UK Consumer Tracking Report: Scotland Level Summary

1st September to 8th November 2022
(Waves 50-52)
## Methodology and Background

<table>
<thead>
<tr>
<th>Background</th>
<th>Frequency</th>
<th>This report</th>
</tr>
</thead>
<tbody>
<tr>
<td>The findings in this report are based on a monthly online survey amongst a nationally representative sample of the UK population with a survey boost for Scotland residents</td>
<td>The research is currently on its 52nd wave – the first wave having been conducted in May 2020, with a weekly, fortnightly and now monthly cadence thereafter</td>
<td>This report is based on research conducted in Waves 50-52 with references to previous waves where applicable</td>
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</tbody>
</table>
WHAT WE’VE LEARNED FROM THE SUMMER
The same proportion of the UK public took a short break or holiday in 2022 as in 2021.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>2022</th>
<th>2021</th>
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<tbody>
<tr>
<td>July to September</td>
<td>35</td>
<td>34</td>
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<tr>
<td>July</td>
<td>15</td>
<td>15</td>
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<td>August</td>
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<td>17</td>
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<tr>
<td>September</td>
<td>13</td>
<td>13</td>
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</tbody>
</table>

OVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
Learning 2: There has been a switch from UK to overseas

However, UK trips *dropped* and overseas trips *increased*, suggesting some switching took place.

**Proportion taken an OVERSEAS or UK trip this summer(%)**

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
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</thead>
<tbody>
<tr>
<td>UK overnight trip this summer (July to September)</td>
<td>25</td>
<td>30</td>
</tr>
<tr>
<td>Overseas overnight trip this summer (July to September)</td>
<td>16</td>
<td>11</td>
</tr>
</tbody>
</table>

QVB13a2: In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months? Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
Learning 3: The switch is driven by single trip-takers choosing overseas over UK

The shift from UK to overseas is driven by people taking just one main holiday

Proportion taken a UK and/or OVERSEAS overnight trip by time period (%)

- Took UK trip and overseas overnight trip:
  - July to September 2022: 5
  - July to September 2021: 1%

- Took UK overnight trip only:
  - July to September 2022: 19
  - July to September 2021: 23

- Took overseas overnight trip only:
  - July to September 2022: 10
  - July to September 2021: 6

Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months? Base: All respondents. October 2022 = 1,756, November 2021 = 1,758. Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
The rebalancing of domestic and international travel aligns with increasing comfort levels with taking an overseas holiday this summer – almost in line with UK and pre-pandemic levels.

The ‘comfort gap’ = the difference between comfort levels with an activity now and before the pandemic

Source: BVA BDRC Consumer Sentiment tracker
Question: VB11. Broadly speaking, how comfortable or uncomfortable would you feel doing the following in the next month or so?
Base: All respondents excluding those stating ‘don’t know’ or who wouldn’t do activity under any circumstances. Base: All months n=c.1,750
The ABTA Holiday Habits report (which looks at trips taken in the last 12 months) also supports the argument that overseas travel has rebounded at the expense of domestic

Source:: ABTA Holiday Habits Survey
Base: n=c.2,000 each year
Learning 4: The public also appear to have abandoned UK trip plans they intended earlier in the year.

There was a huge drop-off in trips taken against trip intentions, suggesting circumstance may have also played a role.

UK trip intention vs. trips taken (%)

- Intended an overnight trip: 46%
- Took an overnight trip: 25%
- Intention gap (Net: Took minus intended): -21%

- Intended: QVB2a. 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? QVB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All trips taken data (October 2022 fieldwork) = 1,756, Trips intenders: July to September (June fieldwork n=c.1,750) April to June (March fieldwork n=c.1,750), January to March (December fieldwork n=c.1,750).
Learning 5: The cost-of-living crisis is a likely driver of changing intentions

The cost-of-living crisis is likely to have been a key circumstance that led to a drop off in trips taken.

‘Cost of living’ impact on UK holidays and short breaks (%)

- Net: Will take more overnight UK trips: 8%
- Net: No impact on overnight UK trips at all: 21%
- Net: Will reduce overnight UK trips: 38%
- Net: Will reduce trip spending/activities but not number of UK overnight trips: 33%

UK Population
Learning 6: Families are the life stage most likely to have reduced their UK trips

The main drop off in 2022 was amongst the family life-stage, choosing overseas instead of the UK.

Life stage profile of overnight UK trip-takers this summer (%)

- Retirement age 22%
- Older Independents 27%
- Families 32%
- Pre-Nesters 19%

UK Population | Summer 2022 (July to September) | Summer 2021 (July to September)
---|---|---
22 | 17 | 19
27 | 30 | 22
32 | 33 | 39
19 | 20 | 19

Source: VisitBritain Consumer Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Learning 7: Most UK destinations lost out due to the drop in domestic travel

Most destinations experienced a drop in visits in absolute terms, particularly SW England – Yorkshire and London bucking the trend

Where stayed on most recent UK overnight trip between July and August (%)

- 2022
- 2021

<table>
<thead>
<tr>
<th>Region</th>
<th>2022</th>
<th>2021</th>
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</thead>
<tbody>
<tr>
<td>South West</td>
<td>19</td>
<td>21</td>
</tr>
<tr>
<td>Scotland</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>London</td>
<td>11</td>
<td>10</td>
</tr>
<tr>
<td>South East</td>
<td>12</td>
<td>11</td>
</tr>
<tr>
<td>North West</td>
<td>13</td>
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<tr>
<td>Wales</td>
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</tr>
<tr>
<td>West Midlands</td>
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<td>5</td>
</tr>
<tr>
<td>East of England</td>
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<td>5</td>
</tr>
<tr>
<td>North East</td>
<td>4</td>
<td>8</td>
</tr>
<tr>
<td>East Midlands</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>

Note: Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
Base: Summer trip takers (September fieldwork) 2022 n=409; 2021 n=396. September used to ensure a like-for-like comparison with 2021.
Learning 8: The reduction in trips may also be due to 2021 displacement

Looking at the year on the whole, more people have taken UK and overseas holidays in 2022 than in 2021.

Proportion taken an OVERSEAS or UK trip this year (%)

- **UK overnight trip this year (January to September)**
  - 2022: 50
  - 2021: 42

- **OVERSEAS overnight trip this year (January to September)**
  - 2022: 31
  - 2021: 17

**Question:** QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?

**Base:** All respondents. October 2022 = 1,756, November 2021 = 1,758. **Note:** Multiple choice question. Totals may exceed 100% as some respondents have taken multiple trips across several time periods.
Summary of summer 2022 learnings...

The UK public took fewer overnight domestic trips in Summer 2022 than in Summer 2021. The drop was driven by...

- A switch to overseas travel in 2022
- The 'displacement effect' of a 'squeezed holiday window' in 2021
- Financial concerns due to the 'cost-of-living crisis' in 2022

The balance of domestic versus overseas travel is closer to pre-pandemic levels, and we must be cautious when reading predictions. However, financial pressures mean domestic trips are still likely to be favoured as we head into 2023.
CURRENT ATTITUDES 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 consistently been significantly higher than the proportion thinking ‘the worst is still to come’.

**Perception of the situation with regards to COVID-19 (%)**

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
The comfort average has consistently increased since the start of the pandemic, and as of November 2022 sits at 84% - the second highest level since May 2020.

**Level of comfort conducting individual activities (%)**

- Comfort average (UK residents)
- Comfort average (Scotland residents)

| Month  | 39 | 45 | 50 | 55 | 55 | 56 | 54 | 55 | 45 | 49 | 52 | 58 | 63 | 66 | 65 | 66 | 74 | 76 | 73 | 70 | 74 | 76 | 82 | 79 | 81 | 83 | 80 | 82 | 83 | 82 | 84 |
|--------|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|

*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.250*  
*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*
However, a minority are still avoiding activities they would ordinarily do due to COVID-19 – indoor venues or activities that include close contact with others leading the list.

Venues/activities people would normally engage in but are avoiding due to COVID-19 (%)

- Nightclub: 11
- Museum/indoor heritage: 9
- Indoor play or activity centre: 9
- Zoo/farm attraction/theme park: 9
- Spa/health treatments: 9
- Cinema/theatre: 8
- Festival enclosed space: 8
- Swimming – indoor: 8
- Festival large space: 7

Scotland residents
COVID has also left a legacy of ‘broken habits’ and ‘more considered’ decision-making

The legacy of COVID

People need ‘reactivating’ after 2 years of inactivity

People are asking ‘is this activity worth catching COVID for?’

Source: Tyne and Wear Museums Research
ATTITUDES TO THE COST-OF-LIVING CRISIS
The vast majority of the UK public are currently pessimistic about the cost-of-living crisis, with Scotland residents consistently more pessimistic.

**Perceptions of the cost of living crisis (%)**

Q7b: And now regarding the ‘cost of living crisis’ in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.260
Around 1 in 4 (24%) UK residents have been hit hard by the cost-of-living crisis, with half (49%) stating ‘things are ok but I have to be careful’. Lower social grades have been hit the hardest. A large proportion (39%) of ABs are better off or don’t expect to be impacted.
Tied to concerns around the cost of living, the perceived barriers to taking an overnight trip in the UK in the next six months are dominated by finances and the economy.

**Top 10 Barriers to taking an overnight UK trip in next 6 months (%)**

- **Rising cost of living**: 42% UK residents, 46% Scotland residents
- **Personal finances**: 29% UK residents, 29% Scotland residents
- **UK weather**: 27% UK residents, 25% Scotland residents
- **Rising costs of holidays/leisure**: 27% UK residents, 28% Scotland residents
- **The cost of fuel**: 26% UK residents, 28% Scotland residents
- **My general health**: 17% UK residents, 25% Scotland residents
- **Limited available annual leave**: 16% UK residents, 16% Scotland residents
- **I have concerns about catching COVID-19**: 13% UK residents, 18% Scotland residents
- **Staff shortages across the tourism sector**: 10% UK residents, 9% Scotland residents
- **Difficulty getting money back if a trip is cancelled**: 10% UK residents, 9% Scotland residents

**Net Financial barriers: 58% (60% Scotland residents)**

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: All UK respondents. n=1776; All Scotland respondents n=270.
‘I will spend less on eating out’, ‘I will choose cheaper accommodation’ and ‘I will look for more free things to do’ are the top 3 ways UK residents expect the cost-of-living crisis to impact domestic holidays and short breaks

<table>
<thead>
<tr>
<th>Action</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will spend less on eating out</td>
<td>32%</td>
</tr>
<tr>
<td>I will choose cheaper accommodation</td>
<td>32%</td>
</tr>
<tr>
<td>I will look for more ‘free things’ to do</td>
<td>31%</td>
</tr>
<tr>
<td>I will cut back on buying gifts/shopping at the destination</td>
<td>25%</td>
</tr>
<tr>
<td>I will take fewer UK short breaks/holidays</td>
<td>21%</td>
</tr>
<tr>
<td>I will do fewer activities</td>
<td>18%</td>
</tr>
<tr>
<td>I will visit fewer visitor attractions</td>
<td>18%</td>
</tr>
<tr>
<td>I will choose self-catering accommodation</td>
<td>18%</td>
</tr>
<tr>
<td>I will stay with friends or relatives</td>
<td>16%</td>
</tr>
<tr>
<td>I will take shorter UK short breaks/holidays</td>
<td>15%</td>
</tr>
<tr>
<td>The cost of living crisis isn’t likely to influence my UK short breaks/holidays at all</td>
<td>21%</td>
</tr>
</tbody>
</table>

Comprised of 64% Older Independents or Retirees

VB7c. How, if at all, would you say the ‘cost of living crisis’ is likely to influence your UK short breaks or holidays in the next six months? Base: All UK respondents. n=1776; All Scotland respondents n=270.
UK (and particularly) Scotland residents express a need for more financial flexibility when engaging with tourism providers in the coming months.

### Top 5 essential conditions for indoor tourism providers (%)

<table>
<thead>
<tr>
<th>Condition</th>
<th>UK Residents</th>
<th>Scotland Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free cancellation</td>
<td>40</td>
<td>48</td>
</tr>
<tr>
<td>Discounts or special offer deals</td>
<td>29</td>
<td>39</td>
</tr>
<tr>
<td>Enhanced cleaning regimes</td>
<td>29</td>
<td>39</td>
</tr>
<tr>
<td>Plentiful hand sanitizers</td>
<td>29</td>
<td>32</td>
</tr>
<tr>
<td>A quick and simple refund process</td>
<td>29</td>
<td>28</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: All UK respondents. n=1776; All Scotland respondents n=270.
However, positively there is a hierarchy of tourism activities that will be cut back on, with domestic travel below overseas travel and cultural/wellness activities at the bottom of the list.

Activities most likely to ‘cut back on’ in next 6 months (% of all who do each activity)

The cost-of-living crisis means some people are likely to have less disposable income in the coming months. In the context of the cost-of-living crisis, if you had to cut back your disposable spending on any 5 of these, which would you choose? Base n=1,750
GENERAL TRAVEL INTENTIONS
Both UK and Scotland residents anticipate taking more UK overnight trips in the next 12 months compared to before the pandemic and fewer overseas trips.

**UK overnight trips intended in next 12m vs. pre-pandemic (%)**

- Will take more: 25 UK residents, 27 Scotland residents
- About the same: 38 UK residents, 40 Scotland residents
- Will take fewer: 21 UK residents, 16 Scotland residents
- Don’t know: 16 UK residents, 17 Scotland residents

**OVERSEAS overnight trips intended in next 12m vs. pre-pandemic (%)**

- Will take more: 14 UK residents, 13 Scotland residents
- About the same: 32 UK residents, 36 Scotland residents
- Will take fewer: 31 UK residents, 35 Scotland residents
- Don’t know: 23 UK residents, 15 Scotland residents

VB1a Thinking about the next 12 months, are you likely to take more, fewer or about the same number of UK and overseas holidays/short breaks as you took before the COVID-19 pandemic?
Base: All UK residents n=1776; All Scotland residents n=270
Compared to the same period in 2021 and 2020, overnight UK trip intention is currently higher.

**Trip intention in next 3 months (%)**

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VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? Base: All UK respondents. n=1776; All Scotland respondents n=270
Overnight domestic and overseas trip intention is significantly higher than this time last year.

### Future UK trip intentions (%)

<table>
<thead>
<tr>
<th></th>
<th>UK residents 2021</th>
<th>UK residents 2022</th>
<th>Scotland residents 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net: Winter (November to March)</td>
<td>32^34</td>
<td>19</td>
<td>4</td>
</tr>
<tr>
<td>November</td>
<td>711</td>
<td>13</td>
<td>7</td>
</tr>
<tr>
<td>December</td>
<td>10</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td>January</td>
<td>4</td>
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<td>February</td>
<td>8</td>
<td>9</td>
<td>10</td>
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<tr>
<td>March</td>
<td>10</td>
<td>8</td>
<td>10</td>
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</table>

### Future OVERSEAS trip intentions (%)

<table>
<thead>
<tr>
<th></th>
<th>UK residents 2021</th>
<th>UK residents 2022</th>
<th>Scotland residents 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net: Winter (November to March)</td>
<td>23^22</td>
<td>11</td>
<td>2</td>
</tr>
<tr>
<td>November</td>
<td>2</td>
<td>4</td>
<td>5</td>
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<tr>
<td>December</td>
<td>4</td>
<td>6</td>
<td>7</td>
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<tr>
<td>January</td>
<td>5</td>
<td>3</td>
<td>2</td>
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<td>February</td>
<td>5</td>
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<td>3</td>
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<tr>
<td>March</td>
<td>5</td>
<td>8</td>
<td>2</td>
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</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? Base: All UK respondents. n=3,532; All Scotland respondents n=546.
Confidence in UK and overseas travel is higher than the equivalent period in 2021

Confidence in taking a UK overnight trip (% confident)

- UK Overnight trip confidence 2021 (UK residents)
- UK Overnight trip confidence 2022 (UK residents)
- UK Overnight trip confidence 2022 (Scotland residents)

<table>
<thead>
<tr>
<th>Month</th>
<th>2021</th>
<th>2022 (UK residents)</th>
<th>2022 (Scotland residents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov</td>
<td>69</td>
<td>64</td>
<td>64</td>
</tr>
<tr>
<td>Dec</td>
<td>64</td>
<td>64</td>
<td>67</td>
</tr>
<tr>
<td>Jan</td>
<td>67</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feb</td>
<td>71</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Confidence in taking an OVERSEAS overnight trip (% confident)

- Overseas Overnight trip confidence 2021 (UK residents)
- Overseas Overnight trip confidence 2022 (UK residents)
- Overseas Overnight trip confidence 2022 (Scotland residents)

<table>
<thead>
<tr>
<th>Month</th>
<th>2021</th>
<th>2022 (UK residents)</th>
<th>2022 (Scotland residents)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov</td>
<td>55</td>
<td>52</td>
<td>52</td>
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<tr>
<td>Dec</td>
<td>52</td>
<td>52</td>
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<tr>
<td>Jan</td>
<td>54</td>
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<td>56</td>
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<tr>
<td>Feb</td>
<td>56</td>
<td></td>
<td></td>
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<tr>
<td>Mar</td>
<td>56</td>
<td></td>
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</tr>
</tbody>
</table>

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=1776; All Scotland residents n=270
London is the preferred destination for a UK holiday or short break this winter. Scotland is the joint 2nd most preferred choice, with intention close to 2021 levels (although higher in absolute terms)

Where planning on staying on next UK overnight trip in winter (November to March) (%)
The gap between overseas comfort levels and trip intentions is closing faster than domestic equivalents, suggesting we may see another ‘intention gap’ this winter.

Domestic trip confidence up **12%** on 2021

Domestic trip intentions up **68%** on 2021

Overseas trip confidence up **29%** on 2021

Overseas trip intentions up **109%** on 2021
However, around 3 in 5 (58%) of Scotland winter intenders have not yet booked their winter trip, suggesting they may yet need some convincing to do so.

**Booking status of next Scotland trip (%)**

- I have already booked the trip: 42%
- I have decided where to go but not yet booked: 34%
- I am yet to decide where to go: 16%
- I am undecided whether I will take this trip at all: 8%

**All Scotland winter intenders**

- 42%
- 34%
- 16%
- 8%

**Scotland resident winter intenders**

- 64%
- 14%
- 19%
- 3%

*Small base sizes. Wave 52 only shown to reflect recency.*
Key findings so far

There is clearly an appetite for domestic travel over the next six months, and it’s likely that financial constraints mean people will choose UK over overseas. However, strong intentions should be processed in the knowledge that...

- Overseas travel is in strong competition and may cannibalise some UK travel
- The cost-of-living crisis may mean people do not follow through on trip intentions
- The cost-of-living crisis also means people will opt for cheaper accommodation and activities on their trips
- COVID means that some people are still moderating their behaviour and need reactivating

The public will need some convincing to take a domestic trip and undertake certain activities. Communications that emphasise good value, financial flexibility or unmissable, time-limited experiences may be essential.

It should also be noted that there is an audience unaffected by the cost-of-living crisis. Good value experiences should therefore be combined with premium, luxury experiences.
Scotland winter intenders life stage distribution has rebalanced in line with the population vs. 2021. Intenders are also more likely to come from outside of Scotland.
Over 3 in 5 (63%) of winter 2022 Scotland intenders plan on taking a shorter break of 1-3 nights on their Scotland trip, a shift on autumn intentions.

**Length of next overnight Scotland trip (%)**

- **Unsure**: 2%
- **Longer break of 4+ nights**: 35%
- **Trips of 1-3 nights**: 63%

**Scotland winter 2022 Intenders (Nov-March)**

- **Highest outside December**: 44%
- **UK TREND VS. 2021**: No clear changes on 2021

QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland winter intenders n=97; All Scotland winter 2022 resident intenders n=53* indicative only.
Large City and Small city/town intentions have increased since the autumn, closing the gap with ‘countryside or village’

**Destination type on next Scotland trip (%)**

- **Countryside or village:** Scotland winter 2022 Intenders (Nov-March): 32%, Autumn 2021 Intenders: 29%
- **Large city:** Scotland winter 2022 Intenders (Nov-March): 42%, Autumn 2021 Intenders: 25%
- **Mountains or hills:** Scotland winter 2022 Intenders (Nov-March): 26%, Autumn 2021 Intenders: 26%
- **Rural coastline:** Scotland winter 2022 Intenders (Nov-March): 14%, Autumn 2021 Intenders: 22%
- **Traditional coastal/seaside town:** Scotland winter 2022 Intenders (Nov-March): 15%, Autumn 2021 Intenders: 20%
- **Small city or town:** Scotland winter 2022 Intenders (Nov-March): 11%, Autumn 2021 Intenders: 3%

QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland winter intenders n=97; All Scotland winter 2022 resident intenders n=53* indicative only
At an overall level UK city or large town trip intention has consistently increased since the start of the pandemic – with intention now higher than the same period in 2021 and 2020.
Edinburgh is the part of Scotland most likely to generate an overnight trip this winter, higher than in Autumn 2022 and winter 2021.

### Scotland destination for next trip (%)

- **All Scotland winter 2022 Intenders**
  - Edinburgh area: 36%
  - Highlands: 30%
  - Glasgow area: 15%
  - West Coast: 12%
  - Scottish Isles: 9%
  - Central Scotland: 7%
  - East Coast: 3%
  - South of Scotland: 3%

- **Scotland autumn 2022 Intenders (Sept-Oct)**
  - Edinburgh area: 37%
  - Highlands: 30%
  - Glasgow area: 18%
  - West Coast: 18%
  - Scottish Isles: 10%
  - Central Scotland: 11%
  - East Coast: 5%
  - South of Scotland: 6%

UK TREND VS. 2021

Uplift in Edinburgh intention (aligns with London uplift)

---

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 in Scotland. All Scotland winter intenders n=131; All Scotland winter 2022 resident intenders n=72; All Scotland winter 2022 non-resident intenders n=72
‘Own car’ (47%) is the leading mode of transport intended to be used on winter trips to Scotland, but – driven by a rise in urban trips - train has risen significantly since Autumn.

Mode of transport on next Scotland trip (%)

- Own car: Scotland winter 2022 Intenders (Nov-March) 69%, Scotland autumn 2022 Intenders (Sept-Oct) 47%
- Train: Scotland winter 2022 Intenders (Nov-March) 28%, Scotland autumn 2022 Intenders (Sept-Oct) 9%
- Plane: Scotland winter 2022 Intenders (Nov-March) 9%, Scotland autumn 2022 Intenders (Sept-Oct) 6%
- Car - hired: Scotland winter 2022 Intenders (Nov-March) 6%, Scotland autumn 2022 Intenders (Sept-Oct) 8%
- Public bus/ coach: Scotland winter 2022 Intenders (Nov-March) 5%, Scotland autumn 2022 Intenders (Sept-Oct) 8%

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 winter intenders n=97; All Scotland winter 2022 resident intenders n=53* indicative only
‘Hotel/motel/inn’, is the number one accommodation type followed by ‘commercial property rental’ and ‘private home’ – the latter driven by Christmas plans.

**Planned accommodation on next Scotland trip (%)**

- **Scotland winter 2022 Intenders (Nov-March):**
  - Hotel/motel/inn: 44%
  - Commercial property rental: 32%
  - Private home: 31%
  - Caravan/Camping: 14%
- **Scotland autumn 2022 Intenders (Sept-Oct):**
  - Serviced apartment/guest house/farmhouse: 25%
  - Other: 5%

**UK TREND VS. 2021**

No clear changes on 2021.

---

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 winter intenders n=97; All Scotland winter 2022 resident intenders n=53* indicative only.

*Category definitions have changed compared to reports prior to June 2022.
‘To get away from it all and have a rest’ is the leading motivation for a Scotland trip with ‘Christmas celebrations’ and New Year luxury/pampering also prominent

Motivations planned for Scotland trip (%)

- To get away from it all and have a rest: 60% in Dec, 51% in Jan-Feb
- Family time or time with my partner: 40% in Dec, 47% in Jan-Feb
- To celebrate a special occasion, such as birthday or anniversary: 25% in Dec, 10% in Jan-Feb
- To spend time with friends: 20% in Dec, 22% in Jan-Feb
- To go somewhere luxurious where I could feel pampered: 18% in Dec, 1% in Jan-Feb
- To connect with nature / be outdoors: 16% in Dec, 31% in Jan-Feb
- To go somewhere there was great food: 12% in Dec, 11% in Jan-Feb
- To travel somewhere new: 16% in Dec, 19% in Jan-Feb
- Because of a particular interest (e.g. sport, music, festival, etc.): 3% in Dec, 14% in Jan-Feb
- For adventure or a challenge: 3% in Dec, 15% in Jan-Feb

VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland winter intenders n=97; All Scotland winter 2022 resident intenders n=53* indicative only
Note: Multiple choice question. Totals may exceed 100%.
‘Trying local food and drink’ is the leading activity Scotland winter intenders with New Year ‘health or wellbeing’ also indexing highly

**Activities planned for next Scotland trip (%)**

- **Scotland winter 2022 Intenders (Nov-March)**
  - Trying local food and drink: 55%
  - Walking, Hiking or Rambling: 42%
  - Visit heritage sites (e.g., castles, historic houses etc.): 49%
  - Explore scenic areas by car: 41%
  - Visit cultural attractions (e.g., museums, galleries etc.): 31%
  - Experience the nightlife (e.g., pubs, bars and nightclubs etc.): 21%
  - Health or wellbeing experiences (e.g., spa, massage etc.): 14%
  - Speciality shopping (e.g., for something that you do not buy regularly): 14%
  - Learn about local history and culture: 14%
  - Nature and wildlife experiences (e.g., bird watching): 13%
  - Visit family attractions: 9%

- **Scotland autumn 2022 Intenders (Sept-Oct)**
  - Trying local food and drink: 42%
  - Walking, Hiking or Rambling: 36%
  - Visit heritage sites (e.g., castles, historic houses etc.): 41%
  - Explore scenic areas by car: 31%
  - Visit cultural attractions (e.g., museums, galleries etc.): 46%
  - Experience the nightlife (e.g., pubs, bars and nightclubs etc.): 15%
  - Health or wellbeing experiences (e.g., spa, massage etc.): 14
  - Speciality shopping (e.g., for something that you do not buy regularly): 14
  - Learn about local history and culture: 13
  - Nature and wildlife experiences (e.g., bird watching): 13
  - Visit family attractions: 20

**Highest in Jan-Feb**

---

**VB6ii. Which of the following best describe your motivation/s for this trip?**

Base: All intenders planning to take a trip exclusively in Scotland. All Scotland winter intenders n=97; All Scotland winter 2022 resident intenders n=53* indicative only

Note: Multiple choice question. Totals may exceed 100%.

**Visit Scotland | Alba**
Scotland residents are more likely to visit rural destinations, to take shorter breaks, travel by car and stay in caravan/camping/other serviced accommodation.

**Main type of destination (%)**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Scotland winter 2022 Intenders</th>
<th>Scotland resident winter 2022 Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countryside or village</td>
<td>32</td>
<td>38</td>
</tr>
<tr>
<td>Large city</td>
<td>29</td>
<td>21</td>
</tr>
<tr>
<td>Mountains or hills</td>
<td>26</td>
<td>24</td>
</tr>
<tr>
<td>Rural coastline</td>
<td>14</td>
<td>21</td>
</tr>
<tr>
<td>Traditional coastal town</td>
<td>15</td>
<td>9</td>
</tr>
<tr>
<td>Small city or town</td>
<td>11</td>
<td>7</td>
</tr>
</tbody>
</table>

**Scotland destination for next trip (%)**

<table>
<thead>
<tr>
<th>Destination</th>
<th>All Scotland winter 2022 Intenders</th>
<th>Scotland resident winter 2022 Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edinburgh area</td>
<td>36</td>
<td>16</td>
</tr>
<tr>
<td>Highlands</td>
<td>30</td>
<td>40</td>
</tr>
<tr>
<td>Glasgow area</td>
<td>15</td>
<td>8</td>
</tr>
<tr>
<td>West Coast</td>
<td>12</td>
<td>17</td>
</tr>
<tr>
<td>Scottish Isles</td>
<td>9</td>
<td>2</td>
</tr>
</tbody>
</table>

**Mode of transport (%)**

<table>
<thead>
<tr>
<th>Transport Type</th>
<th>Scotland winter 2022 Intenders</th>
<th>Scotland resident winter 2022 Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Own car</td>
<td>47</td>
<td>61</td>
</tr>
<tr>
<td>Train</td>
<td>28</td>
<td>15</td>
</tr>
<tr>
<td>Plane</td>
<td>9</td>
<td>8</td>
</tr>
<tr>
<td>Car - hired</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Public bus/ coach</td>
<td>5</td>
<td>6</td>
</tr>
</tbody>
</table>

**Trip length (%)**

<table>
<thead>
<tr>
<th>Trip Length</th>
<th>Scotland winter 2022 Intenders</th>
<th>Scotland resident winter 2022 Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 weeks</td>
<td>2</td>
<td>35</td>
</tr>
<tr>
<td>3 weeks</td>
<td>3</td>
<td>75</td>
</tr>
</tbody>
</table>

**Planned accommodation (%)**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Scotland winter 2022 Intenders</th>
<th>Scotland resident winter 2022 Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>44 44</td>
<td>21</td>
</tr>
<tr>
<td>Commercial property rental</td>
<td>32 21</td>
<td>31</td>
</tr>
<tr>
<td>Private home</td>
<td>31 28</td>
<td>28</td>
</tr>
<tr>
<td>Caravan/ Camping</td>
<td>20 30</td>
<td>20</td>
</tr>
<tr>
<td>Other serviced accomm.</td>
<td>15 22</td>
<td>15</td>
</tr>
</tbody>
</table>

All Scotland autumn intenders n=117; All Scotland autumn 2022 resident intenders n=71
THANK YOU!

...ANY QUESTIONS?
APPENDIX:

DIFFERENCES BY DESTINATION TYPES

(BASED ON ALL UK WINTER INTENDERS)
The life stage of intenders is relatively consistent across destination type, with the exception of ‘mountains or hills winter intenders’ who are less likely to be ‘older independents’ or ‘retirees’.
CITY OR LARGE TOWN INTENDERS ARE MORE LIKELY TO BE SPENDING TIME WITH FRIENDS, VISITING CULTURAL ATTRACTIONS, ON A SHORT BREAK AND STAYING IN A HOTEL/MOTEL/INN

**Top 5 Motivations for winter overnight trip (%)**

<table>
<thead>
<tr>
<th>Motivation</th>
<th>All Winter Intenders</th>
<th>City or Large Town Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family time or time with partner</td>
<td>35</td>
<td>33</td>
</tr>
<tr>
<td>To spend time with friends</td>
<td>21</td>
<td>26</td>
</tr>
<tr>
<td>To get away from it all and have a rest</td>
<td>34</td>
<td>25</td>
</tr>
<tr>
<td>To travel somewhere new</td>
<td>17</td>
<td>18</td>
</tr>
<tr>
<td>To celebrate a special occasion, such as birthday or anniversary</td>
<td>17</td>
<td>17</td>
</tr>
</tbody>
</table>

**Top 6 activities for winter trip (%)**

<table>
<thead>
<tr>
<th>Activity</th>
<th>All Winter Intenders</th>
<th>City or Large Town Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trying local food and drink</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Visit cultural attractions</td>
<td>23</td>
<td>30</td>
</tr>
<tr>
<td>Visit heritage sites</td>
<td>25</td>
<td>27</td>
</tr>
<tr>
<td>Experience the nightlife</td>
<td>16</td>
<td>22</td>
</tr>
<tr>
<td>Walking, Hiking or Rambling</td>
<td>29</td>
<td>19</td>
</tr>
<tr>
<td>Speciality shopping</td>
<td>13</td>
<td>18</td>
</tr>
</tbody>
</table>

**Visitor party make-up for winter trip (%)**

<table>
<thead>
<tr>
<th>Party Make-up</th>
<th>All Winter Intenders</th>
<th>City or Large Town Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner</td>
<td>52</td>
<td>54</td>
</tr>
<tr>
<td>Friends</td>
<td>20</td>
<td>25</td>
</tr>
<tr>
<td>Child, grandchild or young adult</td>
<td>26</td>
<td>22</td>
</tr>
<tr>
<td>Other family members</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td>Alone</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

**Length of next winter trip (%)**

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>All Winter Intenders</th>
<th>City or Large Town Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsure 4+ nights</td>
<td>5</td>
<td>37</td>
</tr>
<tr>
<td>1-3 nights</td>
<td>58</td>
<td>64</td>
</tr>
</tbody>
</table>

**Accommodation planned for winter trip (%)**

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>All Winter Intenders</th>
<th>City or Large Town Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel/motel/inn</td>
<td>40</td>
<td>57</td>
</tr>
<tr>
<td>Commercial property rental</td>
<td>40</td>
<td>27</td>
</tr>
<tr>
<td>Private home</td>
<td>33</td>
<td>29</td>
</tr>
<tr>
<td>Serviced apartment/guest house/farmhouse</td>
<td>29</td>
<td>21</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>33</td>
<td>17</td>
</tr>
</tbody>
</table>

Base: UK winter intenders n=1,391; UK winter city or large town intenders n=550
Top 5 Motivations for winter overnight trip (%)

- To get away from it all and have a rest: 34% (All Winter Intenders), 35% (Traditional Coastal Town Intenders)
- Family time or time with my partner: 17% (All Winter Intenders), 27% (Traditional Coastal Town Intenders)
- To connect with nature/be outdoors: 18% (All Winter Intenders), 17% (Traditional Coastal Town Intenders)
- To travel somewhere new: 17% (All Winter Intenders), 16% (Traditional Coastal Town Intenders)
- To spend time with friends: 21% (All Winter Intenders), 19% (Traditional Coastal Town Intenders)

Top 6 activities for winter trip (%)

- Trying local food and drink: 34% (All Winter Intenders), 29% (Traditional Coastal Town Intenders)
- Walking, Hiking or Rambling: 27% (All Winter Intenders), 27% (Traditional Coastal Town Intenders)
- Explore scenic areas by car: 18% (All Winter Intenders), 19% (Traditional Coastal Town Intenders)
- Visit family attractions: 15% (All Winter Intenders), 19% (Traditional Coastal Town Intenders)
- Visit heritage sites: 25% (All Winter Intenders), 18% (Traditional Coastal Town Intenders)

Visitor party make-up for winter trip (%)

- Your partner: 52% (All Winter Intenders), 45% (Traditional Coastal Town Intenders)
- Child, grandchild or young adult: 26% (All Winter Intenders), 30% (Traditional Coastal Town Intenders)
- Friends: 20% (All Winter Intenders), 14% (Traditional Coastal Town Intenders)
- Other family members: 15% (All Winter Intenders), 13% (Traditional Coastal Town Intenders)
- Pets: 8% (All Winter Intenders), 12% (Traditional Coastal Town Intenders)

Length of next winter trip (%)

- Unsure: 5% (All Winter Intenders), 4% (Traditional Coastal Town Intenders)
- 1-3 nights: 37% (All Winter Intenders), 56% (Traditional Coastal Town Intenders)
- 4+ nights: 40% (All Winter Intenders), 33% (Traditional Coastal Town Intenders)

Accommodation planned for winter trip (%)

- Commercial property rental: 40% (All Winter Intenders), 33% (Traditional Coastal Town Intenders)
- Hotel/motel/inn: 40% (All Winter Intenders), 29% (Traditional Coastal Town Intenders)
- Caravan/Camping: 34% (All Winter Intenders), 34% (Traditional Coastal Town Intenders)
- Serviced apartment/guest house/farmhouse: 29% (All Winter Intenders), 30% (Traditional Coastal Town Intenders)
- Private home: 33% (All Winter Intenders), 30% (Traditional Coastal Town Intenders)

Base: UK winter intenders n=1,391; UK traditional coastal town intenders n=170
Countryside intenders were more likely to be travelling for family time, walking/hiking or rambling and travelling with their partner.

**Top 5 Motivations for winter overnight trip (%)**

- Family time or time with my partner: 35% All Winter Intenders, 42% Countryside Intenders
- To get away from it all and have a rest: 34% All Winter Intenders, 41% Countryside Intenders
- To celebrate a special occasion, such as birthday or anniversary: 17% All Winter Intenders, 22% Countryside Intenders
- To connect with nature / be outdoors: 17% All Winter Intenders, 22% Countryside Intenders
- To spend time with friends: 21% All Winter Intenders, 18% Countryside Intenders

**Top 5 activities for winter trip (%)**

- Walking, Hiking or Rambling: 29% All Winter Intenders, 40% Countryside Intenders
- Trying local food and drink: 34% All Winter Intenders, 39% Countryside Intenders
- Visit heritage sites: 25% All Winter Intenders, 28% Countryside Intenders
- Explore scenic areas by car: 18% All Winter Intenders, 23% Countryside Intenders
- Nature and wildlife experiences: 16% All Winter Intenders, 19% Countryside Intenders

**Visitor party make-up for winter trip (%)**

- Your partner: 52% All Winter Intenders, 56% Countryside Intenders
- Child, grandchild or young adult: 26% All Winter Intenders, 30% Countryside Intenders
- Other family members: 15% All Winter Intenders, 15% Countryside Intenders
- Friends: 20% All Winter Intenders, 14% Countryside Intenders
- Pets: 8% All Winter Intenders, 8% Countryside Intenders

**Length of next winter trip (%)**

- Unsure 4+ nights: 5% All Winter Intenders, 41% Countryside Intenders
- 1-3 nights: 58% All Winter Intenders, 55% Countryside Intenders

**Accommodation planned for winter trip (%)**

- Commercial Private home property rental: 40% All Winter Intenders, 41% Countryside Intenders
- Hotel/motel/inn: 33% All Winter Intenders, 34% Countryside Intenders
- Caravan/Camping: 40% All Winter Intenders, 32% Countryside Intenders
- Serviced apartment/guest house/farmhouse: 33% All Winter Intenders, 29% Countryside Intenders

Base: UK winter intenders n=1,391; UK winter countryside intenders n=170
RURAL COASTLINE INTENDERS WERE MORE LIKELY TO TRAVELLING TO CONNECT WITH NATURE, ON A LONGER BREAK AND TO BE STAYING IN COMMERCIAL PROPERTY, A CARAVAN/CAMPSITE OR A PRIVATE HOME

**Top 5 Motivations for winter overnight trip (%)**

- **Family time or time with my partner**: 35% (All Winter Intenders), 27% (Rural Coastline Intenders)
- **To get away from it all and have a rest**: 34% (All Winter Intenders), 23% (Rural Coastline Intenders)
- **To connect with nature/be outdoors**: 17% (All Winter Intenders), 22% (Rural Coastline Intenders)
- **For adventure or a challenge**: 10% (All Winter Intenders), 15% (Rural Coastline Intenders)
- **To spend time with friends**: 21% (All Winter Intenders), 15% (Rural Coastline Intenders)

**Top 5 activities for winter trip (%)**

- **Trying local food and drink**: 34% (All Winter Intenders), 20% (Rural Coastline Intenders)
- **Nature and wildlife experiences**: 16% (All Winter Intenders), 20% (Rural Coastline Intenders)
- **Walking, Hiking or Rambling**: 29% (All Winter Intenders), 20% (Rural Coastline Intenders)
- **Explore scenic areas by car**: 18% (All Winter Intenders), 19% (Rural Coastline Intenders)
- **Visit heritage sites**: 25% (All Winter Intenders), 15% (Rural Coastline Intenders)

**Visitor party make-up for winter trip (%)**

- **Your partner**: 52% (All Winter Intenders), 50% (Rural Coastline Intenders)
- **Child, grandchild or young adult**: 26% (All Winter Intenders), 23% (Rural Coastline Intenders)
- **Friends**: 20% (All Winter Intenders), 13% (Rural Coastline Intenders)
- **Other family members**: 15% (All Winter Intenders), 11% (Rural Coastline Intenders)
- **Pets**: 8% (All Winter Intenders), 11% (Rural Coastline Intenders)

**Length of next winter trip (%)**

- **4+ nights**: 37% (All Winter Intenders), 41% (Rural Coastline Intenders)
- **1-3 nights**: 58% (All Winter Intenders), 50% (Rural Coastline Intenders)

**Accommodation planned for winter trip (%)**

- **Commercial property rental**: 40% (All Winter Intenders), 57% (Rural Coastline Intenders)
- **Caravan/Camping**: 33% (All Winter Intenders), 47% (Rural Coastline Intenders)
- **Private home**: 33% (All Winter Intenders), 41% (Rural Coastline Intenders)
- **Serviced apartment/guest house/farmhouse**: 29% (All Winter Intenders), 34% (Rural Coastline Intenders)
- **Hotel/motel/inn**: 40% (All Winter Intenders), 25% (Rural Coastline Intenders)

*Base: UK winter intenders n=1,391; UK winter rural coastline intenders n=127*
## Top 5 Motivations for Winter Overnight Trip (%)

<table>
<thead>
<tr>
<th>Motivation</th>
<th>All Winter Intenders</th>
<th>Mountains or Hills Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>To get away from it all and have a rest</td>
<td>34</td>
<td>37</td>
</tr>
<tr>
<td>To connect with nature/be outdoors</td>
<td>17</td>
<td>22</td>
</tr>
<tr>
<td>Family time or time with my partner</td>
<td>35</td>
<td>20</td>
</tr>
<tr>
<td>To spend time with friends</td>
<td>21</td>
<td>20</td>
</tr>
<tr>
<td>To travel somewhere new</td>
<td>17</td>
<td>19</td>
</tr>
</tbody>
</table>

## Top 5 Activities for Winter Trip (%)

<table>
<thead>
<tr>
<th>Activity</th>
<th>All Winter Intenders</th>
<th>Mountains or Hills Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walking, Hiking or Rambling</td>
<td>29</td>
<td>39</td>
</tr>
<tr>
<td>Nature and wildlife experiences</td>
<td>16</td>
<td>25</td>
</tr>
<tr>
<td>Trying local food and drink</td>
<td>34</td>
<td>25</td>
</tr>
<tr>
<td>Visit heritage sites</td>
<td>25</td>
<td>20</td>
</tr>
<tr>
<td>Explore scenic areas by car</td>
<td>18</td>
<td>16</td>
</tr>
</tbody>
</table>

## Visitor Party Make-up for Winter Trip (%)

<table>
<thead>
<tr>
<th>Relationship</th>
<th>All Winter Intenders</th>
<th>Mountains or Hills Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your partner</td>
<td>52</td>
<td>40</td>
</tr>
<tr>
<td>Child, grandchild or young adult</td>
<td>26</td>
<td>17</td>
</tr>
<tr>
<td>Friends</td>
<td>20</td>
<td>13</td>
</tr>
<tr>
<td>Organised group</td>
<td>4</td>
<td>13</td>
</tr>
<tr>
<td>Other members of family</td>
<td>15</td>
<td>12</td>
</tr>
</tbody>
</table>

## Length of Next Winter Trip (%)

<table>
<thead>
<tr>
<th>Length</th>
<th>All Winter Intenders</th>
<th>Mountains or Hills Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsure 4+ nights</td>
<td>5</td>
<td>37</td>
</tr>
<tr>
<td>1-3 nights</td>
<td>58</td>
<td>58</td>
</tr>
</tbody>
</table>

## Accommodation Planned for Winter Trip (%)

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>All Winter Intenders</th>
<th>Mountains or Hills Intenders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial property rental</td>
<td>40</td>
<td>49</td>
</tr>
<tr>
<td>Caravan/Camping</td>
<td>33</td>
<td>47</td>
</tr>
<tr>
<td>Private home</td>
<td>33</td>
<td>41</td>
</tr>
<tr>
<td>Serviced apartment/guest house/farmhouse</td>
<td>29</td>
<td>34</td>
</tr>
<tr>
<td>Hotel/motel/inn</td>
<td>40</td>
<td>25</td>
</tr>
</tbody>
</table>

Base: UK winter intenders n=1,391; UK winter rural coast intenders n=127
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 50-52 of the domestic sentiment tracker.