



# Tracking Scottish tourism intentions during COVID-19

Wave 5:  
11<sup>th</sup> – 14<sup>th</sup> March 2021

A Research Report  
from 56 Degree Insight Ltd



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# The Scottish Tourism Index – Wave 5, March 2021: Introduction



## The results from Wave 5 of our monitor of how the Scottish population feel about tourism and leisure during the COVID-19 Pandemic – the first wave of 2021

- When COVID-19 lockdown began on 23<sup>rd</sup> March 2020 in Scotland, little did any of us know how long we would be living under the restrictions of the pandemic. Back in that first lockdown period, we realised that there was a real need for information to help the Scottish tourism industry – how were Scots residents feeling about the prospect of holidays when lockdown restrictions eased, what were their concerns and would they overcome them to take a holiday? If so, where – and would the potential of a Scottish staycation appeal, especially among those more likely to take summer holidays abroad? We launched the Scottish Tourism Index, and ran the survey across four months of 2020 – firstly in early May, when lockdown was at its toughest, to gauge opinion, then we repeated the survey a month later in early June when our pathway out had been mapped by the Scottish Government. We continued to track opinions and likely behaviours in early July, a week before the official re-opening of Scottish tourism, and then undertook a final wave for 2020 at the end of August. In this wave, we took more of a retrospective – looking back at the holidays that had been taken over the previous 6 weeks, their nature and characteristics, and the extent to which they lived up to expectations.
- At that stage, we were hopeful that with possible vaccines on the horizon and case numbers relatively low, we hoped that we might not need to run the Scottish Tourism Index again. However, as we all now know, as we moved into winter, transmissions increased and the emergence of new variants have caused a second major 'stay at home' lockdown since the festive period. The vaccination programme does provide grounds for optimism however, and as the restrictions begin to be eased again, we felt it was important to run a fifth wave of the Scottish Tourism Index to see how Scots were feeling about holidays this year.
- In this report we examine how Scots feel about travelling and holidays generally, and specifically their intentions for 2021, focusing on their likelihood to take a Scottish staycation. What might it look like, when and where are they considering and what is important to them? We also revisit the potential impacts of incoming tourism on local communities – again, comparing with last year.



Jim Eccleston  
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- **Online Survey of 512 Scottish adults investigating their views about holidays and travel during COVID-19**
- **Representative sample of the Scottish population, weighted by age, gender, socio-economic grouping and region of origin**
- **Wave 5 fieldwork, our first wave since August 2020, was undertaken from 11<sup>th</sup> – 14<sup>th</sup> March 2021**
- **Sample and fieldwork provided by Yonder Data Solutions (previously known as Populus Data Solutions)**

**.YONDER**  
**DATA SOLUTIONS**



# Key Findings March 2021



## SUMMARY FINDINGS – SCOTS AND HOLIDAYS IN MARCH 2021: 1/2

# There remains a general nervousness about travel and a continuing desire to look close to home for holidays with a third of Scots seriously considering a ‘staycation’ in 2021



### Scots feelings about travel generally:

Clearly, COVID-19 has had a continued effect on the appetite for travel amongst the Scottish population, with a broad range of desire for holidays. For almost a quarter (22%), **holidays are simply not in their thoughts** and a further 27% feel that holidays are something to be considered **later rather than now** – this is especially the case among empty nesters and C2DEs. For this group, concerns over safety remain, and the risk of transmission remains a worry meaning that holidays are not high on their agendas. Just under a quarter **will consider a holiday – but only later in the year** (23%). Their reasons are similar – although the timing issues are more significant – almost a third of them are keen to take a holiday but not until things have settled down. The remaining 28% are **keen to take a holiday in the early summer or even earlier – as soon as possible** – especially pre-nesters. This is governed by a ‘need’ to travel and get away and to escape from the difficulties of the last 12 months but there were also mentions of travelling to see family, the need for relaxation and mental health concerns.

There are also some practical considerations playing a key role in how Scots feel about travelling and holidays at the moment. A third have been significantly impacted financially by COVID (34%) which clearly impacts on what they might be able to do, while the thought of flying for a holiday overseas represents a barrier to almost three quarters of Scots this year (72%). Also dampening any enthusiasm for an overseas holiday is the prospect of paying to self-isolate in a hotel on their return – 90% would reject an overseas holiday if this was required. There is broad support however for the introduction of vaccine passports if this could help in the re-opening of travel and attendance at events – four in five Scots would welcome this.

### With ongoing restrictions and concerns about travelling, Scotland’s appeal to Scots for holidays this year is clear whereas trips elsewhere in the UK or especially overseas have much lower levels of appeal:

The prospects for overnight trips in Scotland once lockdown restrictions are lifted looks very strong this year – driven by interest in visiting the coast and countryside in particular. When we analyse our Desirability Index, Scots’ desire for home holidays are at slightly higher levels than in May and June last year – especially amongst pre-nesters and families. The desire to take holidays amongst empty nesters, even in Scotland, remains relatively flat. The appeal of holidays and short breaks outside of Scotland to either England or Wales is much lower – at around 70% of the level of desire for Scottish holidays, whilst the appeal of overseas holidays

is lower still.

When asked directly about the likelihood of taking holidays to specific destinations this year, Scotland is clearly the most likely destination for most Scots’ holidays this year. 46% of Scots are very likely or definite about taking a home holiday this year – and a further 24% are fairly likely – 7 in 10 Scots overall. This compares with around two in five likely to go elsewhere in the UK (42%), three in ten to Europe (29%) and 11% further afield. Spain was the most commonly cited overseas destination (16%).

These findings all suggest that the shift towards more Scots holiday in Scotland which we observed in 2020 is set to continue into 2021 as and when the tourism industry is able to re-open.

### Scottish staycation prospects for 2021:

Whilst 28% of Scots have completely ruled out a staycation this year, the uncertainty of what will be possible means that only a small proportion of Scots have already booked a 2021 staycation (5%). With 9% planning a Scottish holiday and a further 23% seriously considering one, this amounts to around 1.7 million Scots who are so far down the purchase funnel. Until holidays are booked however, there remains uncertainty – over a third of adults claim that they MIGHT take a Scottish holiday this year. Accounting for 1.6 million people, this is a large battleground where marketing needs to highlight and focus on the opportunities and benefits of a home holiday. In terms of lifestage, families are most likely to have booked, planned or are seriously considering a Scottish holiday in 2021 – slightly ahead of pre-nesters and significantly more likely than empty nesters. Amongst those who have booked, are planning, seriously considering or even just thinking about a 2021 staycation, just over half are confident that the holiday will be possible (56%).

Respondents were also asked to rate the importance of a range of factors if they were to take a 2021 Scottish staycation: the significance of high standards of hygiene and cleanliness, especially in accommodation, is clear with around three-quarters describing this as very important. Accommodation considerations – quality and availability of preferred types were also of high importance to around half, while mitigations to aid social distancing, being able to



# Scots holidays are most likely to take place in the third quarter, to rural locations (especially the Highlands), in self-catering accommodation and with an outdoors theme



escape crowds and the behaviour of other tourists were also important – but notably less so than in the summer of 2020. More important in 2021 were reassurances that there would be a range of places open and available to visit, including options for eating and drinking out.

These findings highlight the key messages the industry needs to emphasise this year to convince any wavering potential staycationers that a Scottish holiday is worthwhile. They also highlight that there needs to be a greater emphasis on places being open and available in 2021 than was the case in 2020

So, in summary, most Scots are open minded to taking a Scottish holiday in 2021 – only 28% are rejecting the notion entirely. However, the vast majority of them are in the seriously considering/might do so category rather than actively planning or booking – and almost half of Scots are not confident it will be possible. This illustrates the precarious nature of what may lie ahead – much will depend on the extent to which the tourism economy can open up, and when this happens.

### The anatomy of the Scottish staycation in 2021:

So what might holidays taken by Scots in Scotland this year look like?

- **WHEN?** Although 9% anticipate taking a holiday before the end of May and a further 8% in June, most are thinking about the third quarter - around half (51%) are expected to be in the July-September period. 14% are expecting it will be October onwards, however the uncertainties of what will be possible means that 18% simply do not know at this stage.
- **WHERE?** The Highlands is the most popular proposed destination - by some distance, with over half of Scots who are considering a break this year planning to visit this area. That said, the appeal of visiting Edinburgh and Glasgow is slightly higher in 2021 than was the case last year – perhaps offering rather more hope for these cities than was the case a year ago.
- **ACCOMMODATION:** The importance of staying in accommodation which offers a degree of safety and independence is reflected in the popularity of self-catering

with 47% intending to stay in this type of accommodation in 2021. Small hotels were likely to be used by 44%, guesthouses/B&Bs by 33% and large hotels by 30%. However, this masks a clear story of movement in accommodation preferences compared to pre-COVID times. Self-catering in particular has much greater appeal (+25% swing) as do campervans (+11%). Conversely, there is a negative shift in appeal of hostels and bunkhouses (-28%), large hotels (-13%), and guesthouses/B&Bs (-9%).

- **THINGS TO DO:** The choice of things to do on holiday continues the trends of 2020 with moves towards outdoor spaces as opposed to indoor activities. 33% are more likely to consider visiting the natural outdoors on a Scottish holiday post-COVID-19, and a similar percentage are more likely to seek rest and relaxation. More active pursuits such as walking and cycling are also more popular with +26% appeal.
- **EATING OUT ON HOLIDAY:** There is a reticence amongst potential Scots holidaymakers to eat out whilst away with a net swing compared to pre-Pandemic of -13%. Instead, Scots are more likely to buy takeaways (+15% swing) or especially to buy groceries and cook in their holiday accommodation (+31%). It is clear that further incentive will be required to encourage people to eat out – perhaps a remodelled, Government funded ‘Eat Out to Help Out’ scheme.

### The views of local communities about the return of tourism:

Last year, we were keen to establish how people living in local communities felt about the prospect of the re-opening of tourism and the potential influx of visitors to their communities. We saw a regionalisation of views with those living in the more rural areas the most likely to be negative. This year, although a degree of reticence remains (23% would at most only want small numbers of visitors), there is a more relaxed attitude towards visitors generally with almost half (48%) comfortable and ready to welcome visitors. This is especially the case in the four main cities and in the Highlands and Islands. The greatest reticence is in the rural south perhaps reflecting proximity to the English border.



# Scots' feelings about travel in general



## HOW SCOTS WERE FEELING ABOUT HOLIDAYS AND TRAVEL IN THE MIDDLE OF THE FIRST LOCKDOWN – EARLY MAY 2020:

In the midst of the first lockdown last year, we saw that Scots had a wide range of feelings about future holiday taking, ranging from fear to travel again to a desire to quickly get back to normal



Back in May 2020, there was 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%) suggested 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.

Almost a year on, and as we (hopefully) emerge from an even tougher winter lockdown, how has the mood of the population changed in terms of travel and holidays.....?



Source: Wave 1 (May 2020) Data



## HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND SHORT BREAKS ALMOST A YEAR LATER – IN MARCH 2021:

Around half of Scots are not really thinking about holidays at the moment although almost three in ten are keen for a holiday in the summer or even sooner

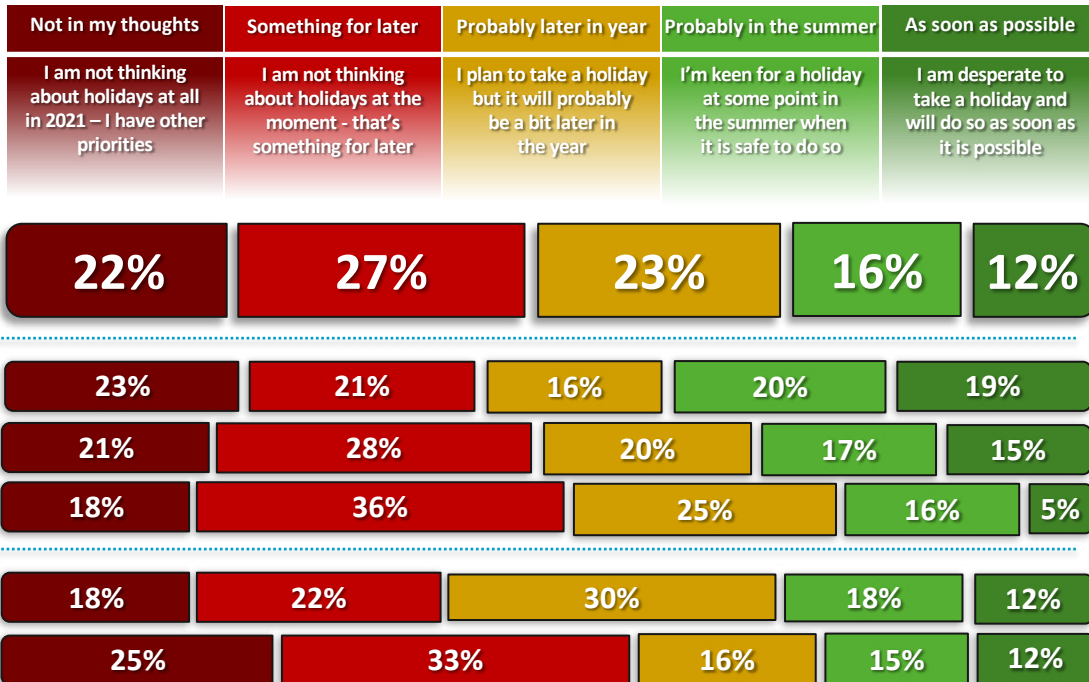


### In mid March 2021, as a roadmap out of lockdown is emerging, how are Scots now feeling about holidays and breaks?

Clearly, COVID-19 has had a continued effect on the appetite for travel amongst the Scottish population, with a broad range of desire for holidays:

- For almost a quarter (22%), holidays are simply not in their thoughts and a further 27% feel that holidays are something to be considered later rather than now. Combining these viewpoints, this is especially the case amongst Empty Nesters, over half of whom feel this way (54%), but is less likely to be the feeling of younger, pre family Scots (44%). There is also a clear socio-economic divide – whereas only 40% of ABC1s feel this way, almost three in five C2DEs are not considering holidays (58%) – almost certainly a reflection of financial considerations.
- Just under a quarter will consider a holiday – but later in the year (23%) – especially the case among ABC1s (30%) and Empty Nesters (25%) – whilst one in six hope to take a holiday when it is deemed safe – hopefully in the summer (16%)
- Whilst one in eight Scots are desperate for a holiday and will take one as soon as they can (12%), this is largely driven by pre-nesters, with around one in five feeling this way (19%)

So, with 28% of Scots keen for a holiday either in the summer or as soon as possible, and 49% not ready to consider one at all, what is driving this?



# When asked why they feel how they do about holidays, there is an emotional ‘tug-of-war’ between a desire to stay safe on one side and a need for travel on the other

Clearly, most Scots fall into one of three broad groups when it comes to holiday considerations at the moment – but what is driving these feelings?

- Amongst the half of Scots for whom holidays are not in their thoughts/something for later, the largest proportions talk about concerns over safety and that there is still too much risk of transmission to consider holidays (25%). They feel that it is too soon and not a priority and that levels of uncertainty are too high. Significantly, the economic impacts of COVID-19 are also playing a part for some.
- Amongst the 23% who would consider a holiday but not until later in the year, the reasons are similar – although the timing issues are more significant – almost a third of them are keen to take a holiday but not until things have settled down. The vaccine rollout provides this group with hope – but it’s a hope that will bear fruit later in the year when restrictions are more likely to be lowered.
- Just under three in ten Scots are keen for a holiday as soon as possible – and certainly in the summer, and this is governed by a ‘need’ to travel and get away and to escape from the difficulties of the last 12 months – 4 in 10 of this group provided this reason. Some also wanted to travel soon to see family and mention was also made of the need for relaxation and mental health considerations.

## Holidays not in my thoughts / Something for later 49% of Scots

Doesn't yet feel safe/ too much risk of transmission	25%
Its too soon/prefer to wait until things settle down	14%
Not a priority/ no plans	13%
Too much uncertainty/ ambiguity	11%
Can't afford to/ too expensive	11%

*“I have no confidence as yet to feel safe travelling or visiting another country despite being vaccinated.”*

*“We don't know for definite that it will be safe to travel. Even if it is safe with the increase of people travelling the chance of another spike is greater.”*

*“I'm not confident it will be safe to take a holiday this year even when we have had the vaccine, I still think there could be a further lock down around summer.”*

*“As I am not working at the moment my priorities are finding a job - holidays are not a priority.”*

## Holidays considered but probably later in year 23% of Scots

Its too soon/prefer to wait until things settle down	31%
Doesn't yet feel safe/ too much risk of transmission	18%
The vaccine rollout provides confidence	17%
Need to wait until lowered restrictions	14%
Can't afford to/ too expensive	7%

*“I am not keen to join a stampede of people who want to go on holiday. I will assess the risk of travelling by different means and decide how and where to travel when I decide the risk is worth taking.”*

*“Summer is too soon, situation could change rapidly again but hopefully will have calmed down in more places later in year with more vaccines.”*

*“Won't consider holiday until later, more people vaccinated, rates very low.”*

## Want a holiday as soon as possible / In the Summer 28% of Scots

Need to get away/escape/deserve a holiday	44%
Need to travel to see family	11%
Need holidays for mental health/ to relax	8%
Will only consider domestic holidays for now	6%
The vaccine rollout provides confidence	5%

*“I haven't had a break since September 2019 and am so exhausted having worked the whole way through the pandemic and never being able to relax or blow off steam. A break is a priority.”*

*“I need to get out my house as live alone and feels like a prison. I need a break ASAP”*

*“Because I enjoy travelling - I usually travel often and have missed doing it since the pandemic started. It will be nice to get a change of scene too.”*

## HOW SCOTS ARE FEELING ABOUT THEIR PERSONAL FINANCES IN MARCH 2021:

Over a third of Scots' finances have been significantly impacted by COVID-19 – a consistent proportion over the last year which undoubtedly impacts on holiday considerations

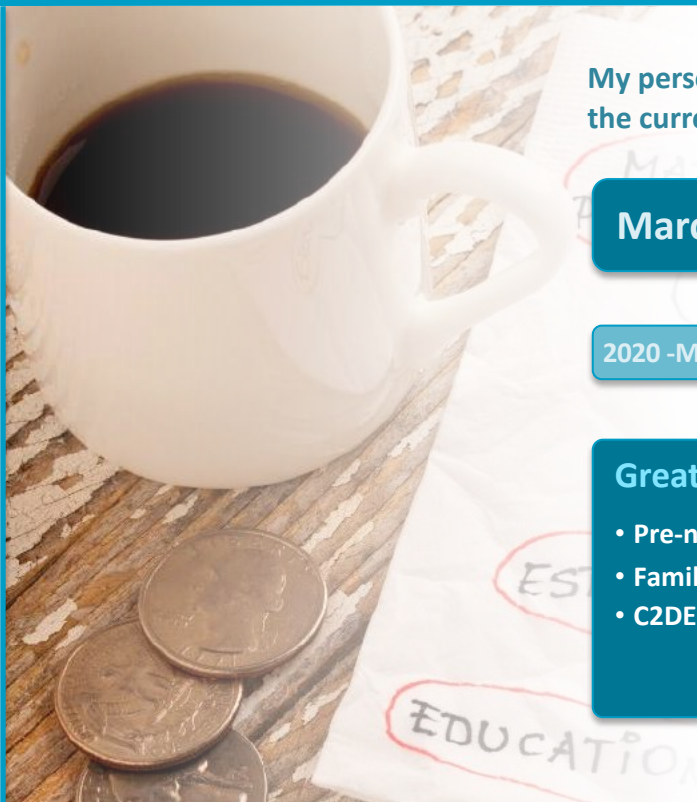
One of the key determinants of holidays and travel for any individual is financial – and we have tracked the impacts of COVID-19 on the pockets of Scots during each wave of the Scottish Tourism Index

In May and June last year, around a third of Scots claimed that their personal finances had been impacted significantly by the COVID-19 restrictions (33% each month). In August, as the furlough scheme initially came to an end and Government support started to be removed, this proportion had increased to 35%.

By March 2021, the proportion affected remains similar – 34% - but its impacts vary across different groups:

- Most likely to have been impacted are pre-nesters (47%), families (43%) and C2DEs (39%).
- On the other hand, smaller proportions of Empty Nesters and ABC1s have suffered significant financial hardship (21% and 28% respectively)

Financial impacts will definitely impact on potential travel in 2021 – with over a third of Scots impacted, we can expect a reduction in demand for holidays generally for this reason alone.



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

March 2021: **34%** in agreement

2020 -May: **33%** June: **33%** August: **35%** in agreement

**Greatest impact on:**

- Pre-nesters (47%)
- Families (43%)
- C2DEs (39%)

**Least Impact on:**

- Empty Nesters (21%)
- ABC1s (28%)

## HOW SCOTS ARE FEELING ABOUT AIR TRAVEL IN 2021:

# Scots' worries about air travel in 2020 have continued into 2021 with almost three quarters unlikely to consider flying to a holiday destination this year



A dampening in desire for air travel has been a feature of Scots opinion during the pandemic. This is undoubtedly going to be a continued feature of travel in 2021 – even when international travel becomes possible again

In June 2020, seven in ten Scots were unwilling to travel by air that year. When asked more specifically in July about travelling by air for holidays or breaks in 2020, this proportion increased to over three quarters of Scots (78%). In August we asked Scots how they felt about travelling by air for a holiday in 2021. Concerns about travelling in this way showed no early signs of abating (even at a point when things were looking more promising around transmissions) – 3 in 5 Scots (60%) said they were unlikely to consider a holiday which involved going on a plane in 2021.

And in March this year, almost three quarters of Scots are unlikely to take a holiday which requires a flight in 2021 (72%) illustrating that the recovery for the air sector is a long way off. Particularly reticent are C2DEs (where financial considerations are also likely to be at play), families and empty nesters.

Clearly, the travel and holiday behaviours of Scots are very unlikely to be back to anything close to normal with a majority rejecting air travel. We examine this further when we look at the appeal of different destinations at home and abroad in the next section



## HOW SCOTS ARE FEELING ABOUT OTHER TOPICAL TRAVEL ISSUES, MARCH 2021:

A clear barrier to air travel abroad is the in-hotel, paid isolation required on return – 90% would reject a holiday for that reason, however there is support for the introduction of vaccine passports



With increasing fears of the introduction of new variants of the virus from overseas, the Scottish Government recently introduced the requirement to self-isolate in airport hotels at a cost of £1,750 for all returning passengers from overseas

If this was to remain in place as a requirement when holiday travel abroad becomes possible again, it would have a marked impact in dampening any enthusiasm for overseas holidays – 90% of Scots would not be willing to take an overseas holiday because of such a requirement.

Vaccine passports have been mooted as a mechanism which could be introduced to enable the opening up of travel, events and larger gatherings. Interestingly, around 4 in 5 Scots would be supportive – especially empty nesters (86%), though it has less appeal among pre-nesters (69%).



Due to the requirement to isolate in a hotel for 10 days at a cost of £1,750 on return, I am very unlikely to take a holiday abroad this year

March 2021: **90%** in agreement

I support the introduction of Vaccine Passports which provide proof you have been vaccinated against Coronavirus to allow people to travel or attend large events

March 2021: **78%** in agreement





# The desirability of different destinations



## What is the Tourism Desirability Score?

The 'Tourism Desirability Score' is a measure of the relative appeal amongst Scots of holiday trips in Scotland, elsewhere in Britain or overseas, to a range of different environmental locations.

The focus is on 'aspirations' – where Scots will go first when it becomes possible again. We asked these questions in May and June 2020 – during the first lockdown and have repeated the same questions in March 2021:

- 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 when tourism becomes possible again) to 10 (Extremely likely to be the type of trip I would consider as soon as it is feasible).
- Across the three waves, 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.





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

# Scots' desire for short breaks or holidays in Scotland when lockdown restrictions permit has increased slightly on those recorded in the first lockdown last year



With an Index of 61/100, Scots' desire for a home holiday is at a slightly higher level than in May and June last year (59 and 58 respectively):

- Highest appeal remains for overnight trips to the Scottish countryside with a desirability score of 65/100 – three points ahead of last year
- Holidays and Breaks to the Scottish coast and seaside are very close behind in terms of desirability at 64/100, five points ahead of 2020
- As previously, the appeal of overnight breaks to Scottish towns and cities is lower at 57/100 – similar to the level recorded in May last year.

The prospects for overnight trips in Scotland once lockdown restrictions are lifted looks very strong this year – driven once more by interest in visiting the coast and countryside in particular.







## TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN SCOTLAND – VARIATIONS BY LIFESTAGE:

These levels of desire for Scottish holidays are mainly driven by pre-nesters and families, both with desirability scores significantly ahead of empty nesters



There are some key variations in the desirability scores for different types of Scottish holiday amongst the three lifestyle groups:

- Pre-Nesters have the highest overall levels of desire (69/100) driven especially by the appeal of rural/countryside holidays, just ahead of coastal trips. City breaks are however, not far behind (66)
- Families also have high Scottish holiday desire (68/100), but with seaside/coast edging out rural holidays (71) and further ahead of city breaks (61)
- Empty Nesters have the lowest desire for a home holiday (56/100) and this index is driven down by the lowest levels of interest in city breaks (49).

As we'll see in the next section, these scores translate into large proportions of Scots considering home holidays this year – especially amongst families and pre-nesters.





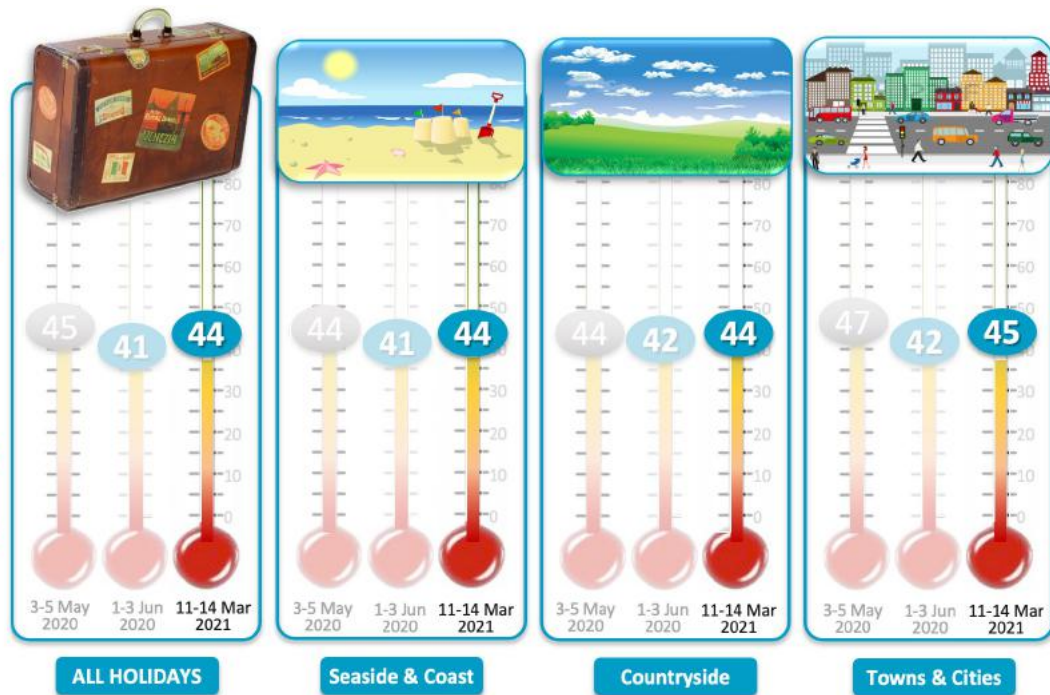
## TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN ENGLAND AND WALES:

# An interest in short breaks and holidays in England and Wales is much lower among Scots, though perhaps marginally ahead of June 2020



The appeal of holidays and short breaks outside of Scotland to either England or Wales is much lower – at around 70% of the level of desire for Scottish holidays (44/100):

- All destination types have similar levels of desire at 44-45/100 with city breaks marginally of highest appeal.
- The desirability scores are slightly ahead of those recorded in June 2020 by around 2-3 points, but very close to the levels recorded in May 2020





## TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS OVERSEAS:

The desire to travel overseas for holidays and breaks is lower still – and below the levels recorded during lockdown in 2020



In May and June 2020, we asked Scots about their desire to take overseas trips and the appeal was just below that for other parts of the UK.

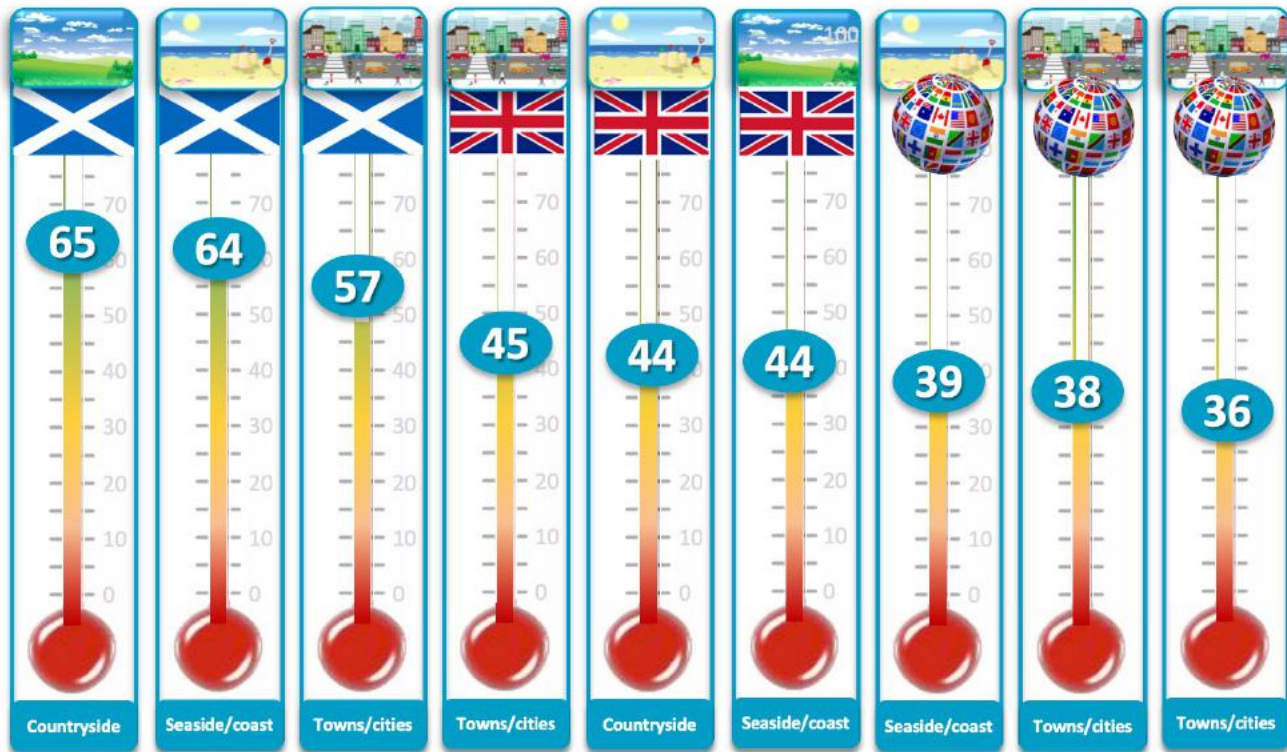
Repeating these questions in March 2021, the appeal of overseas holidays is lower still – now six points below England/Wales and 23 points below Scotland:

- Overseas city breaks (38/100) and beach holidays (39/100) are marginally more appealing than overseas countryside trips (36/100)
- As we saw earlier, the limited desire for air travel and the need for paid self-quarantine means that for the vast majority of Scots, overseas holidays in 2021 are not an appealing or likely option. This appeal has undoubtedly decreased further from 2020.



**TOURISM DESIRABILITY SCORE**

In Summary.....the relative appeal of a staycation in Scotland in 2021 is clear, relative to the lower levels of interest in trips to other parts of the UK or overseas.



## LIKELIHOOD TO VISIT DIFFERENT DESTINATIONS IN 2021:

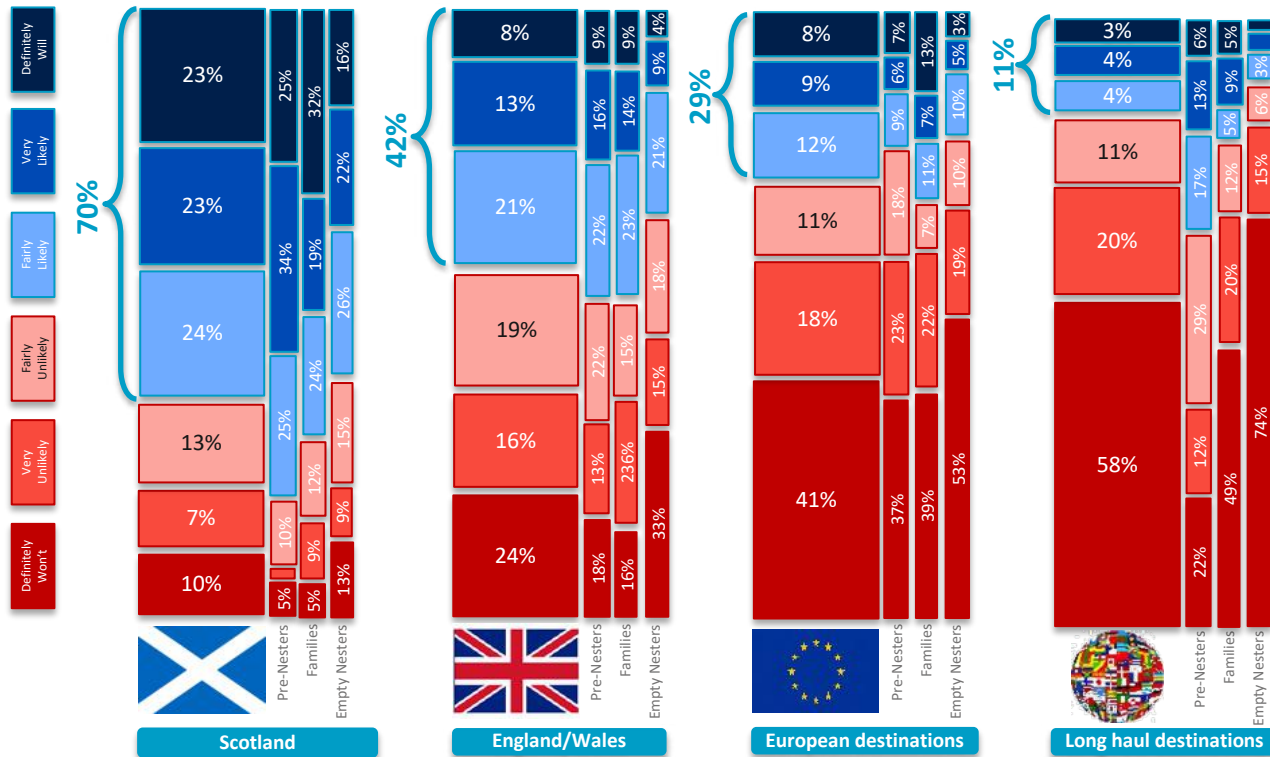
Scotland is clearly the most likely destination for most Scots' holidays this year – 46% are either definite or very likely to take a home holiday and a further 24% are fairly likely to do so



Despite the obvious uncertainties for the rest of the year, there are some clear patterns emerging about the likely destinations of any holidays by Scots in 2021:

- 46% of Scots are very likely or definite about taking a home holiday this year – and a further 24% are fairly likely – 7 in 10 Scots overall. This compares with around two in five likely to go elsewhere in the UK (42%), three in ten into Europe (29%) and 11% further afield.
- Of course, there are major variations by lifecycle group. In terms of Scotland as a destination, families are most definite about taking a Scottish holiday in 2021 (32%) although a larger proportion of pre-nesters overall are 'likely' to take a holiday in Scotland.
- For empty nesters, reticence over taking holidays generally is clear – although four in ten are definitely or very likely to take a holiday in Scotland this year.

This all does suggest that the impacts of COVID in encouraging more Scots to consider a home holiday last year, is very likely to continue in 2021 if and when the tourism industry is able to re-open.



## WHICH OVERSEAS DESTINATIONS DO SCOTS HOPE TO VISIT AT SOME POINT IN 2021?:

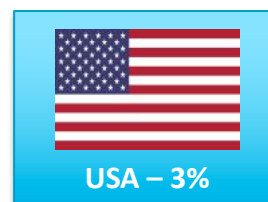
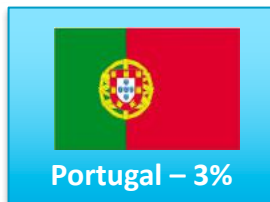
Amongst those 30% of Scots who claim to be likely to take an overseas holiday at some point in 2021, Spain is the most popular destination followed by France, Greece and Italy



Spain has traditionally been the most popular overseas holiday destination amongst Scots for many years. Whilst most Scots appear resigned to not taking a foreign holiday in 2021, amongst those who claim to be likely to do so, Spain is, by some distance, the most likely destination – 16% of Scots claim to be likely to visit on holiday this year.

The other countries most likely to be mentioned for potential holidays are France (7%), Greece (6%) and Italy (4%).

All of the analysis thus far has shown however that in terms of 2021 holidays, most Scots' horizons are quite narrow and holidays, or staycations at home in Scotland seem most likely. The next section of our report looks at the potential scale of 2021 staycations, and what is important to those considering such breaks





# Scottish staycation prospects for 2021



## THE POTENTIAL SCALE OF SCOTTISH STAYCATIONS IN 2021 – PENETRATION WITHIN THE POPULATION:

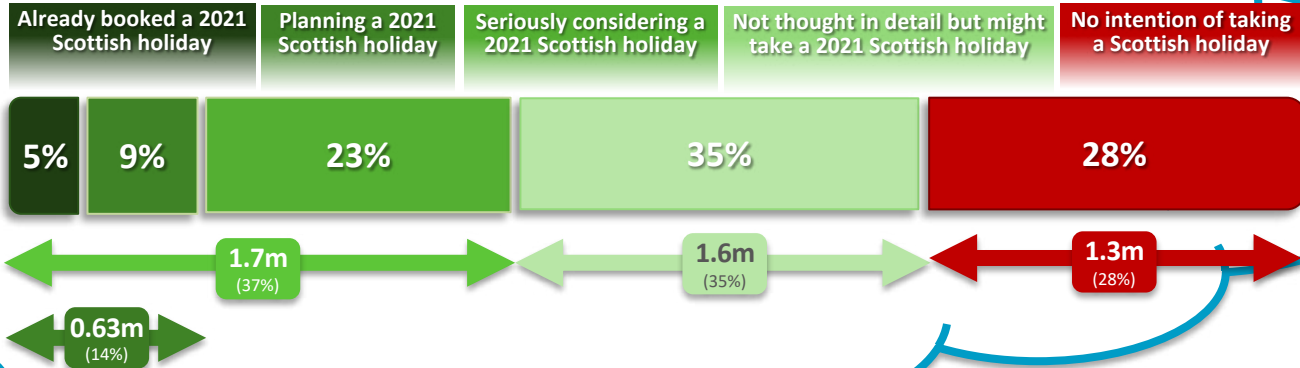
Just under 4 in 10 Scots are seriously considering, planning or have booked a 2021 Scottish holiday – but a further 35% of Scots might be persuaded – 3.2 million adults in total



Whilst 28% of Scots have completely ruled out a staycation this year, the uncertainty of what will be possible this year means that only a small proportion of Scots have already booked a 2021 staycation (5%). With 9% planning a Scottish holiday and a further 23% seriously considering one, this amounts to around 1.7 million Scots who are far down the purchase funnel. Also, 67% of non-rejectors of a Scottish holiday this year are only thinking of a holiday in Scotland because of the complications and likely restrictions on foreign travel.

Until holidays are booked however, there remains uncertainty – with only just over 600,000 having already booked or actively planning a trip. A large proportion of Scots – over a third of adults – have not yet considered in detail – but claim that they MIGHT take a Scottish holiday this year. Accounting for 1.6 million people, this is a large battleground where marketing needs to highlight and focus on the opportunities and benefits of a home holiday.

### A Scottish holiday in 2021....?





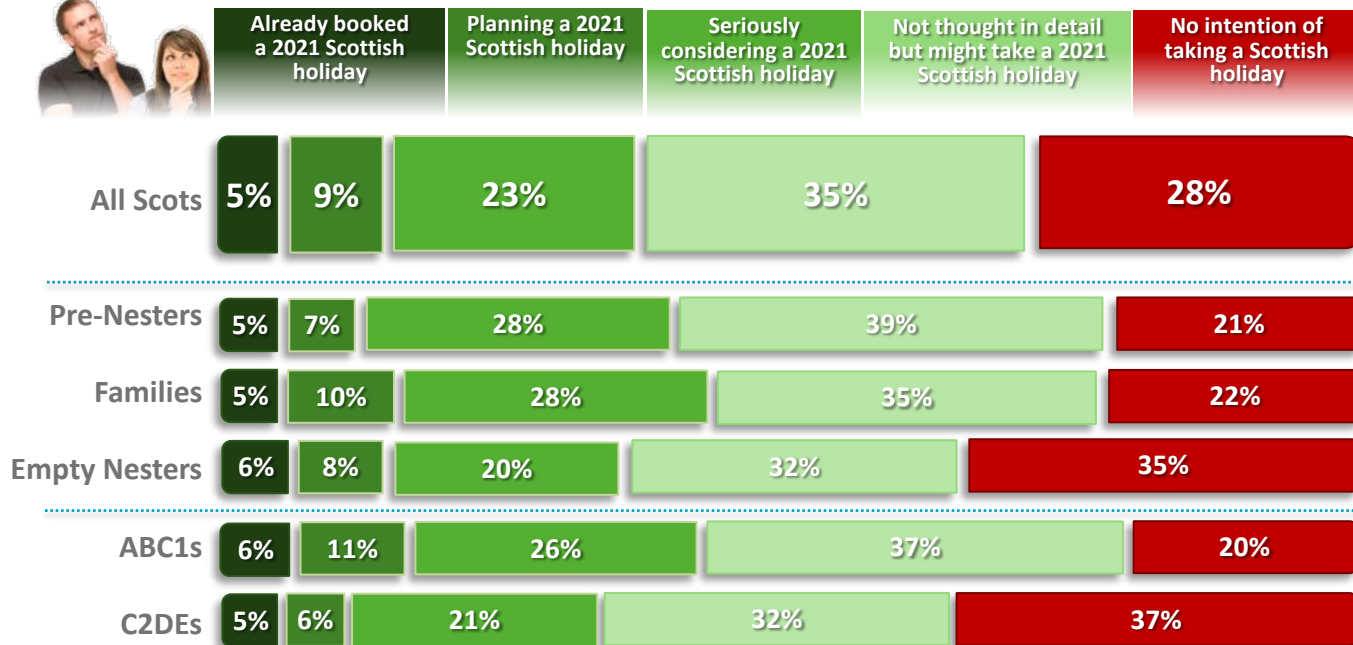
## THE POTENTIAL SCALE OF SCOTTISH STAYCATIONS IN 2021 – VARIATIONS BY DEMOGRAPHICS:

Families and ABC1s are most likely to have booked, planned or be seriously considering a Scottish holiday in 2021 – slightly ahead of pre-nesters and significantly more likely than empty nesters.



There are some demographic variations in terms of which groups are more likely to be considering a Scottish holiday this year than others:

- Lifecycle: Families are most likely to be seriously considering, actively planning or already booked a Scottish holiday in 2021 (43%), just ahead of pre-nesters (40%). Both of these lifestyle groups are above the overall average – and significantly more likely to be planning a staycation than empty nesters (34%). This latter group are also most likely to be rejecting a Scottish holiday outright (35%).
- Affluence: ABC1s are more likely to be considering, planning or have booked a 2021 holiday in Scotland than C2DEs (42% vs 31%) – a reflection of money available at a time when many finances are extremely tight as a consequence of COVID-19 impacts.
- In terms of those unsure at the moment but not yet ruling out a Scottish holiday (35%) overall, this proportion is higher among pre-nesters (39%) and ABC1s (37%)



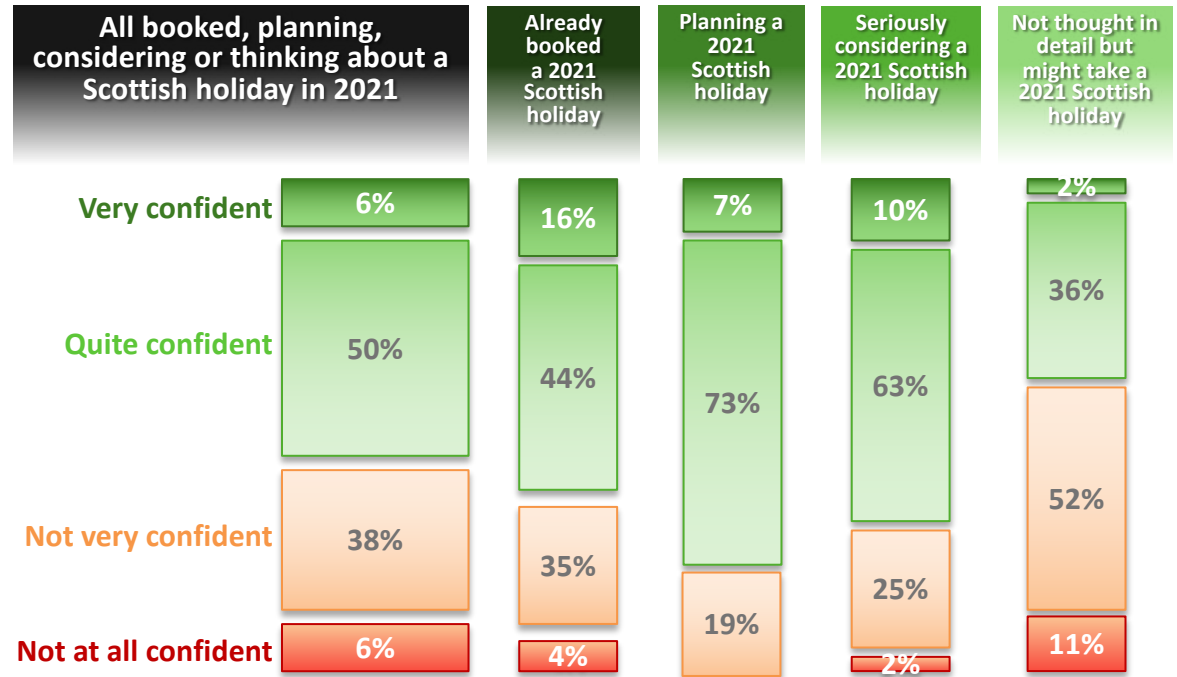
## LEVELS OF CONFIDENCE THAT THEY WILL BE ABLE TO TAKE A SCOTTISH HOLIDAY IN 2021:

Amongst the 7 in 10 Scots who have booked, are planning, seriously considering or even just thinking about a 2021 staycation, just over half of them are confident that the holiday will be possible (56%)



### There are variations in levels of confidence that a Scottish holiday will be possible reflecting the stage of decision-making

- Those who have already booked: although 6 in 10 are confident they will be able to take the break – and 16% are ‘very confident’, the remaining 40% are less confident – perhaps reflecting the fact some of these holidays coming up in the very near future around Easter when tourism is unlikely to have been re-opened
- Most confident are those who are at the planning stage – they have the benefit of still being able to choose their timing, and as a result, 8 in 10 feel confident it will go ahead.
- Those who MIGHT take a Scottish holiday in 2021 are clearly ‘hedging their bets’ at the moment – the majority of them are not confident it will be possible (63%)



## WHAT'S IMPORTANT ON A SCOTTISH HOLIDAY IN 2021?

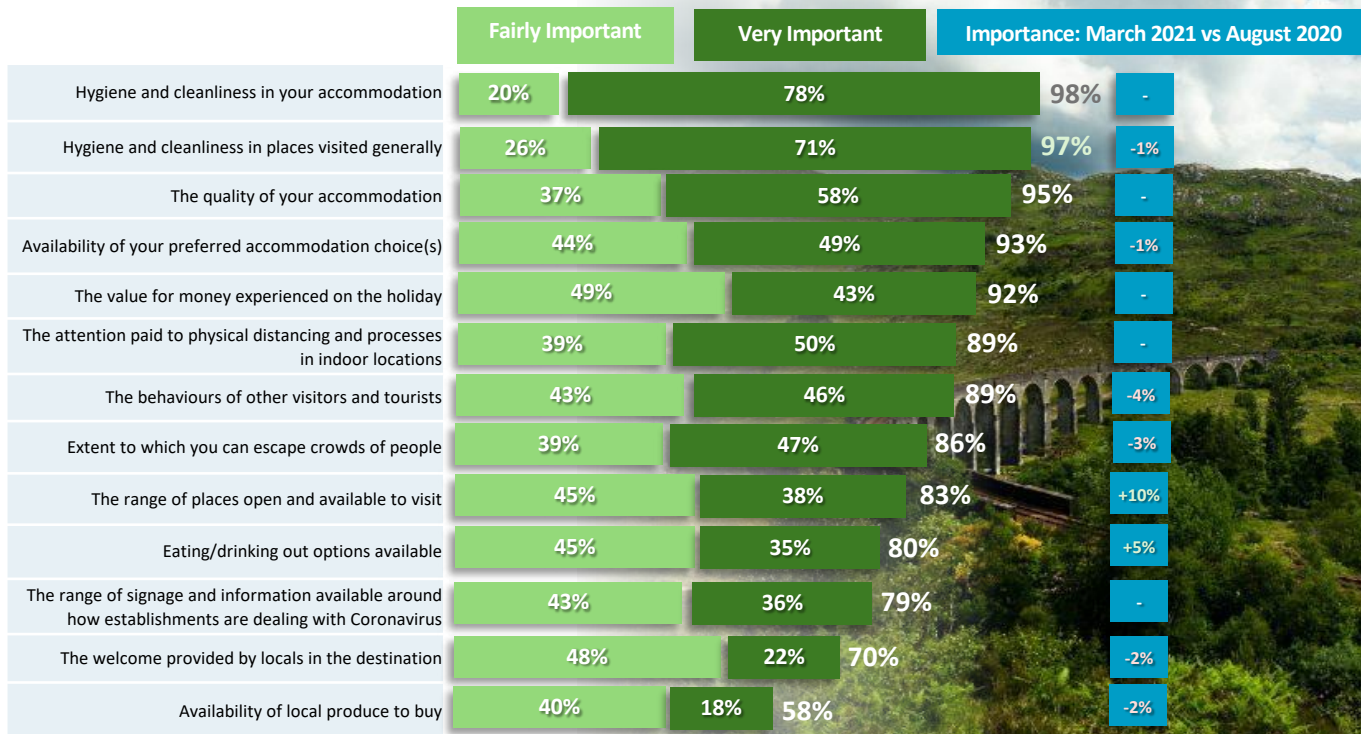
# Hygiene and cleanliness top the list as the most important factors to be adequately addressed on a Scottish staycation in 2021– a similar response for 2020 holidays last August



Those Scots who had booked, were planning, considering or thinking about a staycation this year were asked to rate the importance of a range of factors if they were to take a 2021 Scottish staycation:

- The importance of high standards of hygiene and cleanliness generally – but especially in accommodation is clear with around three-quarters describing this as very important
- Accommodation considerations – quality and availability of preferred types were also of high importance to around half
- Mitigations to aid social distancing, being able to escape crowds and the behaviour of other tourists were also important – but notably less so than in 2020
- More important in 2021 than in the summer of last year were reassurances that there would be a range of places open and available to visit, including options for eating and drinking out

**These findings highlight the key messages the industry needs to emphasise this year to convince any wavering potential staycationers that a Scottish holiday is worthwhile. They also highlight that there needs to be a greater emphasis on places being open and available in 2021 than was the case in 2020**



## HOW SCOTS ARE FEELING ABOUT OTHER ASPECTS OF A SCOTTISH STAYCATION, MARCH 2021:

As in 2020, many Scots are keen to lend their support to the tourism industry by booking a holiday as soon as they can – and three quarters would happily go ‘off the beaten track’



2021 will undoubtedly be another extremely difficult year for the Scottish tourism industry, therefore it is heartening that Scots are keen to support tourism businesses as much as possible – two thirds saying they will take a holiday in Scotland as soon as it’s possible, similar to the levels recorded in June 2020. But with social distancing in mind, there remains a desire to avoid crowds as far as possible – and three quarters would be willing to visit places off the beaten track than the more traditional ‘honeypot’ sites. It represents a slightly lower percentage than that recorded in June 2020 however (82%), perhaps reflecting the need for a balance of sufficient places being open as described previously vs. complete solitude.

So, in summary, most Scots are open minded to taking a Scottish holiday in 2021 – only 28% are rejecting the notion entirely. However, the vast majority of them are in the seriously considering/might do so category rather than actively planning or booking – and almost half of Scots are not confident it will be possible. This illustrates the precarious nature of what may lie ahead – much will depend on the extent to which the tourism economy can open up, and when this happens.

And we have seen the messaging that will be required to help ‘sell’ the appeal of a Scottish holiday – reassurances around hygiene and cleanliness and that places will be open as well as key messaging around value for money and accommodation availability and quality.

In the next section, we examine the likely characteristics of a Scottish staycation in 2021.



I am keen to support the Scottish tourism economy this year by taking a holiday/break in Scotland as soon as it becomes possible

March 2021: **66%** in agreement  
(June 2020 – 68% in agreement)

I’d be willing to visit places off the beaten track in Scotland which might be a bit quieter rather than the more obvious places I’d traditionally visit

March 2021: **76%** in agreement  
(June 2020 – 82% in agreement)





# The anatomy of Scottish staycations in 2021



## THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021 – WHEN SCOTTISH BREAKS MIGHT BE TAKEN:

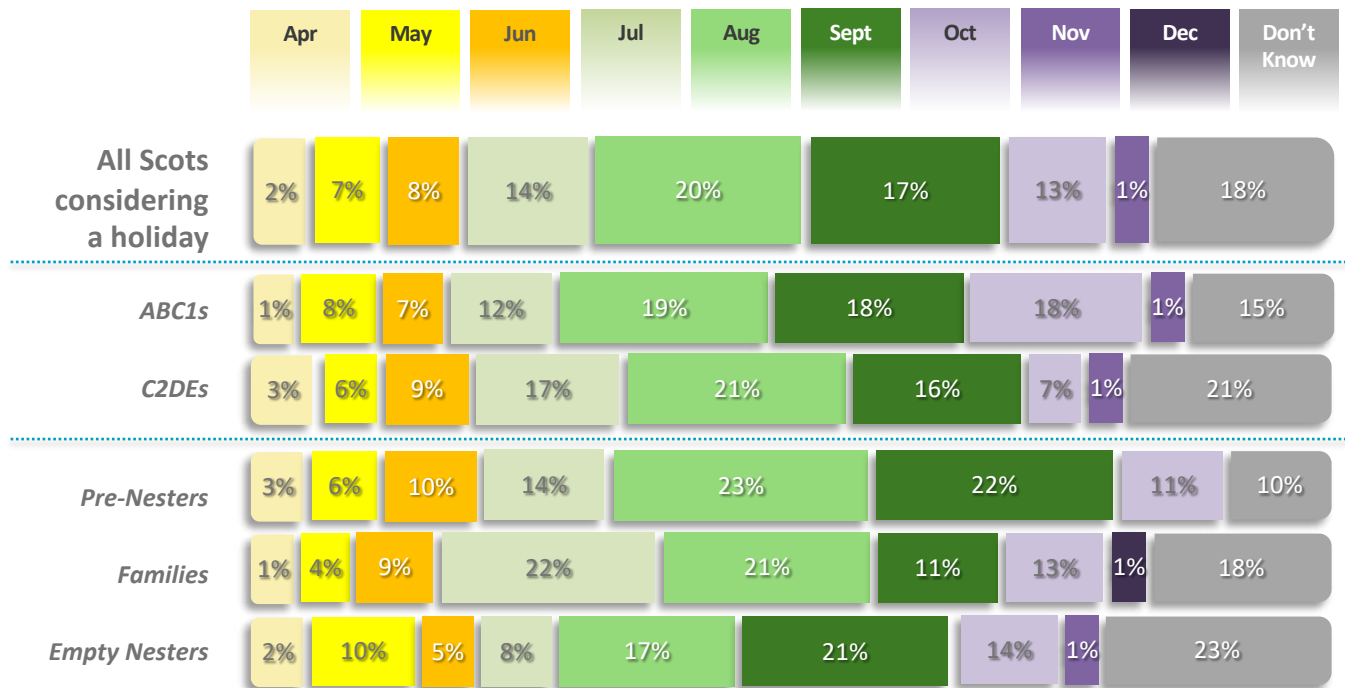


# Although 9% anticipate taking a holiday before the end of May, around half are expected to be in the July-September period

There are variations in when Scots staycations are expected to take place this year by some of the key segments:

- Overall, 17% of trips are expected to be taken before the end of June, 51% between July and the end of September, and 14% in the last quarter. Reflecting the uncertainty however, 18% are unsure when they will take their Scottish holiday
- SEG: C2DEs are less certain about when they will take their holiday than ABC1s (21% vs 15%) although as many as 54% expect to take their holiday in the July-September period. ABC1s are more likely to be looking at an October holiday (18%).
- Lifecycle: Families are most likely to be focusing on a holiday during the school holiday period – 43% in either July or August (34% overall). Pre-nesters are most likely to be looking across the breadth of the year although 59% anticipate taking a holiday in the July-September period. Empty nesters are most likely to be unsure about when they will take their holiday (23%).

It is very early in the season, and with such uncertainty around re-opening, anticipated timings will undoubtedly change, however the appeal of the 3<sup>rd</sup> quarter is clear generally with over half of the holidays expected to be taken then



## THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021 – WHERE THESE HOLIDAYS WILL BE TAKEN

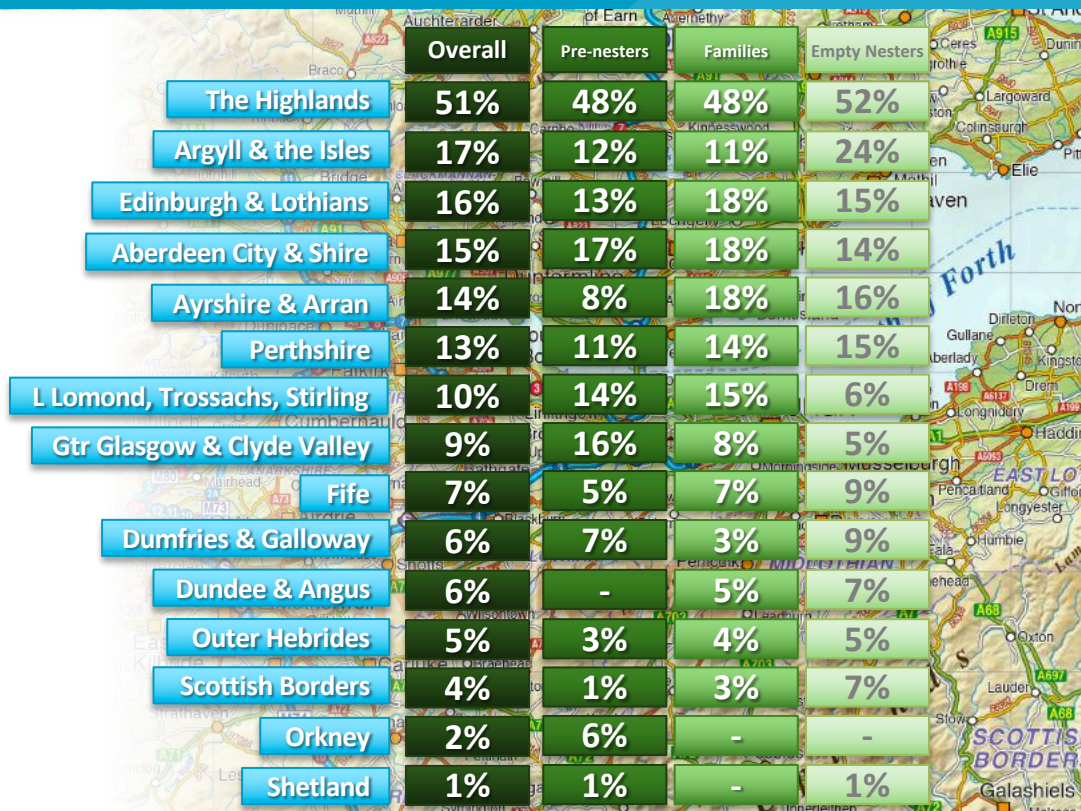
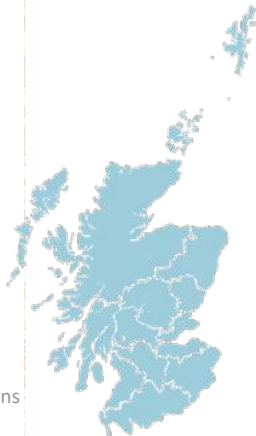
Rural locations hold greatest appeal for Scots holidays in 2021 with the Highlands leading the way, followed by Argyll, Edinburgh & Lothians, Aberdeenshire, Ayrshire & Arran and Perthshire



So which parts of Scotland are most likely to benefit from Scottish staycations during 2021? As we found last year, the Highlands is the most popular proposed destination - by some distance, with over half of Scots who are considering a break this year planning to visit this area. Although the Highlands are consistently the most popular response across all lifestyles, there are variations in the other destinations mentioned:

- Pre-nesters are more likely to mention taking trips to Glasgow and Loch Lomond & the Trossachs
- Families are more likely to anticipate taking holidays in Ayrshire & Arran, Aberdeenshire, Edinburgh & the Lothians and Loch Lomond & the Trossachs
- Empty nesters are generally more likely to mention rural locations – the Highlands, Argyll & the Isles, Ayrshire & Arran, Perthshire, Dumfries and Galloway and the Borders were more likely to be mentioned by this older segment.

As we commented last year, compared with a ‘normal year’, there is undoubtedly greater appeal for rural areas across all of the segments. That said, the appeal of visiting Edinburgh and Glasgow is slightly higher in 2021 than was the case last year – perhaps offering rather more hope for these cities this year.



## THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021: ACCOMMODATION CHOICES

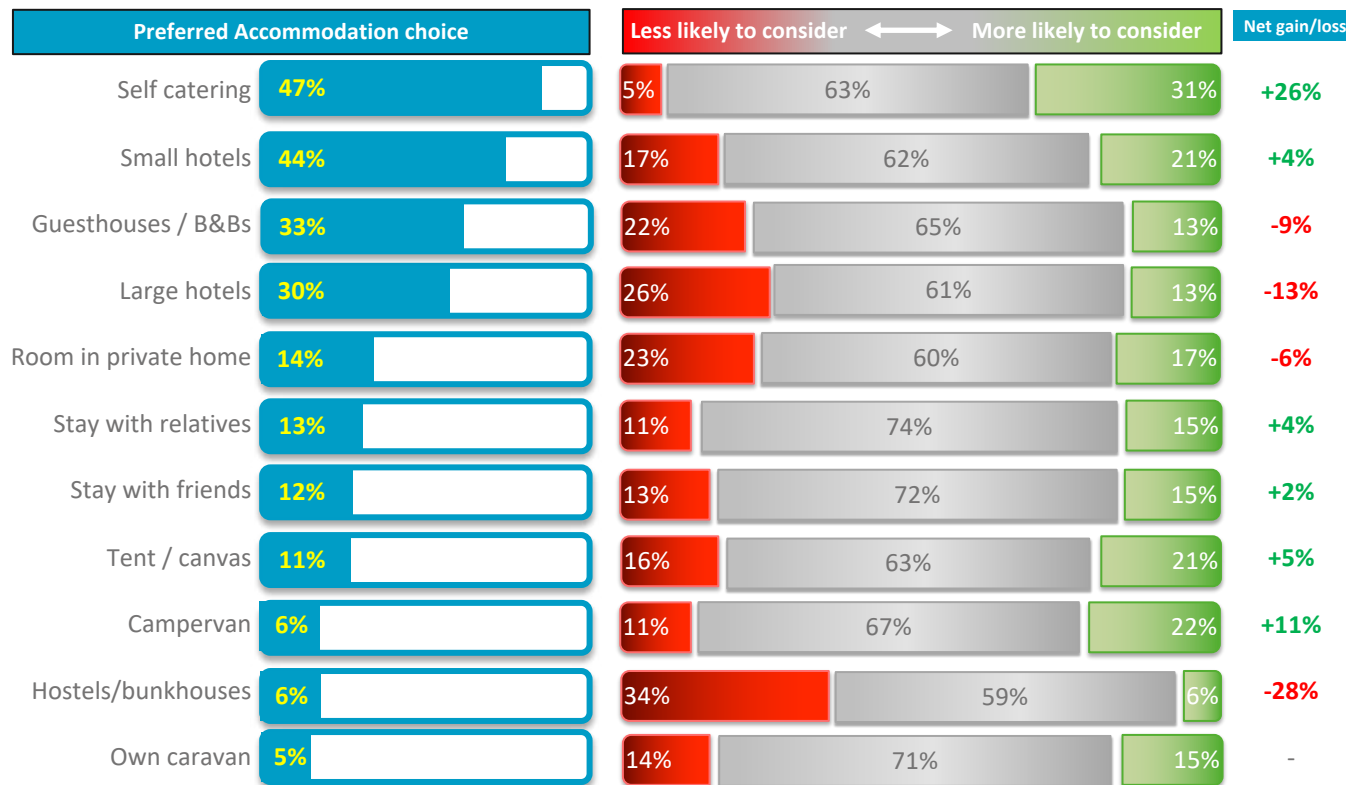
As was the case in 2020, self-catering is the most popular form of accommodation that Scots will choose (47%) with a major swing to self-catering from pre-Pandemic accommodation choices



The importance of staying in accommodation offering a degree of safety and independence is reflected in the popularity of self-catering on anticipated Scottish holidays in 2021 with 47% intending to stay in this type of accommodation:

- Small hotels were likely to be used by 44%, guesthouses/B&Bs by 33% and large hotels by 30% - and all other types of accommodation by less than 15% in each case
- However, these proportions mask a clear story of movement in accommodation preferences compared with pre-COVID. Self-catering in particular now has much greater appeal (+25% swing) as do campervans (+11%), and to a lesser extent tents (+5%), small hotels (+4%) and staying with relatives (+4%).
- Conversely, there is a clear negative shift in appeal for staying in hostels and bunkhouses (-28%), large hotels (-13%), guesthouses/B&Bs (-9%) and rooms in private homes (-6%).

Clearly, the emphasis on taking personal care on cleanliness and hygiene means that there is a natural move away from serviced accommodation to more self-contained units where third party interaction is minimised

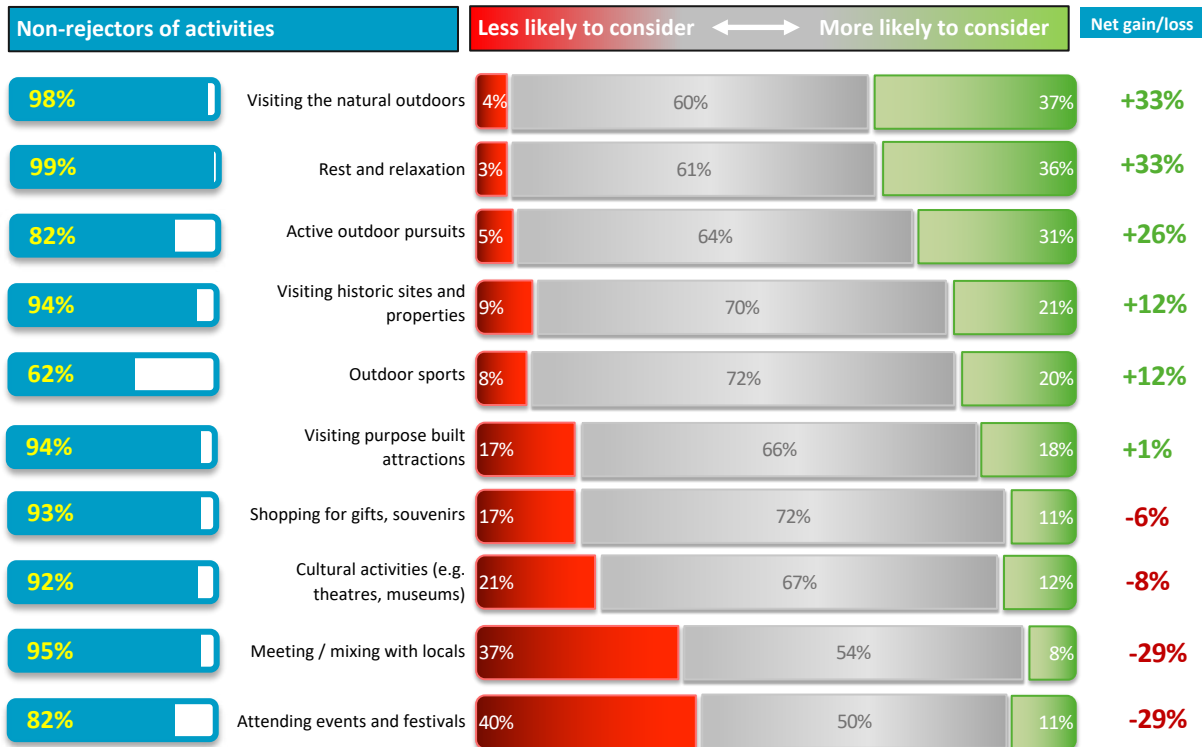




# The natural outdoors, rest and relaxation and outdoor pursuits will have greater appeal on a 2021 Scottish break; events and meeting locals have much reduced appeal

## The choice of things to do on holiday continues the trends we saw in 2020 with moves towards outdoor spaces as opposed to indoor activities

- Some 33% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday post-COVID-19, and a similar percentage are more likely to seek rest and relaxation. More active pursuits such as walking and cycling are also more popular with +26% appeal.
- Indoor activities such as visits to arts and cultural venues and shopping for gifts and souvenirs will have reduced appeal.
- Perhaps reflecting satisfaction with the safety mitigations put in place in 2020, whereas last year visits to purpose built and attractions and to historic properties and sites showed reduced levels of appeal, this has recovered in 2021 to pre-Pandemic levels of appeal or greater (+1% and +12% respectively).
- The big potential 'losers' in post-COVID holidays 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.



## THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021 – EATING AND DRINKING

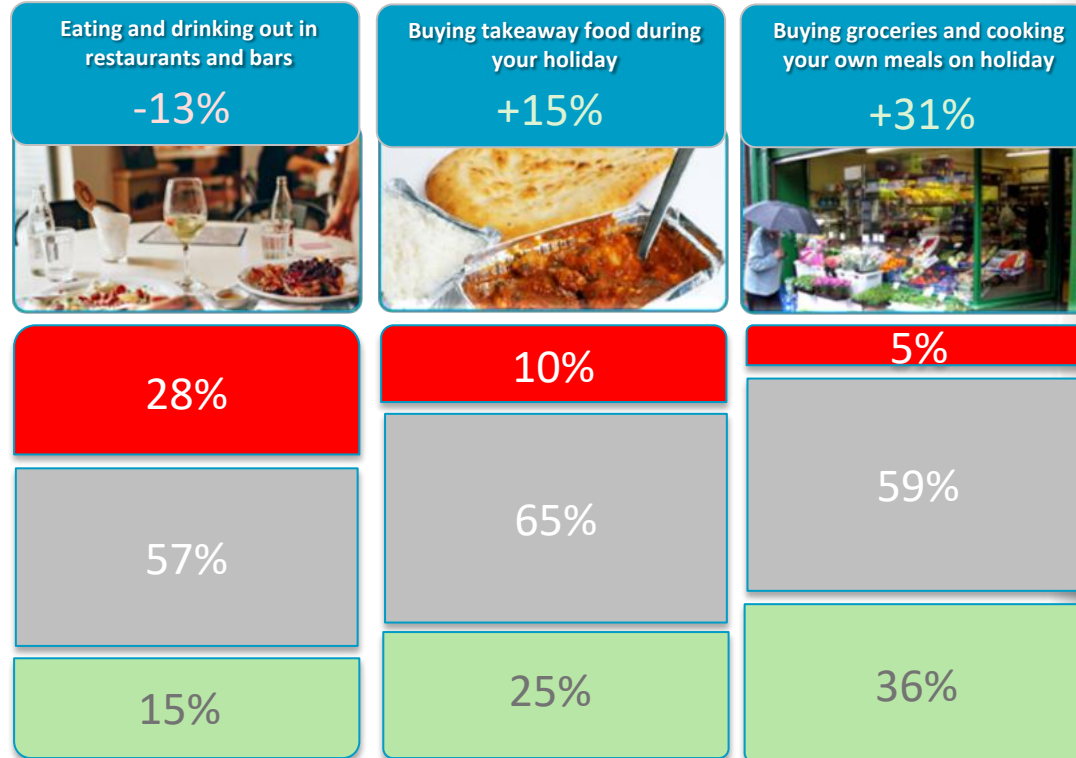
Reflecting the trends we saw in 2020, on a Scottish staycation there is a likely move away from eating in restaurants and bars to cooking at the holiday home and takeaways



Last year, one of the critical concerns expressed by many Scots about holidays revolved around a key activity for many of us on when we take holidays – eating and drinking out in restaurants, pubs and bars:

- ‘Eat Out to Help Out’ was introduced by the UK Government in August 2020 and this undoubtedly provided a boost to the hospitality sector generally – including when people were on holiday.
- However, there remains a reticence amongst potential Scots holidaymakers to eat out whilst away: 28% are less likely to do this than they would have been pre-Pandemic, and although 15% claim to be more likely to do so, this results in a net swing away from eating out of -13%.
- Instead, Scots are more likely to buy takeaways (+15% swing) or especially to buy groceries and cook in their holiday accommodation (+31%) – also reflecting the greater appeal we have seen for self-catering accommodation on a prospective Scottish holiday in 2021.

On the assumption that hospitality does re-open for the tourist season, it would appear clear that further incentive will be required to encourage people to eat out – perhaps a remodelled, Government funded ‘Eat Out to Help Out’ scheme





# Impact on communities



## THE VIEWS OF LOCAL COMMUNITIES ABOUT TOURISM IN 2021:

Although Scots are keen to take holidays at home, a feeling of nervousness about tourists coming into their own communities remains – though less so than in 2020

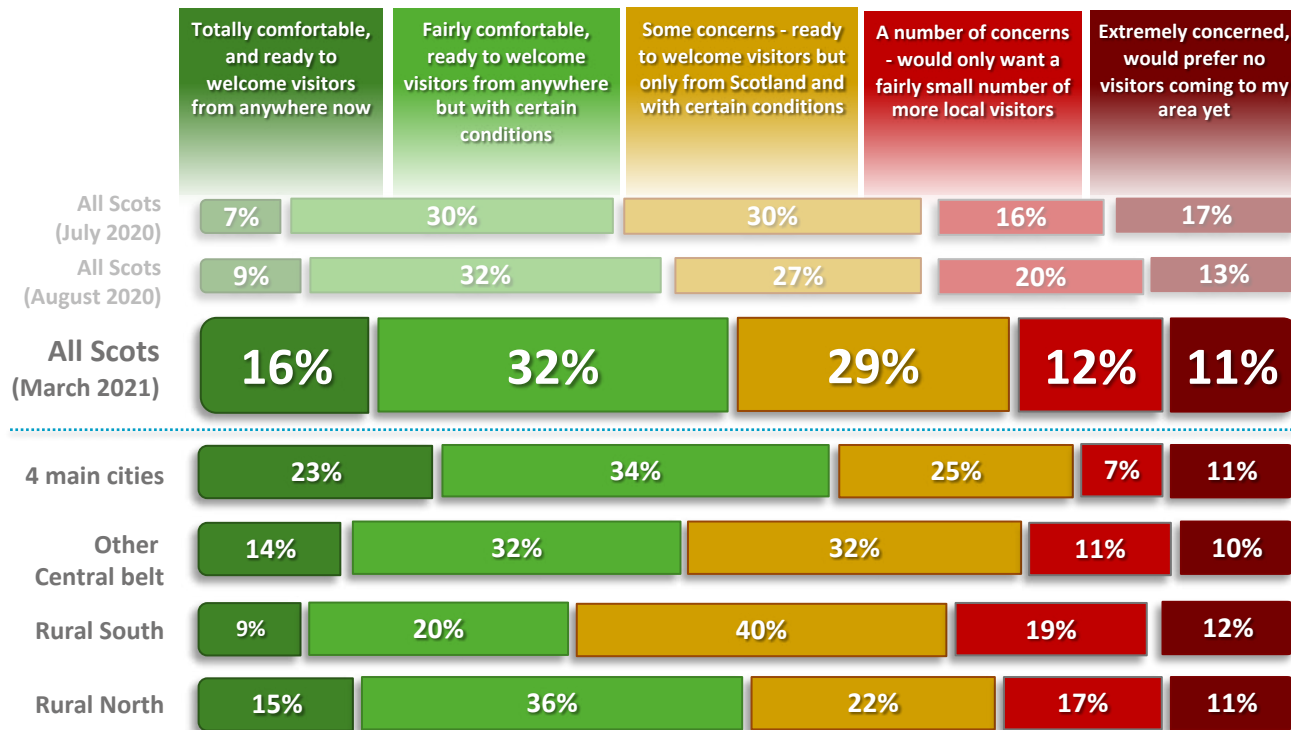


Last year, we were keen to establish how people living in local communities felt about the prospect of the re-opening of tourism and the potential influx of visitors to their communities. We saw a polarisation – and regionalisation of views with those living in the more rural areas the most likely to be negative.

We repeated the question in late August – on the back of over a month of tourism business. Although there remained some polarisation of opinion, a slightly larger proportion in August were comfortable with visitors coming to their areas.

We repeated this question in this most recent wave of research to establish how concerns have shifted in 2021. Interestingly, although a degree of reticence remains (23% would at most only want small numbers of visitors), there is a more relaxed attitude towards visitors generally with almost half (48%) comfortable and ready to welcome visitors.

This is especially the case in the four main cities and in the Highlands and Islands where 57% and 51% respectively are comfortable with the return of visitors. The greatest reticence (as was the case in August) is in the rural south where only 29% are comfortable and 31% have concerns. Perhaps proximity to the English border is one of the factors at play here?





## In Summary.....



# IN SUMMARY.....(1)



**Whilst there is room for some optimism, the latest Scottish Tourism Index demonstrates that there are a number of challenges ahead to ensure home-base holidays (staycations) can provide the tourism industry with the much needed boost it needs in 2021**

- Over a fifth of Scots are simply not thinking about holidays yet (22%) and 27% feel that holidays are something they won't be planning for some time. These groups remained concerned about risks of transmission and would like to wait until the vaccine rollout and declining cases reach a level where they feel completely safe.
- However, the remaining half of the population are more positive about taking a holiday this year – indeed 1 in 8 (12%) are desperate for a holiday and will take one as soon as they can. Members of this group feel they need to travel, to escape from the difficulties of the last 12 months.
- Almost half (46%) of Scots are very likely or definite about taking a home holiday this year – and a further 24% are fairly likely – 7 in 10 Scots overall. This compares with around two in five likely to go elsewhere in the UK (42%), three in ten into Europe (29%) and 11% further afield.
- However the uncertainty of what will be possible this year means that only a small proportion of Scots have already booked a 2021 staycation (5%) while a larger percentage (32%) are just at the planning or consideration stages.
- When asked to rate the importance of a different factors if they were to take a Scottish staycation high standards of hygiene and cleanliness were rated most highly. Mitigations to aid social distancing remain important but notably less so than in the summer of 2020. More important in 2021 were reassurances that there would be a range of places open to visit and where it would be possible to eat and drink.



# IN SUMMARY.....(2)



- While 17% of Scottish staycations are expected to be taken before the end of June, a larger percentage (51%) are expected to take place between July and the end of September, and 14% in the last quarter. Reflecting the uncertainty amongst consumers, 18% of those planning a trip are unsure of when.
- As in 2020, rural locations continue to hold greatest appeal with the Highlands leading the way, followed by Argyll, Edinburgh & Lothians, Aberdeenshire, Ayrshire & Arran and Perthshire.
- Also reflecting demand in 2020, self-catering accommodation continues to be the most popular for holidays planned for 2021 with 47% intending to stay in this type of accommodation. Small hotels are likely to be used by 44%, guesthouses/B&Bs by 33% and large hotels by 30% - and all other types of accommodation by less than 15% in each case.
- Underlying these percentages there are shifts in accommodation preferences compared with pre-COVID. Self-catering in particular now has much greater appeal (+25% swing) as do campervans (+11%).
- In terms of activities undertaken on holidays, 33% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday post-COVID-19, and a similar percentage are more likely to seek rest and relaxation. More active pursuits such as walking and cycling are also more popular with +26% appeal. In contrast indoor activities such as visits to arts and cultural venues and shopping for gifts and souvenirs will still have reduced appeal.
- Considering Scottish community attitudes to the re-opening of tourism, although a degree of reticence remains (23% would at most only want small numbers of visitors), compared to 2020 there is a more relaxed attitude towards visitors generally with almost half (48%) of the population feeling comfortable and ready to welcome visitors.



# Appendix:

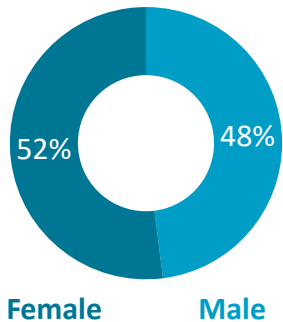
Who did we speak to?



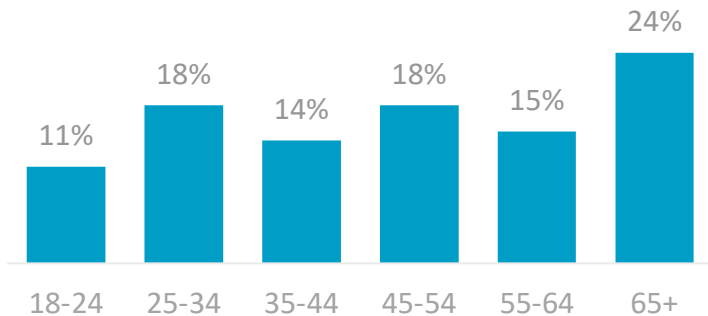


# Who did we speak to?

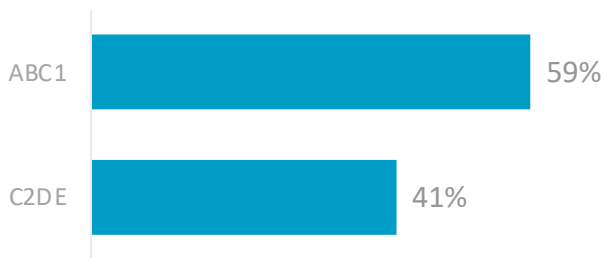
## Gender



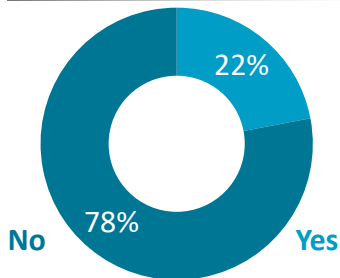
## Age



## 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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