COVID-19 U.K. Consumer Tracking Report: Scotland Level Summary

26th July to 29th August 2021
(Waves 36-38)

Published September 13th 2021
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INTRODUCTION AND METHODOLOGY
INTRODUCTION

• VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a weekly Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the U.K. and abroad, with particular focus around the current barriers and concerns around travel and how these will evolve over time.

• The survey addresses: the likelihood of U.K. residents to travel; when and where they plan to go; specific trip details such as accommodation type and activities undertaken and the type of reassurances they're seeking from the sector.

• The tracker is based on a U.K. nationally representative sample of 1,500 adults aged 16+ with boosts for Scotland and Wales residents to deliver robust weekly samples. The survey has been repeated weekly or fortnightly with the first wave commencing 18th May 2020.

• The findings in this report are based on data from Waves 36-38, with fieldwork taking place during the following dates:
  – Wave 36: 26th July to 1st August
  – Wave 37: 9th August to 15th August
  – Wave 38: 23rd August to 29th August

In some cases, waves 36 and/or 36 have been excluded. This is typically to capture current ‘mood and sentiment’ although in some cases this isn’t possible to do due to small base sizes.
DEFINITIONS USED WITHIN THIS REPORT (1)

The early chapters of this report are ‘forward looking’ and focus on overnight trip intention in the upcoming months. The intention groups are defined as below:

– **UK intenders**: Members of the public who intend to take a U.K. holiday or short break anywhere in the UK
– **Scotland intenders**: Members of the public who intend to take a U.K. holiday or short break in Scotland
– **Scotland resident intenders**: Members of the public who live in Scotland *and* intend to take a U.K. holiday or short break in Scotland

The final chapter of the report looks back at overnight trips taken. The main period used for this chapter is June to August.
To deliver clearer findings, we also profile by life stage. Life stages are preferable to ‘age’ as they better describe someone’s life situation. For the purpose of this report, we have used the following:

- **Pre-nesters**: Aged 16-34 without children in household
- **Families**: Aged 16-64 with children in household
- **Older independents**: Aged 35-64 with no children in household
- **Retirement age**: Aged 65+

We also use ‘social grades’ within this report. Social Grade is a classification system based on occupation and broadly aligns with income. It has been used as a standard within market research for a number of decades to build an understanding of respondents alongside a number of other factors. In this report, social grade should be assessed alongside life stage, financial and attitudinal segments. Broadly, social grades are outlined as below:

- **A** Higher managerial, administrative and professional
- **B** Intermediate managerial, administrative and professional
- **C1** Supervisory, clerical and junior managerial, administrative and professional
- **C2** Skilled manual workers
- **D** Semi-skilled and unskilled manual workers
- **E** State pensioners, casual and lowest grade workers, unemployed with state benefits only
For ease of analysis the following accommodation definitions are used:

- **Hotel/Motel/Inn**
- **Guest house/B&B/Farmhouse**
- **Commercial self-catering**: Rental holiday flat/apartment or Rented holiday home
- **Private home**: Second home/time share or Friends/relative’s home or In someone else’s private home on a commercial basis (e.g., Airbnb)
- **Caravan/Camping/Glamping**: Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
- **Other accommodation**: Hostel or other type of accommodation
This report also includes six attitudinal segments produced to understand how audiences differ attitudinally in relation to COVID-19. These are defined below:

**Cautious but Content**
13% of U.K. Population

The most concerned about catching COVID-19, but generally settled and content with a restrained life-style. Risk, luxury, overnight travel and high-end aspirations do not feature for these steady-state individuals. They will not return to travel until it’s absolutely safe to do so.

**Currently Constrained**
14% of U.K. Population

Worry about catching COVID-19 has brought a temporary halt to trip-taking for these financially confident and ambitious early adopters. They are unlikely to travel until the risk of catching COVID-19 has been significantly reduced.

**Struggling**
22% of U.K. Population

Hit hard by COVID-19, active decisions about financial risk or aspirational spending are a luxury that they cannot afford—the funds simply aren’t available. They are also more concerned than average about catching COVID-19.

**Protective but Pragmatic**
15% of U.K. Population

Characterised by ‘everything in moderation’ across spending, finances and leisure time; an approach that reflects their attitude to COVID-19 and the need to balance the health of the nation with the health of the economy. Will only travel if they feel it is responsible to do so.

**Less to Lose**
27% of U.K. Population

Spontaneous and optimistic for the future, even though their current circumstances are fairly limiting. They believe that we should learn to live with COVID-19. Fewer barriers to domestic travel than other segments, but financial constraints may limit the scope of their spend.

**Life Goes On**
8% of U.K. Population

Protecting the economy should now be the focus for these well-off individuals who are willing to ‘speculate to accumulate’ and pay a premium for top notch experiences. The risks of the COVID-19 virus have been overstated in their estimation. The main barrier to travel is lack of things to do on their trip—they are not particularly concerned about catching the virus.
KEY FINDINGS
General sentiment and travel intentions

1. As of the last week in August, the U.K. public are evenly split in their perceptions of the situation in relation to COVID-19 – 26% thinking that the worst is still to come - the same proportion that the worst has passed - and over half (52%) that things are going to stay the same. The latest sentiment marks a departure from the majority of 2021, where significantly more people felt ‘the worst has passed’. These findings suggest that, on balance, the public do not expect conditions to change anytime soon – a conclusion supported by just 14% expecting normality by December, and less than half (49%) by April to June 2022. The fall in optimism is driven predominantly by older age groups. Between January and July, retirees and older independents were the life stages most likely to believe that ‘the worst has passed’, but as of late August they are as likely to think this as pre-nesters and families.

2. Flattening optimism may in part be a reflection of lower headroom for improvement, rather than immediate of fears things are immediately getting worse. There are also signs that pessimism does not translate to a reduction in immediate leisure behaviour. The ‘comfort average’ with everyday activities, for example, remains as strong as it has done since it peaked in early June, whilst comfort with ‘going to an indoor visitor attraction’ is at its highest to date. Similarly, despite their increased pessimism, comfort levels amongst retirees has increased since June, and this life stage is more likely to fall into the ‘protective but pragmatic’ COVID segment – a cohort that is responsible but active.

3. Whilst near-term behaviour remains unchanged there are signs people think things will get worse in the medium to long term – confidence that a booked domestic trip would go ahead between October and December is lower than in June’s reporting, driven by retirees and older independents. Most notably, ‘I have concerns around catching COVID-19’ is the leading reason for low confidence – the first time it has been most influential since the start of the year. Retirees and older independents are the most likely to state this (in June they were the least likely to), perhaps explaining their increasing pessimism. Fears that government restrictions will impact trips are significantly lower than in June this year, suggesting the threat of further lockdowns is not impacting confidence.

4. Sentiment amongst Scotland residents broadly tracks that of the wider U.K. However, in line with previous reporting they have longer expectations of a return to normality and lower confidence that trips will go ahead between September and December. That said, Scotland residents broadly feel more comfortable doing everyday activities.

5. Scotland residents are aligned with residents from across the U.K. in reasons for lower travel confidence – ‘concerns around catching COVID-19’ the highest.
1. Nearly 3 in 10 (29%) of U.K. adults anticipate taking an overnight trip between September and December this year. Intention amongst Scotland residents is almost identical to intention across the U.K.

2. Families are set to be the biggest life stage for overnight trips between September and December, driven by a high incidence in November and December. In September and October, ‘retirees’ index above their fallout in the population, further suggesting that their increasing pessimism is not impacting near-term behaviour.

3. Beyond the South West of England, which is by far the preferred choice for U.K. intenders this September to December, Scotland is the third most popular destination, just behind Yorkshire and The Humber. Consistent with previous reporting, the majority of Scotland September to December intenders live outside of Scotland, although previous data suggests the balance may switch when it comes to actual booking. Whether there is a switch will depend on the restrictions in place – particularly with the largest proportion of England-based Scotland intenders living relatively far away in London (‘I’m booking trips closer to home’ remains a leading impact of COVID-19 on domestic travel behaviour). Wales and Yorkshire and The Humber are the two most popular alternative destinations amongst Scotland intenders.

4. When it comes to trip behaviour, Scotland overnight trips are marginally more likely to be longer breaks of 4+ nights, although for Scotland residents the split is relatively even. The longer trip length of ‘non-Scotland-based’ Scotland September to December intenders means their anticipated spend is higher than Scotland residents – perhaps a compelling reason to ensure they visit as intended.

5. Scotland September to December intenders are most likely to plan on staying at the ‘rural coastline’ on their overnight trip. ‘Large city’ is the second most preferred destination type, marginally ahead of ‘mountains or hills’. The high placing of ‘large city’ is driven by ‘non-Scotland-based’ intenders who are more than four times as likely to be planning on visiting Edinburgh as ‘Scotland-based’ intenders. Given the likely drop off in trip-takers from outside of Scotland, it’s possible that the actual visits to Edinburgh will be smaller than predicted.

6. The Highlands remains a popular destination for intenders living within and outside Scotland.
KEY FINDINGS (3)

7. Amongst all types of Scotland intenders, ‘partner’ is the most common accompanying party member for a trip, followed by ‘child, grandchild or young adults with parents’.

8. ‘Hotel/motel/inn’ is the preferred accommodation choice for September to December intenders, followed by ‘a private home and ‘commercial self-catering’. Accommodation type varies by destination type – ‘commercial self-catering’ indexing higher at rural destinations, ‘hotel’ at urban destinations.

City and town intenders

1. The rise in intention to visit a large city will in part be driven by seasonality, but may also reflect slightly higher comfort levels with visiting a ‘busy city centre’ and a small drop in those stating ‘we are more likely to avoid cities and large towns’ as a result of COVID-19. That said, ‘avoiding cities and large towns’ remains the most dominant impact of COVID-19 on overnight trips, and comfort has only risen marginally.

2. The COVID cautious retirees remain the most averse to visiting cities, pre-nesters the most interested – a trend that is unlikely to change in the short-term.

3. The biggest barrier to staying in a large city is ‘catching COVID-19’, whilst ‘restrictions on things to do’ are also relatively influential. That said, both of these reasons are less impactful than earlier in the year.

4. Discounted accommodation remains the leading incentive that would encourage a stay in a city/town amongst those that don’t currently intend to stay in one, followed closely by COVID-safe cleanliness measures and open visitor attractions and restaurants. Together these factors indicate the need for city communications to mix safety, reassurances of a guaranteed experience and financial incentives.
1. As of late August, 29% of U.K. adults had taken an overnight domestic short break or holiday between June and the end of August – 10% having done so in June, 13% in July and 12% in August.

2. Notably, the proportion of Scotland adults that report having taken an overnight break is significantly higher than the rest of the U.K. (38% compared to 29%) driven by higher trips taken in July.

3. Consistent with predictions, the South West of England attracted the highest proportion of domestic overnight trips between June and late August, 6 percentage points ahead of Scotland. Scotland’s position in joint 3rd place marks a rise from the 10th place for April to early June trips (as presented in the previous report), likely confirming that this low position was driven by restrictions in Scotland being lifted later than in England.

4. Amongst Scotland residents that took a trip, Scotland was by far the most popular destination – 3 in 5 having stayed there. Notably, 3 in 5 of those that stayed in Scotland live in Scotland – 2 in 5 elsewhere in the U.K. Two thirds of overnight visits to Scotland were for a holiday purpose, higher than the majority of other U.K. destinations and behind only ‘Yorkshire and The Humber’.

5. Trip-takers to Scotland between June and August index significantly higher on families than the general population, particularly in August – unsurprising given the school holidays. Perhaps most notably, the incidence of retirees taking an overnight trip to Scotland is in line with the population, a marked difference to 2020 when they were under-represented.

4. Marking a break from the previous reporting period when the ‘Life Goes on’ segment indexed higher than the population, Scotland trip-takers between June and late August had higher than national representation amongst the ‘protective but pragmatic’ segment – an older audience that has been ‘activated’ to travel by the sense that it is no longer ‘irresponsible’ to do so.

5. ‘Countryside or village’ is the leading type of destination for Scotland trips taken between June and late August, particularly amongst Scottish residents. ‘Large city’ is the second most preferred destination type, followed by traditional coastal town and smaller city or town.
KEY FINDINGS (5)

7. Edinburgh was the number one Scottish destination for a domestic overnight trip between June and late August, driven by ‘non-Scotland-based’ trip-takers and visits to friends or relatives. When looking purely at ‘holiday’ trips, The Highlands was the number one destination.

8. ‘Hotel/motel/inn’ was the most popular choice for an overnight Scotland holiday, followed by ‘a private home’ and ‘caravan/camping’, there being relative consistency amongst Scotland-based trip-takers and all trip-takers. Although private home was the second most preferred choice, this position is driven predominantly by VFR trips.
PUBLIC SENTIMENT AND TRAVEL CONFIDENCE
As of late August 2021, 26% of U.K. adults feel that the worst is still to come in relation to COVID-19, the same proportion that feel the worst has passed. After seven months where the proportion thinking the worst has passed was significantly higher, there has been no consistent pattern in the last four waves, highlighting the renewed uncertainty around the future.

Sentiment of Scotland residents broadly tracks the wider U.K.

Figure 1. Perception of the situation with regards to COVID-19, Waves 1-34, U.K. and Scotland

Q7: Regarding the situation of Coronavirus in the U.K. and the way it is going to change in the coming month, which of the following best describes your opinion?

Base: All U.K. respondents. n=c.1,750. All Scotland respondents n=c.260
Notably, perceptions of the situation in relation to COVID-19 remain relatively similar across life stages. This marks a departure from previous reporting periods this year, when older life stages were more likely to believe the worst has passed. Lower optimism amongst these groups may be linked to increased concerns about catching COVID-19 (see page 28).
LEVEL OF COMFORT UNDERTAKING ACTIVITIES

- Comfort levels with ‘going for a walking in a country park or local trail’ have remained consistently high throughout the pandemic, sitting at 85% as of early August.
- In line with perception levels in relation to COVID-19, comfort levels with most individual activities remain relatively stable compared to previous waves. That said, comfort with visiting indoor attractions has hit new heights in the last two waves.

Figure 4. Level of comfort conducting individual activities, Net very and fairly comfortable, Percent, Waves 1-38, U.K.
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’

- The comfort average amongst U.K. adults has remained stable since early May with minimal movement (note: for comparability purposes, the average does not include ‘travelling by public transport’ and ‘visiting an indoor visitor attraction’.)

Figure 5. Level of comfort conducting individual activities, Net very and fairly comfortable comfort average, Percent average, Waves 1-38, U.K. and Scotland
The higher comfort levels amongst Scotland residents relative to residents from the rest of the U.K. is driven by higher scores for the majority of activities, with the exception of ‘visiting an indoor attraction’ where comfort levels are even. These scores mark a reversal on the previous reporting period in June when Scotland residents reported lower comfort levels on all activities.

Figure 6. Level of comfort conducting activities by place of residence, Net very and fairly comfortable, Percent, Wave 38, U.K.

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? All U.K. respondents. n=1,758; All Scotland respondents n=250
Despite the vast majority having received the vaccine, retirees and older independents remain the life stages least likely to feel comfortable doing most everyday activities, with the exception of ‘going for a walk in a country park/local trail’. This pattern is perhaps most notable for ‘visiting an indoor attraction’, only 36% of retirees describing themselves as ‘comfortable’ compared to 67% of pre-nesters and 65% of families.

That said, comfort levels amongst retirees have increased for most activities since the previous reporting period, suggesting that reduced optimism around the virus has not translated to behaviour.
ATTITUDINAL SEGMENTS BY RESIDENTS (SEE DEFINITIONS PAGE FOR MORE INFORMATION)

- 41% of U.K. residents and 34% of Scotland residents fall into ‘COVID-confident’ segments ‘less to lose’ and ‘life goes on’.
- Consistent with previous reporting periods, retirees are the most likely to fall into ‘COVID cautious’ segments, although positively there has been a notable increase in the ‘protective but pragmatic’ segment – a cohort that are responsible but active.

Figure 8. Breakdown of population by COVID segments, Percentage, Wave 38, U.K. and Scotland

Figure 9. Breakdown of population by COVID segments by life stage, Percentage, Wave 38, U.K.

Base: All U.K. respondents, n=1,758; All Scotland respondents n=250; Pre-nesters n=392; Families n=587; Older Independents n=484; Retirees n=295; Over 45s that have had the vaccine n=645; Over 45s that have not had the vaccine n=121
The vast majority of the U.K. population do not expect normality this year – only 1 in 7 (14%) expecting it by December and only half by April to June 2022. Pre-nesters and families (the most ‘COVID confident’ groups) are the most optimistic, retirees the least. Despite higher comfort levels, expectations of normality are consistently lower amongst Scotland residents than residents from across the U.K.

Figure 10. Cumulative perceptions of when things will return ‘close to normal’. Cumulative percentage Wave 38, UK and Scotland

Table 1. Normality by December by sub-group

<table>
<thead>
<tr>
<th>Audience</th>
<th>%</th>
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<tbody>
<tr>
<td>Pre-nesters</td>
<td>20%</td>
</tr>
<tr>
<td>Families</td>
<td>21%</td>
</tr>
<tr>
<td>Older independents</td>
<td>10%</td>
</tr>
<tr>
<td>Retirees</td>
<td>7%</td>
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Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All U.K. respondents. n=1,758; All Scotland respondents n=250; Pre-nesters n=392; Families n=587; Older Independents n=484; Retirees n=295;
FINANCIAL SEGMENTS AND FINANCIAL IMPACT OF COVID-19

- Half of U.K. adults have either been hit hard by the pandemic or are having to be careful, rising to 56% of Scotland residents. 1 in 9 across Scotland and the U.K. state that they are better off than before.

Figure 11. Breakdown of residents by financial segments, Percentage, Wave 38, U.K. and Scotland

- I’ve been hit hard
- Things are ok but I have to be careful
- I’ve not been affected
- I’m better off than before

<table>
<thead>
<tr>
<th></th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
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<tbody>
<tr>
<td>I’ve been hit hard</td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>Things are ok but I have to be careful</td>
<td>37</td>
<td>47</td>
</tr>
<tr>
<td>I’ve not been affected</td>
<td>38</td>
<td>34</td>
</tr>
<tr>
<td>I’m better off than before</td>
<td>11</td>
<td>11</td>
</tr>
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CONFIDENCE IN THE ABILITY TO TAKE A U.K. SHORT BREAK OR HOLIDAY

- 3 in 5 of the U.K. public would be confident than an overnight U.K. trip would go ahead as planned in September and October. However, confidence drops to 56% in November, and 54% in December. Confidence for each month is lower than it was in the previous reporting period in June.
- Consistent with lower expectations of normality, Scotland residents are less likely to be confident for each month.

Figure 12. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Wave 38, U.K.
Concerns about catching COVID-19 is the leading reason for not being confident about travel between September and December – the first time it has been the leading reason since the start of the year (in the previous reporting period it was second most influential at 35%). Conversely, restrictions on travel from government are a reason for 3 in 10 (31%), significantly less influential than in the previous reporting period when 41% cited this. Consistent with previous reporting, personal finances is the second most influential reason.

The order of reasons amongst Scotland-based residents is broadly consistent with the wider U.K.
Consistent with all previous reporting periods, pre-nesters and families exhibit significantly higher confidence levels that a domestic trip would go ahead between September and December than older independents and retirees. Notably, and aligned with their pessimism around COVID more generally, there has been a fall in confidence amongst retirees since June.

Figure 14. Confidence in taking a U.K. overnight trip across a range of different months by life stage, Net percentage very and fairly confident, Wave 38, U.K.
REASONS FOR NOT FEELING CONFIDENT TAKING TRIPS IN THE U.K.

- Reasons for not feeling confident about trips going ahead continue to vary significantly by life stage. For the first time since the start of the year, older life stages are significantly more likely than younger life stages to state ‘I have concerns about catching COVID-19’ as a leading reason for low confidence. 49% of retirees and 50% of older independents currently cite this, compared to 32% and 35% respectively in June.
- ‘Restrictions on travel from government’ is a more dominant reason for ‘pre-nesters’ and ‘older independents’.

Figure 15. Reasons for not being confident about travelling from September to December by life stage, Percentage ranked on retirees, Wave 37-38, U.K.

QVB8a. Which of the following factors are contributing to you being ‘not very confident’ or ‘not at all confident’ about taking a U.K. short break or holiday between July and September? Pre-nesters n=206; Families n=254; Older Independents n=204; Retirees n=187. *Two waves merged to increase base sizes
THE IMPACT OF COVID-19 ON DESTINATION CHOICE

When asked how COVID-19 is influencing their choice of destination for domestic trips, ‘we are more likely to avoid cities or large towns’ is the most common response. A range of other outcomes are also listed, including ‘staying closer to home than normal’ and ‘avoiding places with overseas tourists’. Only 1 in 4 September to December intenders state that COVID-19 hasn’t influenced their U.K. destination choices.

Compared to when this question was asked in June, ‘avoiding places with overseas tourists’ is a less dominant reason, as is ‘avoiding cities and large towns’ (although the latter only marginally).

Figure 16. Impact on destination choice by intenders, Percentage Waves 36-38, U.K.

'VB13iii. Compared to normal, how if at all would you say COVID-19 is currently influencing your choice of destination for U.K. holidays or short breaks?
Base: Scotland September to December intenders n=195;
DOMESTIC OVERNIGHT TRAVEL INTENTIONS
Around half of U.K. adults and exactly half of Scotland adults expect to take more or about the same number of short breaks and/or longer breaks of 4+ nights in the U.K. compared to normal in the next six months. On balance, both the U.K. and Scottish public anticipate taking ‘net fewer’ U.K. trips this year, whilst around 1 in 5 remain unsure.

That said, intention has increased since the previous reporting period in June.

**Figure 17. Number of U.K. short breaks (1-3 nights) in the next six months compared to normal, Percentage Wave 38, U.K. and Scotland**

**Figure 18. Number of U.K. holidays (4+ nights) in the next six months compared to normal, Percentage Wave 38, U.K. and Scotland**

QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of U.K. holidays/short breaks in the next six months?

Base: All U.K. residents n=1,758; All Scotland residents n=250
• 3 in 10 U.K. and Scotland-based adults anticipate taking an overnight trip between September and December this year – September and October the most popular months. Intention to take an overnight trip in this period falls with age – pre-nesters the most likely to do so, retirees the least likely. The drop-off in age is not to the extent reported during 2020, but does mark a slight shift from the majority of reporting during 2021.
ANTICIPATED NUMBER OF OVERSEAS TRIPS IN THE NEXT SIX MONTHS COMPARED TO NORMAL

• Consistent with previous reporting, U.K. and Scotland residents are significantly more likely to take fewer than normal overseas short breaks or holidays in the next six months. In the event of overseas restrictions being lifted, the vast majority (94%) of Scotland September to December intenders would take their Scotland trip anyway or take it in addition to an overseas trip.
WHERE PLANNING ON STAYING ON NEXT U.K. SEPTEMBER TO DECEMBER SHORT BREAK OR HOLIDAY

- Continuing a trend since the start of this research in May 2020, the South West of England is the most popular region of the U.K. for an overnight short break or holiday, 22% of September to December intenders intending to go there. Yorkshire & The Humber is the next most popular at 12%, followed by Scotland at 11%. 52% of Scotland resident intenders are planning on taking an overnight trip in Scotland.

Figure 23. Where planning on staying on next U.K. overnight trip between September and December, Percentage Waves 36-38, U.K. and Scotland Residents

QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in September to December 2021. All UK September to December intenders n=1,344; All Scotland resident September to December intenders n=202;
Taken as a total, the majority of Scotland September to December intenders continue to live outside of Scotland. Across the border, London is the biggest source of intenders followed by the North West of England and Yorkshire & The Humber.

However, previous research demonstrates that the balance is likely to shift further in favour of Scotland residents when trips are actually taken – particularly if concerns around domestic travel persist and/or Scotland adopts different restrictions.

Figure 24. Region of origin of Scotland September to December intenders, Percentage Waves 36-38, U.K. sample

Figure 25. Breakdown of Scotland September to December intenders by region of residence, Percentage Waves 36-38, U.K.

Base: Scotland September to December intenders n=195;
Most of those considering Scotland as a holiday or short break destination are only considering Scotland for their trip. Amongst the small proportion also considering somewhere else, Wales, Yorkshire & The Humber and North West of England are the three most popular alternatives – although there is minimal separation between them.

Amongst Scotland residents considering Scotland for an overnight break, an even stronger majority are only considering Scotland. This further suggests that Scotland residents may make up the majority of Scotland actual trip-takers.

Table 3. Top 5 alternative destinations for Scotland intenders

<table>
<thead>
<tr>
<th>Scotland</th>
<th>September to December intenders (% of Scotland intenders)</th>
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<tbody>
<tr>
<td>Wales</td>
<td>11%</td>
</tr>
<tr>
<td>Yorkshire &amp; The Humber</td>
<td>10%</td>
</tr>
<tr>
<td>North West</td>
<td>8%</td>
</tr>
<tr>
<td>South West</td>
<td>7%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>5%</td>
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QVB4a. Where in the U.K. are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All respondents planning on taking a holiday or short break in Scotland in 2021. All Scotland September to December intenders n=195; All Scotland resident September to December intenders n=195.
WHETHER PLANNED OR BOOKED U.K. HOLIDAY OR SHORT BREAK

- Nearly half (49%) of Scotland September to December intenders have already planned their Scotland trip with a similar proportion (47%) having booked it.
- Generally, Scotland intenders are planning their September to December trip closer to the date than normal and booking significantly closer than normal.

Figure 27. Proportion that have already planned/ booked their next Scotland September to December trip, Percentage, Wave 38*, U.K.

Figure 28. Planning and booking lead times for Scotland September to December trips compared to normal, Percentage Waves 36-38, U.K.

QVB2a. Thinking of the next U.K. holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB6dlic. Compared to normal, when did or will you plan and book your next UK trip in Scotland? — Scotland September to December intenders Wave 38 n=67; Waves 36 n=236,
Scotland September to December intenders are most likely to book their trip to Scotland directly with the provider followed by ‘an online travel agent’. Direct booking is significantly more likely amongst older life stages, an online travel website more likely amongst younger age cohorts.

Figure 29. Accommodation booking channel for Scotland September to December intenders, Net percentage Waves 36-38, U.K.
PROFILING SCOTLAND INTENDERS AND THEIR BEHAVIOUR

Glentress Forest, Scottish Borders, David N Anderson
DEMOGRAPHICS OF INTENDERS COMPARED TO THE GENERAL POPULATION

- Scotland intenders for September to December are made up of a higher proportion of families than amongst the U.K. population. Despite slightly lower representation across the whole period, retirees index above the population average for September (25%) and October (30%). Families index well above the population in November (39%) and December (42%).
- Scotland resident intenders index significantly higher amongst older independents than Scotland intenders from across the U.K.
- Notably, intenders are more likely than the population to fall into social grades DE.

Figure 30. Breakdown of population and Scotland September to December intenders by life stage, Percentage Waves 36-38, U.K.

Figure 31. Breakdown of population and Scotland September to December intenders social grade, Percentage Waves 36-38, U.K.

Source: Demographics. Base: All respondents. U.K. population n=5,281; Scotland September to December intenders n=236, Scotland September to December resident intenders n=119
FINANCIAL SEGMENTS AND FINANCIAL IMPACT OF COVID-19 ON INTENDERS

- Scotland September to December intenders are significantly more likely than the population to consider themselves financially ‘better off than before’ the pandemic. Scotland resident intenders, however, index higher than all Scotland intenders on ‘things are ok but I have to be careful’.
- Scotland resident intenders are also more likely than their wider U.K. equivalents to be made up of ‘cautious but content’ COVID segments.

Figure 32. Breakdown of intenders by financial segments, Percentage Waves 36-38, U.K.

Figure 33. Breakdown of trip-takers by risk segment, Percentage Waves 36-38, U.K.

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? VB8b: Thinking about your work and financial circumstances which, if any, of the following have happened to you as a result of the COVID-19 pandemic? Base: All respondents. U.K. population n=5,281; Scotland September to December intenders n=236, Scotland September to December resident intenders n=119
A slight majority of Scotland September to December intenders are anticipating their overnight trip to Scotland to be 4+ nights in length, whilst for Scottish resident intenders the split is more even. This difference is consistent with previous reporting.

The vast majority of all Scotland trips are likely to be for a ‘holiday’ purpose.
Scotland September to December intenders are most likely to be planning on staying at the ‘rural coastline’ (32% intending to do so), followed by ‘large city’ (26%), ‘mountains or hills’ (25%) and ‘countryside or village’ (24%). In contrast to overall intention, Scotland resident intenders are most likely to be intending on staying in a ‘traditional coastal town’ – and significantly less likely than average to be planning on staying in a large city.

Figure 36. Main type of destination for Scotland September to December intenders, Percentage Waves 36-38, U.K.
WHERE PLANNING ON STAYING IN SCOTLAND ON NEXT SCOTLAND TRIP

• Consistent with previous reporting, The Highlands remains the most favoured destination for Scotland September to December intenders. Edinburgh is the second most preferred destination for all Scotland September to December intenders, but this is driven by non-Scotland-based intenders, over 2 in 5 of whom are planning on going there.
• With Scotland residents likely to make up a higher proportion of actual visitors than intended, it's likely that visits to Edinburgh will be lower than stated here.

Figure 37. Planned destination for next Scotland trip for September to December intenders, Percentage Waves 36-38, U.K. and Scotland

QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland exclusive September to December intenders n=188; Scotland resident exclusive September to December intenders n=110
**MAKE-UP OF VISITOR PARTY FOR NEXT SCOTLAND HOLIDAY OR SHORT BREAK**

- Amongst September to December Scotland intenders, ‘partner’ is the most common accompanying party member for a trip, followed by ‘child, grandchild or young adults with parents’ and ‘friends’.

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**Figure 38. Visitor party make-up for Scotland September to December intenders, Percentage Waves 36-38, U.K.**

<table>
<thead>
<tr>
<th></th>
<th>Scotland Summer Intenders</th>
<th>Scotland Summer Resident Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Partner</strong></td>
<td>61</td>
<td>68</td>
</tr>
<tr>
<td><strong>Child, grandchild or young adults with parents</strong></td>
<td>23</td>
<td>28</td>
</tr>
<tr>
<td><strong>Friends</strong></td>
<td>22</td>
<td>14</td>
</tr>
<tr>
<td><strong>Other members of family</strong></td>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td><strong>Pets</strong></td>
<td>10</td>
<td>17</td>
</tr>
<tr>
<td><strong>Your parents (of respondents aged 25+ only)</strong></td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td><strong>Intend to travel alone</strong></td>
<td>4</td>
<td>8</td>
</tr>
</tbody>
</table>

QVB4d. With whom are you likely to be spending your holiday? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland exclusive September to December intenders n=188; Scotland resident exclusive September to December intenders n=110
MAIN MODE OF TRANSPORT FOR NEXT SCOTLAND SHORT BREAK OR HOLIDAY

• ‘Own car’ is by far the leading mode of transport intended to be used on trips to Scotland, particularly amongst Scotland residents. Train is the next most preferred transport type.

Figure 39. Top 5 main modes of travel of destination for trip in September to December, Percentage Waves 36-38, U.K.
‘Hotel/motel/inn’ is the preferred accommodation choice for September to December intenders, followed by ‘a private home’ and ‘commercial self-catering’ – the latter higher amongst Scotland-based intenders.

Unsurprisingly, accommodation type varies by destination type – ‘commercial self-catering’ indexing higher at rural destinations, ‘hotel’ at urban destinations.

Figure 40. Accommodation planning on staying in on next U.K. overnight trip for Scotland September to December intenders, Net percentage Waves 36-38, U.K.
ANTICIPATED SPEND ON NEXT SCOTLAND HOLIDAY OR SHORT BREAK

- On average, Scotland September to December intenders expect to spend £1,092 on their trip in Scotland – higher than the wider U.K. spend average (£944). Notably, Scotland resident September to December intenders anticipate spending less than all U.K.-based Scotland intenders. This is likely driven by the lower proportion of longer breaks of 4+ nights amongst Scotland residents.

Figure 41. Anticipated spend for Scotland intenders, Percentage Waves 36-38, U.K.

Figure 42. Anticipated average spend for Scotland September to December intenders, Average, Waves 36-38, U.K.

QVB6e. Approximately how much do you think this trip will cost in total? Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland exclusive September to December intenders n=188; Scotland resident exclusive September to December intenders n=110
CITY AND TOWN INTENDERS: BARRIERS AND INCENTIVES

Pipe band and the North Berwick Highland Games, North Berwick, East Lothian, Kenny Lam
Consistent with previous reporting, those intending to stay in a city/town destination this September to December continue to be significantly more likely to be pre-nesters than ‘non-city/town intenders’ and the wider U.K. population. Retirees are significantly less likely to be intending to visit a city or town.

Figure 43. Breakdown of city/town intenders by life stage, Percentage Waves 36-38, UK

Figure 44. Breakdown of city/town intenders by social grade, Percentage Waves 36-38, UK

Base: UK September to December city intenders – all considering taking a UK overnight break in a city this September to December n=234; Uk September to December non-city intenders all not considering taking a UK overnight break in a city this September to December n=1,110
LEVEL OF COMFORT UNDERTAKING ACTIVITIES AND COVID SEGMENTS

• ‘City/town intenders’ are more comfortable conducting a range of everyday activities associated with large numbers of people. The largest gaps in comfort are for ‘travelling by public transport’ and ‘going to a busy city centre’.

Figure 45. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Waves 36-38, U.K.

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. September to December City Intenders</th>
<th>U.K. September to December Non-City Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>74</td>
<td>70</td>
</tr>
<tr>
<td>Going for a walk in a country park/ local trail</td>
<td>83</td>
<td>89</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>76</td>
<td>70</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>76</td>
<td>72</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>62</td>
<td>47</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>70</td>
<td>59</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>71</td>
<td>47</td>
</tr>
</tbody>
</table>
Perhaps unsurprisingly given comfort levels, ‘city/town intenders’ are significantly more likely than ‘non city intenders’ to belong to more ‘COVID confident’ segments such as ‘less to lose’.

Figure 46. Breakdown of population by COVID segments by life stage, Percentage, Waves 36-38, U.K.
TOP 10 REASONS FOR NOT STAYING IN A CITY

- Consistent with lower comfort levels, concerns about being ‘more likely to catch COVID-19 in a large city/town’ is the most common reason for not staying in this destination type amongst September to December intenders, over a third (37%) citing this. ‘Large cities tend to be too expensive’, ‘fewer things to do/places to visit’ and ‘fewer opportunities to eat/drink out’ are the next most cited reasons.
- A significant minority (19%) are open to staying in a large city ‘later in the year’ suggesting there continues to be potential to nudge visits earlier.
- A further 1 in 5 (22%) wouldn’t stay in one regardless of COVID-19.

Figure 47: Top 10 reasons for not staying in a city amongst September to December intenders, Percentage Waves 36-38, UK
TRENDED REASONS FOR NOT STAYING IN A CITY

- When tracking reasons for not staying in a city over time, it’s notable that ‘restrictions’ have become a less influential reason in recent waves – now 12 percentage points less influential than in early March, and 9 percentage points lower than in late July. Concerns about COVID-19 have also dropped, whilst other factors remain relatively consistent.

Figure 48: Net trended reasons for not staying in a city amongst intenders, Percentage Waves 36-38, UK

![Graph showing trended reasons for not staying in a city over time.](image-url)
TOP 10 FACTORS THAT WOULD ENCOURAGE A STAY IN THE CITY

- Discounted accommodation is the leading incentive that would encourage a stay in a city/town amongst those that don’t currently intend to stay in one, followed closely by COVID-safe cleanliness measures and open visitor attractions and restaurants. COVID numbers also remain an influence – a reason given by nearly 3 in 10.
- Only a minority (1 in 5) of non-city intenders state *nothing* would encourage them to stay in a city in the coming months.

Figure 49: Top 10 factors that would encourage a stay in a city amongst September to December intenders not planning on staying in a town or city, Percentage Waves 36-38, UK
GENERAL LEISURE ACTIVITY

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam
Around 3 in 10 U.K. residents and 1 in 5 Scotland residents anticipate taking a day trip within the next 2 weeks, rising to 48% and 42% respectively by the end of the summer (end of September).

Figure 50. Likelihood to take any day trip, percentage, Wave 38, UK and Scotland
ANTICIPATED DAY TRIPS BY DESTINATION TYPE

- There is minimal variation in short-term daytrip by destination type although by the autumn, intention is highest in traditional coastal towns and countryside or village.

Figure 51. Likelihood to take a day trip by destination type, percentage, Wave 38, UK
TRENDED ANTICIPATED ACTIVITY COMPARED TO ‘NORMAL’ IN THE NEXT FEW MONTHS

- In line with a range of other measures, engagement with most leisure activities remains consistent with the previous few waves. There has been a slight drop in anticipated engagement with outdoor areas and activities, likely linked to weather changes. Most indoor activities remain close to normal engagement.

Figure 52. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Waves 1-34, UK
Anticipated activity compared to ‘normal’ in the next few months

- Outdoor areas and activities continue to be set to experience uplifts in engagement relative to normal in the next few months. Across the U.K., ‘entertainment and events’ are set to generate engagement levels in line with normal, whilst ‘indoor health or wellbeing’ and ‘indoor attractions’ continue to be likely to generate slightly lower than normal engagement.

- Broadly speaking, Scotland residents are more likely than wider U.K. residents to engage in outdoor areas and activities, but less likely to do so with indoor areas and activities.

Figure 53. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Wave 38, UK

<table>
<thead>
<tr>
<th>Category</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor areas (e.g. beaches, mountains, trails etc.)</td>
<td>29</td>
<td>41</td>
</tr>
<tr>
<td>Outdoor leisure or sports activities</td>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td>Predominantly outdoor visitor attractions</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Entertainment and events (e.g. restaurants, cinema, festivals etc.)</td>
<td>-1</td>
<td>-7</td>
</tr>
<tr>
<td>Indoor health or wellbeing activities (e.g. spa, retreat and indoor swimming)</td>
<td>-4</td>
<td>-9</td>
</tr>
<tr>
<td>Predominantly indoor or covered attractions</td>
<td>-5</td>
<td>-7</td>
</tr>
</tbody>
</table>

QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do as restrictions are lifted? Base: All U.K. respondents. n=1,758; All Scotland respondents n=250;
GENERAL LEISURE ACTIVITY INTENTIONS IN NEXT FEW MONTHS

• U.K. and Scotland residents expect visits to ‘restaurants/cafes or pubs with outside seating’ and indoor seating to index significantly above normal in the next few months.
• For all other activities, there continues to be negative net engagement intention - in particular to attend ‘festivals/exhibitions/sport events in an enclosed space’ and to visit nightclubs.

Figure 54. Catering, entertainment and events more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Wave 38, U.K. and Scotland

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant/café/pub with outdoor seating</td>
<td>22</td>
<td>25</td>
</tr>
<tr>
<td>Restaurant/café/pub with indoor seating only</td>
<td>11</td>
<td>14</td>
</tr>
<tr>
<td>Cinema/theatre</td>
<td>-6</td>
<td>-14</td>
</tr>
<tr>
<td>Festival, exhibition, show or sports events across a large space (e.g. a city, along roads etc.)</td>
<td>-10</td>
<td>-15</td>
</tr>
<tr>
<td>Festival, exhibition, show or sports event in an enclosed space (e.g. in a conference centre or stadium)</td>
<td>-18</td>
<td>-22</td>
</tr>
<tr>
<td>Nightclub</td>
<td>-24</td>
<td>-34</td>
</tr>
</tbody>
</table>

QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months? Base: All U.K. respondents. n=1,758; All Scotland respondents n=250;
GENERAL LEISURE ACTIVITY INTENTIONS IN NEXT FEW MONTHS

- Among Scottish and wider UK residents, anticipation for conducting net more visits to ‘gardens or country parks’, ‘castles/forts or other historic sites’ and ‘zoos/farm attractions’ remains in the positive.

- The majority of indoor attractions are still set to attract fewer visits than normal – particularly amongst Scotland residents. There are some exceptions however – most notably, ‘historic houses/palaces, museums and art galleries’ are set to expect more engagement aligning with higher comfort levels with visiting indoor attractions.

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![Figure 55. Visitor attractions more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Wave 38, U.K. and Scotland](image)

<table>
<thead>
<tr>
<th>Outdoor attraction type</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Garden or country park</td>
<td>23</td>
<td>9</td>
</tr>
<tr>
<td>Zoo/farm attraction</td>
<td>35</td>
<td>7</td>
</tr>
<tr>
<td>Castle, fort or other historic site</td>
<td>9</td>
<td>14</td>
</tr>
<tr>
<td>Historic house/palace, museum or art gallery</td>
<td>4</td>
<td>10</td>
</tr>
<tr>
<td>Outdoor playground or activity centre</td>
<td>-1</td>
<td>-4</td>
</tr>
<tr>
<td>Scenic/historic railway</td>
<td>-3</td>
<td>-4</td>
</tr>
<tr>
<td>Aquarium</td>
<td>-4</td>
<td>-5</td>
</tr>
<tr>
<td>Theme park</td>
<td>-4</td>
<td>-8</td>
</tr>
<tr>
<td>Cathedral/church or other religious attraction</td>
<td>-10</td>
<td>-15</td>
</tr>
<tr>
<td>Indoor play or activity centre/attraction e.g. climbing, ziplining, high ropes</td>
<td>-14</td>
<td>-17</td>
</tr>
<tr>
<td>Dungeon, prison or other underground attraction (e.g. show cave, mine)</td>
<td>-17</td>
<td>-17</td>
</tr>
</tbody>
</table>
Again consistent with previous waves, both U.K. and Scotland residents exhibit a higher net increase in anticipated visits to all outdoor areas – Scotland residents more so.
GENERAL LEISURE ACTIVITY INTENTIONS IN NEXT FEW MONTHS

- Consistent with previous reporting, there is an expectation of engagement with walking/hiking being higher than normal over the next few months, with ‘watching wildlife/bird watching also set to experience an uplift, with the exception of ‘cycling and mountain biking’ amongst Scotland residents.
- Also in line with previous reports, there is likely to be a net decrease in anticipation to undertake most other outdoor activities.

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking/hiking</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Watching wildlife/bird watching</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Cycling/mountain biking</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Swimming - outdoor</td>
<td>-1</td>
<td>-1</td>
</tr>
<tr>
<td>Adventure activity (e.g. ziplining, abseiling/pot holing/caving/climbing/air sports etc)</td>
<td>-2</td>
<td>-2</td>
</tr>
<tr>
<td>Fishing - sea angling, coarse fishing, game fishing</td>
<td>-6</td>
<td>-6</td>
</tr>
<tr>
<td>Other water sports (e.g. surf, windsurf, kitesurf, paddle board, coasteering, diving)</td>
<td>-7</td>
<td>-7</td>
</tr>
<tr>
<td>Boating including /kayak/rafting/jet ski/water ski</td>
<td>-8</td>
<td>-8</td>
</tr>
<tr>
<td>Golf</td>
<td>-9</td>
<td>-9</td>
</tr>
<tr>
<td>Horse riding, pony trekking</td>
<td>-11</td>
<td>-11</td>
</tr>
<tr>
<td>Sailing</td>
<td>-9</td>
<td>-9</td>
</tr>
</tbody>
</table>

Figure 57. Outdoor activities more or less likely to do compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Wave 38, U.K. and Scotland

QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months? Base: All U.K. respondents. n=1,758; All Scotland respondents n=250;
GENERAL LEISURE ACTIVITY INTENTIONS IN NEXT FEW MONTHS

- U.K. and Scotland residents continue to exhibit a lower than normal expectation to undertake indoor swimming and retreat or meditation activities. However, anticipation of undertaking spa/beauty/health treatments is above ‘normal’ behaviour, at least amongst U.K. residents.

Figure 58. Indoor activities more or less likely to do compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Wave 38, U.K. and Scotland

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spa/beauty/health treatments</td>
<td>-8</td>
<td>-11</td>
</tr>
<tr>
<td>Retreat or meditation</td>
<td>-4</td>
<td></td>
</tr>
<tr>
<td>Swimming – indoor</td>
<td>-4</td>
<td>-7</td>
</tr>
</tbody>
</table>

QVB9a/bB10a/b. Which, if any, of these types of places/activities in the U.K. are you more/less likely than normal to visit/do in the next few months? Base: All U.K. respondents. n=1,758; All Scotland respondents n=250;
As of late August, 29% of U.K. adults had taken an overnight domestic short break or holiday between June and the end of August—10% having done so in June, 13% in July and 12% in August.

Notably, the proportion of Scotland adults that report having taken an overnight break is significantly higher than the rest of the U.K. (38% compared to 29%) driven by higher trips taken in July.

The proportion of overnight trip-takers from Scotland and elsewhere in the U.K. is significantly higher than in 2020.

Figure 59. Proportion taken an overnight trip in the U.K. In the following time periods, Percentage Wave 38, U.K.

Figure 60. Proportion taken an overnight trip in the U.K. in the following time periods, Percentage Wave 38, U.K.
WHERE STAYED ON TRIPS SINCE JUNE

- Consistent with predictions, the South West of England attracted the highest proportion of domestic overnight trips between June and late August, 6 percentage points ahead of the North West of England in second place and Scotland in joint 3rd. Scotland’s position in joint 3rd place marks a rise from the 10th place for April to early June trips (as presented in the previous report), likely confirming that this low position was driven by restrictions in Scotland being lifted later than in England.

- Amongst Scotland residents that took a trip, Scotland was by far the most popular destination – 3 in 5 having stayed there. Notably, 3 in 5 of those that stayed in Scotland live in Scotland – 2 in 5 elsewhere in the U.K.

Figure 61. Destinations that U.K. June-August trip-takers and holiday makers stayed on their trip, Percentage Wave 37-38, U.K., Ranked on holidays

Figure 62. Breakdown of Scotland June-August trip-takers by region of residence, Percentage Waves 37-38, U.K.

VB13c. Where in the U.K. did you stay on this trip since June? UK resident trip takers n=1,079. Scotland resident trip takers n=191
Purpose of Trips since June by Destination

- Two thirds of overnight visits to Scotland were for a holiday purpose, higher than the majority of other U.K. destinations and behind only ‘Yorkshire and The Humber’.

Figure 63. Purpose of June-August U.K. short break or holiday by destination, Percentage Wave 37-38, U.K.
DEMOGRAPHICS OF TRIP-TAKERS

- Trip-takers to Scotland between June and August index significantly higher on families than the general population, particularly in August – unsurprising given the school holidays. Perhaps most notably, the incidence of retirees taking an overnight trip to Scotland is in line with the population, a marked difference to 2020 when they were under-represented.
- The social grade breakdown of Scotland trip-takers is largely in line with the general population.

Source: Demographics. Base: All respondents. U.K. population n=3518 All Scotland trips n=149; Scotland resident trip takers n=124
Marking a break from the previous reporting period when the ‘Life Goes on’ segment indexed higher than the population, Scotland trip-takers between June and late August had higher than national representation amongst the ‘protective but pragmatic’ segment – an older audience that has been ‘activated’ to travel by the sense that it is no longer ‘irresponsible’ to do so.

**Figure 66. Breakdown of June-August trip-takers by risk segment, Percentage Wave 37-38, U.K.**
TYPES OF TRIPS TAKEN

- ‘Countryside or village’ is the leading type of destination for Scotland trips taken between June and late August, particularly amongst Scottish residents. ‘Large city’ is the second most preferred destination type, followed by traditional coastal town and smaller city or town.

Figure 67. Main type of destination for Scotland June-August overnight trip, Percentage Wave 37-38, U.K.

- All Scotland Trip Takers
- All Scotland Resident Trip Takers

VB13d. Which of the following best describes the main type of destination you stayed in during your trip since June? All Scotland trips n=129; Scotland resident trip takers n=106
TRIP DESTINATIONS

- Edinburgh was the number one Scottish destination for a domestic overnight trip between June and late August, driven by ‘non-Scotland-based’ trip-takers who were four times as likely to stay there than Scotland-based trip takers. Edinburgh is significantly more popular as a destination than in 2020.
- Amongst Scotland residents who took a trip in Scotland, the Highlands was the number one destination.

Figure 68. Main destination for Scotland June-August overnight trip, Percentage Wave 37-38, U.K.

*Small base sizes*
‘Hotel/motel/inn’ was the most popular choice for an overnight Scotland holiday, followed by ‘a private home’ and ‘caravan/camping’, there being relative consistency amongst Scotland-based trip-takers and all trip-takers. Although private home was the second most preferred choice, this position is driven predominantly by VFR trips. Amongst trips taken for a ‘holiday’ purpose, only 14% stayed in this accommodation type.

Linked to a rise in stays in ‘city-based’ destinations, the incidence of overnight stays in a ‘hotel/motel/inn’ are significantly higher this year than in 2020.

Figure 69. Accommodation stayed in on Scotland June-August trip, Net percentage, Wave 37-38, U.K.
METHODOLOGY
METHODOLOGY

• The findings in this report are based on a fortnightly online survey conducted amongst a nationally representative sample of the U.K. population.
• The sample is representative of U.K. adults aged 16+ by gender, age, government region and social grade.
• In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Scotland and Wales to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the U.K. overall and within each nation.
• This report aggregates the results taken from Waves 36-38 of the COVID-19 consumer fortnightly tracker.