COVID-19 UK Consumer Tracking Report: Scotland Level Summary

1st April to 9th May 2022
(Waves 45-46)

Published June 6th 2022
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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 45-46. This is based on fieldwork taking place during the following dates:
  - Wave 45: 1st to 7th April
  - Wave 46: 3rd to 9th May

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:

- **Summer Intenders**: Members of the public who state their next holiday or short break will be between June 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+.
To deliver clearer findings, we also profile by life stage. Life stages are preferable to ‘age’ as they better describe someone’s life situation. For the purpose of this report, we have used the following:

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

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

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

- **Hotel/Motel/Inn**
- **Guest house/B&B/Farmhouse**
- **Commercial self-catering:** Rental holiday flat/apartment or Rented holiday home
- **Private home:** Second home/time share or Friends/relative’s home or In someone else’s private home on a commercial basis (e.g., Airbnb)
- **Caravan/Camping/Glamping:** Touring caravan or Campervan/Motorhome or Static Caravan or Tent or Glamping/Alternative
- **Other accommodation:** Hostel or other type of accommodation
KEY FINDINGS
**KEY FINDINGS (1)**

**General sentiment and leisure activity**

1. As of the latest research period in early May, the UK public are significantly more likely to think ‘the worst has passed’ in relation COVID-19, than ‘the worst is still to come’, a trend that has been consistent since February this year.

2. Linked to this optimism, ‘comfort levels’ with the majority of everyday activities are at their highest point to date, and significantly higher than the equivalent period in 2021.

3. The increase in comfort levels is in part driven by older life stages such as older independents and retirees who report a similar comfort average to families and pre-nesters. This marks a departure from reporting since the start of the pandemic where older life stage comfort levels were consistently lower.

4. That said the virus continues to impact leisure intentions amongst a minority, comfort levels with indoor activities not yet at pre-pandemic levels, and some venues/activities still being avoided due to COVID-19. For example, 11% of Scotland residents are avoiding ‘festivals/exhibitions in an enclosed space’, 9% nightclubs, and 9% ‘museums/indoor heritage.’

5. Furthermore, despite reporting a similar comfort average to younger life stages, retirees and older independents continue to be less comfortable ‘visiting a busy city centre’, ‘travelling by public transport’ and ‘visiting an indoor visitor attraction’.

6. The pandemic also appears to have left a legacy in terms of expectations around conditions at indoor leisure venues – ‘enhanced cleaning regimes’ and ‘plentiful hand sanitisers’ a requirement for at least a third of UK residents.

7. As UK residents appear to feel more positive about the situation in relation to COVID-19, concerns around finances appear to be growing – 57% of UK residents describing themselves as either ‘hit hard financially’ or ‘having to be careful’ in relation to the pandemic. A large majority are concerned about rising living costs.

8. Scotland residents report very similar general sentiment to the wider UK population, a slightly higher proportion now thinking ‘the worst has passed’ in relation to COVID. The comfort average is also similar, Scotland residents slightly more comfortable than residents across the UK. The consistently higher optimism and comfort levels amongst Scotland residents compared to the rest of the UK marks a departure from the majority of research conducted in the last 2 years. However, perhaps as a result of the historically stricter COVID restrictions (in comparison to England), Scotland residents tend to index higher in requiring indoor leisure providers to have cleanliness measures in place in order for them to visit.
KEY FINDINGS (2)

UPCOMING TRIP INTENTIONS (OVERNIGHT VISITORS)

1. Reflecting higher comfort levels, UK and Scotland residents anticipate taking significantly more overnight trips in the next 12 months, than the previous 12 months. This is driven by high ‘trip confidence’, a consistent three quarters of Scotland and UK residents confident that UK trips would go ahead for each month of the year – significantly above confidence for the equivalent period in 2021.

2. Despite high confidence, the public anticipate a number of potential barriers to taking UK trips – ‘financial barriers’ including ‘the cost of living’, ‘personal finances’, ‘the cost of fuel’ and ‘rising costs of holidays/leisure’ making up the top four. This marks a departure from the start of the year when ‘restrictions on travel from government’ was the leading barrier, underlining how front-of-mind, the ‘cost of living crisis’ has become in relation to leisure.

3. The strong relative confidence that UK trips would go ahead means that, compared to 2021 more domestic trips are already booked, and a higher proportion of UK residents are anticipating an overnight domestic trip in summer (June to September) and autumn (October to December). In the summer period, the highest incidence of trips are set to take place in August and September.

4. UK overnight trips continue to be favoured to overseas trips, with a large gap in trip intention and trip confidence, driven in part by older life stages who are more confident in taking domestic trips. UK residents anticipate taking marginally more overseas trips in the next 12 months than in the previous 12 months, and 38% of UK summer intenders are also anticipating an overseas trip. However, the majority of UK intenders are not planning an overseas trip in the same month as their UK trip, suggesting they may take both types of trips, rather than one or the other.

5. Perhaps notably, confidence that overseas trips would go ahead is very similar to confidence in UK trips in the same period last year – however, in addition to financial factors, leading barriers to taking trips overseas also include ‘COVID-related factors’ and ‘the war in Ukraine’. At the time of research, ‘travel chaos’ at airports had not made the news, but it’s likely to be an additional barrier as we head into the summer.

6. Domestic summer trip intention is relatively even across life stages, retirees and families the most likely to be planning on taking one. Unsurprisingly, ‘families’ are the most likely to be intending a trip in August, retirees in September.

7. Unlike domestic trip intention, overseas trip intention strongly correlates with life stage – ‘older’ life stages less likely to be planning an overseas trip.
KEY FINDINGS (3)

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 Summer and Autumn. Scotland is the 4th most preferred destination in summer but only a (non statistically significant) 2 percentage points behind Yorkshire & The Humber in second place. Intentions to visit Scotland are slightly lower than 2021 as a percentage, but given the increase in domestic trip intention overall, intentions are unlikely to drop as an absolute number.

2. Unsurprisingly, Scotland residents are the region most likely to intend to take a trip in Scotland, at 48% of all intenders this is slightly lower than the 54% in the same period in 2021. This may indicate an openness to travelling further afield, but given the increase in overall trip intention compared to 2021, does not represent a fall in absolute numbers.

3. Scotland summer intenders are more likely than the UK population to fall into the family life stage, particularly amongst Scotland residents. Beyond ‘my partner’, ‘child/grandchild/young adult’ is the most prevalent party size (unsurprisingly spiking in July/August), higher than in the equivalent period in 2021.

4. Scotland summer 2022 intenders are significantly more likely to be planning a longer holiday of 4+ nights than a short break of 1-3 nights, the breakdown almost identical to intention in 2021. Longer holidays are particularly dominant in July/August when they make up 3 in 5 of trips, less so outside the core summer months.

5. There is a relatively even split in the destinations Scotland summer intenders plan on visiting for their trip this summer – ‘countryside or village’, ‘mountains or hills’, ‘rural coastline’ and ‘traditional coastal/seaside town’ are the leading destination types for Scotland intenders living in Scotland and elsewhere in the UK. However, when broken down by month, ‘traditional coastal/seaside town’ is the leading type for August/September (at 36%) and ‘mountains or hills’ outside the core summer months.

6. The Scottish Highlands is the part of Scotland most likely to generate an overnight trip this summer, significantly ahead of the Edinburgh area and West Coast. Consistent with previous reporting, The Highlands generates trip intention from both Scotland-based intenders and non-Scotland-based intenders. In contrast, Edinburgh is the leading destination for non-Scotland resident intenders, and the least preferred for Scotland resident intenders.
KEY FINDINGS (4)

7. ‘Own car’ is by far the leading mode of transport intended to be used on summer trips to Scotland, particularly amongst Scotland-based intenders. Train is the second leading transport type, linked to trips to cities and therefore driven by non-Scotland-based intenders. Notably public bus/coach is the third most preferred mode of transport – the first time it has made the top three since the research began, building on its first appearance in the top five in the last report, and reflecting increased comfort levels with public transport.

8. ‘Hotel/motel/inn’, is the number one accommodation type for intended trips in summer - at 39%, almost identical to 2021 intentions. 3 in 10 Scotland intenders plan on staying in ‘a private home’, ‘commercial self-catering’ or ‘caravan/camping’ – the latter two particularly high amongst Scotland resident intenders.

Large city intentions

1. The incidence of UK residents planning on staying in a UK city or large town on their next domestic holiday/short break has consistently increased since the start of the pandemic – the intention in May 2022 higher twice as high as 2 years ago in June 2020.

2. Consistent with previous reporting, large city intenders are more likely to be younger (in particular pre-nesters), and comfortable conducting ‘city-based activities’ (such as travelling by public transport).

3. Aligned with finances being the biggest perceived barrier to UK travel this summer, ‘large cities tend to be too expensive’ is the leading reason for not staying in a large city this summer, followed by ‘fewer things to do/place to visit’. Perhaps reflecting lower comfort levels with ‘city-based activities’, ‘I am worried about catching COVID-19’ is a reason for 1 in 4.

4. Free cancellation’ is the leading condition both ‘large city intenders’ ‘large city non-intenders’ consider essential for indoor tourism/leisure providers to have in place. Large city non-intenders are more likely to require conditions relating to cleanliness, underling their continued concern around COVID-19, and the value in large city destinations continuing to outline COVID protocols.
**KEY FINDINGS (5)**

**Trips taken since January 2022**

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>21% of UK residents and 20% of Scotland residents have taken an overnight domestic trip since January this year, with incidence highest in April. 8% of UK residents have taken an overseas trip, rising to 1 in 9 Scotland residents.</td>
</tr>
<tr>
<td>2.</td>
<td>UK trip-takers since January are more likely than the population and overseas trip-takers in that period to belong to older life stages such as retirees and older independents. Both UK and overseas trip-takers since January are less likely than the general population to belong to lower social grades.</td>
</tr>
<tr>
<td>3.</td>
<td>Consistent with most reporting over the last two years, the South West of England was the destination UK trip-takers were most likely to have stayed in since January 2022, followed by Yorkshire and the Humber, and Scotland.</td>
</tr>
<tr>
<td>4.</td>
<td>Notably, over three quarters (76%) of Scotland residents that have taken a trip since January, took it in Scotland. There was an even split in trip origin between Scottish and non-Scottish residents.</td>
</tr>
<tr>
<td>5.</td>
<td>Families make up the highest proportion of trip-takers to Scotland since Jan 2022, making up 2 in 5 of all trip-takers, higher than the UK. Social grades AB also index higher amongst Scotland trip-takers since January compared to the UK population, and to UK trip takers.</td>
</tr>
<tr>
<td>6.</td>
<td>The vast majority of Scotland trip-takers since January took their trip for holiday/leisure - at 82%, higher than trip-takers to the wider UK.</td>
</tr>
<tr>
<td>7.</td>
<td>Edinburgh was the leading destination for Scotland trip-takers since January, 35% having taken an overnight trip there.</td>
</tr>
</tbody>
</table>
GENERAL SENTIMENT AND LEISURE ACTIVITY
PERCEPTIONS OF THE SITUATION IN RELATION TO COVID-19

• Since February 2022, the proportion of UK and Scotland-based adults thinking ‘the worst has passed’ in relation to COVID-19 has been significantly higher than the proportion thinking ‘the worst is still to come’. Although optimism dropped in April (as COVID-19 cases rose), it has since rebounded, with 51% thinking ‘the worst has passed’ at the start of May – the second highest proportion since the start of the pandemic.

• Since the start of the year, sentiment amongst Scotland-based residents has broadly tracked sentiment across the UK, and currently sits slightly higher.

Figure 1. Perception of the situation with regards to COVID-19, Waves 1-46, UK and Scotland
PERCEPTIONS OF THE SITUATION IN RELATION TO COVID-19

• As outlined on the previous page, UK and Scotland residents are broadly aligned in their perceptions of the situation in relation to COVID-19 (Scotland residents slightly more positive) – significantly more thinking ‘the worst has passed’, than ‘the worst is still to come’.
• Consistent with the previous report in March, sentiment is relatively similar across life stages, with retirees the least likely to think ‘the worst is still to come’.

Figure 2. Perception of the situation with regards to COVID-19, Wave 46, Percentage UK and Scotland

Figure 3. Perception of the situation with regards to COVID-19 by life stage, Wave 46, 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=1760; All Scotland respondents n=265; Pre-nesters n=374; Families n=619; Older Independents n=448; Retirees n=319.
Since March this year, comfort levels with all ‘everyday activities’ have hit their highest point since they were first measured within this research. With the exception of ‘going for a walk in a country park or local trail’ (which has also increased by 4 percentage points), all activities report double digit increases in comfort levels since the same period last year (May 2021) – ‘going to a busy centre’ 30 percentage points higher, ‘visiting an indoor attraction’ 29 points higher.
The comfort average (the average of all individual activities) has consistently increased since the start of the pandemic, and as of May 2022, sits at 81% - only the second month it has been higher than 80% (the first time being in March this year) and 19 percentage points higher than May 2021.

Figure 5. Level of comfort conducting individual activities, Net very and fairly comfortable comfort average, Percent average, Waves 1-46, 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.*
Scotland residents report marginally higher comfort levels than residents from across the UK for all ‘everyday activities’, although differences are minimal. Despite increasing comfort levels, comfort with ‘travelling by public transport’ and ‘going to a busy centre’ remain lower than other activities.

**Figure 6. Level of comfort conducting activities by place of residence, Net very and fairly comfortable, Percent, Wave 46, 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>81</td>
<td>92</td>
</tr>
<tr>
<td>Going for a walk in a country park/ local trail</td>
<td>83</td>
<td>95</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>82</td>
<td>83</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>83</td>
<td>85</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>68</td>
<td>69</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>76</td>
<td>77</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>69</td>
<td>72</td>
</tr>
</tbody>
</table>
LEVEL OF COMFORT UNDERTAKING ACTIVITIES WITH A ‘COMFORT AVERAGE’

- It’s notable that there are minimal differences in the comfort average across life stages, marking a departure from all previous waves where older life stages (such as older independents and retirees) reported significantly lower comfort levels. The overall near-parity is driven by significantly higher comfort levels from older life stages with ‘going for a walk in a country park/local trail’ and broadly similar comfort levels with ‘shopping in your local shopping centre’ and ‘eating at a restaurant’. Whilst older life stages remain less comfortable ‘visiting a busy city centre’, ‘travelling by public transport’ and ‘visiting an indoor visitor attraction’, the gap is smaller than in the previous reporting period (in March).

Figure 7. Level of comfort conducting activities, Net very and fairly comfortable, Percent, Wave 46, 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, followed by ‘a beach or coastal walk/trail’ and ‘restaurant – outdoor seating’.
- Reflecting increasing comfort levels, the proportion of Scotland-residents avoiding places they would normally visit due to COVID has dropped since March 2022 – for indoor restaurants it has halved from 10% to 5%, and for cinemas it has fallen from 8% to 6%. That said, the proportion saying this for ‘museums/indoor heritage’ has remained the same.

### Figure 8. Intention to visit leisure venues, Percentage, Wave 46, UK and Scotland

<table>
<thead>
<tr>
<th>Venue</th>
<th>UK residents</th>
<th>Scotland residents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Restaurant - indoor seating</strong></td>
<td>44</td>
<td>47</td>
</tr>
<tr>
<td><strong>Beach or coastal walk/trail</strong></td>
<td>38</td>
<td>44</td>
</tr>
<tr>
<td><strong>Restaurant - outdoor seating</strong></td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td><strong>Garden/country park</strong></td>
<td>49</td>
<td>52</td>
</tr>
<tr>
<td><strong>Cinema/theatre</strong></td>
<td>57</td>
<td>58</td>
</tr>
<tr>
<td><strong>Museum/indoor heritage</strong></td>
<td>57</td>
<td>55</td>
</tr>
<tr>
<td><strong>Mountain or hills</strong></td>
<td>65</td>
<td>63</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=1760; All Scotland respondents n=265
FUTURE INTENTION TO VISIT LEISURE VENUES

- ‘Festivals, exhibitions in an enclosed space’ and ‘nightclubs’ are the two types of destination Scotland residents are most likely to still be avoiding due to COVID – both at around 1 in 10 of the population.

Figure 9. Intention to visit leisure venues, Percentage, Wave 46, UK and Scotland

<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>73%</td>
<td>77%</td>
</tr>
<tr>
<td></td>
<td>6% (1 in 10)</td>
<td>8%</td>
</tr>
<tr>
<td></td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Zoo/farm attraction/theme park</td>
<td>63%</td>
<td>17%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>13%</td>
</tr>
<tr>
<td>Indoor play or activity centre</td>
<td>74%</td>
<td>14%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Festival, exhibition: enclosed space</td>
<td>72%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>Festival, exhibition: in a large space</td>
<td>77%</td>
<td>10%</td>
</tr>
<tr>
<td></td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Nightclub</td>
<td>73%</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>5%</td>
<td>5%</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=1760; All Scotland respondents n=265
In terms of activities, Scotland residents are most likely to go ‘walking/hiking’ in the next month, over 2 in 5 (44%) intending to do so – significantly above all other activities measured. Similar to UK residents, they are most likely to be avoiding ‘spa/health treatments’ (6%) although the proportion stating this has dropped slightly since the last report in March (when it was 7%).

**Figure 10. Intention to conduct leisure activities, Percentage, Wave 46, 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>Never: 51%</td>
<td>Would normally do: 45%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 92%</td>
<td>Will do next 12 months (exc. next month): 86%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 7%</td>
<td></td>
</tr>
<tr>
<td>Spa/health treatments</td>
<td>Never: 34%</td>
<td>Would normally do: 44%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 9%</td>
<td>Will do next 12 months (exc. next month): 8%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 10%</td>
<td></td>
</tr>
<tr>
<td>Cycling/mountain biking</td>
<td>Never: 23%</td>
<td>Would normally do: 37%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 7%</td>
<td>Will do next 12 months (exc. next month): 6%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 9%</td>
<td></td>
</tr>
<tr>
<td>Watching wildlife</td>
<td>Never: 22%</td>
<td>Would normally do: 36%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 5%</td>
<td>Will do next 12 months (exc. next month): 4%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 9%</td>
<td></td>
</tr>
<tr>
<td>Swimming - indoor</td>
<td>Never: 27%</td>
<td>Would normally do: 35%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 8%</td>
<td>Will do next 12 months (exc. next month): 7%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 10%</td>
<td></td>
</tr>
<tr>
<td>Swimming - outdoor</td>
<td>Never: 23%</td>
<td>Would normally do: 36%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 7%</td>
<td>Will do next 12 months (exc. next month): 6%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 9%</td>
<td></td>
</tr>
<tr>
<td>Adventure activity</td>
<td>Never: 22%</td>
<td>Would normally do: 36%</td>
</tr>
<tr>
<td></td>
<td>Will do next month: 5%</td>
<td>Will do next 12 months (exc. next month): 4%</td>
</tr>
<tr>
<td></td>
<td>Will do in next 12 months but avoiding due to COVID-19: 9%</td>
<td></td>
</tr>
</tbody>
</table>
 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 46, UK and Scotland

- Retreat or meditation: 85% UK residents, 90% Scotland residents, 3% UK residents, 3% Scotland residents.
- Fishing: 85% UK residents, 93% Scotland residents, 3% UK residents, 3% Scotland residents.
- Boating: 91% UK residents, 93% Scotland residents, 4% UK residents, 2% Scotland residents.
- Horse riding, pony trekking: 91% UK residents, 96% Scotland residents, 2% UK residents, 2% Scotland residents.
- Golf: 93% UK residents, 96% Scotland residents, 2% UK residents, 1% Scotland residents.
- Other Water sports: 96% UK residents, 95% Scotland residents, 2% UK residents, 1% Scotland residents.
- Sailing: 97% UK residents, 97% Scotland residents, 2% UK residents, 1% Scotland residents.

Base: All UK respondents. n=1760; All Scotland respondents n=265

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Despite reporting similar comfort levels, there are some large 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 than UK residents to prioritise cleanliness measures such as ‘plentiful hand sanitisers’ and ‘enhanced cleaning regimes’, as well as ‘management of people in communal areas’.

Similar to UK residents, ‘free cancellation’ is also important to Scotland residents.

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 46, UK and Scotland, Top 10 amongst Scotland residents
FINANCIAL SEGMENTS AND ECONOMIC CONCERNS

- More than half (57%) of UK adults have either been hit hard financially by the pandemic or are having to be careful, rising to 59% of Scotland residents – both figures similar to the previous report in March.
- The vast majority of both UK and Scotland residents are concerned about ‘rising living costs/inflation’, ‘a potential recession’ and ‘tax increases’, although there have been no major increases since the previous reporting period.

Figure 13. Breakdown of residents by financial segments, Percentage, Wave 46, 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>18</td>
<td>18</td>
</tr>
<tr>
<td>Things are ok but I have to be careful</td>
<td>39</td>
<td>41</td>
</tr>
<tr>
<td>I’ve not been affected</td>
<td>33</td>
<td>34</td>
</tr>
<tr>
<td>I’m better off than before</td>
<td>10</td>
<td>7</td>
</tr>
</tbody>
</table>

Figure 14. Concerns around economic factors, Percentage, Wave 46, UK and Scotland

- Rising living costs/inflation: U.K. Residents 88%, Scotland residents 78%
- A potential recession: U.K. Residents 75%, Scotland residents 74%
- Tax increases: U.K. Residents 75%, Scotland residents 74%
- Potential job losses: U.K. Residents 54%, Scotland residents 52%

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=1760; All Scotland respondents n=265.
OVERNIGHT TRAVEL INTENTIONS
ANTICIPATED NUMBER OF UK AND OVERSEAS OVERNIGHT TRIPS

• Both UK and Scotland residents anticipate taking more UK overnight trips in the next 12 months than they took in the previous 12 months, UK residents slightly more so. Notably the proportion anticipating taking more UK trips has increased since the previous report in March. UK and Scotland residents also anticipate taking more overseas trips – however, this has not increased since March.

• 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 46, 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 46, UK and Scotland
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.

Figure 17. Anticipated financial spend on UK holidays and short breaks in next 12 months compared to the last 12 months, Percentage, Wave 46, 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 46, UK and Scotland

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=1760; All Scotland residents n=265
Around three quarters of Scotland and UK residents are confident that a UK trip would go ahead as planned between June and the end of the year. Confidence is significantly higher than in the equivalent period in 2021, and tailing off only slightly in the autumn months.

Around 3 in 5 UK and Scotland residents are confident an overseas trip would go ahead as planned between June and December, significantly lower than UK trip confidence this year, and roughly equivalent to UK trip confidence in 2021.
CONFIDENCE IN THE ABILITY TO TAKE UK AND OVERSEAS TRIPS BY LIFE STAGE

• UK trip confidence is relatively similar across all life stages, with ‘older independents’ and ‘retirees’ exhibiting more confidence than other life stages between September and November.
• For overseas trips, younger life stages are significantly more confident trips would go ahead for each month. Notably, the difference in confidence between UK and overseas trips for ‘pre-nesters’ and ‘families’ is narrower than for older life stages, suggesting they are most likely to engage in international travel.

Figure 21. Confidence in taking a UK trip across different time periods by life stage, NET Confident, Percentage, Wave 46, UK

Figure 22. Confidence in taking an overseas trip across different time periods by life stage, NET Confident, Percentage, Wave 46, 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=374; Families n=619; Older Independents n=448; Retirees n=319;
PERCEIVED BARRIERS TO TAKING OVERNIGHT UK AND OVERSEAS HOLIDAYS AND SHORT BREAKS

- The perceived barriers to taking an overnight UK trip this summer are dominated by finances and the economy - ‘the rising cost of living’, ‘personal finances’, ‘rising costs of holidays/leisure’ and ‘the cost of fuel’ making up the top four.
- Financial barriers also make up the top three barriers to overseas travel, although the risk of quarantine and the war in Ukraine are the fourth and fifth leading barriers.
- Scotland residents are more likely than UK residents to cite financial barriers for both domestic and international travel.

**Figure 23. Barriers to taking an overnight UK trip in summer 2022, Percentage, Waves 45-46, UK and Scotland, Top 10**

- Rising cost of living: 35.40
- Personal finances: 31.34
- Rising costs of holidays/leisure: 25.31
- The cost of fuel: 27.31
- UK weather: 19.28
- I have concerns about catching COVID-19: 16.18
- Government restrictions: 11.13
- My general health: 10.13
- Vaccine passports: 9.09
- I have a general unease about travelling: 6.06

**Figure 24. Barriers to taking an overnight OVERSEAS trip in summer 2022, Percentage, Waves 45-46, UK and Scotland, Top 10**

- Rising costs of living: 28.28
- Personal finances: 26.26
- The rising costs of overseas travel: 15.21
- The risk of quarantine in the UK or abroad: 15
- The war in Ukraine: 14
- I have concerns about catching COVID-19: 13
- Restrictions on travel from government: 12
- The amount of paperwork/form-filling needed: 12
- The cost/hassle of getting a COVID-19 test: 11.13
- Limited available annual leave: 9.11
TRENDED FINANCIAL BARRIERS TO TAKING OVERNIGHT UK HOLIDAYS AND SHORT BREAKS

- Concern around ‘personal finances’ and the ‘rising cost of holidays/leisure’ remains significantly higher than at the start of the year. The rising cost of living is a perceived barrier for 35% since April. (Note: ‘personal finances’ and ‘rising costs of holidays/leisure’ may have been depressed since April due to the introduction of new answer options).

Figure 25. Perceived financial barriers to taking a UK short break or holiday in summer, Wave-on-wave, Percentage, UK

<table>
<thead>
<tr>
<th></th>
<th>Personal finances</th>
<th>Rising costs of holidays/leisure</th>
<th>Rising cost of living</th>
<th>The cost of fuel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov-21</td>
<td>28</td>
<td>22</td>
<td>19</td>
<td>24</td>
</tr>
<tr>
<td>Dec-21</td>
<td>26</td>
<td>22</td>
<td>19</td>
<td>24</td>
</tr>
<tr>
<td>Jan-22</td>
<td>26</td>
<td>25</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Feb-22</td>
<td>34</td>
<td>25</td>
<td>31</td>
<td>30</td>
</tr>
<tr>
<td>Mar-22</td>
<td>31</td>
<td>26</td>
<td>35</td>
<td>35</td>
</tr>
<tr>
<td>Apr-22</td>
<td>35</td>
<td>28</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>May-22</td>
<td>32</td>
<td>27</td>
<td>35</td>
<td>35</td>
</tr>
</tbody>
</table>

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: UK residents n=2,343
Around 2 in 5 UK residents (42%) and Scotland residents (41%) anticipate taking an overnight domestic trip this summer (between June and September), the highest incidence of trips taking place in August and September. Around 1 in 4 plan on taking a trip in Autumn (between October and December). At a UK level, this represents a higher proportion of domestic trips across both seasons than projected at the same point in 2021.

1 in 5 (22%) UK residents plan on taking an overseas summer trip, higher amongst Scotland residents (28%). Overseas summer trips are spread relatively evenly across summer months, with a slight uplift in August and September.

Figure 26. Proportion anticipating going on any overnight UK trips, Percentage, Wave 46, UK and Scotland

Figure 27. Proportion anticipating going on any overnight OVERSEAS trips, Percentage, Wave 46, UK and Scotland
Of the 42% of UK residents planning an overnight summer trip (see previous page), around 2 in 5 (38%) anticipate also taking an overseas trip in this period. The majority of UK intenders only plan on taking a UK trip although a notable minority (around 1 in 6 in each summer month) also plan on taking an overseas trip in the same month, suggesting a proportion are either undecided over whether to holiday at home or abroad, or plan on multiple trips. In autumn, 2 in 5 UK intenders also plan an overseas trip.

**Figure 28. Breakdown of UK trip intenders by UK/overseas trip intention, Percentage, Wave 46, UK**

- Only planning a UK overnight trip in this period
- Also planning an overseas overseas trip in this period

<table>
<thead>
<tr>
<th></th>
<th>UK Summer Intenders (June to September)</th>
<th>UK June Intenders</th>
<th>UK July Intenders</th>
<th>UK August Intenders</th>
<th>UK September Intenders</th>
<th>UK Autumn Intenders (October to December)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only planning a UK overnight trip</td>
<td>62</td>
<td>84</td>
<td>85</td>
<td>81</td>
<td>79</td>
<td>62</td>
</tr>
<tr>
<td>Also planning an overseas overseas trip in this period</td>
<td>38</td>
<td>16</td>
<td>15</td>
<td>19</td>
<td>21</td>
<td>38</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: UK summer intenders n=737; UK June intenders n=175; UK July intenders n=215; UK August Intenders n=291; UK September intenders n=297; UK Autumn Intenders n=465
UPCOMING UK AND OVERSEAS OVERNIGHT TRIP INTENTION BY LIFE STAGE

- UK Summer trip intention is relatively even across life stages, ‘retirees’ (44%) and ‘families’ (43%) the most likely to be planning on taking one. Unsurprisingly, ‘families’ are the most likely to be intending a trip in August, retirees in September.
- Consistent with patterns in trip confidence, overseas summer trips are most likely to be planned amongst ‘pre-nesters’ and ‘families’. However, the gap in intention between UK and overseas trips is apparent across all life stages.

Figure 29. Proportion anticipating going on any overnight UK trips by life stage, Percentage, Wave 46, UK

Figure 30. Proportion anticipating going on any overnight OVERSEAS trips by life stage, Percentage, Wave 46, 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?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. Pre-nesters n=374; Families n=619; Older Independents n=448; Empty Nesters n=319
The distribution of UK trip intenders this summer and autumn is broadly in line with the fall-out in the UK population, a contrast to 2021, when older life stages indexed slightly lower. Families have the highest representation in August (making up 38% of intenders), retirees and older independents in September (at 30% each), the former with significantly higher representation than in the population.

For overseas trips, families dominate July and August intenders, with ‘pre-nesters’ consistently indexing above their fall-out in the population.
TRIP INTENTION AND INTENDER PROFILES FOR SCOTLAND TRIPS
WHERE PLANNING ON STAYING ON NEXT UK SUMMER 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 this summer, 22% of Summer intenders planning to go there (although intention is slightly lower than this time last year). Yorkshire & The Humber (12%) and the North West (11%) are the next most popular, with Scotland the fourth most preferred region (at 10%, slightly lower than in 2021).
- 48% of Scotland-based intenders are planning on taking an overnight trip in Scotland in summer, a slight drop on the equivalent period in 2021 - although with more Scottish residents planning on taking an overnight domestic trip overall, intention is higher in absolute terms.

Figure 33. Where planning on staying on next UK overnight trip in summer (June to September), Percentage, Waves 45-46, Proportion of UK and Scotland-based Intenders

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All UK Summer intenders n=1,219; All Scotland resident Summer intenders n=190
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 majority (64%) of Scotland intenders live elsewhere in the UK – slightly lower than in 2021.

Figure 34. Intention to visit Scotland amongst intenders by region, Percentage Waves 45-46, UK

Figure 35. Origin of Scotland intenders by region of residence, Percentage Waves 45-46, UK
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, Yorkshire & The Humber is the most popular alternative destination.
- Amongst Scotland residents considering Scotland for a break, an even stronger majority are only considering Scotland.

Figure 36. Consideration of Scotland and other places, Percentage Waves 45-46, UK and Scotland

Table 1. Top 5 alternative destinations for Scotland intenders

<table>
<thead>
<tr>
<th></th>
<th>Scotland Summer 2021 Intenders (% of Scotland intenders)</th>
<th>Scotland Summer 2022 Intenders (% of Scotland intenders)</th>
</tr>
</thead>
<tbody>
<tr>
<td>North West</td>
<td>9%</td>
<td>Yorkshire &amp; The Humber</td>
</tr>
<tr>
<td>Wales</td>
<td>9%</td>
<td>North West</td>
</tr>
<tr>
<td>South West</td>
<td>7%</td>
<td>Wales</td>
</tr>
<tr>
<td>London</td>
<td>6%</td>
<td>South East</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>4%</td>
<td>East Midlands</td>
</tr>
</tbody>
</table>

QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>? Base: All Scotland summer intenders n=161; All Scotland resident summer intenders n=94
BOOKING STATUS OF TRIPS AMONGST SCOTLAND INTENDERS

- Over half (53%) of Scotland intenders have already planned their summer trip, with 2 in 5 having already booked it – both higher than the equivalent period last year.
- Reflecting increased comfort levels in relation to COVID-19, booking patterns are relatively consistent with ‘normality’ this summer – the proportion planning on booking closer, broadly the same as the proportion booking further away, and only a small proportion stating they ‘don’t know’. This marks a contrast from 2021 where ‘don’t know’ was higher, and there was a tendency to book closer to the travel date.
DEMographics of intenders compared to the general population

- Scotland intenders for summer 2022 index higher than the UK population amongst families and ‘older independents’. Scotland summer intenders who live in Scotland are more likely than non-Scotland resident intenders to belong to the family life stage.

Figure 39. Breakdown of Scotland summer intenders by life stage, Percentage Waves 45-46, UK

<table>
<thead>
<tr>
<th></th>
<th>U.K Population Breakdown</th>
<th>All Scotland Summer 2021 Intenders</th>
<th>All Scotland Summer 2022 Intenders</th>
<th>All Scotland resident Summer Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement age</td>
<td>21</td>
<td>24</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Older independents</td>
<td>30</td>
<td>30</td>
<td>34</td>
<td>31</td>
</tr>
<tr>
<td>Families</td>
<td>30</td>
<td>26</td>
<td>33</td>
<td>40</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>18</td>
<td>20</td>
<td>14</td>
<td>9</td>
</tr>
</tbody>
</table>

Source: Demographics. Base: All respondents. UK population n=3,518; All Scotland summer intenders n=161; Scotland resident Summer Intenders n=94;
The breakdown of social grades amongst Scotland summer 2022 intenders is broadly similar to the general population, and the breakdown in summer 2021.

Figure 40. Breakdown of Scotland summer intenders social grade, Percentage Waves 45-46, UK

Source: Demographics. Base: All respondents. UK population n=3,518; All Scotland summer intenders n=161; Scotland resident Summer Intenders n=94
Scotland summer 2022 intenders are significantly more likely to be planning a longer holiday of 4+ nights (55%) than a short break of 1-3 nights (39%), the breakdown almost identical to intention in 2021. Longer holidays are particularly dominant in July/August when they make up 62% of trips, less so outside the core summer months.

Amongst Scotland summer 2022 resident intenders, there is an equal split between short breaks and holidays.

Figure 41. Length of next Summer holiday or short break in Scotland, Percentage Waves 45-46, 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 summer 2022 intenders n=125; All Scotland summer 2022 resident intenders n=78
There is a relatively even split in the destinations, Scotland summer intenders plan on visiting for their trip this summer – ‘countryside or village’, ‘mountains or hills’, ‘rural coastline’ and ‘traditional coastal/seaside town’ the leading destination types for Scotland intenders living in Scotland and elsewhere in the UK. Scotland-based summer intenders are significantly less likely to be planning an overnight trip to a large city.

However, when broken down by month, ‘traditional coastal/seaside town’ is the leading type for August/September (at 36%) and ‘mountains or hills’ outside the core summer months.

Figure 42. Main type of destination for Scotland summer intenders, Percentage Waves 45-46, UK
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 summer, significantly ahead of the Edinburgh area and West Coast. The Highlands generates trip intention from both Scotland-based intenders and non-Scotland-based intenders. In contrast, Edinburgh is the leading destination for non-Scotland resident intenders, and the least preferred for Scotland resident intenders – this is consistent with previous reporting.

Figure 43. Planned destination for next Scotland trip for Summer intenders, Percentage Waves 45-46, UK and Scotland

- Scotland Summer 2021 Intenders
- Scotland Summer 2022 Scotland Resident Intenders
- Scotland Summer 2022 Non-Scotland Resident Intenders

QVBSix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland summer 2022 intenders n=161; All Scotland summer 2022 residents intenders n=94; All non-Scotland residents intenders n=67
‘Partner’ is the most common accompanying party member for a trip to Scotland this summer, followed by ‘child, grandchild or young adults with parents’ – the latter making up nearly 2 in 5 visitor parties, and slightly higher amongst Scotland resident intenders.

**Figure 44. Visitor party make-up for Scotland summer intenders, Percentage Waves 45-46, UK**
‘Own car’ is by far the leading mode of transport intended to be used on summer trips to Scotland, particularly amongst Scotland-based intenders. Train is the second leading transport type, linked to trips to cities and therefore driven by non-Scotland-based intenders. Notably public bus/coach is the third most preferred mode of transport – the first time it has made the top three since the research began, building on its first appearance in the top five in the last report, and reflecting increased comfort levels with public transport.
‘Hotel/motel/inn’, is the number one accommodation type for intended trips in summer - at 39%, almost identical to 2021 intentions. 3 in 10 Scotland intenders plan on staying in ‘a private home’, ‘commercial self-catering’ or ‘caravan/camping’ – the latter two particularly high amongst Scotland resident intenders.

Figure 46. Accommodation planning on staying in on next UK overnight trip for Scotland summer intenders, Net percentage Waves 45-46, UK

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 summer 2022 intenders n=125; All Scotland summer 2022 residents intenders n=78
Similar to all trip intention, the incidence of UK residents planning on staying in a UK city or large town on their next domestic holiday/short break has consistently increased since the start of the pandemic – the intention in May 2022 higher twice as high as 2 years ago in June 2020.
Consistent with previous reporting, those intending to stay in a large city destination this summer continue to be significantly more likely to be pre-nesters than ‘large city non-intenders’ and the wider UK population. Retirees are significantly less likely to be intending to stay in a large city.
LEVEL OF COMFORT UNDERTAKING ACTIVITIES AMONGST UK CITY INTENDERS

- ‘Large city intenders' are more comfortable conducting a range of everyday activities associated with large numbers of people. The largest gaps in comfort are for ‘going to a busy city centre’ (+10 points) and ‘travelling by public transport’ (+9 points).
- However, it’s worth noting that these gaps have closed since earlier this year, suggesting comfort levels are becoming less of a barrier.

Figure 50. Level of comfort conducting activities, NET very and fairly comfortable, Percentage, Waves 45-46, UK

<table>
<thead>
<tr>
<th>Activity</th>
<th>Summer large city Intenders</th>
<th>Summer large city Non-Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comfort average</td>
<td>85</td>
<td>81</td>
</tr>
<tr>
<td>Going for a walk in a country park/local trail</td>
<td>94</td>
<td>94</td>
</tr>
<tr>
<td>Eating at a restaurant</td>
<td>92</td>
<td>87</td>
</tr>
<tr>
<td>Shopping in your local shopping centre</td>
<td>80</td>
<td>83</td>
</tr>
<tr>
<td>Visiting an indoor attraction (e.g. a museum)</td>
<td>85</td>
<td>80</td>
</tr>
<tr>
<td>Going to a busy city centre</td>
<td>80</td>
<td>70</td>
</tr>
<tr>
<td>Travelling by public transport</td>
<td>78</td>
<td>69</td>
</tr>
</tbody>
</table>

VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so? Base: UK Summer city intenders—all considering taking a UK overnight break in a city this Summer n=232; UK Summer non-city intenders all not considering taking a UK overnight break in a city this Summer n=987.
TOP REASONS FOR NOT STAYING IN A LARGE CITY AMONGST UK INTENDERS

- Aligned with finances being the biggest perceived barrier to UK travel this summer, ‘large cities tend to be too expensive’ is the leading reason for not staying in a large city this summer, followed by ‘fewer things to do/place to visit’. Perhaps reflecting lower comfort levels with ‘city-based activities’, ‘I am worried about catching COVID-19’ is a reason for 1 in 4.

**Figure 51: Reasons for not staying in a large city amongst Summer Trip Intenders, Percentage, Waves 45-46, UK**

- Large cities tend to be too expensive: 30%
- Fewer things to do/places to visit: 26%
- I am more worried about catching COVID-19 in a large city: 25%
- I wouldn’t stay in one regardless of COVID: 23%
- I will stay in a large city later in the year: 20%
- There are no large cities in the U.K. I want to see: 17%
- Fewer opportunities to eat/drink out: 17%
- I don’t trust other people to be responsible: 15%
- Restrictions on opportunities to socialise: 13%
- Local residents may be unwelcoming due to COVID-19: 12%
- It’s not responsible to travel to a city in this period: 10%
- Other (Please write in): 10%
- I’m unwilling to travel to a large city until I get a ‘booster vaccine’: 3%

**VB5b. You indicated you don’t plan on staying in a large city during your UK trip in -period-. Why is this?**

Base: UK Summer city intenders – all considering taking a UK overnight break in a city this Summer n=232; UK Summer non-city intenders all not considering taking a UK overnight break in a city this Summer n=987
CONDITIONS ESSENTIAL FOR INDOOR TOURISM/LEISURE PROVIDERS TO HAVE IN PLACE

- ‘Free cancellation’ is the leading condition both ‘large city intenders’ and ‘large city non-intenders’ consider essential for indoor tourism/leisure providers to have in place. Large city non-intenders are more likely to require conditions relating to cleanliness, underlining their continued concern around COVID.

Figure 52. Conditions that are essential for indoor tourism and leisure providers to have in place to visit them in the next few months, Required by Summer City Intenders and Non-Intenders, Percentage, Waves 45-46, UK

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 Summer city intenders – all considering taking a UK overnight break in a city this Summer n=232; UK Summer non-city intenders all not considering taking a UK overnight break in a city this Summer n=987
TRIPS TAKEN SINCE JANUARY 2022

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam
21% of UK residents and 20% of Scotland residents have taken an overnight domestic trip since January this year, with incidence (amongst UK trip-takers) highest in April.

Around 1 in 12 UK residents have taken an overseas trip since the start of the year, 1 in 9 Scotland residents.

Figure 53. Proportion taken an overnight UK trip in below time period, Percentage, Wave 46, UK

- UK residents
- Scotland residents

Figure 54. Proportion taken an overnight OVERSEAS trip in below time period, Percentage, Wave 46, UK

- UK residents
- Scotland residents
**DEMographics of trip-takers since January 2022**

- UK trip-takers since January are more likely than the population and overseas trip-takers in that period to belong to the retiree life stage. Families make up the highest proportion of trip-takers, which is the case for each month apart from March (when Older Independents were the largest life stage). Families also index highest for overseas trips, again consistent for every month apart from March, when Older Independents are the largest group.
- Both UK and overseas trip-takers since January are less likely than the general population to belong to lower social grades.

**Figure 55. Breakdown of population and trip-takers since Jan 2022 by life stage, Percentage Wave 46, UK**

<table>
<thead>
<tr>
<th>Life Stage</th>
<th>U.K Residents</th>
<th>Taken a UK overnight trip since Jan 2022</th>
<th>Taken an overseas overnight trip since Jan 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement age</td>
<td>22</td>
<td>26</td>
<td>21</td>
</tr>
<tr>
<td>Older independents</td>
<td>29</td>
<td>24</td>
<td>20</td>
</tr>
<tr>
<td>Families</td>
<td>30</td>
<td>30</td>
<td>39</td>
</tr>
<tr>
<td>Pre-nesters</td>
<td>19</td>
<td>20</td>
<td>20</td>
</tr>
</tbody>
</table>

**Figure 56. Breakdown of population and trip-takers since Jan 2022 by social grade, Percentage Wave 46, UK**

<table>
<thead>
<tr>
<th>Social Grade</th>
<th>U.K Residents</th>
<th>Taken a UK overnight trip since Jan 2022</th>
<th>Taken an overseas overnight trip since Jan 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB</td>
<td>22</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>C1C2</td>
<td>52</td>
<td>58</td>
<td>56</td>
</tr>
<tr>
<td>DE</td>
<td>25</td>
<td>20</td>
<td>18</td>
</tr>
</tbody>
</table>

Source: Demographics, Base: All respondents. UK residents n=1,760; Taken a UK trip since January 2022 n=383; Taken overseas trip since January 2022 n=149
TRIP PURPOSE OF UK TRIP-TAKERS SINCE JANUARY 2022

- 7 in 10 trips taken since January 2022 were taken for holiday/leisure (highest amongst retirees), 3 in 10 for visiting friends or relatives (highest amongst families).

Figure 57. Main purpose/s of trip taken since January 2022, Percentage, Wave 46, UK

<table>
<thead>
<tr>
<th>Purpose</th>
<th>All UK trip takers since Jan 2022</th>
<th>Pre-nesters</th>
<th>Families</th>
<th>Older Independents</th>
<th>Retirees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday/leisure</td>
<td>76</td>
<td>72</td>
<td>70</td>
<td>74</td>
<td>89</td>
</tr>
<tr>
<td>Visiting friends or relatives</td>
<td>28</td>
<td>31</td>
<td>40</td>
<td>27</td>
<td>11</td>
</tr>
<tr>
<td>Business</td>
<td>3</td>
<td>2</td>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>1</td>
</tr>
</tbody>
</table>

*Note: Trip-takers are defined by latest trip, so there will be a natural bias towards trip-takers later in the year*
Consistent with most reporting over the last two years, the South West of England was the destination UK trip-takers were most likely to have stayed at, followed by Yorkshire & the Humber, and Scotland.

Over three quarters (76%) of Scotland residents that have taken a trip since January, took it in Scotland. There was an even split in trip origin between Scottish and non-Scottish residents.

**Figure 58. Destination stayed in on most recent UK overnight trip since Jan 2022, Percentage, Wave 46, UK Residents**

**Figure 59. Breakdown of Scotland trip-takers by region of residence, Percentage, Wave 46, UK**

*Note: Questions ask about latest trip, so there will be a natural bias towards trips taken later in the year*
Families make up the highest proportion of trip-takers to Scotland since Jan 2022, making up 2 in 5 of all trip-takers, higher than the UK.

Social grades AB also index higher amongst Scotland trip-takers since January compared to the UK population, and to UK trip takers.

**Figure 60. Breakdown of population and trip-takers since Jan 2022 by life stage, Percentage Waves 45-46, UK**

- Retirement age
- Older independents
- Families
- Pre-nesters

**Figure 61. Breakdown of population and trip-takers since Jan 2022 by social grade, Percentage Waves 45-46, UK**

- AB
- C1C2
- DE

Source: Demographics. Base: UK residents n=5,274 All UK residents that took a UK overnight trip since Jan 2022 n=677 All UK residents that took a trip in Scotland since Jan 2022 n=116

*Note: Trip-takers are defined by latest trip in Scotland, so there will be a natural bias towards trip-takers later in the year*
TRIP PURPOSE OF UK AND SCOTLAND TRIP-TAKERS SINCE JANUARY 2022

- The vast majority (82%) of Scotland trip-takers since January took their trip for holiday/leisure higher than trip-takers to the wider UK.

Figure 62. Main purpose/s of trip taken since January 2022, Percentage, Waves 45-46, UK
Edinburgh was the leading destination for Scotland trip-takers since January, 35% having taken an overnight trip there. However, it’s worth noting that, similar to intention, this is driven predominantly by non-Scottish-based residents – the Highlands the leading destination for Scottish residents.

**Figure 63. Destination of Scotland trip taken since Jan 2022, Percentage Waves 45-46, UK**
DAY TRIP INTENTIONS

Pipe band and the North Berwick Highland Games, North Berwick East Lothian, Kenny Lam
3 in 5 (59%) UK residents and half of Scotland residents plan on taking a day trip of some sort by September 2022 – ‘traditional coastal/seaside town’, and ‘countryside or village’ the most likely destination types.

Figure 64. Next UK day trip intention by September, Cumulative percentages, Wave 46, UK
The life stage of day-trippers varies depending on destination type, younger life stages more dominant in large cities, and older in smaller cities or towns.

Figure 65. Breakdown of Scotland-based June day-trippers by destination type by life stage, Percentage Waves 45-46, Scotland

- All day trippers
- Large city day trippers
- Smaller City or Town day trippers
- Traditional coastal/seaside town day trippers
- Rural coastline day trippers
- Countryside or village day trippers
- Mountains or hills day trippers
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 Wales 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 45-46 of the COVID-19 consumer tracker.