COVID-19 UK Consumer Tracking Report: Scotland Level Summary

4th November to 10th January
(Waves 40-42)

Published February 3rd 2022
INTRODUCTION AND METHODOLOGY
INTRODUCTION

- VisitEngland, VisitScotland and Visit Wales (Welsh Government) have commissioned a Covid-19 consumer sentiment tracking survey to understand domestic intent to take overnight short breaks and holidays both within the UK 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 UK 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 UK 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 run since 18th May 2020

- **The findings in this report are based on data from Waves 40-42.** This is based on fieldwork taking place during the following dates:
  - Wave 40: 4th to 10th November
  - Wave 41: 1st to 7th December
  - Wave 42: 4th to 10th January

In a number of places, and where base sizes allow, the data is based on fewer waves – this is to reflect the most recent public sentiment and intentions.
Definitions used within this report (1)

In this report we look at the profiles and attitudes of a number of separate audiences:

Definitions used include:

- **Winter/Spring Intenders**: Members of the public who state their next UK holiday or short break will be between January and June 2022. “Winter” refers to January – March, “Spring” refers to April – June.

- **Summer Intenders**: Members of the public who state their next UK holiday or short break will be between July and September 2022.

Throughout the report we use a number of definitions. To deliver clearer profiles, 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+.
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
KEY FINDINGS
1. As of early January, the UK public are as likely to think the ‘worst has passed’ as ‘the worst is still to come’ in relation to COVID-19. Although this represents a more pessimistic position than through most of 2021, it is slightly more positive than a month earlier in December, and significantly more positive than January 2021 – the equivalent fieldwork period last year.

2. Similarly, ‘comfort levels’ with ‘typical’ activities such as ‘going for a walk in a country park’ and ‘shopping in your local shopping centre’ are higher than at any point since May 2020 and comfort with ‘eating at a restaurant’ has risen by 44 percentage points since January 2021 (compared to an activity average rise of 29), suggesting the public’s leisure activity has not been significantly dented by a return of government restrictions and the arrival of the Omicron variant.

3. That said the virus continues to impact leisure intentions at some level, significant proportions of the UK and Scotland-based public avoiding activities they would normally do. For example, 21% of Scotland residents state they would normally visit the ‘cinema/theatre’ in the next 12 months, but will avoid doing so due to COVID-19, with 17% stating this for ‘festivals/exhibitions in an enclosed space’, 13% for ‘indoor restaurants’ and 13% for nightclubs.

4. Consistent with previous reporting within this series, ‘older’ life stages such as ‘retirees’ and ‘older independents’ demonstrate the lowest comfort levels with general leisure activity, and are the most likely to avoid activities they would normally do. ‘Pre-nesters’ and families remain the most comfortable.

5. Perhaps linked to lingering concerns around the virus, the UK and Scotland-based public cite a range of conditions as essential for indoor tourism and leisure providers to have in place for them to visit in the next few months. Amongst UK residents, ‘free cancellation’ is the number one requirement, with mask wearing (for staff and customers) close behind. Enhanced cleaning regimes and plentiful hand sanitisers also remain important. Perhaps notably, Scotland residents are significantly more likely than residents from elsewhere in the UK to deem these conditions essential for them to visit, perhaps linked to more rules being in place at the time of research.
KEY FINDINGS (2)

Upcoming trip intentions (overnight visitors)

1. Reflecting higher confidence and comfort levels, UK and Scotland residents anticipate taking significantly more overnight trips in the next 12 months, than the previous 12 months. Although the expected uplift in domestic trips will in part be driven by lockdown restrictions taking up around three months of 2021, it is also linked to higher trip confidence levels. Both Scotland and UK residents are significantly more confident that UK trips would go ahead for each month of the year compared to the equivalent period in 2021, although the proportion currently confident is below half for January and February – rising progressively through the year. The main perceived barriers to taking a UK trip are ‘restrictions on travel from government’, ‘personal finances’ and ‘concerns around catching COVID-19’, with ‘UK weather’ also a factor between January and June.

2. The strong relative confidence that trips would go ahead means that, compared to 2021, a higher proportion of UK residents are anticipating an overnight trip in each of Winter (January to March), Spring (April to June) and Summer (July to September) – for example, 37% anticipate a summer UK trip in 2022, compared to 27% anticipating one in 2021.

3. UK overnight trips continue to be favoured to overseas trips, with a large gap in trip intention and trip confidence. There are some signs, however, that overseas trip intention is on the rise. UK residents anticipate taking marginally more overseas trips in the next 12 months than in the previous 12 months. 61% of UK intenders are also anticipating an overseas trip and confidence that overseas trips would go ahead is above confidence in UK trips in the same period last year. Perhaps notably however, the majority of UK intenders are not planning an overseas trip in the same period as their UK trip, suggesting they may take both types of trips, rather than one or the other.

4. Aligned with general comfort levels, ‘families’ and higher social grades are more likely to take overnight UK trips and overseas trips – the latter especially so. Retirees index just below the population in terms of UK trips – a contrast to 2021 and 2020 where they were significantly below.

5. July to September is the time of year most likely to generate overnight domestic trips to all destination types, particularly to a ‘traditional coastal/seaside town’ which is set to generate twice as much interest as any other time period.
Domestic overnight travel behaviour

1. Consistent with a trend since the start of this research, the South West of England is the most popular region of the UK for an overnight short break or holiday across both Winter/Spring and Summer. Scotland is the 4th most preferred destination for an overnight trip in Winter/Spring, and the 2nd most preferred in summer.

2. Scotland remains the number one destination for Scotland-based residents, although the majority of intenders come from elsewhere in the UK, particularly in the summer when they make up three-quarters of all intenders. Scotland-based intenders are far more likely than non-Scotland-based intenders to only be considering Scotland for their next trip however. Based on previous research, and with the vast majority of intenders not yet having booked their trip, it’s likely the balance of actual visitors will be less in favour of non-Scotland residents, than projected. Of those considering other destinations in addition to Scotland, Wales is the most popular alternative choice.

3. Scotland intenders for Winter/Spring are made up of a higher proportion of ‘retirees’ and a lower proportion of ‘families’ than the UK population. In the summer months, Scotland intenders have a similar fall-out of life stages to the general population. Notably, Scotland intenders have a lower incidence of families than UK intenders across both time periods, with fewer parties accompanied by ‘children, grandchildren or young adults with parents’. Scotland intenders also tend to be made up of a higher proportion of social grades AB.

4. In Winter/Spring, Scotland intenders are marginally more likely to be planning on a short break of 1-3 nights in Scotland than a longer break of 4+ nights. In the summer, they are more likely to be planning on a longer break of 4+ nights. Scotland intenders from within Scotland are more likely to be planning short breaks in Scotland than intenders from outside Scotland.

5. Scotland Winter/Spring intenders anticipate taking an overnight trip to a range of destination types – ‘countryside or village’, ‘mountains or hills’, ‘rural coastline’ and ‘large city’ generating similar interest. Scotland resident intenders are more likely than non-resident intenders to be planning a trip to a ‘rural coastline’ and ‘traditional coastal/seaside town’, less likely to a ‘large city’. The lower incidence of intention amongst Scotland residents to visit a ‘large city’ is evidenced by ‘non-Scotland-based’ Winter/Spring intenders being 3 times as likely to visit the Edinburgh Area in the Winter/Spring, and twice as likely to do so in the summer.
6. The Scottish Highlands holds universal appeal, being the number one destination for Winter/Spring and Summer intenders regardless of their origin.

7. ‘Hotel/motel/inn’, ‘a private home’ and ‘commercial self-catering’ make up the top three accommodation types for Scotland intenders in Winter/Spring and Summer. However, Scotland-based intenders are significantly more likely to opt for ‘caravan/camping’ and significantly less likely to be planning on staying in a ‘private home’ on their trip.

**Large city intentions**

1. There are signs that intention to take overnight trips to large cities is increasing with intention to visit a large city on a Scotland trip and intention to visit Edinburgh significantly higher than in the equivalent periods in 2021. This correlates with comfort levels with activities that involve high densities of people, at their highest point since the start of the pandemic, and desire to stay in ‘hotels’ also high.

2. That said, there remain clear patterns that separate large city intenders from large city non-intenders. Large city intenders continue to be significantly more likely to be pre-nesters and from high social grades – two audiences that are more likely to have access to large cities through their employment. Perhaps linked to greater exposure to urban environments, ‘large city intenders’ have significantly higher comfort levels visiting ‘busy’ destinations – for example, they are significantly more likely than ‘large city non-intenders’ to be comfortable ‘travelling by public transport’ (+13 points), ‘visiting an indoor attraction’ (also +13 points) and ‘going to a busy city centre’ (+12 points). Unsurprisingly, ‘concerns about catching COVID-19 in a large city’ remains one of the leading reasons for avoiding them.

3. However, despite these higher comfort levels ‘large city intenders’ are broadly as likely as ‘large city non-intenders’ to expect certain conditions to be in place for them to visit indoor tourism/leisure providers – more likely to require ‘management of people in communal areas’ and ‘compulsory COVID-19 passports’.
**KEY FINDINGS (5)**

**Trips taken since September 2021**

1. 31% of UK residents and 33% of Scotland residents state that they have taken an overnight UK trip since September 2021. September drove the highest incidence of UK trips, at 14% of UK residents. 10% of UK residents have taken an overseas trip since September 2021.

2. Notably the gap between UK and overseas trips taken in 2021 is larger than the gap in UK overseas/trip intention in 2022, suggesting overseas travel is set to pick up at a faster rate than domestic travel this year.

3. Families have significantly higher representation for overseas trips than UK trips taken since September 2021, reflecting their less risk averse attitude to leisure. Retirees are almost twice as likely to have taken a UK overnight trip as an overseas trip. Higher social grades have higher representation than the population for overseas trips.

4. Consistent with trip intentions at the start of 2021, the South West of England was the UK destination mostly likely to generate an overnight trip since September 2021 (Scotland 6th). Amongst Scotland residents, Scotland was the most popular destination, with over 3 in 5 taking a trip there. Around 2 in 5 (42%) of overnight trip-takers to Scotland came from outside Scotland.

5. Scotland trip-takers have a higher proportion than UK trip-takers of ‘retirees’ and social grades DE (the latter driven by a high incidence of retirees).

6. Similar to UK trip-takers, Scotland trip-takers are most likely to have taken their trip for a holiday/leisure purpose. That said, over 1 in 4 took a trip to visit friends or relatives.
GENERAL SENTIMENT AND LEISURE ACTIVITY
Since August 2021, the proportion of UK adults thinking ‘the worst has passed’ in relation to COVID-19 has been similar to the proportion thinking ‘the worst is still to come’ (currently at 33% and 28% respectively). Despite tracking closely to UK sentiment for the majority of the pandemic, since September 2021 Scotland residents have consistently been less likely to state ‘the worst has passed’. That said, with 32% Scotland residents thinking ‘the worst has passed’ and 25% ‘the worst is still to come’, perceptions amongst Scotland and UK residents have now converged.

Positively, perceptions amongst Scotland and UK residents are significantly more positive than in January 2021.

Figure 1. Perception of the situation with regards to COVID-19, Waves 1-42, UK and Scotland

Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.260
• As outlined on the previous page, UK and Scotland residents are currently aligned in their perceptions of the situation in relation to COVID-19 – more thinking ‘the worst has passed’, than ‘the worst is still to come’, although the largest proportion thinking ‘things are going to stay the same’.
• Across life stages, ‘retirees’ are the least optimistic (driven by a higher proportion thinking ‘things are going to stay the same’), other life stages equally as likely to think ‘the worst has passed’. All life stages are more positive than they were in the previous report in late August 2021 and in the equivalent period last year.

Figure 2. Perception of the situation with regards to COVID-19, Wave 42, Percentage UK and Scotland

Figure 3. Perception of the situation with regards to COVID-19 by life stage, Wave 42, Percentage, UK

Q7: Regarding the situation of Coronavirus in the UK and the way it is going to change in the coming month, which of the following best describes your opinion? Base: All UK respondents. n=1,755; All Scotland respondents n=247; Pre-nesters n=322; Families n=633; Older Independents n=437; Retirees n=363;
The UK general public have exhibited consistently higher comfort levels with the majority of individual activities since January 2021—‘going for a walk in a country park or trail’ and ‘shopping in your local shopping centre’, reporting the highest comfort levels to date. Comfort with ‘eating at a restaurant’ has experienced the biggest growth in comfort, increasing by 44 percentage points (from 29% to 73% comfortable) in that 12 month period.

Comfort with visiting ‘indoor attractions’ and ‘going to a busy centre’ has plateaued in the last 5 months, with ‘travelling by public transport’ dropping.

Figure 4. Level of comfort conducting individual activities, Net very and fairly comfortable, Percent, Waves 1-42, UK
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’*

- Generally, the comfort average – amongst both UK and Scotland residents – has followed an upward trajectory since January 2021. The arrival of the Omicron variant in late 2021 led to a slight fall from October to December, but as of January the comfort average was at its second highest point since the research began in May 2020.

Figure 5. Level of comfort conducting individual activities, Net very and fairly comfortable comfort average, Percent average, Waves 1-42, UK and Scotland

*For comparability, comfort average does not include ‘going to a visitor attraction’ or ‘visiting a city centre’ – statements that were added from March 2021 onwards
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’

- As implied by identical comfort averages, as of January 2022, UK and Scotland residents report very similar comfort levels for the majority of individual activities.

Figure 6. Level of comfort conducting activities by place of residence, Net very and fairly comfortable, Percent, Wave 42, UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>U.K. residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>74</td>
<td>74</td>
</tr>
<tr>
<td>Going for a walk in a country park/ local trail</td>
<td>91</td>
<td>92</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>75</td>
<td>79</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>76</td>
<td>73</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>54</td>
<td>52</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>65</td>
<td>62</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>54</td>
<td>53</td>
</tr>
</tbody>
</table>

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? All UK respondents. n=1,755; All Scotland respondents n=247
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’

- Consistent with previous reporting, comfort conducting individual activities tends to be higher amongst younger life stages – ‘pre-nesters’ reporting the highest comfort average, followed by ‘families’, ‘older independents’ and ‘retirees’. These differences are most apparent for ‘visiting an indoor visitor attraction’ where the gap in comfort between ‘pre-nesters’ and ‘retirees’ is 20 percentage points and ‘visiting a busy city centre’ with a gap 16 percentage points. Positively, all life stages report significantly higher comfort levels than the previous report in late August and in January 2021.

Figure 7. Level of comfort conducting activities by life stage, Net very and fairly comfortable, Percent, Wave 42, UK

[Chart showing comfort levels for different activities and life stages]

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Pre-nesters n=322; Families n=633; Older Independents n=437; Retirees n=363
Future intention to visit leisure venues

- Of the places tested, Scotland residents are most likely to intend to visit a ‘restaurant – with indoor seating’ in the next month (although a high proportion are also avoiding them due to COVID-19), followed by ‘a beach or coastal walk/trail’.
- Scotland residents are most likely to be avoiding ‘cinemas/theatres’ due to COVID-19 – 21% stating they would ordinarily go in the next 12 months – followed by indoor restaurants, 13% avoiding them.

Figure 8. Intention to visit leisure venues, Percentage, Wave 42, UK and Scotland

Figure 8 shows the intention to visit leisure venues, broken down by type of venue and whether the intention is for the next month, the next 12 months, or avoiding due to COVID-19 restrictions. The data is presented in a table format, with percentages indicating the likelihood of visiting each type of venue.

- UK residents and Scotland residents are compared for restaurants with indoor and outdoor seating, beaches or coastal walks, gardens or country parks, cinemas, museums, and mountain or hills.
- The data is presented in a percentage format, showing the likelihood of visiting each type of venue.

VB9a. Which, if any, of these types of places in the UK are you likely to visit in the next 12 months? VB9b. Which, if any, are you likely to visit in the UK in the next month? VB9c. Which, if any, would you normally visit in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)?  
Base: All UK respondents. n=1,755; All Scotland respondents n=247
A notable proportion of Scotland residents also state that they would normally go to ‘festivals/exhibitions in an enclosed space’ (17%) and ‘in a large space’ (12%) in the next 12 months but are avoiding them due to COVID-19. Around 1 in 7 (13%) are also avoiding ‘nightclubs’ as a result of the pandemic.

**Figure 9. Intention to visit leisure venues, Percentage, Wave 42, UK and Scotland**

- **Outdoor playground/activity centre**
  - UK residents: 75%
  - Scotland residents: 74%
  - UK residents (avoiding due to COVID-19): 7%
  - Scotland residents: 10%
  - UK residents (will visit in the next 12 months): 10%
  - Scotland residents: 12%
  - UK residents (will visit in the next month): 8%
  - Scotland residents: 11%

- **Zoo/farm attraction/theme park**
  - UK residents: 66%
  - Scotland residents: 63%
  - UK residents (avoiding due to COVID-19): 8%
  - Scotland residents: 11%
  - UK residents (will visit in the next 12 months): 12%
  - Scotland residents: 19%
  - UK residents (will visit in the next month): 7%
  - Scotland residents: 8%

- **Indoor play or activity centre**
  - UK residents: 74%
  - Scotland residents: 76%
  - UK residents (avoiding due to COVID-19): 7%
  - Scotland residents: 10%
  - UK residents (will visit in the next 12 months): 14%
  - Scotland residents: 17%
  - UK residents (will visit in the next month): 5%
  - Scotland residents: 2%

- **Festival, exhibition: enclosed space**
  - UK residents: 72%
  - Scotland residents: 68%
  - UK residents (avoiding due to COVID-19): 22%
  - Scotland residents: 12%
  - UK residents (will visit in the next 12 months): 13%
  - Scotland residents: 10%
  - UK residents (will visit in the next month): 5%
  - Scotland residents: 15%

- **Festival, exhibition: in a large space**
  - UK residents: 75%
  - Scotland residents: 68%
  - UK residents (avoiding due to COVID-19): 17%
  - Scotland residents: 12%
  - UK residents (will visit in the next 12 months): 11%
  - Scotland residents: 12%
  - UK residents (will visit in the next month): 10%
  - Scotland residents: 13%

- **Nightclub**
  - UK residents: 84%
  - Scotland residents: 79%
  - UK residents (avoiding due to COVID-19): 4%
  - Scotland residents: 7
  - UK residents (will visit in the next 12 months): 10%
  - Scotland residents: 4
  - UK residents (will visit in the next month): 13
  - Scotland residents: 9

**Base:** All UK respondents. n=1,755; All Scotland respondents n=247.
FUTURE INTENTION TO CONDUCT LEISURE ACTIVITIES

- In terms of activities, Scotland residents are most likely to go ‘walking/hiking’ in the next month, 2 in 5 (39%) intending to do so – significantly above all other activities measured. Similar to UK residents, they are most likely to be avoiding ‘spa/health treatments’ (9%) and ‘indoor swimming’ (also 9%) due to COVID-19.

Figure 10. Intention to conduct leisure activities, Percentage, Wave 42, UK and Scotland

<table>
<thead>
<tr>
<th>Activity</th>
<th>UK residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking/hiking</td>
<td>53</td>
<td>43</td>
</tr>
<tr>
<td>Spa/health treatments</td>
<td>67</td>
<td>67</td>
</tr>
<tr>
<td>Cycling/mountain biking</td>
<td>73</td>
<td>69</td>
</tr>
<tr>
<td>Watching wildlife</td>
<td>83</td>
<td>81</td>
</tr>
<tr>
<td>Swimming - indoor</td>
<td>83</td>
<td>87</td>
</tr>
<tr>
<td>Swimming - outdoor</td>
<td>85</td>
<td>83</td>
</tr>
<tr>
<td>Adventure activity</td>
<td>87</td>
<td>86</td>
</tr>
<tr>
<td>Would normally do in next 12 months but avoiding due to COVID-19</td>
<td>43</td>
<td>39</td>
</tr>
<tr>
<td>Will do in next 12 months (exc. next month)</td>
<td>11</td>
<td>13</td>
</tr>
<tr>
<td>Will do in next month</td>
<td>31</td>
<td>39</td>
</tr>
</tbody>
</table>

**VB10a.** Which, if any, of these types of activities are you likely to do in the UK in the next 12 months? **VB10b.** Which, if any, are you likely to do in the UK in the next month? **VB10c.** Which, if any, would you normally do in the next 12 months, but will avoid due to COVID-19-related reasons (e.g. government restrictions, the risk of catching COVID-19 etc.)? Base: All UK respondents. n=1,755; All Scotland respondents n=247
Only a small minority of UK and Scotland residents are intending to conduct other leisure activities in the next 12 months.

Figure 11. Intention to conduct leisure activities, Percentage, Wave 42, UK and Scotland

<table>
<thead>
<tr>
<th>Activity</th>
<th>Never</th>
<th>Would normally do in next 12 months but avoiding due to COVID-19</th>
<th>Will do in next 12 months (exc. next month)</th>
<th>Will do in next month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retreat or meditation</td>
<td>86</td>
<td>6</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>Fishing</td>
<td>91</td>
<td>4</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Boating</td>
<td>90</td>
<td>3</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Horse riding, pony trekking</td>
<td>96</td>
<td>2</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Golf</td>
<td>91</td>
<td>3</td>
<td>3</td>
<td>2</td>
</tr>
<tr>
<td>Other Water sports</td>
<td>92</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Sailing</td>
<td>93</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

UK residents | Scotland residents | UK residents | Scotland residents | UK residents | Scotland residents | UK residents | Scotland residents | UK residents | Scotland residents | UK residents | Scotland residents

Base: All UK respondents. n=1,755; All Scotland respondents n=247
Conditions Essential for Tourism/Leisure Providers to Have in Place

- Despite exhibiting similar ‘comfort levels’, Scotland residents index significantly higher than UK residents on a wide range of conditions they deem essential for indoor leisure providers to have in place for them to visit. Perhaps reflecting differing rules in Scotland and in England, the gap is largest for ‘staff and customers wearing face masks’ and ‘enforced social distancing’.

Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months?

Base: All UK respondents. n=1,755; All Scotland respondents n=247

<table>
<thead>
<tr>
<th>Condition</th>
<th>UK Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff to wear face masks</td>
<td>53</td>
<td>43</td>
</tr>
<tr>
<td>Customers to wear face masks</td>
<td>52</td>
<td>41</td>
</tr>
<tr>
<td>Free cancellation</td>
<td>46</td>
<td>46</td>
</tr>
<tr>
<td>Plentiful hand sanitizers</td>
<td>51</td>
<td>49</td>
</tr>
<tr>
<td>Enhanced cleaning regimes</td>
<td>49</td>
<td>49</td>
</tr>
<tr>
<td>Enforced social distancing</td>
<td>45</td>
<td>45</td>
</tr>
<tr>
<td>Management of people in communal areas (e.g. games areas, bars, restaurants, toilets etc.)</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Significantly reduced capacity compared to before COVID-19</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Transferable bookings to a later date</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td>Compulsory COVID-19 passports for staff and customers</td>
<td>35</td>
<td>35</td>
</tr>
</tbody>
</table>
FINANCIAL SEGMENTS AND ECONOMIC CONCERNS

- Half of UK adults have either been hit hard financially by the pandemic or are having to be careful, rising to 54% of Scotland residents.
- The vast majority of both UK and Scotland residents are concerned about ‘rising living costs/inflation’, ‘a potential recession’ and ‘tax increases’.

Figure 13. Breakdown of residents by financial segments, Percentage, Wave 42, UK and Scotland

<table>
<thead>
<tr>
<th>Financial Segment</th>
<th>U.K. Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>I’ve been hit hard</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>Things are ok but I have to be careful</td>
<td>37</td>
<td>39</td>
</tr>
<tr>
<td>I’ve not been affected</td>
<td>38</td>
<td>37</td>
</tr>
<tr>
<td>I’m better off than before</td>
<td>11</td>
<td>10</td>
</tr>
</tbody>
</table>

Figure 14. Concerns around economic factors, Percentage, Wave 42, UK and Scotland

<table>
<thead>
<tr>
<th>Economic Concern</th>
<th>U.K Residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rising living costs/inflation</td>
<td>85</td>
<td>82</td>
</tr>
<tr>
<td>A potential recession</td>
<td>67</td>
<td>71</td>
</tr>
<tr>
<td>Tax increases</td>
<td>70</td>
<td>68</td>
</tr>
<tr>
<td>Potential job losses</td>
<td>48</td>
<td>47</td>
</tr>
</tbody>
</table>

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Q18d How worried, if at all, are you about the following and their impact on your personal finances? Base: All UK respondents. n=1,755; All Scotland respondents n=247.
OVERNIGHT TRAVEL INTENTIONS
Both UK and Scotland residents anticipate taking more UK overnight trips in the next 12 months than they took in the previous 12 months, around 3 in 10 anticipating taking more compared to around 1 in 8 expecting to take fewer. UK residents also anticipate taking more overseas trips, although this is only marginally the case. Scotland residents anticipate taking marginally fewer overseas trips in the next 12 months. A high proportion of both UK and Scotland residents don’t know how many domestic and particularly overseas trips they will take, highlighting scope for change in the coming months.

**Figure 15. Number of UK overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 42, UK and Scotland**

**Figure 16. Number of OVERSEAS overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 42, UK and Scotland**

QVB1b. Compared to normal, are you likely to take more, fewer or about the same number of UK holidays/short breaks in the next six months?
Base: All UK residents n=1,755; All Scotland residents n=247
ANTICIPATED FINANCIAL SPEND ON UK AND OVERSEAS OVERNIGHT TRIPS

- Aligned with the number of trips they anticipate taking, UK and Scotland-based residents expect to spend more on UK holidays or short breaks in the next 12 months, compared to the last 12 months.
- For overseas trips, spend is likely to be ‘net neutral’.

Figure 17. Anticipated financial spend on UK holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 42, UK and Scotland

Figure 18. Anticipated financial spend on OVERSEAS holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 42, UK and Scotland

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VB1b. Do you think you are likely to spend more, less or about the same amount of money on UK and overseas holidays/short breaks in the next 12 months as you did in the last 12 months? Base: All UK residents n=1,755; All Scotland residents n=247
Confidence in the ability to take UK and overseas trips

• Confidence amongst UK residents that a booked UK holiday or short break would go ahead as planned sits at 48% for January trips and 47% for February trips. Confidence rises from March onwards, and continually tracks significantly above confidence that overseas trips would go ahead. Scotland residents are significantly less confident than UK-based residents in January, but exhibit ‘near-equal’ confidence from March onwards.

• Compared to 2021, confidence that a UK trip would go ahead is significantly higher for all months – for example, in early 2021 confidence that a trip in July 2021 would go ahead was at 42% for UK residents, compared to 73% currently confident that a July 2022 trip would go ahead.

Figure 19. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident) Percentage, Wave 42, UK

QVB7anew. We’d like you to imagine that you have booked a UK 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 UK residents n=1,755; All Scotland residents n=247
Consistent with all previous reporting periods, ‘pre-nesters’ and ‘families’ exhibit significantly higher ‘near-term’ confidence that a domestic trip would go ahead than ‘older independents’ and ‘retirees’. ‘Families’ are especially confident.

However, the gap in confidence between life stages converges as the year progresses, and is almost identical by September 2022.

Figure 20. Confidence in taking a UK overnight trip across a range of different months by life stage, Net percentage very and fairly confident, Wave 42, UK
Perceived barriers to taking overnight UK holidays and short breaks

- ‘Restrictions on travel from government’, ‘personal finances’ and ‘concerns around catching COVID-19’ are the leading perceived barriers for UK residents taking a UK overnight trip between January and June, with ‘UK weather’ close behind. Barriers to taking summer trips are similar to winter/spring, with the exception of ‘UK weather’ featuring lower down the list, but rising costs of holidays become more prominent.
- Scotland residents generally communicate similar barriers to UK residents.
- There are minimal differences by life stage, although between January and June, ‘retirees’ are most likely to state ‘I have concerns about catching COVID-19’, with ‘pre-nesters’ and ‘families’ the most likely to cite ‘personal finances’.

Figure 21. Barriers to taking an overnight UK trip in Winter/Spring 2022, Percentage, Waves 41 to 42, UK and Scotland, Top 10

- Restrictions on travel from government
- Personal finances
- I have concerns about catching COVID-19
- Rising costs of holidays/leisure
- UK weather
- My general health
- Vaccine passports
- I have a general unease about travelling
- Limited available annual leave
- Local residents may be unwelcoming
- Would never take a UK trip in these months

Figure 22. Barriers to taking an overnight UK trip in Summer 2022, Percentage, Waves 41 to 42, UK and Scotland, Top 10

- Restrictions on travel from government
- Rising costs of holidays/leisure
- Personal finances
- Vaccine passports
- I have concerns about catching COVID-19
- My general health
- UK weather
- Limited available annual leave
- I have a general unease about travelling
- Local residents may be unwelcoming
- Would never take a UK trip in these months
Upcoming UK and Overseas Overnight Trip Intention

- Nearly 3 in 5 (58%) UK residents anticipate taking an overnight UK trip in 2022, significantly higher than the 2 in 5 (40%) that anticipate taking a 2022 trip overseas. The highest incidence of trips is set to be in the summer, with nearly 2 in 5 (37%) UK residents planning an overnight trip then. As of the first week in January (Wave 42), Scotland residents are as likely as UK residents to be anticipating an overnight UK trip, but less likely to be planning on an overseas trip.
- Compared to the equivalent period in 2021, a significantly higher proportion of UK and Scotland-based residents are anticipating an overnight domestic trip for each period – for example, 37% anticipating a summer UK trip in 2022, compared to 27% anticipating one in 2021.

Figure 23. Proportion anticipating going on any overnight UK trips, Percentage, Wave 42, UK and Scotland

<table>
<thead>
<tr>
<th>Month</th>
<th>UK residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>January to December</td>
<td>58</td>
<td>59</td>
</tr>
<tr>
<td>January to March 2022 (Winter)</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>April to June 2022 (Spring)</td>
<td>25</td>
<td>26</td>
</tr>
<tr>
<td>July to September 2022 (Summer)</td>
<td>37</td>
<td>34</td>
</tr>
</tbody>
</table>

Figure 24. Proportion anticipating going on any overnight OVERSEAS trips, Percentage, Wave 42, UK and Scotland

<table>
<thead>
<tr>
<th>Month</th>
<th>UK residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>January to December</td>
<td>40</td>
<td>35</td>
</tr>
<tr>
<td>January to March 2022 (Winter)</td>
<td>7</td>
<td>6</td>
</tr>
<tr>
<td>April to June 2022 (Spring)</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>July to September 2022 (Summer)</td>
<td>22</td>
<td>14</td>
</tr>
</tbody>
</table>

VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,755; All Scotland respondents n=247
INCIDENCE OF UK AND OVERSEAS TRIP INTENTION

- Around 3 in 5 (61%) of the UK public who are planning on taking a UK overnight trip in 2022, are also planning a trip overseas in this period. However, overseas and UK trips are predominantly likely to take place in different seasons, the highest incidence of the UK public planning both at 38% (in July and September).

Figure 25. Breakdown of UK trip intenders by UK/overseas trip intention, Percentage, Wave 42, UK
UK residents from the ‘family’ life stage are the most likely to be planning on taking a UK short break or holiday in 2022, 72% expecting to do so. They are also the life stage most likely to be planning on taking an overseas trip in this time period (52%).

Retirees are the least likely to be planning an overnight trip either in the UK or overseas.

Notably, all life stages are more likely to be planning overnight UK trips in each period, compared to the equivalent period in 2021.

**Figure 26.** Proportion anticipating going on any overnight UK trips by life stage, Percentage, Wave 42, UK

**Figure 27.** Proportion anticipating going on any overnight OVERSEAS trips by life stage, Percentage, Wave 42, UK
Upcoming UK and Overseas Overnight Trip Intention

- Aligned with trip intentions, families make up the highest proportion of intenders across all time periods, for both UK and overseas holidays and short breaks, particularly for overseas trips. Retirees have lower representation than the general population, as do ‘older independents’ but still make up a combined total of 2 in 5 UK trip intenders.

Figure 28. Breakdown of population and UK trip-takers by life stage, Percentage Wave 42, UK and Scotland

Figure 29. Breakdown of population and Overseas trip-takers by life stage, Percentage Wave 42, UK and Scotland

VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: Jan to Dec UK intenders n=983; Jan to Mar UK intenders n=217; April to June UK intenders n=423; Summer UK intenders n=647.
UPCOMING UK AND OVERSEAS OVERNIGHT TRIP INTENTION

- UK residents from a high social grade are more likely to be planning on taking a domestic overnight trip than lower social grades, particularly DEs.
- All social grades are more likely to take UK trips than overseas trips in 2022, although the gap is smallest for social grades AB, who are only 11 percentage points more likely to take UK overnight trips.

Figure 30. Proportion anticipating going on any overnight UK trips by social grade, Percentage, Wave 42, UK

Figure 31. Proportion anticipating going on any overnight OVERSEAS trips by social grade, Percentage, Wave 42, UK

VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: AB social grade n=488; C1C2 social grade n=623; DE social grade n=644

VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: AB social grade n=488, C1C2 social grade n=623; DE social grade n=644
UPCOMING UK AND OVERSEAS OVERNIGHT TRIP INTENTION

- Amongst UK trip intenders, social grades AB and C1C2 have higher representation than the general population, social grades DE lower.
- AB social grades have a significantly higher likelihood to be intending to take an overseas trip and DE social grades a lower likelihood to do so.

Figure 32. Breakdown of population and UK trip-takers by life stage, Percentage Wave 42, UK

Figure 33. Breakdown of population and OVERSEAS trip-takers by life stage, Percentage Wave 42, UK

<table>
<thead>
<tr>
<th></th>
<th>AB</th>
<th>C1C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.K Population Breakdown</td>
<td>22</td>
<td>52</td>
<td>25</td>
</tr>
<tr>
<td>Jan to Dec Intenders</td>
<td>27</td>
<td>56</td>
<td>18</td>
</tr>
<tr>
<td>Jan to Mar Intenders</td>
<td>29</td>
<td>53</td>
<td>18</td>
</tr>
<tr>
<td>Apr to Jun Intenders</td>
<td>27</td>
<td>54</td>
<td>18</td>
</tr>
<tr>
<td>Jul to Sept Intenders</td>
<td>29</td>
<td>53</td>
<td>18</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>AB</th>
<th>C1C2</th>
<th>DE</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.K Population Breakdown</td>
<td>22</td>
<td>52</td>
<td>25</td>
</tr>
<tr>
<td>Jan to Dec Intenders</td>
<td>33</td>
<td>52</td>
<td>15</td>
</tr>
<tr>
<td>Jan to Mar Intenders</td>
<td>38</td>
<td>47</td>
<td>15</td>
</tr>
<tr>
<td>Apr to Jun Intenders</td>
<td>33</td>
<td>50</td>
<td>16</td>
</tr>
<tr>
<td>Jul to Sept Intenders</td>
<td>35</td>
<td>50</td>
<td>15</td>
</tr>
</tbody>
</table>

VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: Jan to Dec UK intenders n=983; Jan to Mar UK intenders n=217; April to June UK intenders n=423; Summer UK intenders n=647
DOMESTIC OVERNIGHT TRAVEL BEHAVIOUR
WHERE PLANNING ON STAYING ON NEXT UK WINTER/SPRING 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 UK for an overnight short break or holiday, 18% of Winter/Spring intenders planning to go there. London is the next most popular at 16% (the most popular between January and March). 12% of Winter/Spring intenders plan on going to Scotland in this period, equally high across the six month period.
- 51% of Scotland-based intenders are planning on taking an overnight trip in Scotland in Winter/Spring. Although this is lower as a proportion of intenders projected in 2021, it is higher in absolute numbers (due to the uplift in intenders overall).

Figure 34. Where planning on staying on next UK overnight trip in Winter/Spring, Percentage Wave 40-42, UK and Scotland Residents

QVB4a. Where in the UK 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 Winter/Spring 2021. All UK Winter/Spring intenders n=1,548; All Scotland resident Winter/Spring intenders n=223
WHERE PLANNING ON STAYING ON NEXT UK SUMMER SHORT BREAK OR HOLIDAY

• The South West of England is also the most preferred destination for summer trips, at 25% significantly ahead of interest in Winter/Spring and the next most preferred destinations in summer – Scotland (15%), and Wales (13%).
• Amongst Scotland-based summer intenders, Scotland is the most likely domestic trip destination, significantly ahead of the North West of England (the next most popular destination for Scotland residents). As in the ‘Winter/Spring’, Scotland resident projections of a summer trip in Scotland are lower than in 2021 as a percentage but not in absolute terms.

Figure 35. Where planning on staying on next UK overnight trip in Summer, Percentage Wave 40-42, UK and Scotland Residents
BREAKDOWN OF SCOTLAND INTENDERS BY REGION OF RESIDENCE

As a percentage of all intenders within each region, Scotland is the ‘UK government region’ with the highest proportion of intenders planning on an overnight holiday/short break in Scotland across both time periods. Despite this, and consistent with previous reporting, the vast majority of Scotland intenders live elsewhere in the UK – particularly in the Summer.

Figure 36. Intention to visit Scotland amongst intenders by region, Percentage Wave 40-42, UK

Figure 37. Origin of Scotland intenders by region of residence, Percentage Wave 40-42, UK

QVB4b. Where in the UK do you expect to be staying on this next holiday or short break? Where do you live?

Base: All residents planning on taking a holiday or short break in the UK between Winter/Spring/Summer. Residents in each region Wales n=172/122, East of England n=100/67; East Mids n=125/50; North East n=59/34*; North West n=139/104; South East n=160/129; South West n=105/50; West Mids n=117/87; Yorkshire and The Humber n=126/73; London n=204/107; Scotland n=223/125. Scotland Winter/Spring intenders n=220; Scotland summer intenders n=149 *Small base sizes – treat with caution.
DESTINATION CONSIDERATION AMONGST SCOTLAND INTENDERS

• 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 is the most popular alternative destination across both time periods.
• Amongst Scotland residents considering Scotland for a break, an even stronger majority are only considering Scotland, although this is less the case in the summer months.

Figure 38. Consideration of Scotland and other places, Percentage Waves 40-42, UK and Scotland

Table 1. Top 5 alternative destinations for Scotland intenders

<table>
<thead>
<tr>
<th>Scotland Winter/Spring Intenders (%) of Scotland intenders</th>
<th>Scotland Summer Intenders (%) of Scotland intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wales 8%</td>
<td>Wales 18%</td>
</tr>
<tr>
<td>North West 8%</td>
<td>South West 14%</td>
</tr>
<tr>
<td>Northern Ireland 6%</td>
<td>Yorkshire and The Humber 11%</td>
</tr>
<tr>
<td>London 6%</td>
<td>North West of England 8%</td>
</tr>
<tr>
<td>Yorkshire and The Humber 6%</td>
<td>London 8%</td>
</tr>
</tbody>
</table>

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? All UK Winter/Spring intenders n=1,548; All Scotland resident Winter/Spring intenders n=223; All UK Summer intenders n=956; All Scotland resident Summer intenders n=125;
BOOKING STATUS OF TRIPS AMONGST SCOTLAND INTENDERS

- 3 in 10 (30%) of Scotland intenders have already planned and booked their Winter/Spring trip, only 1 in 25 (4%) their summer trip. 3 in 5 (60%) of Scotland Winter/Spring intenders have not planned or booked their Scotland trip, rising to nearly 9 in 10 (86%) of Scotland Summer intenders. This suggests uncertainty is still playing a role in travel intentions.

- Whilst 3 in 5 (60%) of Scotland Winter/Spring intenders plan on booking their trip at the same time as normal, over a quarter (26%) will book closer to the travel date than normal. Summer intender booking behaviour also suggests a bias towards later booking.

Figure 39. Breakdown of Scotland intenders by booking status, Percentage, Wave 42, UK

<table>
<thead>
<tr>
<th></th>
<th>Scotland Winter/Spring Intenders</th>
<th>Scotland Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planned and booked Scotland trip</td>
<td>30</td>
<td>4</td>
</tr>
<tr>
<td>Planned not booked Scotland trip</td>
<td>10</td>
<td>86</td>
</tr>
<tr>
<td>Not planned and not booked Scotland trip</td>
<td>60</td>
<td></td>
</tr>
</tbody>
</table>

Figure 40. Breakdown of Scotland intenders by booking habits, Percentage, Waves 40-42, UK

<table>
<thead>
<tr>
<th></th>
<th>Scotland Winter/Spring Intenders</th>
<th>Scotland Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will book closer to the travel date than normal</td>
<td>26</td>
<td>54</td>
</tr>
<tr>
<td>Will book about the same as normal</td>
<td>60</td>
<td></td>
</tr>
<tr>
<td>Will book further from the travel date than normal</td>
<td>11</td>
<td>15</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2</td>
<td>6</td>
</tr>
</tbody>
</table>

QVB2a. Thinking of the next UK holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB6diic. Compared to normal, when did or will you plan and book your next UK trip in Scotland? Base: Figure 41 Scotland Winter/Spring Intenders n=75; Scotland Summer Intenders n=53; Figure 42 Scotland Winter/Spring Intenders n=144; Scotland Summer Intenders n=103
Demographics of Intenders Compared to the General Population

- Scotland intenders for Winter/Spring are made up of a higher proportion of ‘retirees’ and a lower proportion of ‘families’ than both the UK population and UK intenders in the same period. In the summer months, Scotland intenders have a similar fall-out of life stages to the general population, with lower family representation than intenders to the UK on the whole.
- Social grades AB have higher representation amongst Scotland intenders than amongst the population and Scotland-based intenders in Winter/Spring.

Source: Demographics. Base: All respondents. UK population n=5,269; All Scotland Winter/Spring Intenders n=220; Scotland resident Winter/Spring Intenders n=113; All Scotland Summer Intenders n=149; Scotland resident summer intenders n=57* *Low base size – treat with caution
FINANCIAL SEGMENTS AND ECONOMIC CONCERNS OF INTENDERS

- Scotland intenders are broadly in line with the population in terms of how much they have been financially impacted by COVID-19 – around half either stating ‘they have to be careful’ or that they’ve ‘been hit hard’.
- Similar to the UK public, the vast majority of Scotland intenders have concerns around the impact of the economy on their finances – most notably ‘rising living costs/inflation’. Summer intenders exhibit more concern around economic factors, although low base sizes mean this finding should be treated with caution.

Figure 43. Breakdown of intenders by financial segments, Percentage Wave 40-42, UK

Figure 44. Concerns around economic factors, Percentage, Wave 40-42, UK

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Q18d How worried, if at all, are you about the following and their impact on your personal finances? Base: All respondents. UK population n=5,269; All Scotland Winter/Spring Intenders n=220; Scotland resident Winter/Spring intenders n=113; All Scotland Summer Intenders n=149; Scotland resident summer intenders n=57* *Low base size – treat with caution
**ANTICIPATED LENGTH OF SCOTLAND HOLIDAYS AND SHORT BREAKS**

- In Winter/Spring, Scotland intenders are marginally more likely to be planning on a short break of 1-3 nights in Scotland than a longer break of 4+ nights. In the summer, they are more likely to be planning on a longer break of 4+ nights.
- Scotland intenders from within Scotland are more likely to be planning short breaks in Scotland than intenders from outside Scotland.

Figure 45. Length of next Winter/Spring holiday or short break in Scotland, Percentage Wave 40-42, UK

Figure 46. Length of next Summer holiday or short break in Scotland, Percentage Wave 40-42, UK

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Winter/Spring Intenders n=179; Scotland resident Winter/Spring Intenders n=105; All Scotland Summer Intenders n=98; Scotland resident summer intenders n=46* **Low base size – treat with caution**
Type of destination for next Scotland short break or holiday

- Scotland Winter/Spring intenders anticipate taking an overnight trip to a range of destination types this Winter/Spring – ‘countryside or village’, ‘mountains or hills’, ‘rural coastline’ and ‘large city’ generating similar interest. Scotland resident intenders are more likely than non-resident intenders to be planning a trip to a ‘rural coastline’ and ‘traditional coastal/seaside town’, less likely to a ‘large city’. ‘Countryside or village’, ‘rural coastline’ and ‘mountains or hills’ also make up the top three preferred destination types for Scotland trips in the summer.

- Compared to all UK intenders, Scotland is more likely to generate overnight trips to ‘mountains or hills’ and ‘rural coastline’.

- Intention to visit a ‘large city’ is significantly higher than the equivalent period in 2021.

Figure 47. Main type of destination for Scotland Winter/Spring intenders, Percentage Wave 40-42, UK

Figure 48. Main type of destination for Scotland Summer intenders, Percentage Wave 40-42, UK

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?

Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Winter/Spring Intenders n=119; Scotland resident Winter/Spring Intenders n=74; All Scotland Summer Intenders n=67; Scotland resident summer intenders n=30* *Low base size – treat with caution
WHERE PLANNING ON STAYING IN SCOTLAND ON NEXT SCOTLAND TRIP

- The Scottish Highlands is the part of Scotland most likely to generate an overnight trip this Winter/Spring – the leading destination regardless of intender origin. Edinburgh is the next most preferred, although this is driven predominantly by non-Scottish-based intenders, who tend to be less likely to follow through with their trip intentions. Beyond the Highlands, Scotland-based Winter/Spring intenders are more likely to visit the Scottish Isles.

Figure 49. Planned destination for next Scotland trip for Winter/Spring intenders, Percentage Wave 40-42, UK and Scotland

QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All intenders planning to take a trip to Scotland. All Scotland Winter/Spring Intenders n=220; Scotland resident Winter/Spring Intenders n=113; Scotland non-resident winter/spring intenders n=107
WHERE PLANNING ON STAYING IN SCOTLAND ON NEXT SCOTLAND TRIP

- The Scottish Highlands is also the part of Scotland most likely to generate an overnight trip in the summer – again the case regardless of the origin, although especially so for Scotland residents.
- As in Winter/Spring, Edinburgh is significantly more likely to be a draw for Scotland intenders living outside Scotland. Notably however, intention to visit Edinburgh is higher than in the equivalent period in 2021 (25% compared to 16%).

Figure 50. Planned destination for next Scotland trip for Summer intenders, Percentage Wave 40-42, UK and Scotland

<table>
<thead>
<tr>
<th>Destination</th>
<th>All Scotland Summer intenders</th>
<th>Scotland resident Summer intenders</th>
<th>Scotland non-resident Summer intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Highlands</td>
<td>32</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>Edinburgh area</td>
<td>25</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Glasgow area</td>
<td>15</td>
<td>16</td>
<td>11</td>
</tr>
<tr>
<td>Scottish Isles</td>
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<td>West Coast</td>
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<td>7</td>
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<tr>
<td>South of Scotland</td>
<td>13</td>
<td>7</td>
<td>2</td>
</tr>
<tr>
<td>East Coast</td>
<td>8</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Central Scotland</td>
<td>9</td>
<td>2</td>
<td>7</td>
</tr>
</tbody>
</table>

QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All intenders planning to take a trip in Scotland. All Scotland Summer Intenders n=149; Scotland resident summer intenders n=57 * Scotland non-resident winter/spring intenders n=92 * Low base size – treat with caution
MAKE-UP OF VISITOR PARTY FOR NEXT SCOTLAND HOLIDAY OR SHORT BREAK

- Amongst both time periods, ‘partner’ is the most common accompanying party member for a trip, followed by ‘child, grandchild or young adults with parents’ – the latter making up around 2 in 5 visitor parties in the summer months. ‘Friends’, ‘pets’ and ‘other members of the family’ also make up significant proportions of intenders across both time periods.
- In line with the fallout by life stage, Scotland intenders are less likely than UK intenders to be made-up of parties with a ‘child, grandchild or young adults with parents’ – particularly in the Winter/Spring.

Figure 51. Visitor party make-up for Scotland Winter/Spring intenders, Percentage Wave 40-42, UK

Figure 52. Visitor party make-up for Scotland Summer intenders, Percentage Wave 40-42, UK

QVB4d. With whom are you likely to be spending your holiday? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Winter/Spring Intenders n=170; Scotland resident Winter/Spring Intenders n=105; All Scotland Summer Intenders n=98; Scotland resident summer intenders n=46* *Low base size – treat with caution
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, across both time periods. In Winter/Spring, train is the next most preferred transport type with plane the next most popular in the summer. Perhaps unsurprisingly, Scotland resident intenders are significantly less likely to be planning to travel to their destination by plane.

Figure 53. Top 5 main modes of travel of destination for trip in Winter/Spring, Percentage Wave 40-42, UK

- Own car: 64%
- Train: 17%
- Plane: 9%
- Car-hired: 4%
- Public bus/coach: 3%

Figure 54. Top 5 main modes of travel of destination for trip in Summer, Percentage Wave 40-42, UK

- Own car: 62%
- Plane: 17%
- Train: 9%
- Boat/ship/ferry: 6%
- Motor home/Campervan: 3%

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination? All intenders planning to take a trip exclusively in Scotland. All Scotland Winter/Spring Intenders n=170; Scotland resident Winter/Spring Intenders n=105; All Scotland Summer Intenders n=98; Scotland resident summer intenders n=46 *Low base size – treat with caution
**TYPE OF ACCOMMODATION FOR NEXT SCOTLAND SHORT BREAK OR HOLIDAY**

- ‘Hotel/motel/inn’, ‘a private home’ and ‘commercial self-catering’ make up the top three accommodation types for Scotland intenders in Winter/Spring and Summer.
- However, Scotland-based intenders are significantly more likely to opt for ‘caravan/camping’ and significantly less likely to be planning on staying in a ‘private home’ on their trip.

**Figure 55. Accommodation planning on staying in on next UK overnight trip for Scotland Winter/Spring intenders, Net percentage Wave 40-42, UK**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>All Scotland Winter/Spring Intenders</th>
<th>Scotland resident Winter/Spring Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/motel/inn (e.g. AirBnb, second home, friends etc.)</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Private home (e.g. Airbnb, second home, friends etc.)</td>
<td>36%</td>
<td>19%</td>
</tr>
<tr>
<td>Commercial self-catering (e.g. rented holiday cottage)</td>
<td>36%</td>
<td>33%</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B / Farmhouse</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Figure 56. Accommodation planning on staying in on next UK overnight trip for Scotland Summer intenders, Net percentage Wave 40-42, UK**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>All Scotland Summer Intenders</th>
<th>Scotland resident Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/motel/inn (e.g. AirBnb, second home, friends etc.)</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>Commercial self-catering (e.g. rented holiday cottage)</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>A private home (e.g. Airbnb, second home, friends etc.)</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>34%</td>
<td>20%</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B / Farmhouse</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>53%</td>
<td>18%</td>
</tr>
</tbody>
</table>

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? All intenders planning to take a trip exclusively in Scotland. All Scotland Winter/Spring Intenders n=170; Scotland resident Winter/Spring Intenders n=105; All Scotland Summer Intenders n=98; Scotland resident summer intenders n=46* *Low base size – treat with caution
CITY AND TOWN INTENDERS

Pipe band and the North Berwick Highland Games, North Berwick, East Lothian, Kenny Lam
• Consistent with previous reporting, those intending to stay in a large city destination this Winter/Spring continue to be significantly more likely to be pre-nesters than ‘non-large city intenders’ and the wider UK population. Retirees are significantly less likely to be intending to visit a large city.
• ‘Large-city intenders’ are also significantly more likely to belong to social grades AB.

**Figure 57. Breakdown of city/town intenders by life stage, Percentage Wave 40-42, UK**

**Figure 58. Breakdown of city/town intenders by social grade, Percentage Wave 40-42, UK**

Base: UK Winter/Spring city intenders – all considering taking a UK overnight break in a city this Winter/Spring n=337; Uk Winter/Spring non-city intenders all not considering taking a UK overnight break in a city this Winter/Spring n=1,211
LEVEL OF COMFORT UNDERTAKING ACTIVITIES AMONGST UK CITY INTENDERS

- ‘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’ (+13 points), ‘visiting an indoor attraction’ (also +13 points) and ‘going to a busy city centre’ (+12 points).

Figure 59. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 40-42, UK

- Comfort average
- Going for a walk in a country park/local trail
- Shopping in your local shopping centre
- Eating at a restaurant
- Travelling by public transport
- Visiting an indoor attraction (e.g. a museum)
- Going to a busy city centre

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: UK Winter/Spring city intenders – all considering taking a UK overnight break in a city this Winter/Spring n=337; UK Winter/Spring non-city intenders all not considering taking a UK overnight break in a city this Winter/Spring n=1,211.
Despite exhibiting higher comfort levels, Scotland ‘large city intenders’ are broadly as likely as ‘large city non-intenders’ to expect certain conditions to be in place for them to visit indoor tourism/leisure providers – more likely to require ‘management of people in communal areas’ and ‘compulsory COVID-19 passports’.

Figure 60. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, Wave 42, UK and Scotland, Top 10 amongst Scotland residents

- Free cancellation
- Enhanced cleaning regimes
- Management of people in communal areas (e.g. games areas, bars, restaurants, toilets etc.)
- Transferable bookings to a later date
- Plentiful hand sanitizers
- Staff to wear face masks
- Customers to wear face masks
- Compulsory COVID-19 passports for staff and customers
- Government certification for complying with hygiene and distancing guidelines
- Significantly reduced capacity compared to before COVID-19

Q63. Which, if any, of the following conditions would be essential for indoor tourism and leisure providers (e.g. indoor visitor attractions, restaurants, hotels etc.) to have in place for you to visit/use them over the next few months? Base: UK Winter/Spring city intenders – all considering taking a UK overnight break in a city this Winter/Spring n=337; Uk Winter/Spring non-city intenders all not considering taking a UK overnight break in a city this Winter/Spring n=1,211
**TOP REASONS FOR NOT STAYING IN A CITY AMONGST UK INTENDERS**

- Consistent with previous reporting, concerns about being ‘more likely to catch COVID-19 in a large city/town’ is a leading reason for not staying in this destination type amongst Winter/Spring intenders, 3 in 10 (30%) citing this. ‘Large cities tend to be too expensive’ and ‘fewer things to do/places to visit’ are also important reasons.
- A notable minority (24%) are open to staying in a large city ‘later in the year’ suggesting there continues to be potential to nudge visits earlier.

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**Figure 61: Leading reasons for not staying in a city amongst Winter/Spring intenders, Percentage Wave 40-42, UK**

- 31%: Concerns about COVID-19
- 30%: Large cities tend to be too expensive
- 26%: I am more worried about catching COVID-19 in a large city
- 24%: Fewer things to do/places to visit
- 24%: I will stay in a large city later in the year
- 21%: Restrictions on opportunities to socialise
- 20%: Fewer opportunities to eat/drink out
- 16%: I wouldn’t stay in one regardless of COVID
- 15%: Local residents may be unwelcoming due to COVID-19

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VB5b. You indicated you don’t plan on staying in a large city during your UK trip in <period>. Why is this?
Base: Winter/Spring intenders who do not intend to stay in a city  n=1,211
DAY TRIP INTENTIONS

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam
Around half of UK and Scotland-based resident intend to take a day trip of some sort by June – ‘countryside or village’ and ‘traditional coastal/seaside town’ the preferred destination types.

Despite being less likely than UK residents to take an *overnight trip* to a large city, Scotland residents are more likely to take a day trip to one.

**Figure 62. Next UK day trip intention between January to June, Cumulative percentages, Wave 42, UK**

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>UK Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any day trip by June</td>
<td>49</td>
<td>53</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>30</td>
<td>27</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>26</td>
<td>23</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Large city</td>
<td>19</td>
<td>26</td>
</tr>
<tr>
<td>Smaller City or Town</td>
<td>19</td>
<td>22</td>
</tr>
</tbody>
</table>
**ANTICIPATED DAY TRIPS BY JUNE BY DESTINATION TYPE**

- The life stage of day-trippers varies depending on destination type, older life stages more prevalent amongst ‘rural coastline day trippers’ and families more dominant in ‘large cities’.

**Figure 63. Breakdown of Scotland-based Jan to June day-trippers by destination type by life stage, Percentage Waves 40-42, Scotland**

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Retirement age</th>
<th>Older independents</th>
<th>Families</th>
<th>Pre-nesters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large city day trippers</td>
<td>13</td>
<td>24</td>
<td>39</td>
<td>14</td>
</tr>
<tr>
<td>Smaller City or Town day trippers</td>
<td>22</td>
<td>27</td>
<td>33</td>
<td>14</td>
</tr>
<tr>
<td>Traditional coastal/seaside town day trippers</td>
<td>19</td>
<td>34</td>
<td>34</td>
<td>13</td>
</tr>
<tr>
<td>Rural coastline day trippers</td>
<td>22</td>
<td>37</td>
<td>37</td>
<td>12</td>
</tr>
<tr>
<td>Countryside or village day trippers</td>
<td>20</td>
<td>32</td>
<td>34</td>
<td>14</td>
</tr>
<tr>
<td>Mountains or hills day trippers</td>
<td>15</td>
<td>32</td>
<td>38</td>
<td>15</td>
</tr>
</tbody>
</table>

**VB16a. Are you likely to go on any day trips to the following types of places in these time periods? Base: Scotland-based Large city day trippers n=124; Smaller city or town day trippers n=117; Traditional coastal town day trippers n=153; Rural coastline day trippers n=113; Countryside or village day trippers n=155; Mountain or hills day trippers n=106. Three waves used to increase base sizes**
OVERNIGHT TRIPS TAKEN SINCE SEPTEMBER 2021
31% of UK residents state that they have taken an overnight UK trip since September 2021. September drove the highest incidence of UK trips, at 14% of UK residents. 10% of UK residents have taken an overseas trip since September 2021.

Notably the gap between UK and overseas trips taken in 2021 is larger than the gap in UK overseas/trip intention in 2022, suggesting overseas travel is set to pick up at a faster rate than domestic travel this year.

Scotland-based residents reported a similar incidence of trip-taking in the UK and overseas compared to the wider UK population.
Families have significantly higher representation for overseas trips than UK trips taken since September 2021, reflecting their less risk averse attitude to leisure. Retirees are almost twice as likely to have taken a UK overnight trip as an overseas trip. Higher social grades have higher representation than the population for overseas trips.

**Figure 66. Breakdown of population and trip-takers since September by life stage, Percentage Waves 41-42, UK**

<table>
<thead>
<tr>
<th>Life Stage</th>
<th>U.K Residents</th>
<th>Taken a UK overnight trip since September</th>
<th>Taken an overseas overnight trip since September</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement age</td>
<td>22</td>
<td>22</td>
<td>15</td>
</tr>
<tr>
<td>Older independents</td>
<td>29</td>
<td>29</td>
<td>24</td>
</tr>
<tr>
<td>Families</td>
<td>32</td>
<td>35</td>
<td>45</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>18</td>
<td>14</td>
<td>16</td>
</tr>
</tbody>
</table>

**Figure 67. Breakdown of population and trip-takers since September by social grade, Percentage Waves 41-42, UK**

<table>
<thead>
<tr>
<th>Social Grade</th>
<th>U.K Residents</th>
<th>Taken a UK overnight trip since September</th>
<th>Taken an overseas overnight trip since September</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>22</td>
<td>22</td>
<td>24</td>
</tr>
<tr>
<td>C1C2</td>
<td>52</td>
<td>59</td>
<td>55</td>
</tr>
<tr>
<td>DE</td>
<td>25</td>
<td>20</td>
<td>20</td>
</tr>
</tbody>
</table>

Source: Demographics. Base: All respondents. UK population n=3,511; Taken a UK overnight trip since September n=436; Taken an overseas overnight trip since September n=339;
Consistent with trip intentions at the start of 2021, the South West of England was the UK destination mostly likely to generate an overnight trip since September 2021 (Scotland 6th). Amongst Scotland residents, Scotland was the most popular destination, with over 3 in 5 taking a trip there.

Around 2 in 5 (42%) of overnight trip-takers to Scotland came from outside Scotland.

Figure 68. Destination stayed on most recent UK overnight trip since September, Percentage, Waves 41-42, UK and Scotland Residents

Figure 69. Breakdown of Scotland trip-takers by region of residence, Percentage, Waves 41-42, UK

Note: Questions ask about latest trip, so there will be a natural bias towards trips taken later in the year.
Older Independents make up the highest proportion of trip-takers to Scotland since September, although with lower representation than amongst UK intenders. Scotland trip-takers have a higher proportion than UK trip-takers of ‘retirees’ and social grades DE (the latter driven by a high incidence of retirees).

Figure 70. Breakdown of populations and UK and Scotland trip-takers since September by life stage, Percentage Waves 41-42, UK

Figure 71. Breakdown of populations and UK and Scotland trip-takers since September, Percentage Waves 41-42, UK

Source: Demographics. Base: UK residents n=3,511 All UK residents that took a UK overnight trip since September n=915; All UK residents that took a trip to Scotland since September n=127  *Note: Trip-takers are defined by latest trip to Scotland, so there will be a natural bias towards trip-takers later in the year
Similar to UK trip-takers, Scotland trip-takers are most likely to have taken their trip for a holiday/leisure purpose. That said, over 1 in 4 took a trip to visit friends or relatives.

Figure 72. Main purpose/s of trip taken since September, Percentage, Waves 41-42, UK
METHODOLOGY
METHODOLOGY

• The findings in this report are based on a fortnightly online survey conducted amongst a nationally representative sample of the UK population.
• The sample is representative of UK 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 Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.
• This report aggregates the results taken from Wave 40-42 of the COVID-19 consumer tracker.