

Natural Advocates

(1.1 million UK households, 8% of total UK households)



“Natural Advocates are passionate about Scotland as it offers everything they want from a holiday; breathtaking scenery, a connection with nature and the chance to get away from it all. A holiday in Scotland will really help them to unwind, recharge and enjoy quiet time.”

Personality:

Natural Advocates are typically more introverted individuals who value peace and quiet. Confident in themselves and what they want out of life, Natural Advocates don't follow the crowds. They pay great attention to detail and can be wary of providing their personal details to organisations.

Natural Advocates are less likely to consider themselves as adventurous, spontaneous, early adopters of new technology or being unaffected by the recession.

In the next 3 years, key life events include moving home (28%) or changing career (18%), or none (47%), for that matter, as they are quite settled.

Some Natural Advocates may have a dog and enjoy long walks in the country with their pet. Dog friendly hotels, restaurants, pubs and cafes can appeal.

Profile:

Mid affluence

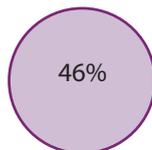


The majority fall into 35-54s.

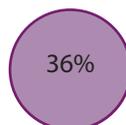
Under 35



35-54



Over 55



59% live across England

35% are based in Scotland

Key areas include:

Central Scotland **21%**

Northern Scotland **11%**

Northern England **29%**



Children living in their household **27%**
(slightly below average)



26% have grandchildren (above average)



Likely to be working full time: **52%**
(slightly below average)



Retired: **18%** (slightly above average)



Holiday Profile:

Whilst Natural Advocates take fewer holidays or short breaks in a given year, on average, when they do go away it tends to be to Scotland (71% of their nights away and 60% of their annual holiday spend). Therefore, Scotland is the main destination of choice for Natural Advocates.

However, proximity is not the driving factor. Scotland offers exactly what they want from a holiday: scenery, nature, history, culture and getting away from it all.

Total Annual Holiday Nights



7% will be abroad



22% rest of UK



71% Scotland

Natural Advocates think Scotland is best for:

- 48% 'the main holiday of the year'
- 16% 'a longer holiday (a week or more) but not the main holiday of the year'
- 36% 'a short break of 1-6 nights'



Top 3 Factors When Choosing a Holiday Destination for Natural Advocates:

- 1 Breathtaking scenery and landscapes
- 2 Relaxing place to unwind
- 3 Unspoilt nature



Holiday Activities:

Their **passion for and loyalty to Scotland** is arguably the most distinctive feature of Natural Advocates. They really do feel Scotland is the best part of the UK for a holiday or short break.

Natural Advocates will enjoy being cut off from the world and **getting away from it all**.

They see holidays as a time for reflection and quiet time. Rigid itineraries and plans are avoided, given their preference for restorative and relaxing trips in Scotland. Holidays can often be a chance to spend time with close friends and family.

With their desire to get away from it all, rural and more remote locations can appeal. They tend to reject holidays which involve large amounts of hustle, bustle and people.

Gentle outdoor activities are favoured such as enjoying beautiful scenery and landscapes, walking (short walks and longer walks), visiting natural sites, watching wildlife, parks and gardens, sightseeing and visiting castles/monuments.

Accommodation Preferences:



Flexible accommodation is important for Natural Advocates. Rural and more remote locations will appeal. Self-catering in particular is well used (57%), as well as hotels (53%) and B&Bs (36%). 51% will use accommodation of medium quality and 22% will use 4-5 star accommodation.

Usual Choice of Accommodation in UK	% Above or Below Average
Self-catering	57% 
Hotels	53% 
B&B	36% 
Friends/relatives	23% 
Guest House	16% 
Caravan	15% 
Camping	14% 
Hostels	5% 

"This year we're planning to stay in Scotland..get a cottage, somewhere up North, west coast maybe. Just somewhere there's space to let the dog run, maybe do some walking.."



"It is pictures of barren Scottish nature that make me think 'that's where we should go'"





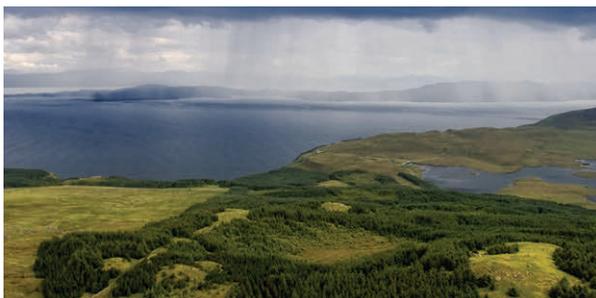
Technology & Media:

Natural Advocates are average users of the internet and social media. Facebook and Twitter are the two most common, however, 29% do not currently have a social media account, slightly higher than average.

They are more functional users of the internet with a focus on carrying out practical activities, compared with other segments, and can be described as 'keeping up' with internet usage trends rather than leading the way.

They enjoy planning holidays and will gain inspiration and information from a mix of offline and online sources (recommendations, official country tourism websites, travel books, review sites). Natural Advocates are the heaviest users of official country tourism websites.

Technology & Media Summary
Light/medium internet users
Light/medium television viewers
Medium cinema goers
Medium/heavy quality news readers
Light popular news readers
Medium e-versions of newspapers readers
Medium/heavy commercial radio listeners



Relationship with Scotland:

Their relationship with Scotland is the defining aspect of Natural Advocates and sets them apart from other segments. 74% recommend Scotland to others, 67% are regular visitors and 19% are occasional visitors. They see Scotland as best for the main holiday of the year (48%, which is well above average).

Of those living outside Scotland, they also have very good connections with Scotland. Good friends currently living here, definite Scottish ancestry, relations currently living in Scotland or they have previously lived in Scotland themselves.

Natural Advocates feel they know Scotland well. Self-claimed knowledge (82%) is double that of other segments. 95% intend to spend more time in Scotland in future.

They feel Scotland is different to other parts of the UK for a holiday or short break and feel they will be welcomed here. Reliable weather isn't an issue for Natural Advocates.



"I think Scotland's nature is spectacular. It would be a long time before I felt I needed to go abroad to see nature"

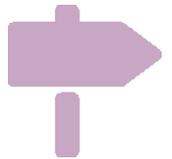


"My ideal holiday involved as few people as possible"



"There's a huge variety of places and it doesn't take very long to leave your house in Edinburgh and get out in the wilderness where there's nobody around"





Challenges:

Few potential challenges to the loyalty of Natural Advocates. However, the most important thing is ensuring they do keep taking holidays and short breaks in Scotland and that Scotland continues to meet their needs.

Natural Advocates offer good potential to be used as advocates of Scotland and promoting Scotland via word of mouth and through their activity via social media. A key challenge will be to encourage this.

They perceive a trip to Scotland as offering good value for money. However, cost may be a challenge in future if prices were to rise significantly.

How the Tourism Industry Can Help:

Recognise that they know Scotland well and are spending time in Scotland to get away from it all. Try to ensure they have a relaxing time and take the hassle out of things for them. Signpost them to different walks they can do and natural sites they might not already have visited. Given their love of Scotland and experience, remember they are likely to come back and offer good potential for a repeat visit and the opportunity to recommend their experiences to others. Although they may know Scotland, they may not have visited everywhere, offering the opportunity to keep reminding them of the diversity of locations to visit.



Natural Advocates at A Glance



2014

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