COVID-19 UK Consumer Tracking Report: Scotland Level Summary

1st February to 7th March
(Waves 43-44)

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INTRODUCTION AND METHODOLOGY

The 144th Open, St Andrews, Kenny Lam
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 43-44. This is based on fieldwork taking place during the following dates:
  – Wave 43: 1st to 7th February
  – Wave 44: 1st to 7th March

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

Definitions used include:

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

Where possible, comparisons are also made to the equivalent period in 2021.

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+.
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
KEY FINDINGS
KEY FINDINGS (1)
General sentiment and leisure activity

1. As of early March, the UK and Scottish public are more optimistic in relation to COVID-19 than at any point since the start of the pandemic. The proportion thinking that ‘the worst has passed’ in relation to COVID has risen for three consecutive months and is 10 points higher than the next highest point in May 2021.

2. Similarly, ‘comfort levels’ with every ‘typical’ activity we measure are higher than at any point since May 2020 with double-digit increases since February this year in comfort for ‘travelling by public transport’ and ‘visiting an indoor attraction’. As a result the proportion of the UK and Scottish public stating they are avoiding activities due to COVID have also dropped, with ‘concerns around catching COVID’ and ‘government restrictions’ no longer perceived as a key barrier to Spring or Summer UK trips.

3. That said the virus continues to impact leisure intentions at some level. Whilst comfort levels have increased significantly, a notable minority remain ‘uncomfortable’ with activities conducted indoors. For example, comfort with ‘travelling by public transport’ remains nearly 20 percentage points lower than ‘shopping in your local shopping centre’, and 30 point slower than ‘going for a walk in a country trail’. Furthermore, there remain a notable minority who would usually do activities but are still avoiding them due to COVID. For example, 8% of Scotland residents state they would normally visit the ‘cinema/theatre’ and ‘museums/heritage venues’ in the next 12 months, but will avoid doing so due to the virus.

4. Consistent with previous reporting, ‘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. However, comfort levels have increased across all life stages.

5. Perhaps linked to lingering concerns around COVID, the UK 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 ‘plentiful hand sanitisers’ and ‘enhanced cleaning regimes’ close behind. Perhaps linked to different rules compared to the rest of the UK, Scotland residents are more likely to require customers to wear masks.

6. Whilst COVID concerns are clearly declining, ‘financial concerns’ are on the rise. ‘Personal finances’ and ‘rising costs of holiday/leisure’ are perceived to be ‘top 3’ barriers to taking a UK holiday or short break in both the Spring and Summer. More generally, the vast majority of the UK and Scottish population are now concerned about rising living costs/inflation – a significant increase on the previous reporting period (November to January).
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.

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 both Spring (April to June) and Summer (July to September) – for example, 38% anticipate a summer UK trip in 2022, compared to 27% anticipating one in 2021. High trip confidence also means that for the first time since this measure was introduced, trip booking is likely to be in line with ‘normal’ – previously intenders were significantly more likely to book closer to the date.

3. However, it’s important to note that, despite record rises in comfort levels and ‘COVID-optimism’ since February this year, intention to take Spring and Summer domestic overnight trips has not increased at a similar rate. This suggests that domestic trip intention has hit a ceiling, or is being held back by other factors. Given the dominance of ‘personal finances’/‘rising cost of leisure’ as barriers to taking Spring and Summer trips, and ‘free cancellation’ being the leading requirement for the public to visit indoor leisure venues, it may be that concerns around ‘spending power’ is dampening intention. Plateauing domestic trip intention may also be driven by competition from overseas trips, but with international trip intention only increasing by 2 percentage points, this is only likely to have a small influence. That said, around a third of UK trip intenders are planning an overseas trip in the same time period, so a more appealing overseas travel environment may reduce UK trip-taking closer to the time.

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.

5. July to September is the time of year most likely to generate overnight domestic trips to all destination types.
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 Spring and Summer. Scotland is the 2nd most preferred destination in Spring and the joint 6th in Summer, summer intention dropping by 6 percentage points since the previous report.

2. The drop in Scotland summer trip intention is in part driven by fewer Scotland residents taking an overnight trip there. However, Scotland remains the number one destination for Scotland-based residents across both periods. That said, as in previous waves, the majority of intenders come from elsewhere in the UK, particularly in the summer when they make up nearly three-quarters of all Scotland intenders. Scotland-based intenders are far more likely than non-Scotland-based intenders to only be considering Scotland for their next trip however. Of those considering other destinations in addition to Scotland, Wales is the most popular alternative choice across both time periods.

3. Scotland intenders for Spring are evenly split between life stages. In the summer months, families are the largest life stage. However, 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’.

4. In 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 significantly more likely to be planning on a longer break of 4+ nights. Compared to the equivalent periods last year (2021) Scotland intenders are more likely to be planning longer trips of 4+nights.

5. Scotland Spring intenders are most likely to be planning on a trip to a ‘countryside or village’ destination, followed by ‘mountains or hills’ – both higher than in the same period in 2021. Scotland Summer intenders are most likely to be planning on staying in ‘rural coastline’ and ‘countryside or village’ – also marginally higher than in 2021.

6. The Scottish Highlands is the part of Scotland most likely to generate an overnight trip this Spring and Summer. In the Spring, the Highlands is followed by the Edinburgh Area – in the Summer, by the Scottish Isles. The research suggests lower intention to visit both the Edinburgh and Glasgow areas than in 2022, however as ‘overall trip intention’ is higher there is unlikely to be a drop in absolute terms.
7. ‘Own car’ is by far the leading mode of transport intended to be used on trips to Scotland, across both time periods. In Spring, train is the next most preferred transport type with public bus/coach the next most popular in the summer. Perhaps reflecting higher comfort levels with travelling by public transport, ‘public bus/coach’ makes the top 5 main modes of travel across both periods for the first time in this reporting series.

8. ‘Hotel/motel/inn’, is the number one accommodation type for intended trips in Spring - at 45%, significantly higher than ‘commercial self-catering’. In the summer, ‘caravan/camping’ is the leading preferred accommodation type – significantly preferred to 2021.

Large city intentions

1. Despite increasing confidence levels in conducting ‘city-based’ activities, 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.

2. Perhaps linked to greater exposure to urban environments, ‘city/large 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’ (+19 points), ‘visiting an indoor attraction’ (also +19 points) and ‘going to a busy city centre’ (+17 points).

3. Intenders that are avoiding large cities cite ‘I am concerned about catching COVID in a large city’ as the second biggest reason for doing so, and are more likely to require social distancing and cleanliness measures to go to indoor leisure venues. This suggests that there is continued value in city-based destinations ensuring COVID protocols are in place, and communicating this to potential visitors.
GENERAL SENTIMENT AND LEISURE ACTIVITY
PERCEPTIONS OF THE SITUATION IN RELATION TO COVID-19

- As of early March 2022, the proportion of UK adults thinking ‘the worst has passed’ in relation to COVID-19 sits at 58% - 10 percentage points higher than at any point since the start of the pandemic. This represents 3 consecutive months of increased positivity, breaking the stasis from September to January.
- Scotland residents share similar optimism to UK adults.

Figure 1. Perception of the situation with regards to COVID-19, Waves 1-44, 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 broadly aligned in their perceptions of the situation in relation to COVID-19 – significantly more thinking ‘the worst has passed’, than ‘the worst is still to come’.

Sentiment is relatively similar across life stages, marking a departure from the previous report (based on November to January fieldwork) which indicated higher pessimism amongst retirees.
LEVEL OF COMFORT UNDERTAKING ACTIVITIES

- Further underlining the public's increasing optimism, comfort levels with all 'everyday activities' measured, are at their highest point since the start of the pandemic. There were double-digit rises in confidence for ‘travelling by public transport’ (+10 percentage points) and ‘visiting an indoor visitor attraction’ (+11 percentage points).

**Figure 4. Level of comfort conducting individual activities, Net very and fairly comfortable, Percent, Waves 1-44, UK**

- Green: Going for a walk in a country park or local trail
- Grey: Eating at a restaurant
- Purple: Visiting an indoor attraction (e.g. a museum)
- Orange: Shopping in your local shopping centre
- Blue: Travelling by public transport
- Pink: Going to a busy city centre
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’

- Unsurprisingly, the overall comfort average is at its highest point to date – at 82% it is 6 percentage points higher than in February and more than two times higher than in May 2020 during the first nationwide lockdown.

Figure 5. Level of comfort conducting individual activities, Net very and fairly comfortable comfort average, Percent average, Waves 1-44, UK and Scotland

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All UK 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 March 2021 onwards
Scotland residents report marginally higher comfort levels than residents across the UK, although differences are minimal.

Figure 6. Level of comfort conducting activities by place of residence, Net very and fairly comfortable, Percent, Wave 44, 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>82</td>
<td>93</td>
</tr>
<tr>
<td>Going for a walk in a country park/ local trail</td>
<td>84</td>
<td>95</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>84</td>
<td>88</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>83</td>
<td>82</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>67</td>
<td>71</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>77</td>
<td>77</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>66</td>
<td>67</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=1,756; All Scotland respondents n=269
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 ‘travelling by public transport’ (13 percentage points). Despite these differences it’s important to note that comfort levels have increased for all life stages since the previous reporting period between November and January.

Figure 7. Level of comfort conducting activities by life stage, Net very and fairly comfortable, Percent, Wave 44, UK
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 1 in 10 are also avoiding them due to COVID-19), followed by ‘a beach or coastal walk/trail’.
- A notable proportion of Scotland residents are also likely to be avoiding ‘cinemas/theatres’ and ‘museum/indoor heritage’ due to COVID-19 – 8% stating they would ordinarily go in the next 12 months, but not doing so due to the pandemic. Generally ‘visit avoidance due to COVID’ is lower than in previous waves.

Figure 8. Intention to visit leisure venues, Percentage, Wave 44, UK and Scotland

<table>
<thead>
<tr>
<th>Venue</th>
<th>UK residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant - indoor seating</td>
<td>42</td>
<td>42</td>
</tr>
<tr>
<td>Beach or coastal walk/trail</td>
<td>36</td>
<td>35</td>
</tr>
<tr>
<td>Restaurant - outdoor seating</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Garden/country park</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Cinema/theatre</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Museum/indoor heritage</td>
<td>23</td>
<td>23</td>
</tr>
<tr>
<td>Mountain or hills</td>
<td>22</td>
<td>22</td>
</tr>
</tbody>
</table>

*Figure 8 shows the percentage of UK residents and Scotland residents who intend to visit various leisure venues in the next month, with data indicating preferences and avoidances due to COVID-19.*
FUTURE INTENTION TO VISIT LEISURE VENUES

- A notable proportion of Scotland residents also state that they would normally go to ‘indoor play or activity centres’ (8%) and ‘festivals/exhibitions in an enclosed space’ (7%) in the next 12 months but are avoiding them due to COVID-19. Again, ‘avoidance’ is lower than in previous waves.

Figure 9. Intention to visit leisure venues, Percentage, Wave 44, UK and Scotland

- Never
- Would normally visit in next 12 months but avoiding due to COVID-19
- Will visit in next 12 months (excl next month)
- Will visit in next month

<table>
<thead>
<tr>
<th>Venue Type</th>
<th>UK residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor playground/activity centre</td>
<td>74%</td>
<td>76%</td>
</tr>
<tr>
<td>Zoo/farm attraction/theme park</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Indoor play or activity centre</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Festival, exhibition: enclosed space</td>
<td>73%</td>
<td>73%</td>
</tr>
<tr>
<td>Festival, exhibition: in a large space</td>
<td>78%</td>
<td>76%</td>
</tr>
<tr>
<td>Nightclub</td>
<td>83%</td>
<td>86%</td>
</tr>
</tbody>
</table>

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=1,756; All Scotland respondents n=269
In terms of activities, Scotland residents are most likely to go ‘walking/hiking’ in the next month, 2 in 5 (38%) intending to do so – significantly above all other activities measured. Similar to UK residents, they are most likely to be avoiding ‘spa/health treatments’ (7%) and ‘indoor swimming’ (6%) due to COVID-19 – but both are lower than in the previous wave.
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 44, UK and Scotland

- **Retreat or meditation**
- **Fishing**
- **Boating**
- **Horse riding, pony trekking**
- **Golf**
- **Other Water sports**
- **Sailing**

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**Notes:**
- 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=1,756; All Scotland respondents n=269
Despite reporting similar comfort levels, there are some differences in the conditions Scotland and UK-based residents expect indoor tourism/leisure providers to have in place for them to visit in the next few months. Scotland residents are more likely to require customers to wear masks, and broadly as likely as UK residents to prioritise cleanliness measures. Residents from elsewhere in the UK are more likely to cite the importance of financial conditions such as ‘free cancellation’.

Figure 12. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Percentage, Wave 44, UK and Scotland, Top 10 amongst Scotland residents
More than half (55%) of UK adults have either been hit hard financially by the pandemic or are having to be careful, rising to 61% 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’. Concern about ‘rising costs/inflation’ is significantly higher than in the previous reporting period (November to January).

Figure 13. Breakdown of residents by financial segments, Percentage, Wave 44, UK and Scotland

Figure 14. Concerns around economic factors, Percentage, Wave 44, UK and Scotland

Q17. If you had to choose, which one of the following statements would best describe your feelings right now? Base: All UK respondents. n=1,756; All Scotland respondents n=269.

Q18d How worried, if at all, are you about the following and their impact on your personal finances? Base: All UK respondents. n=1,756; All Scotland respondents n=269.
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, with 3 in 10 anticipating taking more compared to around 1 in 8 expecting to take fewer. UK and Scotland residents also anticipate taking more overseas trips, and this is significantly more the case than in the previous reporting period (November to January). 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 44, UK and Scotland**

- **UK residents**
  - 3+ more: 26%
  - 1 or 2 more: 31%
  - About the same: 28%
  - 1 or 2 fewer: 10%
  - 3+ fewer: 3%
  - Don't know: 10%

- **Scotland residents**
  - 3+ more: 18%
  - 1 or 2 more: 28%
  - About the same: 11%
  - 1 or 2 fewer: 8%
  - 3+ fewer: 2%
  - Don't know: 4%

**Figure 16. Number of OVERSEAS overnight trips likely to take in next 12 months compared to the last 12 months, Percentage, Wave 44, UK and Scotland**

- **UK residents**
  - 3+ more: 3%
  - 1 or 2 more: 24%
  - About the same: 10%
  - 1 or 2 fewer: 5%
  - 3+ fewer: 3%
  - Don't know: 41%

- **Scotland residents**
  - 3+ more: 19%
  - 1 or 2 more: 23%
  - About the same: 10%
  - 1 or 2 fewer: 7%
  - 3+ fewer: 3%
  - Don't know: 44%
**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 and overseas holidays or short breaks in the next 12 months, compared to the last 12 months.

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**Figure 17. Anticipated financial spend on UK holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 44, UK and Scotland**

- Will spend more: 27% UK residents, 22% Scotland residents
- Will spend about the same: 36% UK residents, 34% Scotland residents
- Will spend less: 14% UK residents, 15% Scotland residents
- Don't know: 23% UK residents, 29% Scotland residents

**Figure 18. Anticipated financial spend on OVERSEAS holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 44, UK and Scotland**

- Will spend more: 20% UK residents, 18% Scotland residents
- Will spend about the same: 29% UK residents, 33% Scotland residents
- Will spend less: 12% UK residents, 13% Scotland residents
- Don't know: 39% UK residents, 36% Scotland residents

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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=1,756; All Scotland residents n=269
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 70% for April trips and 72% for May trips, steadily rising with each consecutive month up to September (81%). Scotland residents report near-identical confidence.
- Notably, short-term confidence levels (i.e. within the next 3 months) are at their highest point since the research began in May 2020.

Figure 19. Confidence in taking a UK and Overseas overnight trip across different time periods, NET Confident (Very confident + fairly confident). Percentage, Wave 44, 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=1,756; All Scotland residents n=269
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’.

However, the gap in confidence between life stages converges as the year progresses, and is almost eliminated 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 44, 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? Pre-nesters n=335; Families n=647; Older Independents n=459; Retirees n=315;
PERCEIVED BARRIERS TO TAKING OVERNIGHT UK HOLIDAYS AND SHORT BREAKS

- ‘Personal finances’ and ‘rising costs of holidays/leisure’ make the top 3 perceived barriers to taking an overnight UK holiday or short break in both Spring (April to June) and Summer (July to September). Notably, ‘restrictions on travel from government’ have moved out of the top 5 main barriers, as has ‘concerns around catching COVID-19’.

Figure 21. Barriers to taking an overnight UK trip in Spring 2022, Percentage, Waves 43-44, UK and Scotland, Top 10

- Personal finances
- Rising costs of holidays/leisure
- My general health
- I wouldn’t take a UK break then regardless
- I have concerns about catching COVID-19
- Limited available annual leave
- Restrictions on travel from government
- Local residents unwelcoming due to COVID-19
- I have a general unease about travelling
- Vaccine passports

Figure 22. Barriers to taking an overnight UK trip in Summer 2022, Percentage, Waves 43-44, UK and Scotland, Top 10

- Personal finances
- Rising costs of holidays/leisure
- My general health
- I wouldn’t take a UK break then regardless
- I have concerns about catching COVID-19
- Limited available annual leave
- Restrictions on travel from government
- Local residents unwelcoming due to COVID-19
- Vaccine passports

VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in <INSERT TIME FRAME BELOW>?
Base: December and January fieldwork to boost base sizes. Figure 11. UK residents n=1,751; Scotland residents n=253. Figure 12. UK residents n=1,756; Scotland residents n=280.
UPCOMING UK AND OVERSEAS OVERNIGHT TRIP INTENTION

- Half of UK residents anticipate taking an overnight domestic break between April and September – 24% anticipating a trip in Spring, and 38% in Summer. Scotland residents are less likely to be anticipating a trip in this period, driven by lower intention in the Summer.
- A third of UK residents plan on taking an overseas trip between April and September – 15% in the Spring and 24% in the Summer. Overseas trip intention amongst Scotland residents is also lower than amongst the wider UK public.

**Figure 23. Proportion anticipating going on any overnight UK trips, Percentage, Waves 43-44, UK and Scotland**

- UK residents: 50% (April to September), 24% (April to June 2022), 38% (July to September 2022)
- Scotland residents: 43% (April to September), 22% (April to June 2022), 31% (July to September 2022)

**Figure 24. Proportion anticipating going on any overnight OVERSEAS trips, Percentage, Waves 43-44, UK and Scotland**

- UK residents: 33% (April to September), 15% (April to June 2022), 24% (July to September 2022)
- Scotland residents: 27% (April to September), 10% (April to June 2022), 20% (July to September 2022)
Around half (51%) of those planning a UK Spring/Summer overnight trip are also planning one overseas in the same period. The cross-over is biggest in the summer, when 39% are planning to do so.

**Figure 25. Breakdown of UK trip intenders by UK/overseas trip intention, Percentage, Wave 44, UK**

- **Spring/Summer 2022 UK Intenders**
  - Only planning a UK overnight trip in this period: 49%
  - Also planning an overseas overseas trip in this period: 51%

- **Spring 2022 UK Intenders**
  - Only planning a UK overnight trip in this period: 68%
  - Also planning an overseas overseas trip in this period: 32%

- **Summer 2022 UK Intenders**
  - Only planning a UK overnight trip in this period: 61%
  - Also planning an overseas overseas trip in this period: 39%

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: SPRING/SUMMER UK INTENDERS N=1,744; SPRING 2022 UK INTENDERS N=870; SUMMER 2022 UK INTENDERS N=1,315**
UK residents from the ‘family’ life stage are the most likely to be planning on taking a UK short break or holiday between April and September, driven by particularly high intention in the summer. Intention to take a trip in the Spring is consistent across all life stages at around 1 in 4.

Pre-nesters and families are equally as likely to be intending on taking an overseas overnight trip between April and September – retirees, and older independents significantly less likely to do so.

Figure 26. Proportion anticipating going on any overnight UK trips by life stage, Percentage, Waves 43-44, UK

Figure 27. Proportion anticipating going on any overnight OVERSEAS trips by life stage, Percentage, Waves 43-44, UK
Notably, the fallout of life stages for April to June is almost identical to their incidence in the population, underlining the increasing comfort levels across the population. Families have the highest representation for UK overnight trips intended in both April to June and July to September – particularly the latter (unsurprising given the school holidays fall in this period).

Figure 28. Breakdown of population and UK trip-takers by life stage, Percentage Wave 44, UK and Scotland

Figure 29. Breakdown of population and OVERSEAS trip-takers by life stage, Percentage Wave 44, 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? UK population n=3,512; April to June UK intenders n=870; July to September intenders n=1,315; April to June overseas n=470; Summer overseas n=805
TRIP INTENTION AND INTENDER PROFILES FOR SCOTLAND TRIPS
WHERE PLANNING ON STAYING ON NEXT UK 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 Spring intenders planning to go there. The North West and Scotland are the next most popular at 12%.
- 55% of Scotland-based intenders are planning on taking an overnight trip in Scotland in Spring.

Figure 34. Where planning on staying on next UK overnight trip in Spring, Percentage Waves 43-44, 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 UK Spring intenders n=684; All Scotland resident Spring intenders n=123
The South West of England is also the most preferred destination for summer trips, at 22% significantly ahead of interest in Spring and the next most preferred destinations in summer. Scotland is currently the joint 6th most preferred UK destination for summer trips, lower than in previous reporting periods (although not significantly so). Amongst Scotland-based summer intenders, Scotland is the most likely domestic trip destination, significantly ahead of Yorkshire and The Humber (the next most popular destination for Scotland residents).

Figure 35. Where planning on staying on next UK overnight trip in Summer, Percentage Waves 43-44, UK and Scotland Residents
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 majority of Scotland intenders live elsewhere in the UK – particularly in the Summer, where they make up more than 7 in 10 (72%).
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 Spring and Summer.
- 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 43-44, UK and Scotland**

**Table 1. Top 5 alternative destinations for Scotland intenders**

<table>
<thead>
<tr>
<th>Scotland Spring Intenders (% of Scotland intenders)</th>
<th>Scotland Summer Intenders (% of Scotland intenders)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wales 8%</td>
<td>Wales 11%</td>
</tr>
<tr>
<td>North West England 6%</td>
<td>Yorkshire and The Humber 8%</td>
</tr>
<tr>
<td>South West England 5%</td>
<td>South West England 8%</td>
</tr>
<tr>
<td>Yorkshire and The Humber 5%</td>
<td>Northern Ireland 5%</td>
</tr>
<tr>
<td>South East England 4%</td>
<td>London 5%</td>
</tr>
</tbody>
</table>
4 in 10 (39%) of Scotland intenders have already planned and booked their Spring trip, only 1 in 6 (16%) their summer trip. Over half (54%) of Scotland Spring intenders have not planned or booked their Scotland trip, rising to nearly 8 in 10 (78%) of Scotland Summer intenders.

Notably, and perhaps reflecting increased comfort levels in relation to COVID-19, booking patterns are relatively consistent with ‘normality’ in both Spring and Summer – the proportion planning on booking closer, broadly the same as the proportion booking further away.

**Figure 39. Breakdown of Scotland intenders by booking status, Percentage, Wave 44, UK**

- Planned and booked Scotland trip: 39%
- Planned not booked Scotland trip: 7%
- Not planned and not booked Scotland trip: 54%

**Figure 40. Breakdown of Scotland intenders by booking habits, Percentage, Waves 44, UK**

- Will book closer to the travel date than normal: 18%
- Will book about the same as normal: 57%
- Will book further from the travel date than normal: 17%
- Don’t know: 8%

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 Spring Intenders n=56; Scotland Summer Intenders n=48; *Caution low base sizes
DEMographics of Intenders Compared to the General Population

- Scotland intenders for 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.

**Figure 41. Breakdown of Scotland Spring intenders by life stage, Percentage Waves 43-44, UK**

<table>
<thead>
<tr>
<th>Life Stage</th>
<th>U.K Population Breakdown</th>
<th>All Scotland Spring intenders</th>
<th>All Scotland Summer intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement age</td>
<td>22</td>
<td>25</td>
<td>17</td>
</tr>
<tr>
<td>Older independents</td>
<td>30</td>
<td>25</td>
<td>27</td>
</tr>
<tr>
<td>Families</td>
<td>30</td>
<td>25</td>
<td>32</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>18</td>
<td>25</td>
<td>23</td>
</tr>
</tbody>
</table>

Source: Demographics. Base: All respondents. UK population n=3,511; All Scotland Spring Intenders n=118; Scotland resident Spring Intenders n=65; All Scotland Summer Intenders n=93; Scotland resident summer intenders n=43* "Low base size – treat with caution
Social grades AB have higher representation amongst Scotland Spring intenders but lower amongst Summer Intenders.

**Figure 42.** Breakdown of Scotland Spring intenders social grade, Percentage Waves 43-44, UK

<table>
<thead>
<tr>
<th>Social Grade</th>
<th>U.K Population Breakdown</th>
<th>All Scotland Spring intenders</th>
<th>All Scotland Summer intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>22</td>
<td>26</td>
<td>18</td>
</tr>
<tr>
<td>C1C2</td>
<td>52</td>
<td>49</td>
<td>63</td>
</tr>
<tr>
<td>DE</td>
<td>25</td>
<td>25</td>
<td>19</td>
</tr>
</tbody>
</table>
SCOTLAND TRIP
INTENDER
BEHAVIOUR
ANTICIPATED LENGTH OF SCOTLAND HOLIDAYS AND SHORT BREAKS

- In 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 significantly more likely to be planning on a longer break of 4+ nights.
- Compared to the equivalent periods last year (2021) Scotland intenders are more likely to be planning longer trips of 4+ nights.

**Figure 45. Length of next Spring holiday or short break in Scotland, Percentage Waves 43-44, UK**

- Unsure: 49%
- Holiday (4+ nights): 51%
- Short break (1-3 nights): 50%

**Figure 46. Length of next Summer holiday or short break in Scotland, Percentage Waves 43-44, UK**

- Unsure: 49%
- Holiday (4+ nights): 51%
- Short break (1-3 nights): 35%

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 Spring Intenders n=95; All Scotland Summer Intenders n=71
*Please note, Spring intentions in 2021 would have been influenced by most of the UK being in lockdown during the fieldwork period.
TYPE OF DESTINATION FOR NEXT SCOTLAND SHORT BREAK OR HOLIDAY

- Scotland Spring Intenders are most likely to be planning on a trip to a ‘countryside or village’ destination, followed by ‘mountains or hills’ – both higher than in the same period in 2021.
- Scotland Summer Intenders are most likely to be planning on staying in ‘rural coastline’ and ‘countryside or village’ – also marginally higher than in 2021.

Figure 47. Main type of destination for Scotland Spring intenders, Percentage Waves 43-44, UK

<table>
<thead>
<tr>
<th></th>
<th>All Scotland Spring 2022 intenders</th>
<th>All Scotland Spring 2021 intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countryside or village</td>
<td>39%</td>
<td>32%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>23%</td>
<td>28%</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Large city</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Small city or town</td>
<td>6%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Figure 48. Main type of destination for Scotland Summer intenders, Percentage Waves 43-44, UK

<table>
<thead>
<tr>
<th></th>
<th>All Scotland Summer 2022 intenders</th>
<th>All Scotland Summer 2021 intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rural coastline</td>
<td>38%</td>
<td>29%</td>
</tr>
<tr>
<td>Countryside or village</td>
<td>33%</td>
<td>31%</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>Traditional coastal/seaside town</td>
<td>25%</td>
<td>18%</td>
</tr>
<tr>
<td>Large city</td>
<td>19%</td>
<td>21%</td>
</tr>
<tr>
<td>Small city or town</td>
<td>6%</td>
<td>17%</td>
</tr>
</tbody>
</table>

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 Spring Intenders n=95; All Scotland Summer Intenders n=71
*Please note, Spring intentions in 2021 would have been influenced by most of the UK being in lockdown during the fieldwork period.
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 Spring and Summer. In the Spring, the Highlands is followed by the Edinburgh Area – in the Summer, by the Scottish Isles. The research suggests lower intention to visit both the Edinburgh and Glasgow areas than in 2022, however as ‘overall trip intention’ is higher there is unlikely to be a drop in absolute terms.

Figure 49. Planned destination for next Scotland trip for Spring intenders, Percentage Waves 43-44, UK and Scotland

Figure 50. Planned destination for next Scotland trip for Summer intenders, Percentage Waves 43-44, UK and Scotland

*Please note, Spring intentions in 2021 would have been influenced by most of the UK being in lockdown during the fieldwork period.
Across 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 nearly 2 in 5 visitor parties in the summer months.

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 Spring.

Figure 51. Visitor party make-up for Scotland Spring intenders, Percentage Waves 43-44, UK

Figure 52. Visitor party make-up for Scotland Summer intenders, Percentage Waves 43-44, 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 Spring Intenders n=95; All Scotland Summer Intenders n=71

*Please note, Spring intentions in 2021 would have been influenced by most of the UK being in lockdown during the fieldwork period.
• ‘Own car’ is by far the leading mode of transport intended to be used on trips to Scotland, across both time periods. In Spring, train is the next most preferred transport type with public bus/coach the next most popular in the summer.
• Perhaps reflecting higher comfort levels with travelling by public transport, ‘public bus/coach’ makes the top 5 main modes of travel across both periods for the first time in this reporting series.

Figure 53. Top 5 main modes of travel of destination for trip in Spring, Percentage Waves 43-44, UK

![Chart showing the top 5 main modes of travel for Spring 2022 and 2021 in Scotland.]

Figure 54. Top 5 main modes of travel of destination for trip in Summer, Percentage Waves 43-44, UK

![Chart showing the top 5 main modes of travel for Summer 2022 and 2021 in Scotland.]

QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring Intenders n=95; All Scotland Summer Intenders n=71
*Please note, Spring intentions in 2021 would have been influenced by most of the UK being in lockdown during the fieldwork period.
**TYPE OF ACCOMMODATION FOR NEXT SCOTLAND SHORT BREAK OR HOLIDAY**

- ‘Hotel/motel/inn’, is the number one accommodation type for intended trips in Spring - at 45%, significantly higher than ‘commercial self-catering’.
  - In the summer, ‘caravan/camping’ is the leading preferred accommodation type – significantly preferred to 2021.

---

**Figure 55. Accommodation planning on staying in on next UK overnight trip for Scotland Spring intenders, Net percentage Waves 43-44, UK**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>All Scotland Spring 2022 intenders</th>
<th>All Scotland Spring 2021 intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/motel/inn</td>
<td>41</td>
<td>34</td>
</tr>
<tr>
<td>Commercial self-catering (e.g. Airbnb, second home, friends etc.)</td>
<td>34</td>
<td>33</td>
</tr>
<tr>
<td>A private home</td>
<td>33</td>
<td>38</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>23</td>
<td>16</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B / Farmhouse</td>
<td>15</td>
<td>2</td>
</tr>
<tr>
<td>Other</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

---

**Figure 56. Accommodation planning on staying in on next UK overnight trip for Scotland Summer intenders, Net percentage Waves 43-44, UK**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>All Scotland Summer 2022 intenders</th>
<th>All Scotland Summer 2021 intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caravan/Camping</td>
<td>50</td>
<td>40</td>
</tr>
<tr>
<td>Hotel/motel/inn</td>
<td>42</td>
<td>42</td>
</tr>
<tr>
<td>Commercial self-catering (e.g. Airbnb, second home, friends etc.)</td>
<td>39</td>
<td>34</td>
</tr>
<tr>
<td>A private home</td>
<td>34</td>
<td>37</td>
</tr>
<tr>
<td>Guesthouse / B&amp;B / Farmhouse</td>
<td>28</td>
<td>20</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
<td>8</td>
</tr>
</tbody>
</table>

---

QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring Intenders n=95; All Scotland Summer Intenders n=71

*Please note, Spring intentions in 2021 would have been influenced by most of the UK being in lockdown during the fieldwork period.*
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 Spring continue to be significantly more likely to be pre-nesters than ‘city/large town non-intenders’ and the wider UK population. Retirees are significantly less likely to be intending to visit a city/large town.

‘City/large town intenders’ are also significantly more likely to belong to social grades AB.
LEVEL OF COMFORT UNDERTAKING ACTIVITIES AMONGST UK CITY INTENDERS

- ‘City/large 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’ (+19 points), ‘visiting an indoor attraction’ (also +19 points) and ‘going to a busy city centre’ (+17 points).

Figure 59. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Waves 43-44, UK

### Figure 59. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Waves 43-44, UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>UK Spring City/Large Town Intenders</th>
<th>UK Spring City/Large Town Non-Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>87/77</td>
<td>93/92</td>
</tr>
<tr>
<td>Going for a walk in a country park/local trail</td>
<td>93/92</td>
<td>89/79</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>89/79</td>
<td>89/78</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>89/78</td>
<td>77/58</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>77/58</td>
<td>87/68</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>87/68</td>
<td>77/60</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>77/60</td>
<td>77/60</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 Spring city intenders – all considering taking a UK overnight break in a city this Spring n=587; UK Spring non-city intenders all not considering taking a UK overnight break in a city this Spring n=2,925
**CONDITIONS ESSENTIAL FOR INDOOR TOURISM/LEISURE PROVIDERS TO HAVE IN PLACE**

- City/large town intenders are more likely than non-intenders to see financial incentives as essential to encourage them to visit in the next few months. ‘Cleanliness’ and ‘social distancing’ measures tend to index higher for city/large town non-intenders.

---

**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 44, UK and Scotland, Top 10 amongst Scotland residents**

<table>
<thead>
<tr>
<th>Condition</th>
<th>UK Spring City/Large Town Intenders</th>
<th>UK Spring City/Large Town Non-Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free cancellation</td>
<td>49</td>
<td>43</td>
</tr>
<tr>
<td>Enhanced cleaning regimes</td>
<td>39</td>
<td>37</td>
</tr>
<tr>
<td>Plentiful hand sanitizers</td>
<td>39</td>
<td>37</td>
</tr>
<tr>
<td>Transferable bookings to a later date</td>
<td>30</td>
<td>37</td>
</tr>
<tr>
<td>Staff to wear face masks</td>
<td>34</td>
<td>31</td>
</tr>
<tr>
<td>Contactless check-in and payments</td>
<td>29</td>
<td>32</td>
</tr>
<tr>
<td>Customers to wear face masks</td>
<td>28</td>
<td>23</td>
</tr>
<tr>
<td>Discounts or special offer deals</td>
<td>28</td>
<td>23</td>
</tr>
<tr>
<td>Management of people in communal areas</td>
<td>30</td>
<td>25</td>
</tr>
<tr>
<td>Significantly reduced capacity compared to before COVID-19</td>
<td>25</td>
<td>24</td>
</tr>
<tr>
<td>Government certification for complying with hygiene and distancing guidelines</td>
<td>26</td>
<td>24</td>
</tr>
<tr>
<td>Compulsory COVID-19 passports for staff and customers</td>
<td>20</td>
<td>18</td>
</tr>
<tr>
<td>The ability to pay in instalments</td>
<td>16</td>
<td>14</td>
</tr>
<tr>
<td>Enforced social distancing</td>
<td>15</td>
<td>16</td>
</tr>
<tr>
<td>Packaged food only (no open buffets)</td>
<td>16</td>
<td>24</td>
</tr>
</tbody>
</table>

**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 Spring city intenders – all considering taking a UK overnight break in a city this Spring n=587; UK Spring non-city intenders all not considering taking a UK overnight break in a city this Spring n=2,925
Around 1 in 3 (32%) of UK intenders not planning on staying in a large city state it is because they are ‘too expensive’, with nearly 3 in 10 (28%) stating it’s because they are ‘more worried about catching COVID-19 in a large city’. Despite concerns about catching COVID being a ‘top-2 barrier’ it’s worth noting that it is less of a concern than in the previous reporting period.
DAILY TRIP INTENTIONS

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

Scotland residents are more likely than wider UK residents to take a day trip to a large city or to mountains/hills.
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 ‘traditional coastal/seaside towns’.

Figure 63. Breakdown of Scotland-based June day-trippers by destination type by life stage, Percentage Waves 43-44, Scotland

<table>
<thead>
<tr>
<th>Destination Type</th>
<th>Large City Day Trippers</th>
<th>Smaller City or Town Day Trippers</th>
<th>Traditional Coastal/Seaside Town Day Trippers</th>
<th>Rural Coastline Day Trippers</th>
<th>Countryside or Village Day Trippers</th>
<th>Mountains or Hills Day Trippers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement Age</td>
<td>15</td>
<td>25</td>
<td>20</td>
<td>29</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Older Independents</td>
<td>41</td>
<td>35</td>
<td>39</td>
<td>39</td>
<td>38</td>
<td>38</td>
</tr>
<tr>
<td>Families</td>
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<td>Pre-nesters</td>
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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=111; Smaller city or town day trippers n=107; Traditional coastal town day trippers n=135; Rural coastline day trippers n=103; Countryside or village day trippers n=138; Mountain or hills day trippers n=92.
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 Waves 43-44 of the COVID-19 consumer tracker.