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

31\textsuperscript{st} May to 2\textsuperscript{nd} July 2021

(Waves 32-34)

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<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction and methodology</td>
<td>3</td>
</tr>
<tr>
<td>Key findings</td>
<td>9</td>
</tr>
<tr>
<td>Public sentiment and travel confidence</td>
<td>15</td>
</tr>
<tr>
<td>Domestic overnight travel intentions</td>
<td>31</td>
</tr>
<tr>
<td>Profiling Scotland intenders and their booking behaviour</td>
<td>38</td>
</tr>
<tr>
<td>Trip behaviour</td>
<td>44</td>
</tr>
<tr>
<td>City and town intenders: Barriers and incentives</td>
<td>55</td>
</tr>
<tr>
<td>General leisure activity</td>
<td>63</td>
</tr>
<tr>
<td>Trips taken since April</td>
<td>73</td>
</tr>
</tbody>
</table>
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 32-34, with fieldwork taking place during the following dates:
  - Wave 32: 31st May to 4th June
  - Wave 33: 14th to 18th June
  - Wave 34: 28th June to 2nd July

In some cases, waves 33 and/or 32 have been excluded. This is typically to capture current ‘mood and sentiment’ although in some cases this isn’t possible to due to small base sizes.
The early chapters of this report are ‘forward looking’ and focus on 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

For ease of reference, intention groups have been given seasonal labels, although we appreciate these may not necessarily correspond with meteorological definitions. These are:

- **Summer intenders**: Anyone planning a trip between July and September
- **Autumn intenders**: Anyone planning a trip between October and December

Please note, due to low base sizes a ‘Scotland resident intender’ figure has not been given for autumn.
DEFINITIONS USED WITHIN THIS REPORT (2)

• 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
DEFINITIONS USED WITHIN THIS REPORT (3)

• 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**
12% of U.K. Population
The most concerned about catching COVID-19, but generally settled and content with a restrained lifestyle. 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**
20% 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**
12% 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**
32% 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**
10% 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
The Scottish and U.K. public are relatively optimistic about the situation in relation to COVID-19. In the latest wave of sentiment research in early July, 33% of U.K. residents and 31% of Scotland residents feel that the worst has passed – comfortably higher than at any point in 2020. The public also report high comfort levels with everyday activities relative to 2020 – ‘the comfort average’ having increased for 12 out of the last 13 research waves. The proportion of ‘COVID confident’ audience segments within the population has also increased. Recent waves of research are broadly characterised by stability in sentiment (unlike in 2020 where it fluctuated from wave to wave) driven by the uptake of the COVID vaccine – a majority now having had a second dose, and a strong majority having had at least one dose. There is still potential for the vaccine to positively impact sentiment – of those that haven’t had one, a third will do so as soon as they can.

Despite these generally positive indicators, the overarching story of the latest wave of research is of plateauing sentiment. Although the proportion thinking the worst has passed is higher than at any point last year, it has not increased across the last 3 waves, and is lower than in Waves 30 and 31. Similarly, although comfort levels are on an upwards trajectory relative to 2020 and the start of 2021, the latest research wave in early July was the first time that the ‘comfort average’ did not increase. This lack of movement appears to be less about a rise in pessimism than it is about a sense of acceptance that the ‘COVID environment’ is here to say. The drop in people stating ‘the worst has passed’ correlates with a rise in the belief that ‘things are going to stay the same’ (as opposed to ‘get worse’), whilst only 30% of the population now expect normality in 2021. The rise in ‘COVID confident’ segments and stable ‘comfort levels’ suggests that much of the public are increasingly learning how to live with COVID without sacrificing their leisure.

However, the lack of appreciable rise in positive sentiment translates to a ceiling in holiday intentions and attitudes. Although a majority are confident that domestic overnight trips will go ahead from August onwards, this confidence plateaus at around 60% all the way through to December. This suggests that there remains a significant proportion of people for whom U.K. short breaks or holidays are not yet a consideration. As a result of this, intentions to take an overnight U.K. trip in either this summer or autumn remain at the same level as they did in the previous reporting period.

The plateauing in sentiment is likely driven by increasing COVID case numbers, in particular in relation to the Delta variant – ‘catching COVID’ is the second biggest driver of low travel confidence. However, the biggest driver of low confidence remains the threat of government restrictions. This suggests that there is still some scepticism that restriction loosening will be a permanent fixture. This scepticism is most apparent amongst retirees – the audience that continue to be the least comfortable with all everyday activities despite being almost universally vaccinated with two doses.
KEY FINDINGS (2)

5. A notable finding from the previous report was that Scotland residents were some way behind U.K. residents in their comfort levels and travel confidence. This large gap was attributed to differences in restrictions – at the time of fieldwork Glasgow and some other parts of Scotland were in level 3, whilst England was in the equivalent of level 2. It’s likely that this hypothesis was correct – following weeks of relatively similar restrictions, the gap between U.K. and Scotland residents has closed significantly. There remains some separation between the two (Scotland residents more cautious) but this is consistent with the trend since the start of the pandemic in March 2020.

Scotland intenders – profiles and behaviour

1. Nearly half (44%) of U.K. adults anticipate taking an overnight trip between July and December this year, over a third (34%) planning to do so this summer (defined as between July and September for this report). Intention amongst Scotland residents is almost identical to intention across the U.K.

2. Beyond the South West of England, which is by far the preferred choice for U.K. intenders this summer, Scotland is the second most popular summer destination, and third in the autumn. Consistent with previous reporting, the majority of Scotland summer 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’ is a leading impact of COVID-19 on domestic travel behaviour).

3. When it comes to trip behaviour, Scotland summer trips are most likely to be longer breaks of 4+ nights, although there is some divergence with Scotland residents who are more likely to be taking short breaks across this period regardless of the month. The longer trip length of ‘non-Scotland-based’ Scotland summer intenders means their anticipated spend is higher than Scotland residents – perhaps a compelling reason to ensure they visit as intended.

4. Scotland summer intenders are most likely to plan on staying in a ‘countryside or a village’ on their Scotland trip. ‘Traditional coastal town’ is the second most preferred destination type for U.K. residents, and the most preferred for Scotland residents planning a trip in Scotland.

5. The Highlands remains the most favoured destination for Scotland summer intenders living within and outside Scotland – particularly the former. Edinburgh is the second most preferred destination for summer intenders, but significantly less so for Scotland residents.
KEY FINDINGS (3)

6. 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’ – the latter making up over a third visitor parties across all summer months, rising to half of visitors in August. Consistent with previous reporting, ‘children, grandchildren or young adults with parents’ are most likely to belong to parties visiting coastal/seaside destinations. City/town destinations attract the highest proportion of ‘friends’.

7. ‘Hotel/motel/inn’ is the preferred accommodation choice for summer intenders, followed by ‘a private home and ‘caravan/camping’. ‘Camping/caravanning’ is the joint leading accommodation choice for Scotland residents who live in Scotland, along with ‘hotel/motel/inn’. The higher prevalence of Scotland residents taking ‘camping/caravanning’ trips is also likely to be a driver of their lower spend.

8. Anticipated accommodation choice differs by destination type. Scottish intenders considering a trip to a Scottish coastal or rural destination are most likely to stay in commercial self-catering – urban intenders most likely to choose a hotel. Those considering a trip to a Scottish coastal or rural destination are most likely to be planning ‘camping/caravanning’, whilst ‘rural intenders’ index the highest on ‘commercial self-catering’. ‘City/town destinations’ unsurprisingly index the highest on ‘hotel/motel/inn’.

9. Older independents are likely to be the largest life stage spending an overnight stay in Scotland this summer, with higher representation than in the wider U.K. population. Families are likely to be the second largest group, in line with the population but in contrast to all U.K. overnight trips where families have the highest representation.
KEY FINDINGS (4)
City and town intenders

1. Interest in ‘a large city’ has risen since the previous report, but continues to be down the list of holiday destination type preferences this summer - the fourth most popular. In the face of rising COVID-19 case numbers, this is perhaps unsurprising – concerns about being ‘more likely to catch COVID-19 in a large city’ is the most common reason for not staying in this destination type whilst ‘I am avoiding busy cities’ is the most commonly cited general travel behaviour change as a result of COVID-19. ‘Visiting a large city centre’ continues to generate the lowest comfort levels with little sign of improvement.

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

3. However, it should be noted that ‘restrictions on opportunities to socialise’ and ‘fewer things to do /places to visit’ are also leading factors (particularly for younger life stages and the more ‘COVID confident’) for not visiting a city, suggesting that the continued lifting of restrictions may act as a catalyst for visits. Furthermore, the increasing comfort levels with ‘visiting a visitor attraction’ show that there is some hope for venues with high footfall, when their opening is well-managed.

4. 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. Together these factors indicate the need for city communications to mix safety, reassurances of a guaranteed experience and financial incentives.
KEY FINDINGS (5)

Trips taken since April

1. As of early July, 28% of U.K. residents had taken an overnight short break or holiday in the U.K. since April 2021 - 24% of Scotland residents.

2. Only 7% of trip-takers took a trip to Scotland, a figure that doesn't rise when looking only at holidays. As the 10th most visited destination, visits to Scotland are behind projections for this time period. This will in part be related to the high level of VFR trips to other destinations, but may also be linked to parts of Scotland raising restrictions slightly later than England.

3. Trip-takers to Scotland from April index higher amongst older independents than the wider population (particularly amongst Scotland residents), with retirees and families in line with the population. Elsewhere in the U.K. families dominate trips taken.

4. Scotland trip-takers since April are significantly more likely than the broader population to fall into COVID-confident segments such as ‘life goes on’ and ‘less to lose’ – consistent with trip-takers elsewhere in the U.K.

5. ‘Countryside or village’ is the leading type of destination for trips taken since April, particularly amongst Scottish residents. Although ‘large city’ is the joint second most visited destination type (with ‘traditional coastal town’), it is significantly behind ‘countryside or village’. Consistent with previous findings in this report, Scotland residents are significantly less likely to have taken a trip to a large city in Scotland.

6. Hotel/motel/inn was the most popular choice for an overnight Scotland holiday, followed by ‘a private home’ and ‘caravan/camping’ – the latter two indexing higher amongst Scotland residents.
PUBLIC SENTIMENT AND TRAVEL CONFIDENCE
VACCINE TAKE-UP AND INTENTIONS

- As of early July a majority of U.K. (53%) and Scotland-based (60%) adults have received a second dose of the COVID-19 vaccine, with a large majority having received at least one dose (67% and 74% respectively). Consistent with previous reporting within this series, vaccine uptake is highest amongst retirees (more than 9 in 10 having received at least one dose) and older independents (78% having done so). Notably, a majority of pre-nesters are yet to receive a vaccine with over a third exhibiting some reluctance to do so.
- Of the 33% of U.K. adults that are yet to receive a vaccine, around two thirds demonstrate reluctance to have one at all, with 1 in 5 stating they definitely won’t have one.

Figure 1. Vaccine take-up and intentions, Percentage, Wave 34, U.K.

Figure 2. Vaccine take-up and intentions, Percentage, Wave 34, U.K.
PERCEPTIONS OF THE SITUATION IN RELATION TO COVID-19

- As of early July, 33% of U.K. adults feel that the worst is still to come in relation to COVID-19, with 22% feeling the worst has passed. Although perceptions have stabilised in the last two waves following drops from the record optimism reported in Wave 30 (early May), the proportion thinking the worst has passed is lower than in the previous report within this series. That said, the reduced positivity is more of a reflection of people shifting to ‘things are going to stay the same’ than ‘the worst is still to come’.
- The mood of Scotland residents broadly tracks U.K. residents

Figure 3. 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=1,750. All Scotland respondents n=360
Consistent with previous reporting, optimism in relation to COVID-19 somewhat correlates with age – older life stages the most likely to state ‘the worst has passed’. That said the difference is not as large as in previous waves of research when retirees and older independents were significantly more positive.
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 July 2021.
- Despite lower optimism levels relative to the previous reporting period, comfort levels with individual activities remain strong. For ‘visiting an indoor attraction’, comfort levels are at their highest to date, increasing by 5 percentage points to 52% from Wave 33 in mid-June. Conversely, ‘travelling by public transport’ and ‘going to a busy centre’ continue to generate the lowest comfort levels and have stagnated for a number of waves.

Figure 6. Level of comfort conducting individual activities, Net very and fairly comfortable, Percent, Waves 1-34, U.K.
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’

- After 11 consecutive waves (around 6 months) of growth, the comfort average for everyday activities has plateaued, hovering between 66% and 67% over the last three waves. With the exception of a dip in Wave 33, Scotland residents broadly track U.K. residents on this measure.

Figure 7. Level of comfort conducting individual activities, Net very and fairly comfortable comfort average, Percent average, Waves 1-34, U.K. and Scotland

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VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?

Base: All U.K. respondents. n= c.1,750. All Scotland respondents n= c.519

*For comparability, comfort average does not include ‘going to a visitor attraction’ or ‘visiting a city centre’ – statements that were added from wave 26 onwards.
The higher comfort levels amongst U.K. residents relative to Scotland residents is evident in the majority of individual activities, particularly those that involve high volumes of people. The largest gap is for ‘going to a busy centre’, where U.K. residents exhibit a 6 percentage point higher comfort level.

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**Figure 8. Level of comfort conducting activities by place of residence, Net very and fairly comfortable, Percent, Wave 34, U.K.**

- Comfort average: 66% U.K., 62% Scotland
- Going for a walk in a country park/local trail: 85% U.K., 83% Scotland
- Shopping in your local shopping centre: 67% U.K., 62% Scotland
- Eating at a restaurant: 64% U.K., 61% Scotland
- Travelling by public transport: 47% U.K., 42% Scotland
- Visiting an indoor attraction (e.g., a museum): 52% U.K., 47% Scotland
- Going to a busy city centre: 42% U.K., 36% Scotland

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VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? All U.K. respondents. n=1,759; All Scotland respondents n=251
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’. Pre-nesters and families are the most comfortable with the majority of activities.

This pattern is perhaps most notable for ‘visiting an indoor attraction’, only 36% of retirees describing themselves as ‘comfortable’ compared to 63% of pre-nesters and 61% of families.

Figure 9. Level of comfort conducting activities by life stage, Net very and fairly comfortable, Percent, Wave 34, U.K.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Pre-nesters</th>
<th>Families</th>
<th>Older independents</th>
<th>Retirees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>66</td>
<td>64</td>
<td>58</td>
<td>51</td>
</tr>
<tr>
<td>Going for a walk in a country park/local trail</td>
<td>85</td>
<td>82</td>
<td>87</td>
<td>86</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>71</td>
<td>71</td>
<td>64</td>
<td>63</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>76</td>
<td>71</td>
<td>59</td>
<td>54</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>55</td>
<td>50</td>
<td>45</td>
<td>39</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>63</td>
<td>61</td>
<td>50</td>
<td>36</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>47</td>
<td>49</td>
<td>43</td>
<td>29</td>
</tr>
</tbody>
</table>

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Pre-nesters n=406; Families n=540; Older Independents n=451; Retirees n=362
ATTITUDBNAL SEGMENTS BY RESIDENTS (SEE DEFINITIONS PAGE FOR MORE INFORMATION)

- Despite a general flattening of sentiment and comfort levels, the proportion falling into ‘COVID-confident’ segments such as ‘life goes on’ and ‘less to lose’ has increased since the previous report in late May – 44% of U.K. residents and 40% of Scotland residents falling into these segments (increases of 3 and 5 percentage points respectively).
- Notably, despite continuing to be more likely to belong to ‘COVID cautious’ segments, the increase in ‘COVID confident’ segment representation is driven by a slight shift amongst older life stages.

Figure 10. Breakdown of population by COVID segments, Percentage, Wave 34, U.K. and Scotland

Figure 11. Breakdown of population by COVID segments by life stage, Percentage, Wave 34, U.K.

Base: All U.K. respondents. n=1,759; All Scotland respondents n=251; Pre-nesters n=406; Families n=540; Older Independents n=451; Retirees n=362; 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 3 in 10 (30%) expecting it by December and only two thirds by April to June 2022. Pre-nesters and families (the most ‘COVID confident’ groups) are the most optimistic.

In line with comfort levels and ‘COVID segments’, expectations of normality are consistently lower amongst Scotland residents than residents from across the U.K. However, the gap is significantly smaller than in the previous reporting period (late May) when restrictions in some parts of Scotland were stricter than England.

Consistent with previous reporting, pre-nesters and families are the life stages most likely to anticipate normality by September, although this is a minority amongst all.

Figure 12. Cumulative perceptions of when things will return ‘close to normal’. Cumulative percentage Wave 34, UK and Scotland

<table>
<thead>
<tr>
<th>Audience</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-nesters</td>
<td>22%</td>
</tr>
<tr>
<td>Families</td>
<td>23%</td>
</tr>
<tr>
<td>Older independents</td>
<td>14%</td>
</tr>
<tr>
<td>Retirees</td>
<td>16%</td>
</tr>
</tbody>
</table>

Q16: Given what you know today, when do you think life will return to something close to normal?
Base: All U.K. respondents, n=1,759; All Scotland respondents n=251; Pre-nesters n=406; Families n=540; Older Independents n=451; Retirees n=362; Over 45s that have had the vaccine n=645; Over 45s that have not had the vaccine n=121
Around half of both U.K. and Scottish adults have either been hit hard by the pandemic or are having to be careful.

Unsurprisingly, the proportion of the population on furlough is now lower than in previous reports at 8%. However, a significant minority (around a third) have had their employment impacted in some way by the pandemic.

Figure 13. Breakdown of residents by financial segments, Percentage, Wave 34, U.K. and Scotland

<table>
<thead>
<tr>
<th>Statement</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>I've been hit hard</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Things are ok but I have to be careful</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>I've not been affected</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>I'm better off than before</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Figure 14. Employment impact of COVID-19, Percentage, Wave 34, U.K. and Scotland residents of working age*

<table>
<thead>
<tr>
<th>Employment Impact</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>I'm on furlough</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Reduced income</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Unpaid leave/redundant</td>
<td>21%</td>
<td>20%</td>
</tr>
<tr>
<td>None of these</td>
<td>65%</td>
<td>67%</td>
</tr>
</tbody>
</table>

*Working age defined as 16-65
CONFIDENCE IN THE ABILITY TO TAKE A U.K. SHORT BREAK OR HOLIDAY

- From July onwards more than half of the U.K. population are confident a booked domestic overnight trip would go ahead as planned, plateauing at around 3 in 5 from August onwards. It’s notable that a consistent 2 in 5 of the U.K. and Scotland population are not confident a trip would go ahead as planned at any point this year, underlining ongoing caution amongst a cohort of the population.
- Perhaps reflecting rising case numbers, confidence across all months has dropped slightly (although not significantly) compared to reporting in late May.

Figure 15. Confidence in taking a U.K. overnight trip across a range of different months, Net percentage very and fairly confident, Wave 34, U.K.

QVB7anew. We’d like you to imagine that you have booked a U.K. holiday or short break in each of the six time periods listed below. In light of the current COVID-19 pandemic, how confident are you that you would be able to go on these trips? Base: All U.K. respondents. n=1,759; All Scotland respondents n=251
Restrictions on travel from government is the most common reason for U.K. and Scotland adults not being confident to travel this summer (between July and September). However, whilst for U.K. adults this reason has increased since last wave and is marginally ahead of a number of others, amongst Scotland residents it dominates – 13 percentage points ahead of the next most important reason (‘concerns around catching COVID-19’).

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 March and June? Base: U.K. respondents not confident in taking a trip between July and September n=851; Scotland residents not confident in taking a trip between July and September n=120 *Two waves merged to increase base sizes
CONSISTENT with all previous reporting periods, pre-nesters and families exhibit significantly higher confidence levels that a domestic trip would go ahead in the summer than older independents and retirees.

Notably, ‘retirees’ exhibit more confidence than ‘older independents’.

Figure 17. Confidence in taking a U.K. overnight trip across a range of different months by life stage, Net percentage very and fairly confident, Wave 34, U.K.
REASONS FOR NOT FEELING CONFIDENT TAKING TRIPS IN THE U.K.

- Reasons for not feeling confident about trips going ahead vary significantly by life stage. Amongst pre-nesters and families, ‘personal finances’ are the most important barrier. Amongst retirees, it’s the threat of ‘government restrictions’ – a factor that is a top 3 influence for all life stages.
- ‘Older independents’ demonstrate a wide range of reasons with no single reason dominating. However, they are more likely to state reasons relating to catching COVID than retirees, perhaps driven by lower vaccination levels. However, with most generally of working age ‘finances’ and ‘annual leave’ are also factors.

Figure 18. Reasons for not being confident about travelling from July to September by life stage, Percentage ranked on retirees, Waves 33-34, 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 amongst summer and autumn intenders. A range of other outcomes are also listed, including ‘avoiding places with overseas tourists’, ‘staying closer to home than normal’ and ‘avoiding shared accommodation’.
- Only 1 in 5 summer intenders and 1 in 8 autumn intenders state that COVID-19 hasn’t influenced their U.K. destination choices.

Figure 19. Impact on destination choice by intenders, Percentage Waves 32-34, U.K.
DOMESTIC OVERNIGHT TRAVEL INTENTIONS
Around half of U.K. adults and a similar proportion 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 between now and the end of the year. On balance, however, both the U.K. and Scottish public anticipate taking ‘net fewer’ U.K. trips this year, whilst around 1 in 5 remain unsure.

Figure 20. Number of U.K. short breaks (1-3 nights) in the next six months compared to normal, Percentage Wave 34, U.K. and Scotland

Figure 21. Number of U.K. holidays (4+ nights) in the next six months compared to normal, Percentage Wave 34, 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 between now and the end of the year? Base: All U.K. residents n=1,759; All Scotland residents n=251
Nearly half (44%) of U.K. adults anticipate taking an overnight trip between July and December this year, over a third planning to do so this summer (between July and September), with August and September being the most ‘popular’ individual months. The U.K. picture is very similar to reporting in late May, however, the incidence of anticipated trips from Scotland residents has increased significantly, closing the gap with intention from adults living across the U.K. The closing of the gap correlates with the alignment of restrictions across the three nations of the U.K. – during the previous reporting period, the majority of restrictions had been lifted in England whilst a number of areas in Scotland remained in level 3.

Of the four life stages, families are most likely to take a summer domestic break, whilst all others are fairly united in planning to do so.
• 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 (89%) of Scotland summer intenders would take their Scotland trip anyway or take it in addition to an overseas trip – only a small proportion would switch their trip to overseas.

• Autumn intenders are more likely to take an overseas trip in the event of restrictions being lifted, but switching is unlikely.

Figure 23. Number of OVERSEAS short breaks (1-3 nights) in the next six months compared to normal, Percentage Wave 34, U.K. and Scotland

Figure 24. Number of OVERSEAS holidays (4+ nights) in the next six months compared to normal, Percentage Wave 34, U.K. and Scotland

Figure 25. Impact on Scotland trip if majority of overseas travel restrictions were lifted, percentage Wave 34, UK

QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of overseas holidays/short breaks between now and the end of the year? Base: All U.K. residents n=1,759; All Scotland residents n=251 VB6gii. In the event of the vast majority of restrictions relating to overseas travel being lifted, how, if at all, would this impact your decision to take an overseas trip in the UK during <<insert month>>? Scotland summer intenders n=264; Scotland autumn intenders n=80.
WHERE PLANNING ON STAYING ON NEXT U.K. SUMMER SHORT BREAK OR HOLIDAY

- Continuing a trend since the start of this research, the South West of England is the most popular region of the U.K. for an overnight short break or holiday this summer, 22% of summer intenders intending to go there. Scotland is the next most popular at 13%, followed by Wales and London. 60% of Scotland resident summer intenders are planning on taking an overnight trip in Scotland this summer, a rise on previous reporting.
- The South West is also the most popular region in the autumn, followed by the North West of England and Scotland. Half of Scotland resident autumn intenders plan to holiday there.

Figure 26. Where planning on staying on next U.K. overnight trip in summer 2021 (July to September), Percentage Waves 32-34, U.K. and Scotland Residents

Figure 27. Where planning on staying on next U.K. overnight trip in autumn 2021 (October to December), Percentage Waves 32-34, 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 Summer 2021. All UK summer intenders n=1,651; All Scotland resident summer intenders n=240; All UK autumn intenders n=535; All Scotland resident autumn intenders n=73
BREAKDOWN OF SCOTLAND INTENDERS BY REGION OF RESIDENCE

• Taken as a total, the majority of Scotland intenders continue to live outside of Scotland both in the summer and autumn months – particularly in the autumn. Outside of Scotland, London is the biggest source of intenders across both seasons. The North West of England is the next most significant contributor in summer, the South East of England in autumn. A range of other regions contribute similar proportions of intenders.

• As outlined in previous reporting, 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 28. Region of residents of Scotland summer and autumn intenders, Percentage Waves 32-34, U.K. sample**

- Scotland Summer Intenders
- Scotland Autumn Intenders

**Figure 28b. Breakdown of Scotland Spring & Summer intenders by region of residence, Percentage Waves 32-34, U.K.**

- Non-Scotland residents
- Scotland residents

<table>
<thead>
<tr>
<th>Region</th>
<th>Summer Intenders</th>
<th>Autumn Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>39</td>
<td>30</td>
</tr>
<tr>
<td>London (within M25)</td>
<td>11</td>
<td>14</td>
</tr>
<tr>
<td>North West</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Eastern</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>South East</td>
<td>7</td>
<td>13</td>
</tr>
<tr>
<td>West Midlands</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Yorkshire &amp; Humberside</td>
<td>6</td>
<td>10</td>
</tr>
<tr>
<td>East Midlands</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Wales</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>South West</td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td>North East</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>2</td>
<td>4</td>
</tr>
</tbody>
</table>

Base: Scotland summer intenders n=264; Scotland autumn intenders n=80
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, the South West of England and London are the three most popular alternatives – although there is minimal separation between them.

Amongst Scotland residents considering Scotland for a 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 Summer Intenders (% of Scotland intenders)</th>
<th>Scotland Autumn Intenders (% of Scotland intenders)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wales 9%</td>
<td>Wales 11%</td>
</tr>
<tr>
<td>South West 7%</td>
<td>South West 9%</td>
</tr>
<tr>
<td>London 7%</td>
<td>London 7%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humber 5%</td>
<td>West Midlands 6%</td>
</tr>
<tr>
<td>East Midlands 4%</td>
<td>East Midlands 6%</td>
</tr>
</tbody>
</table>

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 summer intenders n=264; All Scotland autumn intenders n=146; All Scotland resident summer intenders n=80; All Scotland resident autumn intenders n=37* Small base sizes
PROFILING SCOTLAND INTENDERS AND THEIR BOOKING BEHAVIOUR

Glentress Forest, Scottish Borders, David N Anderson
Older independents are likely to be the largest life stage spending an overnight stay in Scotland this summer, with higher representation than in the wider U.K. population. Families are likely to be the second largest group, in line with the population but in contrast to all U.K. overnight trips where they have the highest representation. Notably, families are the largest audience for trips to Scotland in the autumn.

Scotland intenders are significantly more likely than the U.K. population to belong to social grades AB.
The financial profile of Scotland summer intenders is relatively consistent with the wider U.K. population. Autumn intenders however, are more likely to indicate that they have been impacted financially by COVID-19 – ‘reduced’ income the most common outcome.

Figure 32. Breakdown of intenders by financial segments, Percentage Waves 32-34, U.K.

Figure 33. Employment impact on intenders, Percentage Waves 32-34, 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=5,275; Scotland summer intenders n=279; Scotland autumn intenders n=193.
RISK-BASED ATTITUINAL SEGMENTS (SEE DEFINITIONS PAGE FOR MORE INFORMATION)

- Broadly speaking, Scotland summer intenders are as likely as the wider U.K. population to belong to 'COVID confident' attitudinal segments, around 2 in 5 falling into either the 'life goes on' or 'less to lose' audiences. This proportion rises to half of autumn intenders, indicating that their decision to 'wait' until the latter part of the year to take an overnight trip is less likely to be related to attitudes in relation to COVID.

Figure 34. Breakdown of trip-takers by risk segment, Percentage Waves 32-34, U.K.
WHETHER PLANNED OR BOOKED U.K. HOLIDAY OR SHORT BREAK

- Over half (55%) of Scotland summer intenders have already planned their Scotland trip with just over 2 in 5 (42%) having booked it – a significant increase on the proportion that had done so in late May. It’s worth noting that booking levels for Scotland remain behind levels reported in the wider U.K. (49%).
- Generally, Scotland intenders are planning their summer trip closer to the date than normal and booking significantly closer than normal.
- For Scotland autumn intenders, planning is significantly in advance of the trip compared to normal, with booking set to be closer.

Figure 35. Proportion that have already planned/booked their next Scotland summer or autumn trip, Percentage, Waves 32-34*, U.K.

<table>
<thead>
<tr>
<th>Already planned Scotland summer trip</th>
<th>Already booked Scotland summer trip</th>
<th>Already planned Scotland autumn trip</th>
<th>Already booked Scotland autumn trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>55</td>
<td>42</td>
<td>23</td>
<td>12</td>
</tr>
</tbody>
</table>

Figure 36. Planning and booking lead times for Scotland summer or autumn trips compared to normal, Percentage Waves 32-34, U.K.

- Net: Closeness
  - Closer to the travel date than normal: +3 (26), -30 (13)
  - About the Same: +21 (34), +7 (27)
  - Further from the travel date than normal: -30 (13), -21 (44)
  - Don’t know: +7 (10), +7 (10)

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? Base: Scotland summer intenders (wave 34) n=99 Scotland autumn intenders (waves 32-34) n=80 VB6dlic. Compared to normal, when did or will you plan and book your next UK trip in Scotland?
Scotland summer intenders are most likely to book their trip to Scotland directly with the provider followed by ‘an online travel agent’. Amongst autumn intenders, the top 2 is the same, although the order is reversed, driven by a younger age profile.

Figure 37. Accommodation booking channel for Scotland summer and autumn intenders, Net percentage Waves 32-34, U.K.
TRIP BEHAVIOUR

Pipe band and the North Berwick Highland Games, North Berwick, East Lothian, Kenny Lam
The majority of 'all' Scotland summer intenders are anticipating their overnight trip to Scotland to be 4+ nights in length, a contrast to Scotland resident summer intenders whose trip is most likely to be a short-break across all summer months. This difference is consistent with previous reporting.

The vast majority of all Scotland trips are likely to be for a 'holiday' purpose.
Scotland summer intenders are most likely to plan on staying in a ‘countryside or a village’ on their Scotland trip, with ‘rural coastline’ and ‘traditional coastal town’ close behind. A ‘large city or town’ is the destination of choice for just 20% of Scotland summer intenders, although this represents an increase on summer projections in May. Scotland resident intenders are more likely than wider U.K. intenders to spend their Scotland summer trip at a ‘traditional coastal/seaside town’.

Notably, in the autumn months, ‘large city’ is the main destination type preferred by intenders.

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip?
Base: All respondents planning on taking a holiday or short break exclusively in Scotland. Scotland exclusive summer intenders n=215; Scotland resident exclusive summer intenders n=133; Scotland exclusive autumn intenders n=99* *Low base sizes
WHERE PLANNING ON STAYING IN SCOTLAND ON NEXT SCOTLAND TRIP

• Consistent with previous reporting, The Highlands remains the most favoured destination for Scotland summer intenders living within and outside Scotland. Edinburgh is the second most preferred destination for all Scotland summer intenders, but significantly less so for Scotland resident intenders (see next page for more detail).

• In line with preferences to stay in a large city, Scotland’s autumn intenders are most likely to stay in the Edinburgh area, although the Highlands is also popular in this period.

Figure 42. Planned destination for next Scotland trip for summer intenders, Percentage Waves 32-34, U.K. and Scotland

- Scotland Summer Intenders
- Scotland Summer Resident Intenders

Figure 43. Planned destination for next Scotland trip for autumn intenders, Percentage Waves 32-34, U.K. and Scotland

- Scotland Autumn Intenders

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 summer intenders n=215; Scotland resident exclusive summer intenders n=133; Scotland exclusive autumn intenders n=99** Low base sizes
WHERE PLANNING ON STAYING BY COUNTRY OF ORIGIN

- As alluded to on the previous page, Scotland-based summer intenders are significantly more likely to favour The Highlands for their domestic trip and significantly less likely to stay in cities such as Edinburgh and Glasgow.

Figure 44. Planned destination for next Scotland trip for summer intenders by region of residence, Percentage Waves 32-34, U.K. and Scotland

<table>
<thead>
<tr>
<th>Region</th>
<th>Scotland residents</th>
<th>Non-Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlands</td>
<td>40</td>
<td>23</td>
</tr>
<tr>
<td>Edinburgh area</td>
<td>18</td>
<td>29</td>
</tr>
<tr>
<td>Glasgow area</td>
<td>9</td>
<td>18</td>
</tr>
<tr>
<td>Scottish Isles</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>West Coast</td>
<td>16</td>
<td>10</td>
</tr>
<tr>
<td>East Coast</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>South of Scotland</td>
<td>12</td>
<td>3</td>
</tr>
<tr>
<td>Central Scotland</td>
<td>3</td>
<td>2</td>
</tr>
</tbody>
</table>

QVBSix. 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 resident intenders n=133; Scotland non-resident summer intenders n=82
MAKE-UP OF VISITOR PARTY FOR NEXT SCOTLAND HOLIDAY OR SHORT BREAK

• 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’ – the latter making up over a third of visitor parties across all summer months, rising to half of visitors in August. ‘Other family members’ and ‘friends’ also make up a significant proportion of Scotland summer intenders.

• The fall-out in autumn is relatively similar to the summer, although parties with a ‘child, grandchild or young adults with parents’ are less prevalent.

Figure 45. Visitor party make-up for Scotland summer intenders, Percentage Waves 32-34, U.K.

Figure 46. Visitor party make-up for Scotland autumn intenders, Percentage Waves 32-34, U.K.
VISITOR PARTY BREAKDOWN OF SCOTLAND INTENDERS - BY DESTINATION TYPE

- Travelling to Scotland with a partner has the highest representation across all destination types this summer, followed by people travelling with 'children, grandchildren or young adults with parents'.
- Consistent with previous reporting, 'children, grandchildren or young adults with parents' are most likely to belong to parties visiting coastal/seaside destinations. City/town destinations attract the highest proportion of 'friends'.

Table 4. Visitor party make-up for Scotland summer intenders by destination type, Percentage Waves 32-34, U.K.

<table>
<thead>
<tr>
<th></th>
<th>All Scotland summer intenders</th>
<th>Scotland Seaside/Coastal Destinations</th>
<th>Scotland Rural Destinations</th>
<th>City/town destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner</td>
<td>58%</td>
<td>63%</td>
<td>55%</td>
<td>57%</td>
</tr>
<tr>
<td>Children or young adults (aged 16-24) with parents</td>
<td>35%</td>
<td>33%</td>
<td>29%</td>
<td>25%</td>
</tr>
<tr>
<td>Friend/s</td>
<td>20%</td>
<td>15%</td>
<td>9%</td>
<td>20%</td>
</tr>
<tr>
<td>Other family member</td>
<td>21%</td>
<td>24%</td>
<td>22%</td>
<td>23%</td>
</tr>
<tr>
<td>Pets</td>
<td>10%</td>
<td>9%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Will travel alone</td>
<td>10%</td>
<td>7%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Older adults (25+) with parents</td>
<td>9%</td>
<td>11%</td>
<td>11%</td>
<td>6%</td>
</tr>
</tbody>
</table>
`Own car` is by far the leading mode of transport intended to be used on trips to Scotland in the summer and autumn. Train is the next most preferred transport type.
TYPE OF ACCOMMODATION FOR NEXT SCOTLAND SHORT BREAK OR HOLIDAY

- ‘Hotel/motel/inn’ is the preferred accommodation choice for summer intenders, followed by ‘a private home’ and ‘caravan/camping’.
- ‘Camping/caravanning’ is the joint leading accommodation choice for Scotland intenders who live in Scotland, along with ‘hotel/motel/inn’.
- In the autumn months, ‘hotel/motel/inn’ and ‘commercial self-catering’ are the leading accommodation choices.

### Figure 49. Accommodation planning on staying in on next U.K. overnight trip for Scotland summer intenders, Net percentage Waves 32-34, U.K.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Scotland Summer Intenders</th>
<th>Scotland Summer Resident Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/motel/inn (e.g. Airbnb, second home, friends etc.)</td>
<td>40</td>
<td>35</td>
</tr>
<tr>
<td>A private home</td>
<td>37</td>
<td>31</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>32</td>
<td>35</td>
</tr>
<tr>
<td>Commercial self-catering (e.g. rented holiday cottage)</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B/ Farmhouse</td>
<td>19</td>
<td>17</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

### Figure 50. Accommodation planning on staying in on next U.K. overnight trip for Scotland autumn intenders, Net percentage Waves 32-34, U.K.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Scotland Autumn Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/motel/inn (e.g. Airbnb, second home, friends etc.)</td>
<td>58</td>
</tr>
<tr>
<td>Commercial self-catering (e.g. rented holiday cottage)</td>
<td>51</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>30</td>
</tr>
<tr>
<td>A private home (e.g. Airbnb, second home, friends etc.)</td>
<td>29</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B/ Farmhouse</td>
<td>24</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
</tr>
</tbody>
</table>
ACCOMMODATION CHOICE OF SCOTLAND INTENDERS - BY DESTINATION TYPE

- Anticipated accommodation choice differs by destination type. Those considering a trip to a Scottish coastal or rural destination are most likely to be planning ‘camping/caravanning’, whilst ‘rural intenders’ index the highest on ‘commercial self-catering’. ‘City/town destinations’ unsurprisingly index the highest on ‘hotel/motel/inn’.

Table 5. Visitor party make-up for Scotland summer intenders by destination type, Percentage Waves 32-34, U.K.

<table>
<thead>
<tr>
<th></th>
<th>All Scotland summer Intenders</th>
<th>Scotland Seaside/Coastal Destinations</th>
<th>Scotland Rural Destinations</th>
<th>City/town destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel / Motel / Inn</td>
<td>40%</td>
<td>33%</td>
<td>20%</td>
<td>66%</td>
</tr>
<tr>
<td>Private home</td>
<td>37%</td>
<td>35%</td>
<td>26%</td>
<td>32%</td>
</tr>
<tr>
<td>Caravan/camping</td>
<td>32%</td>
<td>40%</td>
<td>34%</td>
<td>16%</td>
</tr>
<tr>
<td>Commercial self-catering</td>
<td>27%</td>
<td>28%</td>
<td>40%</td>
<td>16%</td>
</tr>
<tr>
<td>Guesthouse/B&amp;B/Farmhouse</td>
<td>19%</td>
<td>14%</td>
<td>21%</td>
<td>13%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>12%</td>
<td>16%</td>
<td>0%</td>
</tr>
</tbody>
</table>

QVB4d. With whom are you likely to be spending your holiday? QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your U.K. trip? Base: All respondents planning exclusively on taking a holiday or short break in Scotland between July and September. Scotland Seaside destinations exclusive (rural coastline + traditional seaside/coastal town) n=50; Scotland Rural Destinations (Countryside or village + mountains or hills) n=59; Scotland Cities or large towns n=43* Small base sizes. Treat with caution.
ANTICIPATED SPEND ON NEXT SCOTLAND HOLIDAY OR SHORT BREAK

- On average, Scotland summer intenders expect to spend £963 on their trip in Scotland – higher than the U.K. average. Notably, Scotland resident summer intenders anticipate spending significantly 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.

- Scotland autumn intenders intend to spend £1,027 on average, aligning with their high social grades and high proportion of families.

Figure 51. Anticipated spend for Scotland intenders, Percentage Waves 32-34, U.K.

<table>
<thead>
<tr>
<th></th>
<th>Scotland Summer Intenders</th>
<th>Scotland Resident Summer Intenders</th>
<th>Scotland Autumn Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under £200</td>
<td>13</td>
<td>17</td>
<td>5</td>
</tr>
<tr>
<td>£200-£499</td>
<td>12</td>
<td>26</td>
<td>25</td>
</tr>
<tr>
<td>£500-£999</td>
<td>25</td>
<td>34</td>
<td>30</td>
</tr>
<tr>
<td>£1000+</td>
<td>30</td>
<td>28</td>
<td>40</td>
</tr>
</tbody>
</table>

Figure 52. Anticipated average spend for Scotland summer and autumn intenders, Average, Waves 32-34, U.K.

£963          £787          £1,027
Scotland Summer Intenders  Scotland Resident Summer Intenders  Scotland Autumn Intenders

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 summer intenders n=215; Scotland resident exclusive summer intenders n=133; Scotland exclusive autumn intenders n=59* *Low base sizes
CITY AND TOWN INTENDERS: BARRIERS AND INCENTIVES

Pipe band and the North Berwick Highland Games, North Berwick, East Lothian, Kenny Lam
Those intending to stay in a city/town destination this summer are 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 53. Breakdown of city/town intenders by life stage, Percentage Waves 32-34, UK

Figure 54. Breakdown of city/town intenders by social grade, Percentage Waves 32-34, UK

Base: UK summer city intenders – all considering taking a UK overnight break in a city this summer n=416; Uk summer non-city intenders all not considering taking a UK overnight break in a city this summer n=1,364
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’ (both with gaps of 16 percentage points).

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. Summer City Intenders</th>
<th>U.K. Summer Non-City Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>81</td>
<td>73</td>
</tr>
<tr>
<td>Going for a walk in a country park/local trail</td>
<td>93</td>
<td>93</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>83</td>
<td>74</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>84</td>
<td>76</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>65</td>
<td>49</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>67</td>
<td>57</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>62</td>
<td>46</td>
</tr>
</tbody>
</table>

Figure 55. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Waves 32-34, U.K.

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: UK summer city intenders – all considering taking a UK overnight break in a city this summer n=416; UK summer non-city intenders all not considering taking a UK overnight break in a city this summer n=1,364
LEVEL OF COMFORT UNDERTAKING ACTIVITIES AND COVID SEGMENTS

- Perhaps unsurprisingly given comfort levels, ‘summer city intenders’ are significantly more likely than ‘non city intenders’ to belong to more ‘COVID confident’ segments such as ‘life goes on’ and ‘less to lose’.

Figure 56. Breakdown of population by COVID segments by life stage, Percentage, Waves 32-34, U.K.

<table>
<thead>
<tr>
<th>Segment</th>
<th>All U.K. residents</th>
<th>U.K. Summer City Intenders</th>
<th>U.K. Summer Non-City Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life goes on</td>
<td>10</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>Less to lose</td>
<td>32</td>
<td>36</td>
<td>30</td>
</tr>
<tr>
<td>Protective but pragmatic</td>
<td>12</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td>Struggling</td>
<td>20</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>Currently constrained</td>
<td>14</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Cautious but content</td>
<td>12</td>
<td>7</td>
<td>13</td>
</tr>
</tbody>
</table>

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: UK summer city intenders – all considering taking a UK overnight break in a city this summer n=416; UK summer non-city intenders all not considering taking a UK overnight break in a city this summer n=1,364
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 summer intenders, over a third (36%) citing this. ‘Large cities tend to be too expensive’, ‘fewer things to do/places to visit’ and ‘restrictions on opportunities to socialise’ are the next most cited reasons.

Notably a significant minority (18%) are open to staying in a large city ‘later in the year’ suggesting there is potential to nudge visits earlier.

A further 1 in 5 (22%) believe it isn’t responsible to travel in a city during this period, whilst 36% wouldn’t stay in one regardless of COVID-19.

Figure 57: Top 10 reasons for not staying in a city amongst Scotland summer intenders, Percentage Waves 32-34, UK
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 2 in 5.
- 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 58: Top 10 factors that would encourage a stay in a city amongst summer intenders not planning on staying in a town or city, Percentage Waves 32-34, UK*
TOP 5 REASONS FOR NOT STAYING IN A CITY AND THAT WOULD ENCOURAGE A VISIT BY LIFE STAGE

- For families, retirees and older independents 'I am worried about catching COVID' is the leading reason putting them off visiting a city this summer. Pre nesters and families are more likely than older life stages to cite restrictions on things to do/places to visit.
- Discounted accommodation is the leading incentive for staying in a city across all life stages with the exception of retirees, for whom 'all restaurants and bars to be open' is the main potential draw. ‘Low COVID-19 case numbers’ is also a priority for retirees, underlining their continued caution around the virus. Notably, ‘all visitor attractions to be open’ is a top 5 incentive for all life stages.

Table 6: Top 5 factors that would encourage a stay in a city amongst summer intenders not planning on staying in a town or city by life stage, Waves 32-34, UK

<table>
<thead>
<tr>
<th>Rank</th>
<th>Pre-nesters</th>
<th>Families</th>
<th>Older independents</th>
<th>Retirees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fewer things to do/places to visit</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>I am more worried about catching COVID-19 in a large city</td>
</tr>
<tr>
<td>2</td>
<td>Large cities tend to be too expensive</td>
<td>Fewer things to do/places to visit</td>
<td>Large cities tend to be too expensive</td>
<td>Restrictions on opportunities to socialise</td>
</tr>
<tr>
<td>3</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>Large cities tend to be too expensive</td>
<td>Fewer things to do/places to visit</td>
<td>Large cities tend to be too expensive</td>
</tr>
<tr>
<td>4</td>
<td>Restrictions on opportunities to socialise</td>
<td>Restrictions on opportunities to socialise</td>
<td>Restrictions on opportunities to socialise</td>
<td>It’s not responsible to travel to a city in this period</td>
</tr>
<tr>
<td>5</td>
<td>Fewer opportunities to eat/drink out</td>
<td>I will stay in a large city later in the year</td>
<td>It’s not responsible to travel to a city in this period</td>
<td>Fewer things to do/places to visit</td>
</tr>
</tbody>
</table>

Table 7: Top 5 factors that would encourage a stay in a city amongst summer intenders not planning on staying in a town or city by life stage, Waves 32-34, UK

<table>
<thead>
<tr>
<th>Rank</th>
<th>Pre-nesters</th>
<th>Families</th>
<th>Older independents</th>
<th>Retirees</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Discounted accommodation</td>
<td>All visitor attractions to be open</td>
<td>Discounted accommodation</td>
<td>All restaurants and bars to be open</td>
</tr>
<tr>
<td>2</td>
<td>All visitor attractions to be open</td>
<td>COVID-safe cleanliness measures in public spaces</td>
<td>Discounted accommodation</td>
<td>Low COVID-19 case numbers</td>
</tr>
<tr>
<td>3</td>
<td>All restaurants and bars to be open</td>
<td>COVID-safe cleanliness measures in public spaces</td>
<td>All visitor attractions to be open</td>
<td>COVID-safe cleanliness measures in public spaces</td>
</tr>
<tr>
<td>4</td>
<td>COVID-safe cleanliness measures in public spaces</td>
<td>Discounted entry to visitor attractions</td>
<td>All restaurants and bars to be open</td>
<td>Discounted accommodation</td>
</tr>
<tr>
<td>5</td>
<td>Low COVID-19 case numbers</td>
<td>COVID-safe social distancing in public spaces</td>
<td>COVID-safe social distancing in public spaces</td>
<td>All visitor attractions to be open</td>
</tr>
</tbody>
</table>

QVB5b: You indicated you don’t plan on staying in a large city during your UK trip in [pipe: hVB3]. Why is this? VBSc. Which, if any, of the following would encourage you to take a U.K. short break or holiday in a large city in the next few months? Base: Respondents who would not stay in a city. Pre-nesters n=280; Families n=490; Older Independents n=352; Retirees n=277
TOP 5 REASONS FOR NOT STAYING IN A CITY AND THAT WOULD ENCOURAGE A VISIT BY SEGMENT

- Unsurprisingly, the more COVID-cautious segments are significantly more likely to cite concerns about catching COVID-19 as a barrier to visiting a city. The more COVID-confident segments are more likely to index higher on reasons relating to things to do and the cost of cities.
- There is significant variation in factors that would encourage a stay in a city by COVID-19 segment, although some clear themes emerge. Perhaps unsurprisingly, COVID-cautious segments are more likely to cite measures that create a sense of safety around COVID-19. The more COVID-confident segments are more likely to cite discounts, conditions that will ensure a ‘full’ holiday experience such as ‘all restaurants and bars to be open’ and ‘all visitor attractions to be open’, although COVID-safety measures assume some importance for these groups too.

Table 8: Top 5 factors that would encourage a stay in a city amongst summer intenders not planning on staying in a town or city by segment, Waves 32-34, UK

<table>
<thead>
<tr>
<th>Rank</th>
<th>Cautious but constrained</th>
<th>Currently constrained</th>
<th>Struggling but pragmatic</th>
<th>Less to lose</th>
<th>Life goes on</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>Low COVID-19 case numbers</td>
<td>Low COVID-19 case numbers</td>
<td>Discounted accommodation</td>
<td>Discounted accommodation</td>
</tr>
<tr>
<td>2</td>
<td>Restrictions on opportunities to socialise</td>
<td>COVID-safe cleanliness measures in public spaces</td>
<td>COVID-safe social distancing in public spaces</td>
<td>All visitor attractions to be open</td>
<td>All restaurants and bars to be open</td>
</tr>
<tr>
<td>3</td>
<td>Fewer things to do/places to visit</td>
<td>All visitor attractions to be open</td>
<td>Low COVID-19 case numbers</td>
<td>All visitor attractions to be open</td>
<td>All restaurants and bars to be open</td>
</tr>
<tr>
<td>4</td>
<td>Large cities tend to be too expensive</td>
<td>Fewer people/crowds than normal</td>
<td>Low COVID-19 case numbers</td>
<td>Restaurant vouchers or discounted prices</td>
<td>Discounted entry to visitor attractions</td>
</tr>
<tr>
<td>5</td>
<td>It’s not responsible to travel to a city in this period</td>
<td>Discounted accommodation</td>
<td>All visitor attractions to be open</td>
<td>Discounted entry to visitor attractions</td>
<td>Discounted entry to visitor attractions</td>
</tr>
</tbody>
</table>

Table 9: Top 5 factors that would encourage a stay in a city amongst summer intenders not planning on staying in a town or city by segment, Waves 32-34, UK

<table>
<thead>
<tr>
<th>Rank</th>
<th>Cautious but constrained</th>
<th>Currently constrained</th>
<th>Struggling but pragmatic</th>
<th>Less to lose</th>
<th>Life goes on</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I am more worried about catching COVID-19 in a large city</td>
<td>Low COVID-19 case numbers</td>
<td>Low COVID-19 case numbers</td>
<td>Discounted accommodation</td>
<td>Discounted accommodation</td>
</tr>
<tr>
<td>2</td>
<td>Restrictions on opportunities to socialise</td>
<td>COVID-safe cleanliness measures in public spaces</td>
<td>COVID-safe social distancing in public spaces</td>
<td>All visitor attractions to be open</td>
<td>All restaurants and bars to be open</td>
</tr>
<tr>
<td>3</td>
<td>Fewer things to do/places to visit</td>
<td>All visitor attractions to be open</td>
<td>Low COVID-19 case numbers</td>
<td>All visitor attractions to be open</td>
<td>All restaurants and bars to be open</td>
</tr>
<tr>
<td>4</td>
<td>Large cities tend to be too expensive</td>
<td>Fewer people/crowds than normal</td>
<td>Low COVID-19 case numbers</td>
<td>Restaurant vouchers or discounted prices</td>
<td>Discounted entry to visitor attractions</td>
</tr>
<tr>
<td>5</td>
<td>It’s not responsible to travel to a city in this period</td>
<td>Discounted accommodation</td>
<td>All visitor attractions to be open</td>
<td>Discounted entry to visitor attractions</td>
<td>Discounted entry to visitor attractions</td>
</tr>
</tbody>
</table>
GENERAL LEISURE ACTIVITY

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam
Around 3 in 10 U.K. and Scotland residents anticipate taking a day trip within the next 2 weeks, rising to 63% and 55% respectively by the summer.
ANTICIPATED DAY TRIPS BY DESTINATION TYPE

- Rural and coastal areas are most likely to generate day trips by this summer, urban areas significantly less likely to
TRENDED ANTICIPATED ACTIVITY COMPARED TO ‘NORMAL’ IN THE NEXT FEW MONTHS

- Consistent with a range of other measures, engagement with most leisure activities remains consistent with the previous few waves.

Figure 61. 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

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All U.K. respondents. n=c.1,750.
Outdoor 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 now set to generate engagement levels in line with normal, whilst ‘indoor health or wellbeing’ and ‘indoor attractions’ continue to be likely to generate lower than normal engagement. Broadly speaking, Scotland residents are set to engage less than residents from across the U.K. – particularly for indoor activities.

**Figure 62. Leisure venues and activities more or less likely to visit/do as lockdown restrictions are lifted, Net: ‘more likely’ minus ‘less likely’ Wave 34, UK**

<table>
<thead>
<tr>
<th>Activity Type</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>35</td>
<td>33</td>
</tr>
<tr>
<td>Outdoor leisure or sports activities</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>Predominantly outdoor visitor attractions</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Entertainment and events (e.g. restaurants, cinema, festivals etc.)</td>
<td>0</td>
<td>-4</td>
</tr>
<tr>
<td>Indoor health or wellbeing activities (e.g. spa, retreat and indoor swimming)</td>
<td>-4</td>
<td>-12</td>
</tr>
<tr>
<td>Predominantly indoor or covered attractions</td>
<td>-9</td>
<td>-15</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=1,759; All Scotland respondents n=251;
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 63. Catering, entertainment and events more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Wave 34, U.K. and Scotland
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 – ‘historic houses/palaces, museums and art galleries’ and ‘outdoor playgrounds or activity areas’ likely to attract similar interest to normal times.

Figure 64. Visitor attractions more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 34, U.K. and Scotland
GENERAL LEISURE ACTIVITY INTENTIONS IN NEXT FEW MONTHS

- 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.

Figure 65. Outdoor areas more or less likely to visit compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 34, U.K. and Scotland

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beach</td>
<td>33</td>
<td>28</td>
</tr>
<tr>
<td>Coastal walk or trail</td>
<td>26</td>
<td>26</td>
</tr>
<tr>
<td>Mountain, hills or other rural areas</td>
<td>12</td>
<td>21</td>
</tr>
</tbody>
</table>
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’, ‘swimming outdoors’ and ‘cycling/mountain biking’ also set to experience an uplift.

Also in line with previous reports, there is likely to be a net decrease in anticipation to undertake most other outdoor activities.

Figure 66. Outdoor activities more or less likely to do compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 34, U.K. and Scotland
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 now level with ‘normal’ behaviour.

Figure 67. Indoor activities more or less likely to do compared to normal in next few months, Net: ‘more likely’ minus ‘less likely’ Waves 34, U.K. and Scotland
OVERNIGHT TRIPS TAKEN SINCE APRIL
TRIPS TAKEN AND PURPOSE OF TRIPS SINCE APRIL

- As of early July, 28% of U.K. residents had taken an overnight short break or holiday in the U.K. since April 2021 - 24% of Scotland residents. 3 in 5 U.K. residents that went on a trip took a holiday, the majority of the remainder visiting friends or relatives (VFR). Scotland residents were also most likely to have taken a holiday.

Figure 68. Proportion taken an overnight trip in the U.K. since April, Percentage Wave 34, U.K.

![Bar chart showing the proportion of UK and Scotland residents who took an overnight trip since April. UK residents: 28%, Scotland residents: 24%.]

Figure 69. Purpose of UK and Scotland trips taken compared to UK trips intended, Percentage Waves 33-34, U.K.

![Bar chart showing the purpose of trips taken compared to those intended. For UK residents: Business 31%, Visiting friends or relatives 60%, Holiday 4%. For Scotland residents: Business 35%, Visiting friends or relatives 54%, Holiday 8%.]

QVB13a. Have you already taken an overnight short break or holiday in the U.K. since April? VB13e. And which of the following best describes the purpose of the trip you took since April? Base: All U.K. respondents. n=1,759; All Scotland respondents n=251; UK trip takers n=951; Scotland trip-takers n=113
Consistent with predictions, the South West of England attracted the highest proportion of trips from April – generating 18% of all trips, rising to 20% amongst those taking a trip for a *holiday* purpose. Only 7% of trip-takers took a trip to Scotland, a figure that doesn’t rise when looking only at holidays. As the 10th most visited destination, visits to Scotland are behind projections for this time period.

Amongst Scotland residents that took a trip, 3 in 5 took their trip in Scotland - relatively consistent with predictions.
Nearly two thirds of visits to Scotland were for a holiday purpose, higher than the majority of other U.K. destinations but behind East of England, South West of England, Wales and Yorkshire and The Humber.

Figure 71. Purpose of April-June U.K. short break or holiday by destination, Percentage Waves 33-34, U.K.
DEMOGRAPHICS OF TRIP-TAKERS

- Trip-takers to Scotland from April index higher amongst older independents than the wider population (particularly amongst Scotland residents), with retirees and families in line with the population. Elsewhere in the U.K., families dominate trips taken.
- In terms of social grade, trip-takers are more likely to belong to social grades C1C2.

Figure 72. Breakdown of population and April-June trip-takers by life stage, Percentage Waves 33-34, U.K. and Scotland

Figure 73. Breakdown of population and April-June trip-takers by social grade, Percentage Waves 33-34, U.K. and Scotland

Source: Demographics. Base: All respondents. U.K. population n=3518 All Scotland trips n=93; Scotland resident trip takers n=65
ATTITUDINAL SEGMENTS (SEE DEFINITIONS PAGE FOR MORE INFORMATION)

- Scotland trip-takers since April are significantly more likely than the broader population to fall into COVID-confident segments such as ‘life goes on’ and ‘less to lose’ – consistent with trip-takers elsewhere in the U.K.

Figure 74. Breakdown of April-June trip-takers by risk segment, Percentage Waves 33-34, U.K.

Source: Attitudinal segments: Full description on page 7
Base: All respondents. U.K. population n=3518 All Scotland trips n=93; Scotland resident trip takers n=65
‘Countryside or village’ is the leading type of destination for trips taken since April, particularly amongst Scottish residents. Although ‘large city’ is the joint second most visited destination type (with ‘traditional coastal town’), it is significantly behind ‘countryside or village’. Consistent with previous findings in this report, Scotland residents are significantly less likely to have taken a trip to a large city in Scotland.
ACCOMMODATION STAYED IN TRIPS TAKEN

- ‘Hotel/motel/inn’ was the most popular choice for an overnight Scotland holiday, followed by ‘a private home’ and ‘caravan/camping’ – the latter two indexing higher amongst Scotland residents.
- Unsurprisingly, private home indexed higher for ‘all trips’ than ‘holiday trips’, driven by trips with a VFR purpose.

Figure 76. Accommodation stayed in on Scotland April-June trip, Net percentage, Waves 33-34, U.K.

### ACCOMMODATION STAYED IN TRIPS TAKEN

- **Hotel/motel/inn**
  - All Scotland Trip Takers: 48%
  - All Scotland Resident Trip Takers: 41%

- **A private home (e.g. Airbnb, second home, friends etc.)**
  - All Scotland Trip Takers: 31%
  - All Scotland Resident Trip Takers: 38%

- **Caravan/ Camping**
  - All Scotland Trip Takers: 29%
  - All Scotland Resident Trip Takers: 32%

- **Commercial self-catering (e.g. rented holiday cottage)**
  - All Scotland Trip Takers: 23%
  - All Scotland Resident Trip Takers: 25%

- **Guesthouse / B&B / Farm house**
  - All Scotland Trip Takers: 8%
  - All Scotland Resident Trip Takers: 10%

- **Other**
  - All Scotland Trip Takers: 6%
  - All Scotland Resident Trip Takers: 8%

**Note:** All Scotland trips n=77; Scotland resident trip takers n=58
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 32-34 of the COVID-19 consumer fortnightly tracker.