely to be suppressed for some time. Pre-families have lower levels of concern than families or empty nesters however.
- Although there is also a large proportion of Scots who will not take public transport such as trains or buses in the near future (27%) and a further 36% will only do so if they have no other option, just under 4 in 10 would consider these modes of travel. This perhaps reflects the reality that many will be likely to travel by these means in everyday life at some point in the near future meaning that it will become less of a barrier for holidays.
- However the biggest barriers undoubtedly face the cruise industry. Over 7 in 10 Scots will avoid this type of holiday completely for the foreseeable future and a further 14% would only do so if no other options are available.. This illustrates that even more than air travel, the cruise industry faces the longest period to recover.



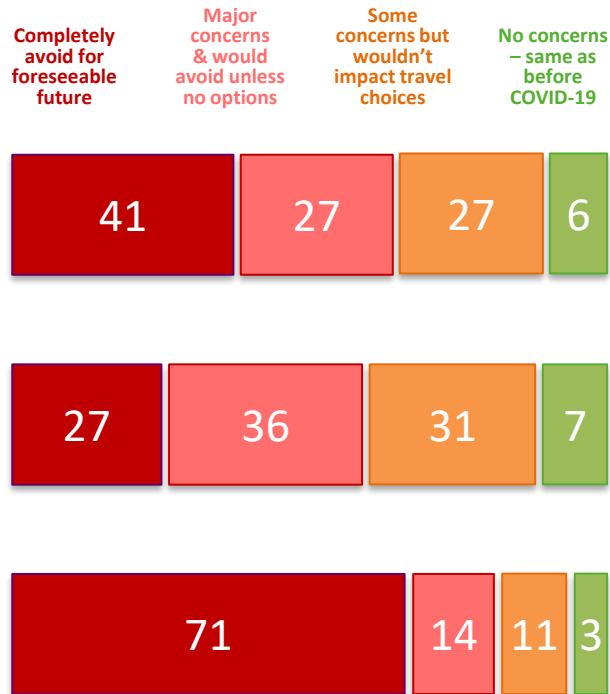
Travelling by air



Travelling via public transport (trains, buses etc.)



Going on a cruise ship



Groups most likely to completely avoid or have major concerns

- Empty Nesters (78%) vs Pre Families (43%)

- Empty Nesters (68%) vs Pre Families (50%)

- Empty Nesters (90%) vs Pre Families (78%)



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.

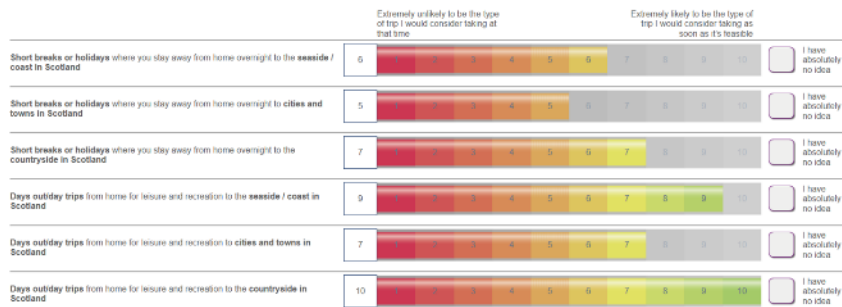
Analysis identifies what and where Scots might do first – and where tourism recovery may happen first.

This analysis is based on Scottish consumer views in early June 2020 and we examine changes in appeal over the last four weeks.

- 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:

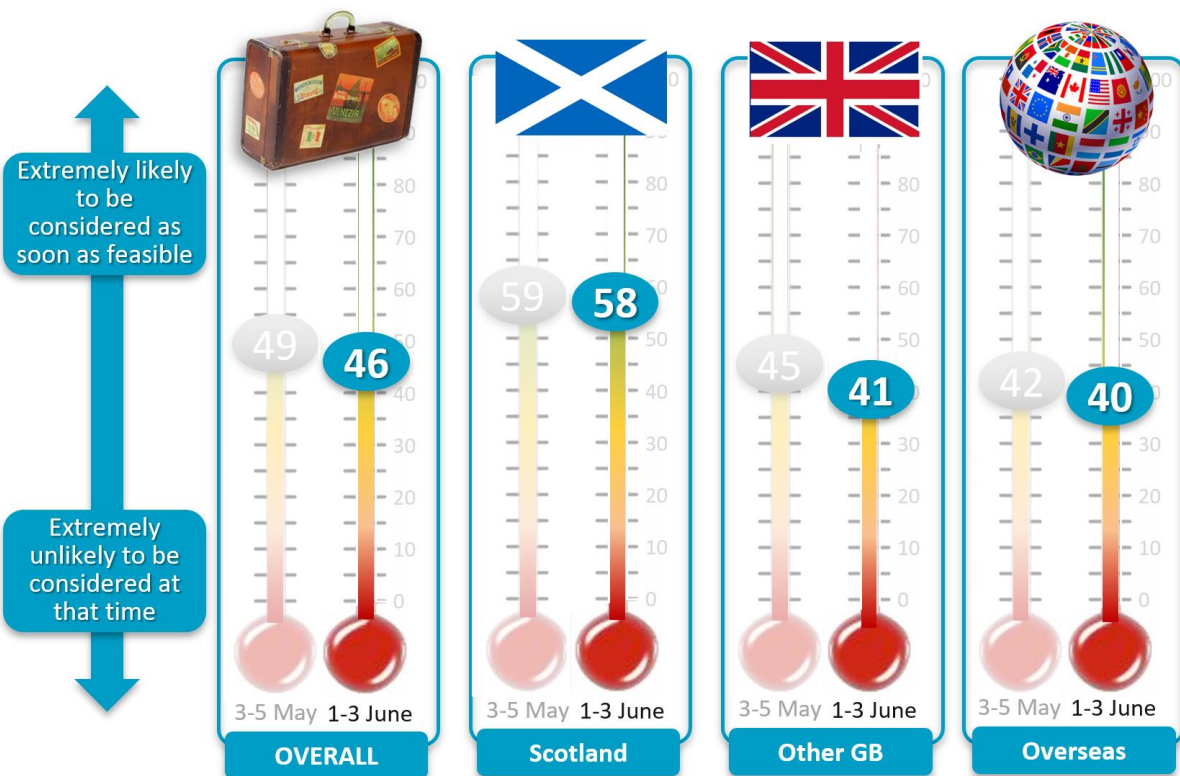
By early June, Scots' overall desire for holidays and breaks when lockdown restrictions are eased has decreased from 49 to 46/100



However, as in May, it is clear that the desire for overnight tourism increases when we come closer to home:

- With a score of 58/100, as soon as conditions allow, overnight holidays and breaks in Scotland hold the greatest appeal
- Travelling further afield has significantly less immediate appeal and has decreased over the last 4 weeks:
 - Overnight holidays elsewhere in Britain has a score of 41/100 – a significant drop from 45 in May.
 - Travelling overseas is now only slightly behind England and Wales in appeal (40/100) – though again, this has dropped by two points in the last month

Clearly, as in May, the domestic tourism market looks to benefit first when Scots are able to resume overnight tourism activity – and if anything, this preference for holidaying at home over travelling further afield has strengthened further in the last 4 weeks.





TOURISM DESIRABILITY SCORE – DAY TRIPS IN SCOTLAND:

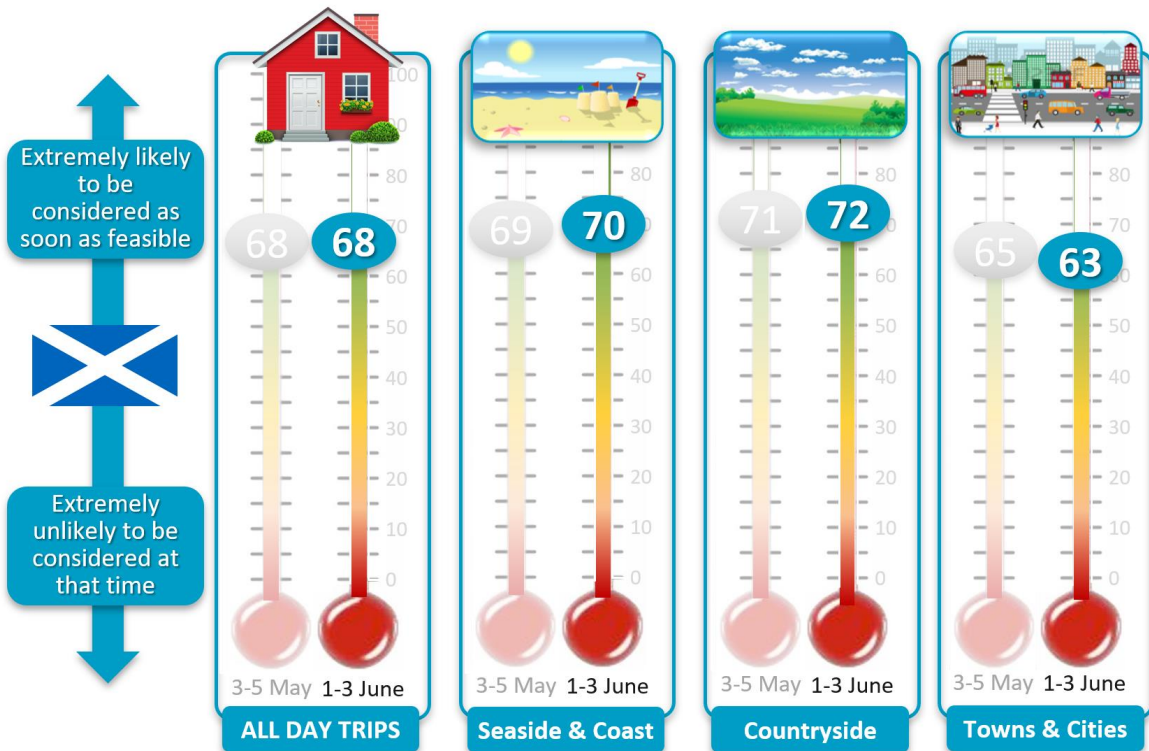
In June, Scots' desire for day trips in Scotland as soon as lockdown restrictions permit, remains at 68/100 overall



As in May, day trips from home have the highest appeal at this time – a very similar picture to May albeit with some slight changes in the types of places considered:

- Highest appeal is for day trips in the Scottish countryside with a desirability score of 72/100, a slight increase on May
- Day trips to the Scottish coast and seaside has next highest desirability at 70/100 – again, a slight increase on the previous month
- Day visits to towns and cities have lower appeal and this desire has declined over the last 4 weeks by two points to 63/100.

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. If anything, the relative appeal of the countryside and the coast have increased at the expense of the possibility of taking day trips to urban areas.





TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN SCOTLAND:

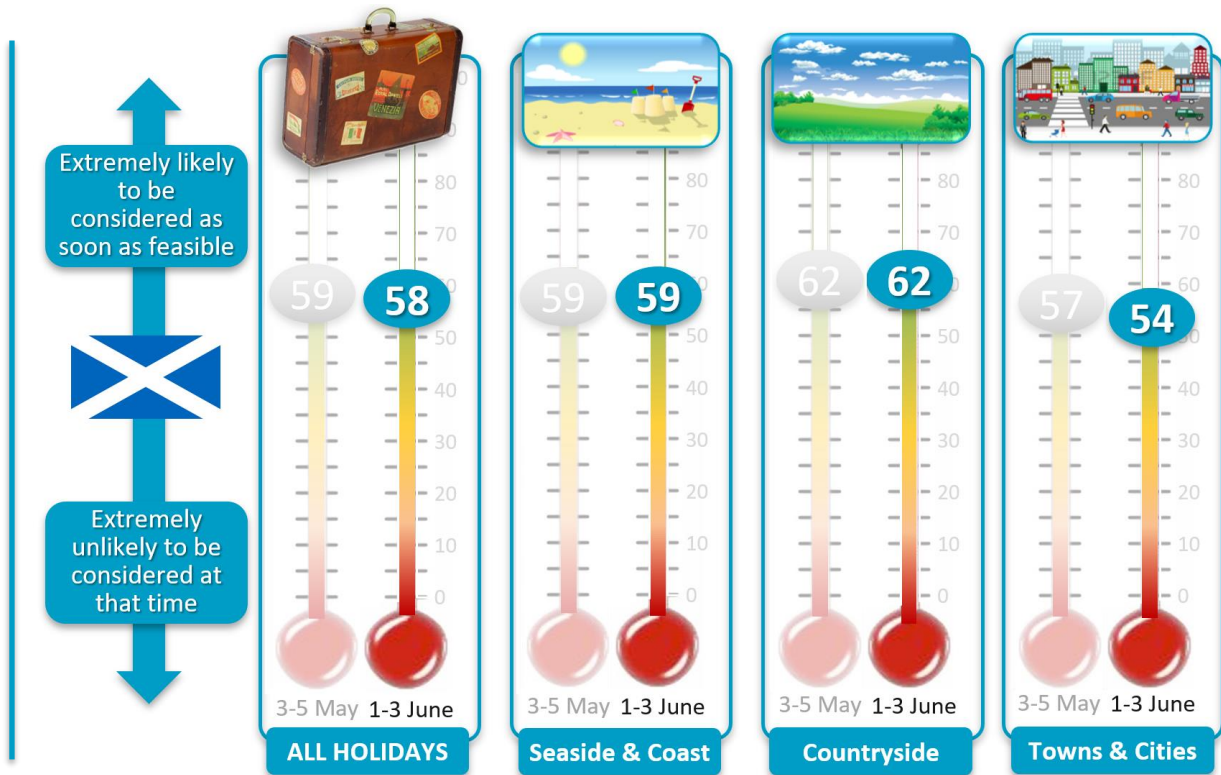
Scots' desire for short breaks or holidays in Scotland when lockdown restrictions permit is very slightly lower in June – driven by a reduced desire for city breaks



Interest in short break and holiday environments in Scotland has moved in a similar way to day trips with a decline in interest for city breaks resulting in a very slight decrease in the overall appeal of a Scottish holiday:

- Highest appeal is for overnight trips to the Scottish countryside with a desirability score of 62/100 – an identical position to May
- Holidays and Breaks to the Scottish coast and seaside has next highest desirability at 59/100 (again, the same as in May), however the appeal of overnight breaks to Scottish towns and cities has declined by three points to 54/100.

The prospect of an overnight trip in Scotland once lockdown restrictions are lifted remains 'second in the list' after a day trip – but in a very strong position relative to trips further afield.





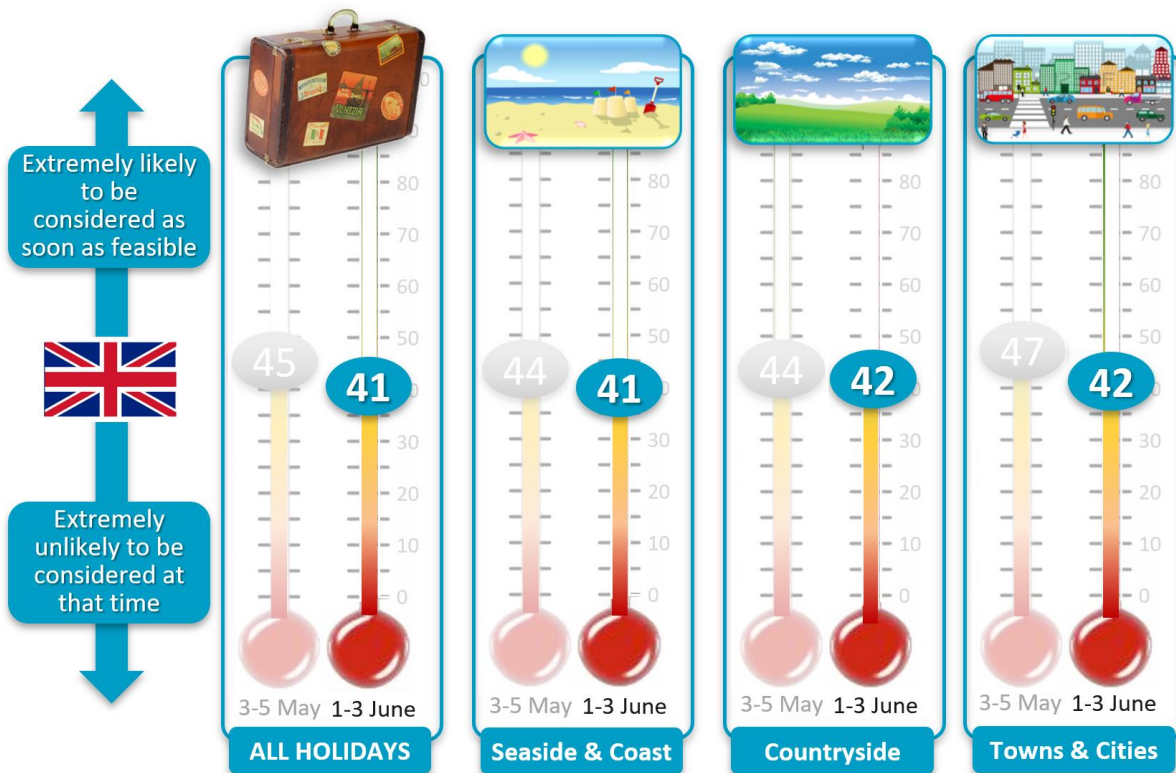
TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN ENGLAND AND WALES:

An interest in short breaks and holidays in England and Wales is much lower among Scots – and has dropped significantly from May to 41/100



The appeal of holidays and short breaks outside of Scotland to either England or Wales is much lower – and 4 points down on the score recorded in May:

- All destination types have similar levels of desire at 41-42/100, however there have been large drops in the appeal of breaks to cities south of the border (from 47 to 42) and to the seaside and coast (from 44 to 41).
- During May, many images appeared in the media of apparently crowded beaches across England and this may well have helped to drive down the appeal for such trips by Scots.





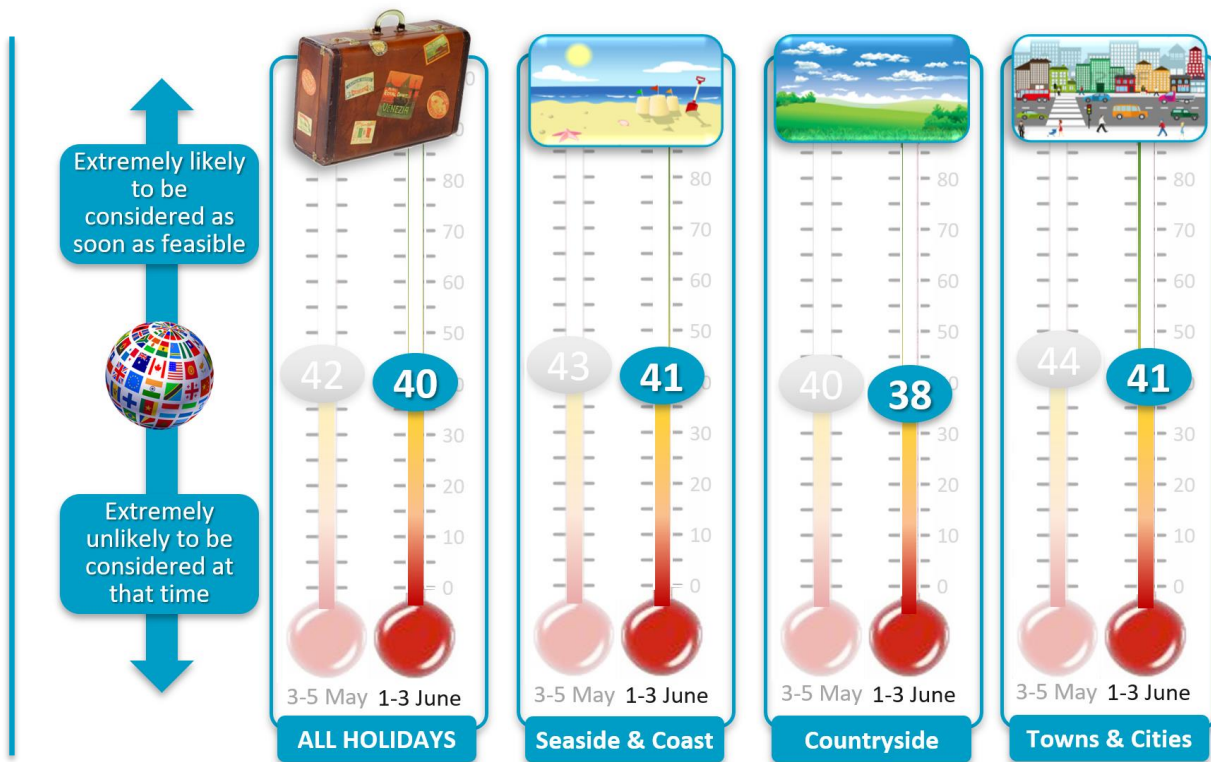
TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS OVERSEAS:

The desire to travel overseas for holidays and breaks has also dropped and is just behind England and Wales in appeal for Scots with an overall score of 40/100



Although overseas holiday desirability is lower again, the difference relative to the appeal of England and Wales is even smaller than in May suggesting that, for now, Scots overnight tourism attention will be focused much closer to home in Scotland itself

- Overseas city breaks (41/100) and beach holidays (41/100) are marginally more appealing than overseas countryside trips (38/100).



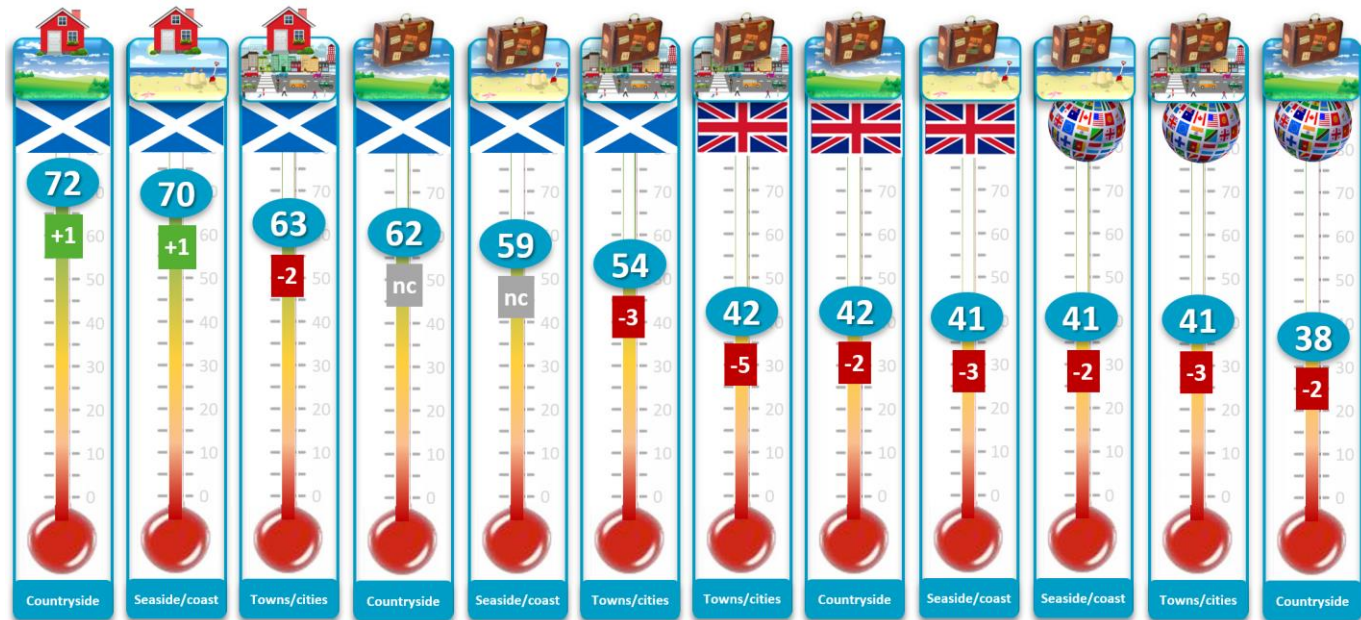
TOURISM DESIRABILITY SCORE

In Summary.....appeal of Scotland remains but decrease in desire from May to go further afield

In summary, as was the case in May, in early June, the highest desirability for tourism and leisure among Scots post lockdown is for day trips from home, followed by overnight trips in Scotland. Trips further afield to other parts of Britain and overseas are some distance behind. We also saw earlier that in terms of overseas trips, long haul travel is of lower appeal at present than trips into Europe.

The countryside and coast are the most desired environments in Scotland. City breaks have reduced appeal over May.

As can be seen opposite, if anything, there has been a further strengthening in the appeal of Scotland in June for both day trips and holidays relative to trips further afield – some potential for optimism in these difficult times for our domestic tourism industry.



Scotland remains most likely to benefit from increased interest in overnight tourism among pre-families and families – but drop in holiday interest among empty nesters in general

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



	May	June	Change
Day Trips in Scotland	73	72	-1
Holidays/Breaks in Scotland	66	65	-1
Holidays/Breaks elsewhere in GB	54	49	-5
Holidays/Breaks Overseas	56	56	-

- 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.
- No significant change in desire for Scottish breaks over May but significant drop in interest to visit other parts of GB

SCOTTISH FAMILIES (kids still at home)



	May	June	Change
Day Trips in Scotland	71	73	+2
Holidays/Breaks in Scotland	63	64	+1
Holidays/Breaks elsewhere in GB	49	47	-2
Holidays/Breaks Overseas	48	43	-5

- Slightly higher desire to travel to all destinations. Again, Scotland likely to gain first due to proximity.
- A slight increase in appeal of Scotland in June compared to May whilst the appeal to travel further has decreased – especially to go overseas.

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



	May	June	Change
Day Trips in Scotland	66	63	-3
Holidays/Breaks in Scotland	55	52	-3
Holidays/Breaks elsewhere in GB	40	34	-6
Holidays/Breaks Overseas	33	29	-4

- Significantly lower desire to travel to all destinations. However, Scotland is still much more likely to benefit from trips by these older Scots age groups than elsewhere in the UK or overseas.
- However, empty nesters' desires for holidays has decreased over the last 4 weeks – to all destinations. Scotland's desirability score has dropped by 3 points however the declines are even greater for overseas (-4) and elsewhere in Britain (-6)

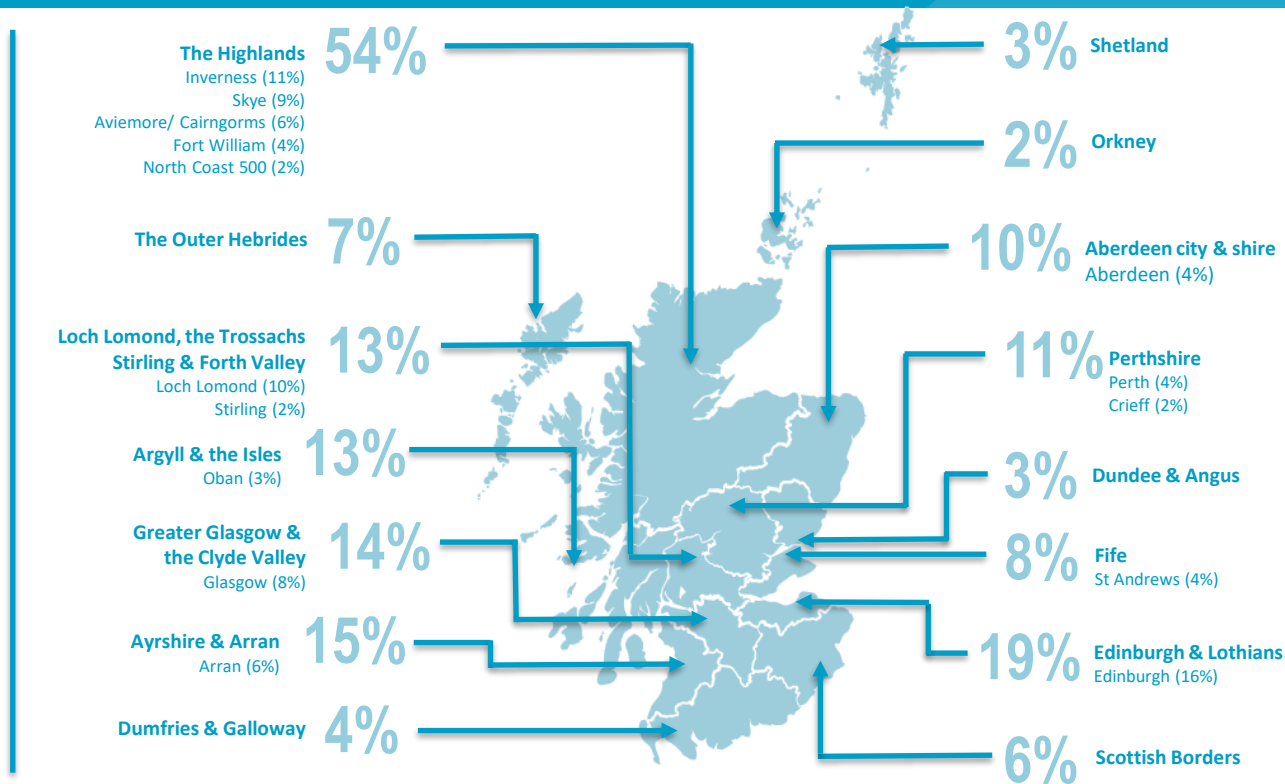
WHICH AREAS OF SCOTLAND ARE MOST DESIRABLE?

Rural areas, particularly those north of the Central Belt, continue to appeal the most for future visits with a number of 'honey pot' destinations mentioned regularly



As would be expected given the Tourism Desirability Scores, rural areas continue to appeal the most to Scots for future overnight holidays in breaks:

- The Highlands and other rural areas continue to be top of the list of places to visit for most of the population.
- A number of specific 'honey pot' locations were mentioned by high proportions as desirable destinations including Inverness, Loch Lomond, Skye, Aviemore, Pitlochry, Arran and Stirling.
- Compared to May an increased percentage of people mentioned a desire to visit places in Argyll, the Isles and Ayrshire.





The Appeal of Scottish holidays



Reassurances on cleanliness, safety, escaping crowds and price will be most important to Scots when they plan their next holiday or short break in Scotland

Focusing on holidays in Scotland, Scots were asked to comment on the factors that would be important when they are next able to plan a holiday or short break in Scotland

- The most frequently provided answers related to being able to know with certainty that the places visited, particularly accommodation, were definitely going to meet high cleaning and hygiene standards.
- In general feeling safe, away from crowds and being able to travel safely and away from strangers was also important.
- Also, with much of the population suffering financially, the price of a holiday was of most importance to many.
- Other factors influencing decisions which were mentioned frequently included:
 - The number of cases/ R number in destination areas.
 - Availability of outdoor places and activities to do.
 - Whether the local community was welcoming visitors.
 - Being able to support small/local businesses.
 - Whether facilities would be open for business in destinations.



THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS – FACTORS IMPORTANT IN PLANNING:

Examples of the responses provided bring the concerns of visitors to life

Guaranteed high standards of cleaning and hygiene – 21%

That accommodation providers can prove that they are fully committed to maintaining rigorous cleaning and safety practices

Knowing that accommodation has been thoroughly cleaned and establishments have correct hand sanitisers in place, etc.

..obvious that hygiene is an important and continuous part of how the business operates

Price/ affordability – 15%

The most important factor would be the cost, my household income has been significantly reduced and we have no idea when the chief income earner will be able to return to work.

I would definitely be looking at cheap prices too because there is no way I could afford an expensive holiday due to losing my job for this summer.

Feeling safe/not at risk – 17%

It must be safe to visit with no chance of contracting the virus or inadvertently spreading the virus.

I would have to be 100% confident there would be no risk to myself, my husband or child by travelling.

Access/ transport/ using own car – 13%

Not too much travel involved. Ideally accessible in one non-stop journey.

I would only travel when advised it is safe to do so and would travel in my own car.

Ability to get there safely e.g. fuel and toilet stops are likely to be clean.

Off the beaten track, avoiding crowds – 17%

Ideally I would be looking for low density of population areas with outdoor walking/sailing activities top of the list.

Peace, quiet and open countryside. I don't want to disturb any other people - especially locals - nor for other people to disturb me.

Ability to social distance – 10%

I would want to know that social distancing measures were in place where I was visiting

Safe social distancing away from crowds. Being able to stay in own accommodation (e.g tent, wigwam, hotel room, cottage, cabin).

..social distancing as I find that particularly in shops I regularly come across people who appear to forget about it..



THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS

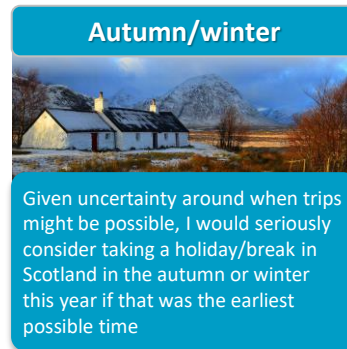
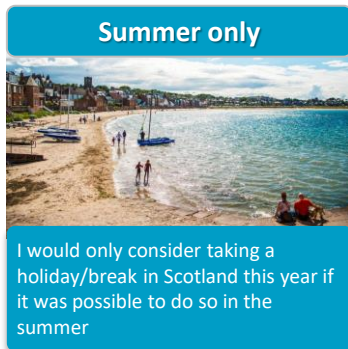
A willingness to travel out of season, go off the beaten track, actively supporting the Scottish tourism economy and an overwhelming desire to respect local communities. But an underlying need for a safety/hygiene endorsement



We then probed on some key considerations, and in early June, Scots are showing a willingness to embrace the opportunities for Scottish holidays and to adapt to meet the changing conditions:

- Recognising that a traditional 'summer holiday' may not be possible in Scotland in 2020, there is a willingness to consider taking Scottish holidays and breaks later in the year – three quarters would consider an autumn/winter break whilst only 30% would only consider a summer holiday.
- Over four in five are willing to go 'off the beaten track' to avoid tourist hotspots (82%).
- Over two thirds are keen to show their support for Scottish tourism businesses by taking a holiday in Scotland as soon as is feasible.
- Very encouragingly, 96% of Scots claim they would be extremely respectful of local host communities' concerns around health and wellbeing when visiting these areas.
- But there is clear evidence of the need for some form of accreditation to reassure them that the tourism facilities had been checked and endorsed as safe and following best hygiene practices.

These findings should be reassuring for VisitScotland – their planned campaign fits many of these needs. However, ensuring reassurances around health and safety are in place will also be important.



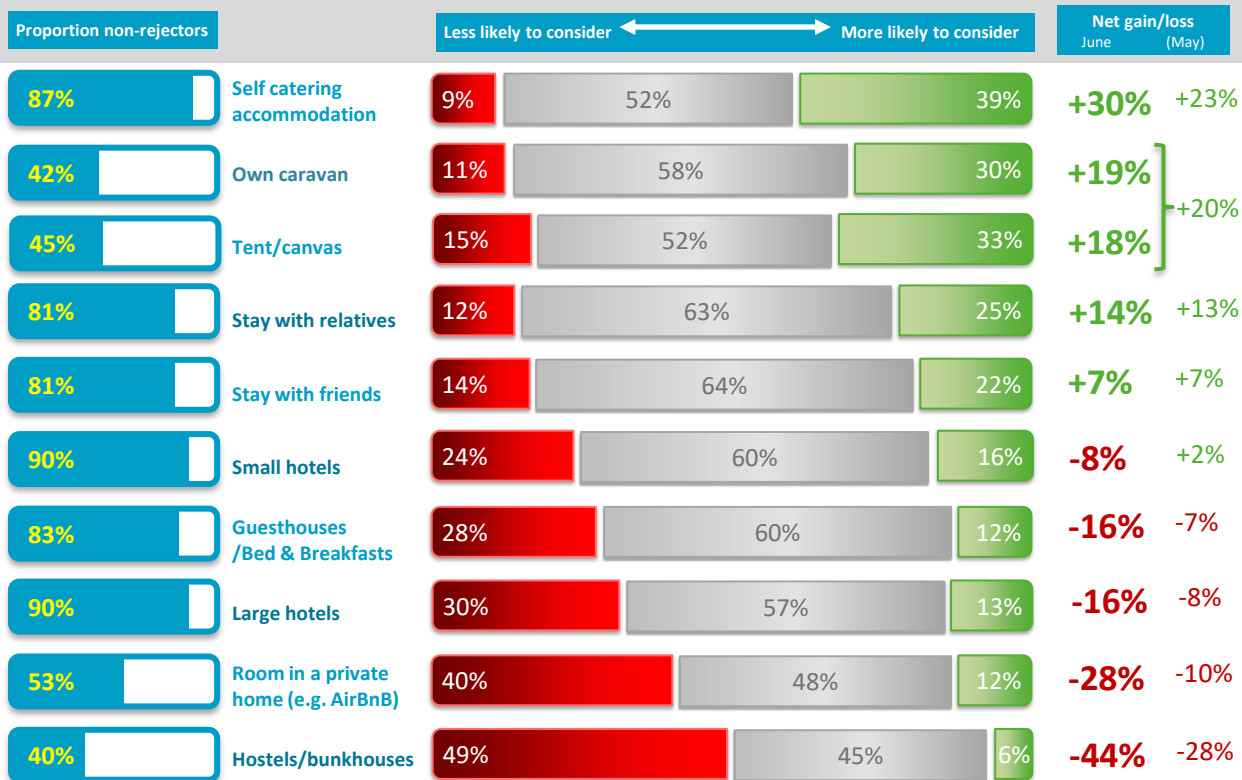
THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS – ACCOMMODATION CHOICES:

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:

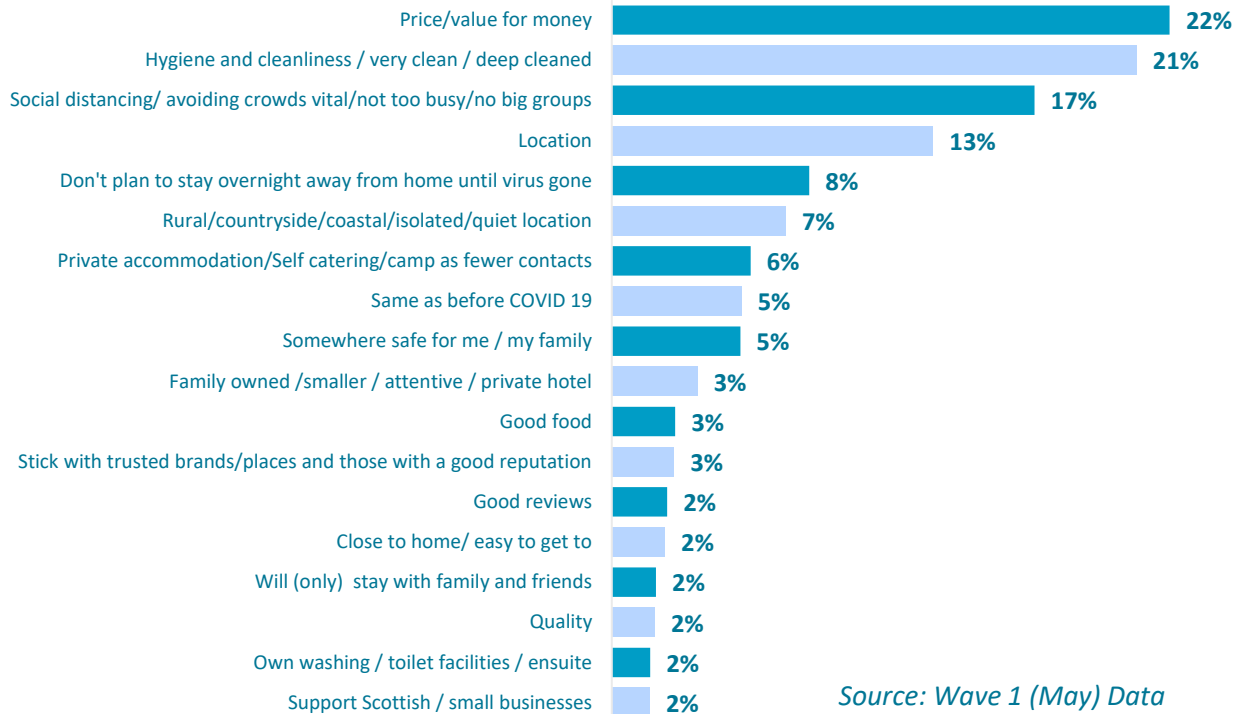
- Self catering accommodation demand is likely to show a net increase of 30 percentage points, with owned caravans and tents both also showing greater appeal (+19% and +18% respectively).
- A desire to stay with friends and relatives in particular also shows a net increased appeal of this type of accommodation
- All serviced accommodation is likely to have reduced appeal: small hotels (-8%), guesthouses and B&Bs (-16%), large hotels (-16%) and rooms in private houses (-28%) show lower levels of consideration compared to pre-COVID.
- Hostels and bunkhouses have lowest levels of appeal now – 46% are less likely to consider this type of accommodation and only 9% are more likely to do so.
- Compared with May, there has been a solidifying of opinion – self-catering appeal has increased, whilst the appeal of serviced accommodation is even less now than a month ago.



We saw in early May that whilst price/value remains a key driver of accommodation choice, 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



Source: Wave 1 (May) Data

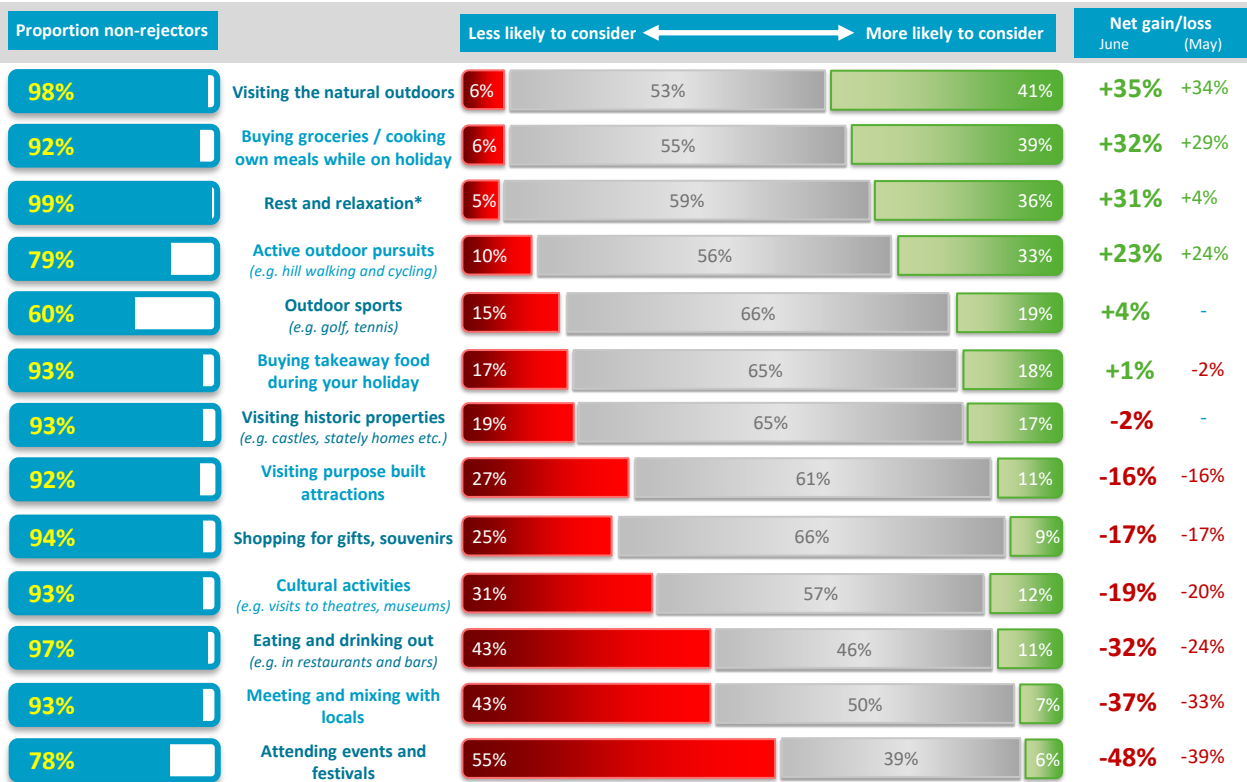
THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS – CHOICE OF THINGS TO DO ON HOLIDAY:

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:

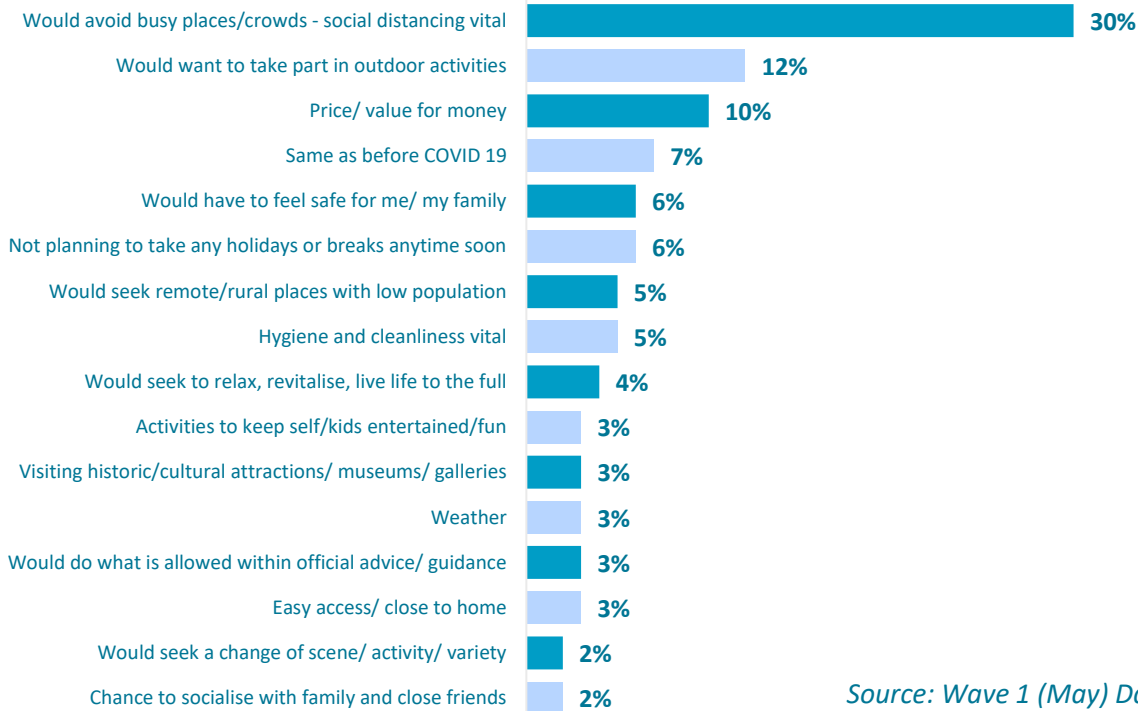
- Some 38% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday immediately post-COVID-19, and 33% likely to consider more active pursuits such as walking and cycling. Rest and relaxation also has slightly greater appeal.
- Indoor activities such as visits to arts 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 – this is even more evident in June than it was in May.
- 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.
- Results are broadly similar between early May and early June – though there has been a degree of hardening of appeal between those activities more likely to be considered and those less likely.
- **NOTE: Change of wording in June – removed ‘e.g. spas’ from Rest and Relaxation code as this was too restrictive**



We saw in May that key for Scots 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.



Source: Wave 1 (May) Data

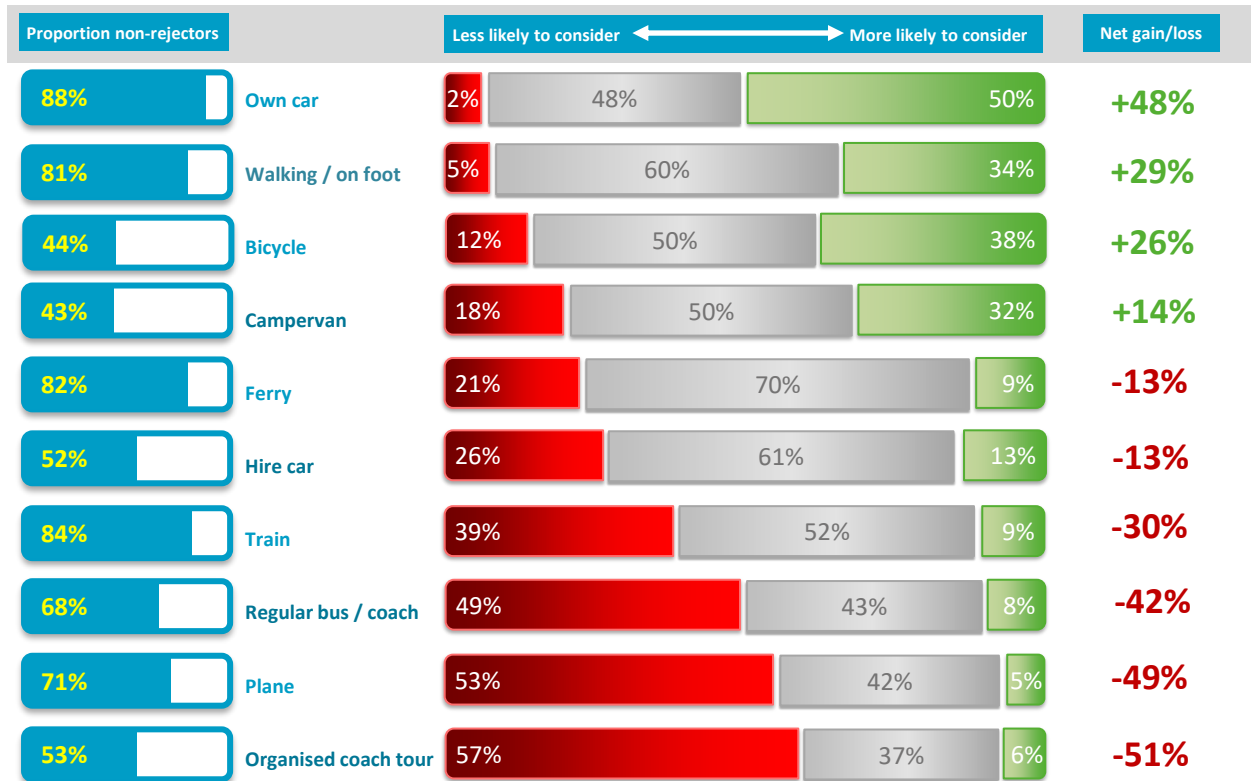
THE APPEAL OF SCOTTISH HOLIDAYS AMONG SCOTS – ACCOMMODATION CHOICES:

Scots are much more likely to use their own cars on a Scottish holiday than would have previously been the case. Clear difficulties ahead for the coach tour market



Changes in preferred transport choices both to and during their Scottish holiday suggest there will be a move away from public services to their own transport means:

- Half of Scots are now more likely to use their own car than before to get to and during their Scottish holiday.
- Active travel options such as walking and bicycle are likely to be much more popular while on holiday now too than before – 34% are more likely to go walking whilst 38% are likely to use bicycles.
- Campervans are the only other transport type likely to see increased usage – all others have lower appeal. Public transport such as trains and buses have net considerations of -30% and -42% respectively while both ferries and hire cars also have a net lower likelihood to consider (-13% in each case).
- Not surprisingly, air travel is 49% less likely than before, however the net deficit of -51% is likely to be extremely worrying for the coach tour industry – likely to be driven down by empty nesters who are the core market but less likely to be considering holidays at all.





In summary.....



The June wave of the Scottish Tourism Index shows a trend towards Scotland over other destinations and some real fears about international travel

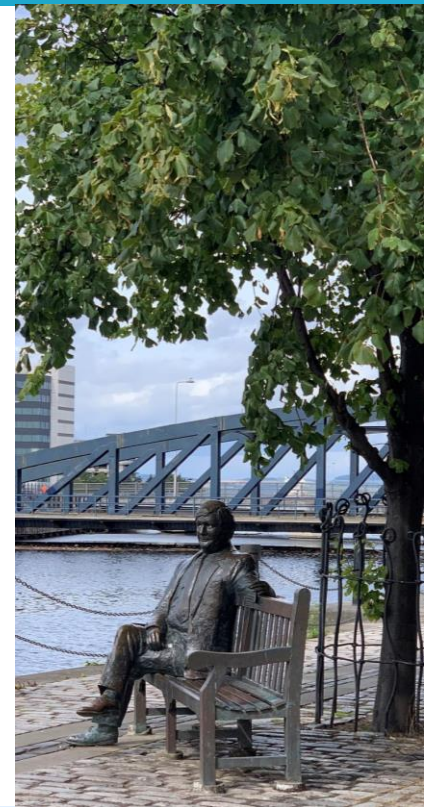
Some major impacts of COVID-19 on how Scots feel about travel generally are continuing to emerge and evolve:

- A third of Scots claim to have been significantly **impacted financially** by lockdown and this forms important context for their potential holiday choices and considerations. Also underpinning their views is an **increasing concern about how they will travel around** (83%): transport considerations will have a major impact on the types of trips they might consider – and where they will go. 4 in 10 Scots will **not set foot in a plane** for the foreseeable future and a further 27% will try to avoid unless they have no other options. This illustrates the difficulties the air industry will have in its road to recovery. Although there is also a large proportion of Scots who will not take **public transport** such as trains or buses in the near future (27%) and a further 36% will only do so if they have no other option, just under 4 in 10 would consider these modes of travel. This perhaps reflects the reality that many will be likely to travel by these means in everyday life at some point in the near future meaning that it will become less of a barrier for holidays. However the **biggest barriers undoubtedly face the cruise industry**. Over 7 in 10 Scots will avoid this type of holiday completely for the foreseeable future and a further 14% would only do so if no other options are available.
- The prospect of **travelling overseas** has very limited appeal for most Scots at this stage – with the new **14-day self-quarantine requirement a major barrier**: 7 in 10 Scots would completely shun foreign travel to avoid a 14-day quarantine on their return – and a further 20% would have major concerns and would be unlikely to put themselves in that situation. These prospects of quarantine are dampening desires to travel abroad generally: 63% would be very likely to avoid travelling to **continental Europe**, and an even larger proportion (75%) would be likely to reject **long haul travel**. But this could paradoxically provide some opportunities for the domestic tourism industry as it is encouraging even more Scots to **focus on home holidays rather than trips overseas**.

- The **health and safety impacts of COVID-19** will also play a role in shaping the nature of holiday choices in the months ahead. In particular, **cleanliness and hygiene**: 8 in every 10 Scots would avoid visiting places where no guarantees or assurances on hygiene were available. Also important will be choosing locations and destinations where **social distancing** can be achieved and where busy places can be avoided.

With increasing concerns about travelling, Scotland's appeal to Scots has held up over the last month whereas there is clear diminished appeal to go to other parts of Britain or overseas:

- **Day trips have highest appeal followed by Scottish breaks and holidays**. This reflects the findings 4 weeks ago which highlighted an initial desire to not stray too far from the safety of home. But again, there will be differential benefits to the Scottish tourism industry, with the countryside continuing to hold greatest appeal, followed by the seaside and then towns and cities: the appeal of this latter category has decreased in June compared to May.
- Whilst the appeal of Scotland for holidays has held quite firm, there have been **drops in interest to go south of the border or travel overseas**. As discussed above, the threats of quarantine will have played a role in dampening any enthusiasm to travel overseas, whilst larger drops in the appeal of seaside holidays elsewhere in Britain will have been fuelled by the many scenes of crowded English beaches in the media during May.
- There does however appear to be a move amongst the over 55s to be less likely to consider holidays to any destination in the near future – most of the potential for Scotland – in early June – appears to lie with younger Scots without children and the family market.



And it also demonstrates a willingness among Scots to discover new parts of the country, off the beaten track and to travel outside of the summer season – though the 2020 holiday will be built on a new set of parameters



In general however, there are a number of very positive messages coming from Scots about what a Scottish holiday or break may look like in 2020 which will provide a lot of heartening news for VisitScotland:

- Recognising that a traditional ‘summer holiday’ may not be possible in Scotland in 2020, there is a willingness to consider **taking Scottish holidays and breaks later in the year** – three quarters would consider an autumn/winter break whilst only 30% would only consider a summer holiday. Over four in five are willing to go **‘off the beaten track’** to avoid tourist hotspots (82%).
- Encouragingly, over two thirds are keen to show their **support for Scottish tourism businesses** by taking a holiday in Scotland as soon as is feasible. And even more encouraging, 96% of Scots claim they would be extremely **respectful of local host communities’** concerns around health and wellbeing when visiting these areas.
- But there is clear evidence of the need for some form of **accreditation** to reassure them that the tourism facilities had been checked and endorsed as safe and following best hygiene practices.
- More specifically, when it comes to **planning a Scottish holiday**, some key elements are critical to Scots:
 - Most important is to know with certainty that the places visited, particularly accommodation, were definitely going to meet high cleaning and hygiene standards.
 - In general feeling safe, away from crowds and being able to travel safely and away from strangers were also important.
 - Also, with much of the population suffering financially, the price of a holiday was of most importance to many.

We discovered in the early May research that we are likely to return to a new world of attitudes and choices when it comes to holidays in Scotland. This evidence continues from the June wave of research:

- **Destinations to visit:** the desire to visit rural areas over town and cities continues to come through when specific places in Scotland are mentioned. If anything, the views are rather more nuanced than in May, with more mentions of specific locations. Despite that, the Highlands remains the most mentioned area – 54% want to visit, but all other rural areas have shown slight increases over May.
- **Accommodation:** there is a continued desire to choose self-catering accommodation over serviced accommodation. If anything, views have further solidified in June – with a greater switch to self-catering from serviced options.
- **Things to do:** as in May, there is clear evidence of an increasing desire for the outdoors and little desire to visit indoor attractions or events – the polarisation of this opinion is even greater in June than it was in May.
- **Eating and Drinking:** as in May, there is little ‘appetite’ for eating or drinking out on holiday – indeed the proportions likely to consider this have decreased from May with a greater desire for takeaways but especially buying and cooking your own meals – the tourist industry will need to find creative solutions to address these concerns.
- **Transport choices:** changes in considerations around transport choices both to and during their Scottish holiday suggest there will be a move away from public services such as trains, buses and ferries to greater use of private means of transport: Half of Scots are now more likely to use their own car than before to get to and during their Scottish holiday. Of major concern is the **coach tour market**. 57% are less likely to take a coach tour – most likely driven down by empty nesters who are the core market but less likely to be considering holidays at all.

To meet the aspirations and needs of potential Scots visitors, the industry will have to find creative solutions and innovations. Examples are already appearing from across the globe:



SG Clean - guaranteeing high standards of cleaning and hygiene

- This campaign in Singapore aims to instil a national 'keep clean culture'
- Organisations receive the SG Clean Quality mark if they commit to sector specific sanitation and hygiene standards.
- Certified premises display signage and promote their accreditation online.
- See www.sgclean.gov.sg. Also a similar US scheme see - www.ahla.com/safestay



Haven Hideaway – socially distanced, self catering breaks

- Haven Holidays are promoting this offer available in 2020 when guidelines allow.
- The focus is on self contained accommodation, outdoor activities, takeaway food, social distancing and cleanliness standards.
- Pricing has been adjusted to reflect the simplified package and there is a money back guarantee for cancellations.
- See www.haven.com/haven-hideaway



Cinque Terre – technology to manage visitor numbers

- Prior to COVID 19, plans were announced to use technology to manage over tourism at the UNESCO protected Cinque Terre villages in Italy.
- The system uses an online ticketing system to manage visitor flows and sensors on trails to monitor numbers.
- This or other technology (e.g. mobile phone data) could offer solutions to manage social distancing in Scotland.



Brewdog – communicating plans to reopen safely

- It is important to maintain a dialogue with customers during lockdown, including reassurance that safety will be a top priority .
- BrewDog produced a video and blog to highlight how they will be ensuring safety, ranging from contactless ordering to amended furniture layouts.
- See <https://vimeo.com/415917130/22c77d252f>





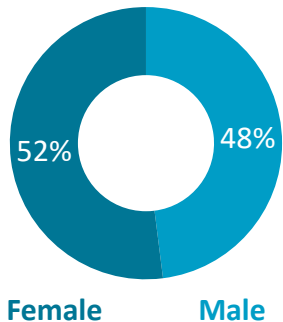
Appendix:

Who did we speak to?

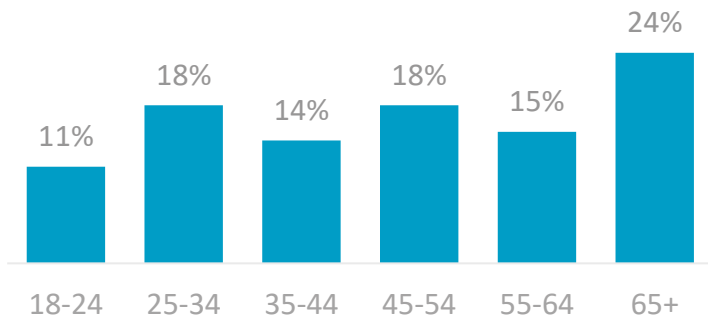


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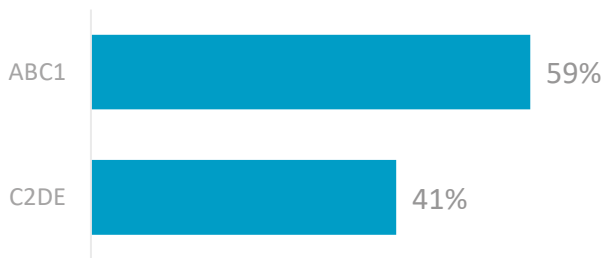
Gender



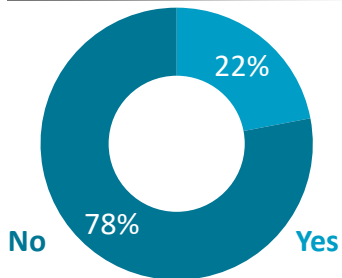
Age



Social Class



Kids at home



Origin

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



Any questions? A follow-up discussion?

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