



Tracking Scottish tourism intentions during COVID-19

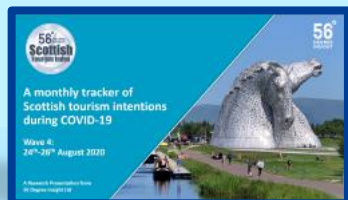
What are the prospects for 2021?

A Research Presentation
from 56 Degree Insight Ltd

21st April 2021



The Scottish Tourism Index – Wave 5, March 2021: Introduction



56 Degree Insight defines who we are and where we come from. Our home turf, the Edinburgh area, sits on the 56 Degree North line of latitude and we provide precise direction and insights looking at your business issues from every possible angle.

Jim Eccleston and Duncan Stewart



- Online Survey of 512 Scottish adults investigating their views about holidays and travel during COVID-19
- Representative sample of the Scottish population, weighted by age, gender, socio-economic grouping and region of origin
- Wave 5 fieldwork, our first wave since August 2020, was undertaken from 11th – 14th March 2021
- Sample and fieldwork provided by **Yonder Data Solutions** (previously known as Populus Data Solutions)

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What we'll cover today

- Scots' feelings about travel in general
- The desirability of different destinations
- Scottish staycation prospects for 2021
- The anatomy of the Scottish Staycation in 2021
- Impact on Communities





Scots' feelings about travel in general

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HOW SCOTS WERE FEELING ABOUT HOLIDAYS AND TRAVEL IN THE MIDDLE OF THE FIRST LOCKDOWN – EARLY MAY 2020:

In the midst of the first lockdown last year, we saw that Scots had a wide range of feelings about future holiday taking, ranging from fear to travel again to a desire to quickly get back to normal



**SCARED – NERVOUS ABOUT TRAVEL
AND FEELING VERY WARY (11%)**

*Feel nervous, going to
avoid travel till its settled*

Very, very wary

*I am in the shielded group
of people. I will be very
cautious of going away
anywhere until I know
covid19 has passed*



**EXPECT TO TRAVEL IN FUTURE BUT WITH ADDITIONAL
CAUTION, PLANNING AND SOME CHANGES**

*Cannot see how air travel will be
possible for a while - busy airports and
full aircraft are one of the best
situations for the spread of disease.
Same with public transport.*

*Scared to be with a
lot of people*

*I would use our own transport. Keep
away from crowds or restricted spaces.*



**NOTHING'S CHANGED – EXPECT
TO CONTINUE AS BEFORE (17%)**

*Makes me desperate
to go travelling*

*I am still not scared to go places
as I think if you take care you
should be ok. It's like the cold or
the flu. If you don't pick up the
virus you cant get sick.*

*My opinion on travel hasn't
changed at all.*

Source: Wave 1 (May) Data

HOW SCOTS ARE FEELING ABOUT HOLIDAYS AND SHORT BREAKS ALMOST A YEAR LATER – IN MARCH 2021:

Around half of Scots are not really thinking about holidays at the moment although almost three in ten are keen for a holiday in the summer or even sooner



Not in my thoughts

I am not thinking about holidays at all in 2021 – I have other priorities

Something for later

I am not thinking about holidays at the moment - that's something for later

Probably later in year

I plan to take a holiday but it will probably be a bit later in the year

Probably in the summer

I'm keen for a holiday at some point in the summer when it is safe to do so

As soon as possible

I am desperate to take a holiday and will do so as soon as it is possible

All Scots

22%

27%

23%

16%

12%

Pre-Nesters

23%

21%

16%

20%

19%

Families

21%

28%

20%

17%

15%

Empty Nesters

18%

36%

25%

16%

5%

ABC1s

18%

22%

30%

18%

12%

C2DEs

25%

33%

16%

15%

12%

WHY SCOTS FEEL HOW THEY DO AT THE MOMENT ABOUT HOLIDAYS - MARCH 2021:

When asked why they feel how they do about holidays, there is an emotional 'tug-of-war' between a desire to stay safe on one side and a need for travel on the other



Holidays not in my thoughts / Something for later 49% of Scots		Holidays considered but probably later in year 23% of Scots		Want a holiday as soon as possible / In the Summer 28% of Scots	
Doesn't yet feel safe/ too much risk of transmission	25%	Its too soon/prefer to wait until things settle down	31%	Need to get away/escape/deserve a holiday	44%
Its too soon/prefer to wait until things settle down	14%	Doesn't yet feel safe/ too much risk of transmission	18%	Need to travel to see family	11%
Not a priority/ no plans	13%	The vaccine rollout provides confidence	17%	Need holidays for mental health/ to relax	8%
Too much uncertainty/ ambiguity	11%	Need to wait until lowered restrictions	14%	Will only consider domestic holidays for now	6%
Can't afford to/ too expensive	11%	Can't afford to/ too expensive	7%	The vaccine rollout provides confidence	5%
<p><i>"I have no confidence as yet to feel safe travelling or visiting another country despite being vaccinated."</i></p> <p><i>"We don't know for definite that it will be safe to travel. Even if it is safe with the increase of people travelling the chance of another spike is greater."</i></p> <p><i>"I'm not confident it will be safe to take a holiday this year even when we have had the vaccine, I still think there could be a further lock down around summer."</i></p> <p><i>"As I am not working at the moment my priorities are finding a job - holidays are not a priority."</i></p>		<p><i>"I am not keen to join a stampede of people who want to go on holiday. I will assess the risk of travelling by different means and decide how and where to travel when I decide the risk is worth taking."</i></p> <p><i>"Summer is too soon, situation could change rapidly again but hopefully will have calmed down in more places later in year with more vaccines."</i></p> <p><i>"Won't consider holiday until later, more people vaccinated, rates very low."</i></p>		<p><i>"I haven't had a break since September 2019 and am so exhausted having worked the whole way through the pandemic and never being able to relax or blow off steam. A break is a priority."</i></p> <p><i>"I need to get out my house as live alone and feels like a prison. I need a break ASAP"</i></p> <p><i>"Because I enjoy travelling - I usually travel often and have missed doing it since the pandemic started. It will be nice to get a change of scene too."</i></p>	

HOW SCOTS ARE FEELING ABOUT THEIR PERSONAL FINANCES IN MARCH 2021:

Over a third of Scots' finances have been significantly impacted by COVID-19 – a consistent proportion over the last year which undoubtedly impacts on holiday considerations



My personal finances are being impacted significantly by the current COVID-19 restrictions

2020 -May: **33%** June: **33%** August: **35%** in agreement

March 2021: **34%** in agreement

Greatest impact on:

- Pre-nesters (47%)
- Families (43%)
- C2DEs (39%)

Least Impact on:

- Empty Nesters (21%)
- ABC1s (28%)

HOW SCOTS ARE FEELING ABOUT AIR TRAVEL IN 2021:

Scots' worries about air travel in 2020 have continued into 2021 with almost three quarters unlikely to consider flying to a holiday destination this year



Unlikely to consider travelling by air during 2020

June 2020: **68%** in agreement

Unlikely to consider travelling by air for a holiday or break during 2020

July 2020: **78%** in agreement

Unlikely to consider travelling by air for a holiday or break during 2021

August 2020: **60%** in agreement

Unlikely to consider travelling by air for a holiday or break during 2021

March 2021: **72%** in agreement

Greatest agreement:

- Empty Nesters (79%)
- Families (76%)
- C2DEs (74%)

Least agreement:

- Pre-Nesters (56%)
- ABC1s (69%)



The desirability of different destinations





TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN SCOTLAND:

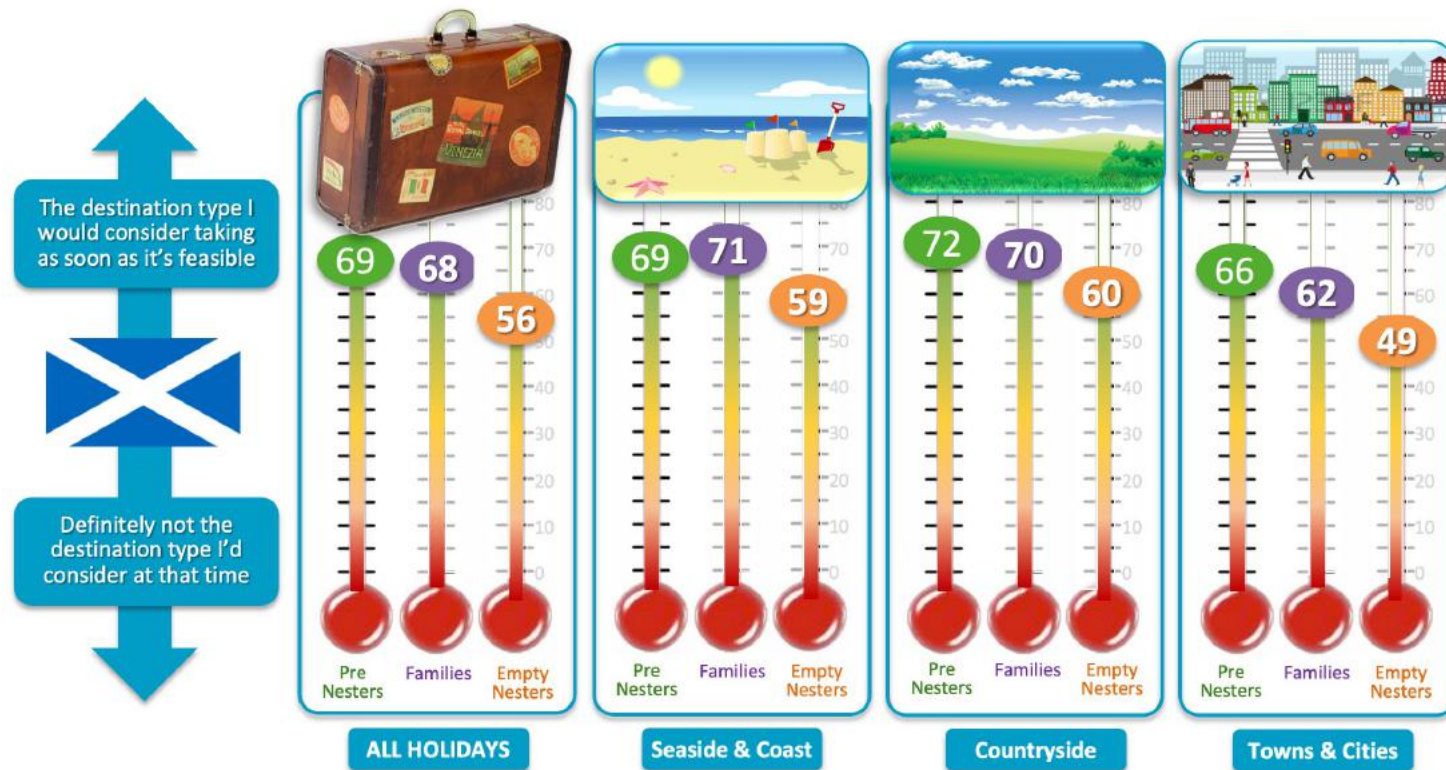
Scots' desire for short breaks or holidays in Scotland when lockdown restrictions permit has increased slightly on those recorded in the first lockdown last year





TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN SCOTLAND – VARIATIONS BY LIFESTAGE:

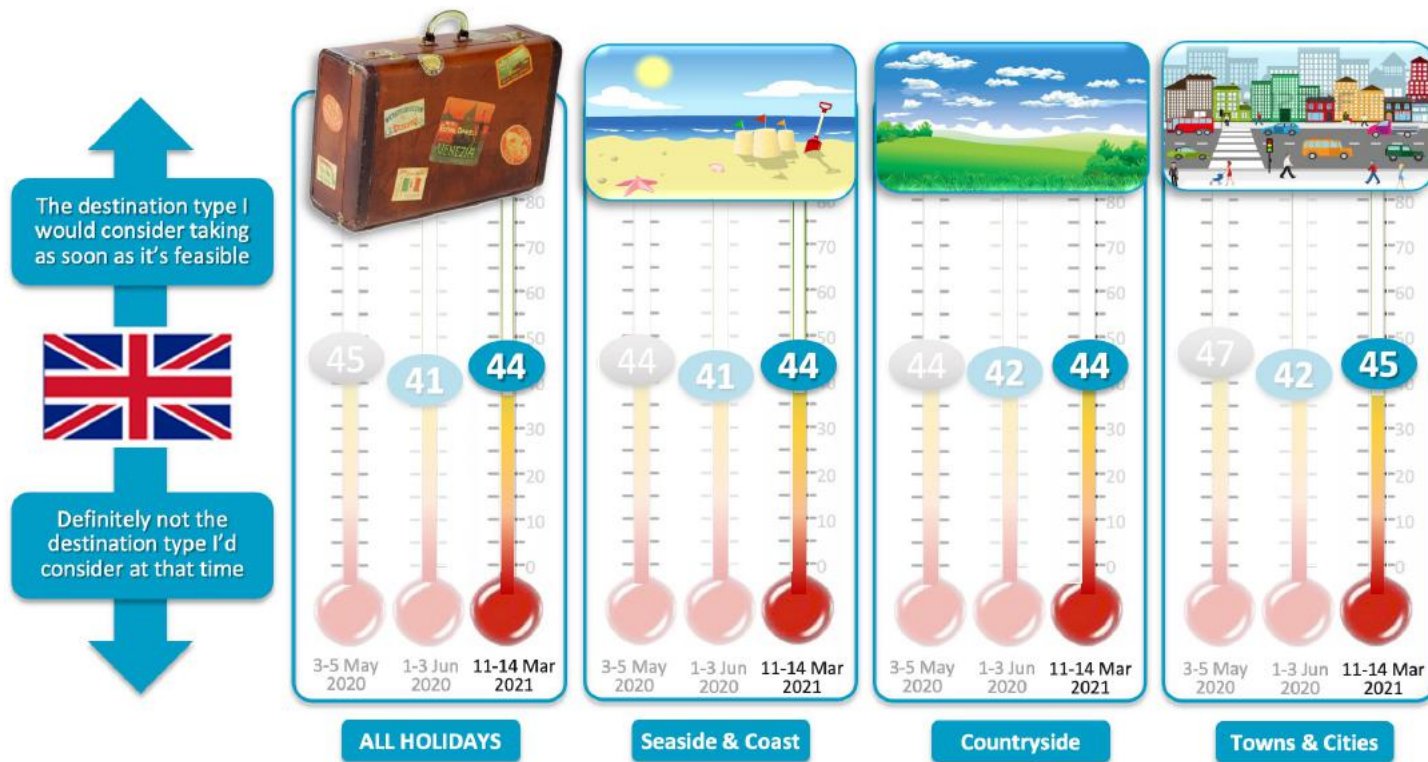
These levels of desire for Scottish holidays are mainly driven by pre-nesters and families, both with desirability scores significantly ahead of empty nesters





TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS IN ENGLAND AND WALES:

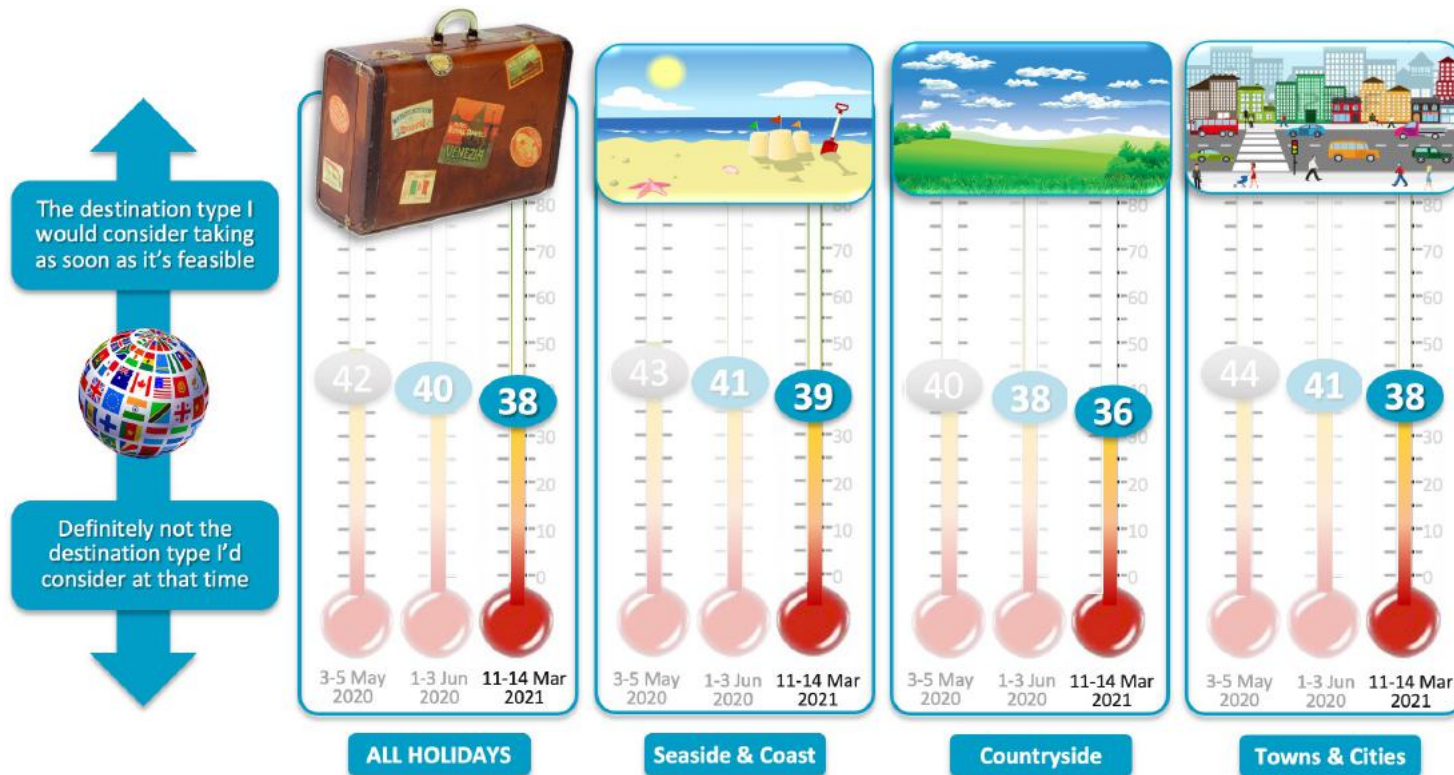
An interest in short breaks and holidays in England and Wales is much lower among Scots, though perhaps marginally ahead of June 2020





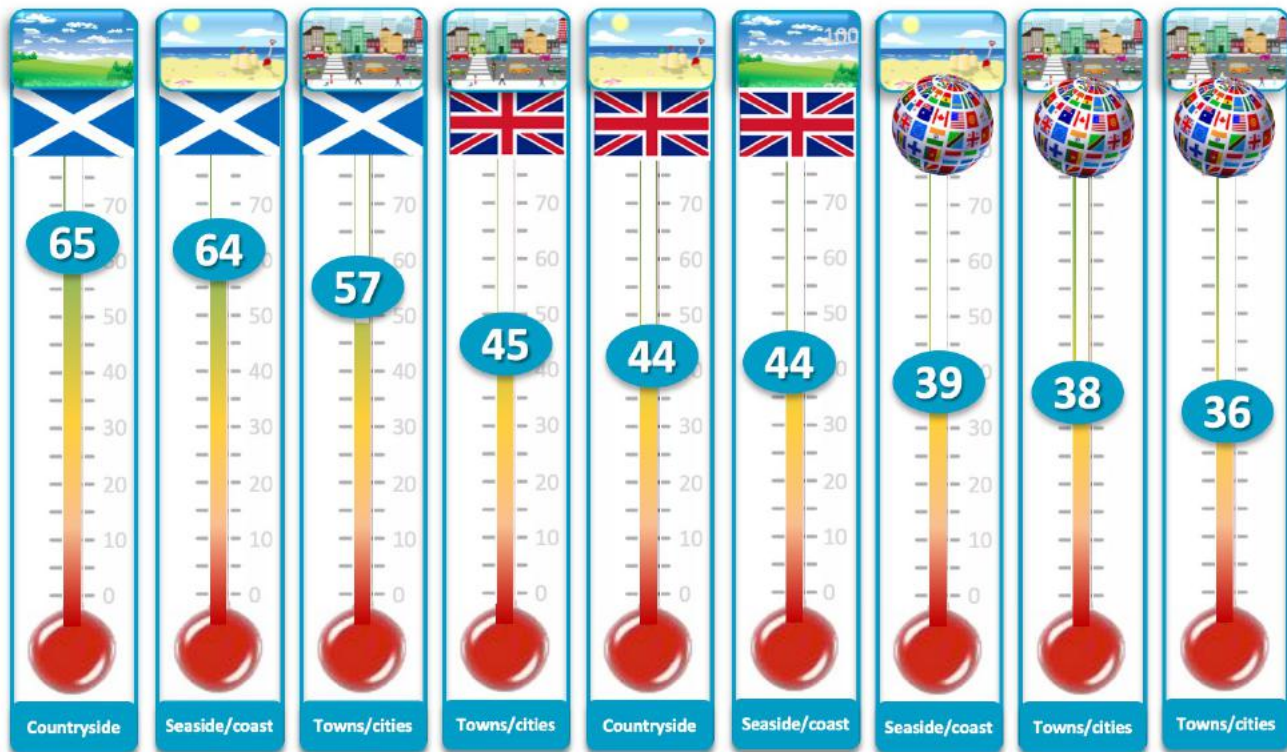
TOURISM DESIRABILITY SCORE – HOLIDAYS AND BREAKS OVERSEAS:

The desire to travel overseas for holidays and breaks is lower still – and below the levels recorded during lockdown in 2020



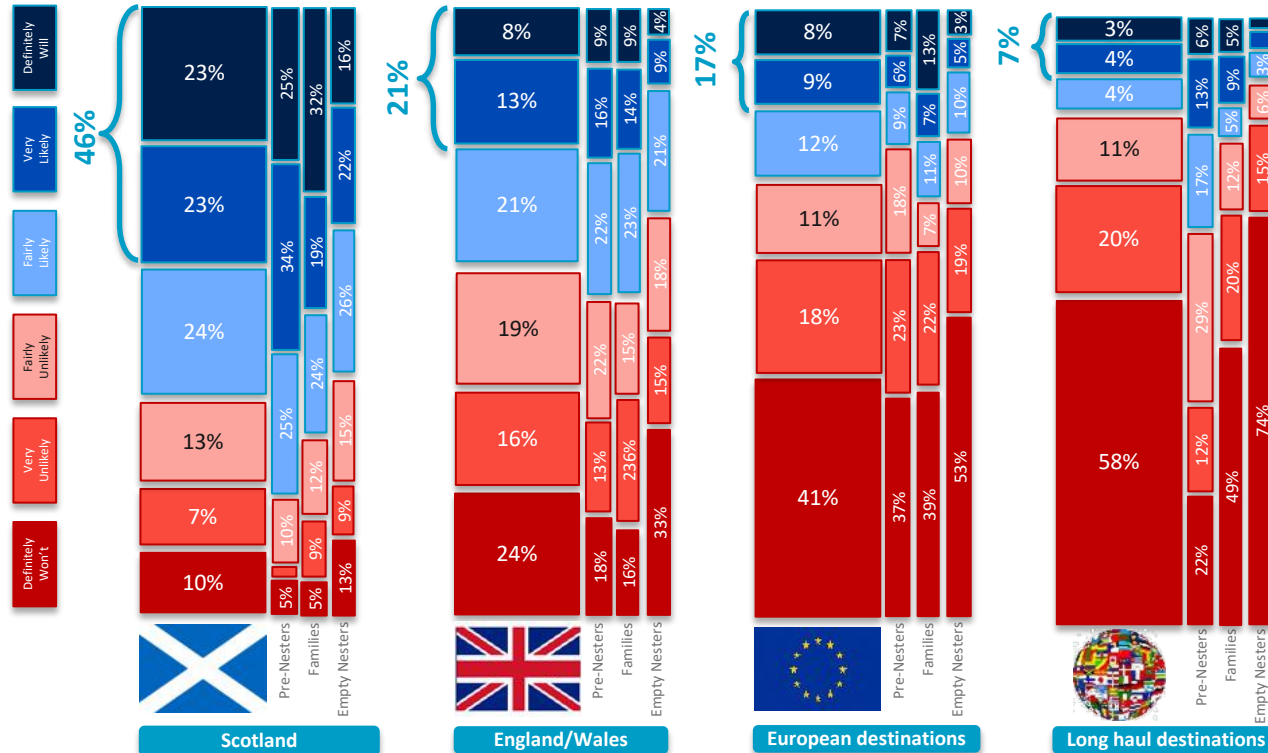
TOURISM DESIRABILITY SCORE

In Summary.....the relative appeal of a staycation in Scotland in 2021 is clear, relative to the lower levels of interest in trips to other parts of the UK or overseas.



LIKELIHOOD TO VISIT DIFFERENT DESTINATIONS IN 2021:

Scotland is clearly the most likely destination for most Scots' holidays this year – 46% are either definite or very likely to take a home holiday and a further 24% are fairly likely to do so





Scottish staycation prospects for 2021

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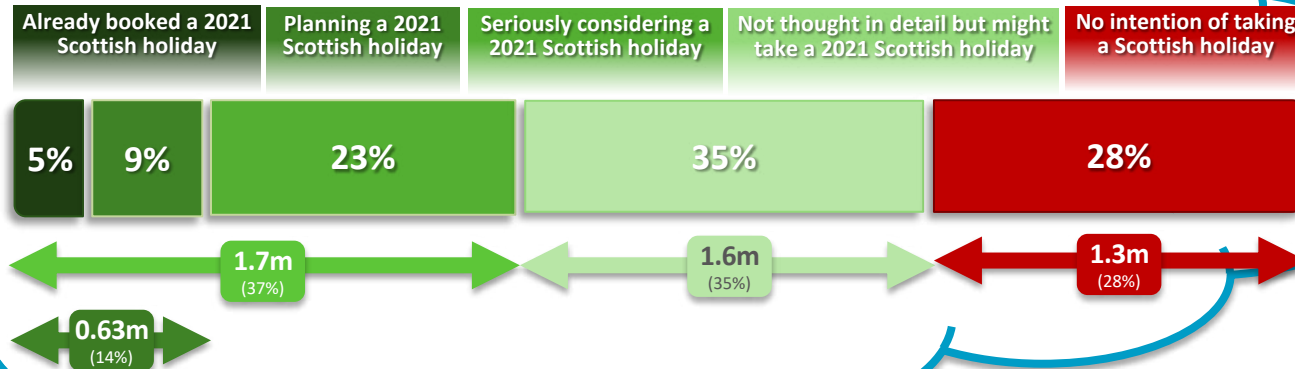


THE POTENTIAL SCALE OF SCOTTISH STAYCATIONS IN 2021 – PENETRATION WITHIN THE POPULATION:

Just under 4 in 10 Scots are seriously considering, planning or have booked a 2021 Scottish holiday – but a further 35% of Scots might be persuaded – 3.2 million adults in total

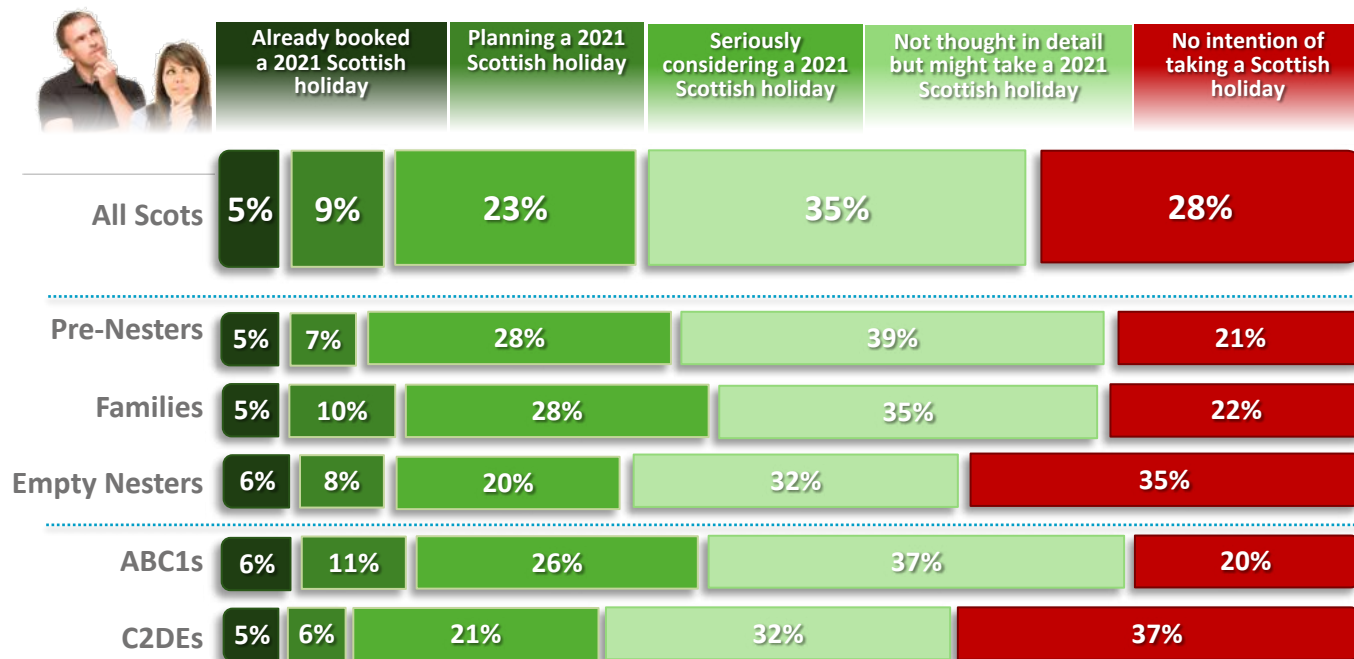


A Scottish holiday in 2021....?



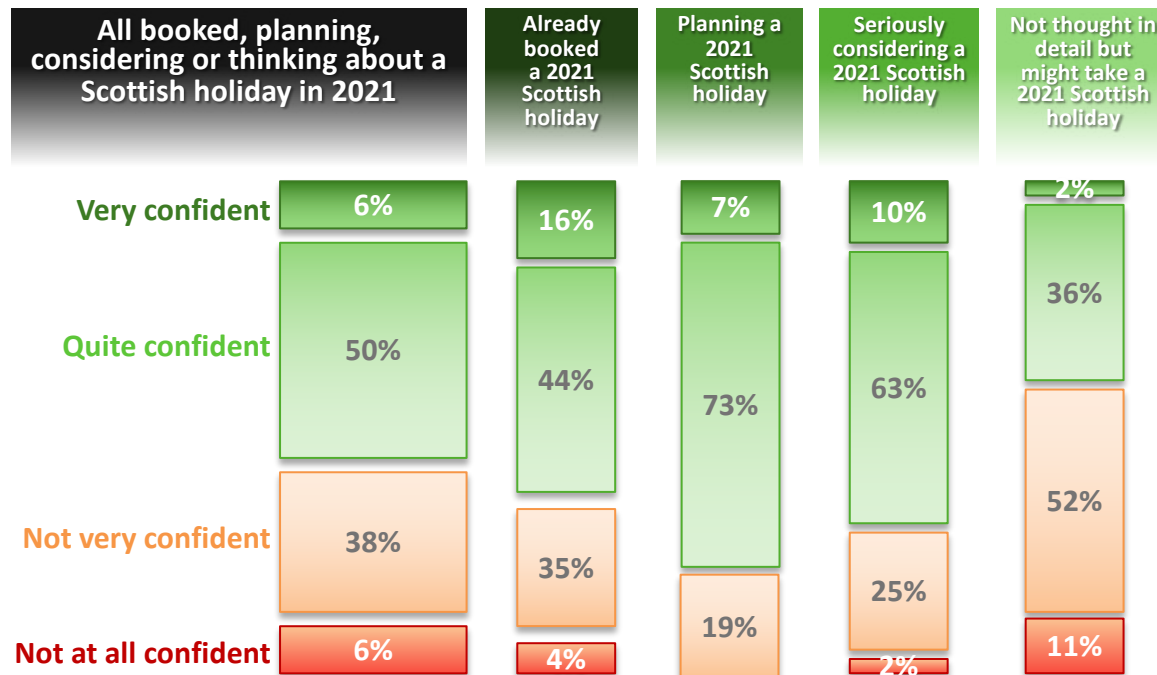
THE POTENTIAL SCALE OF SCOTTISH STAYCATIONS IN 2021 – VARIATIONS BY DEMOGRAPHICS:

Families and ABC1s are most likely to have booked, planned or be seriously considering a Scottish holiday in 2021 – slightly ahead of pre-nesters and significantly more likely than empty nesters.



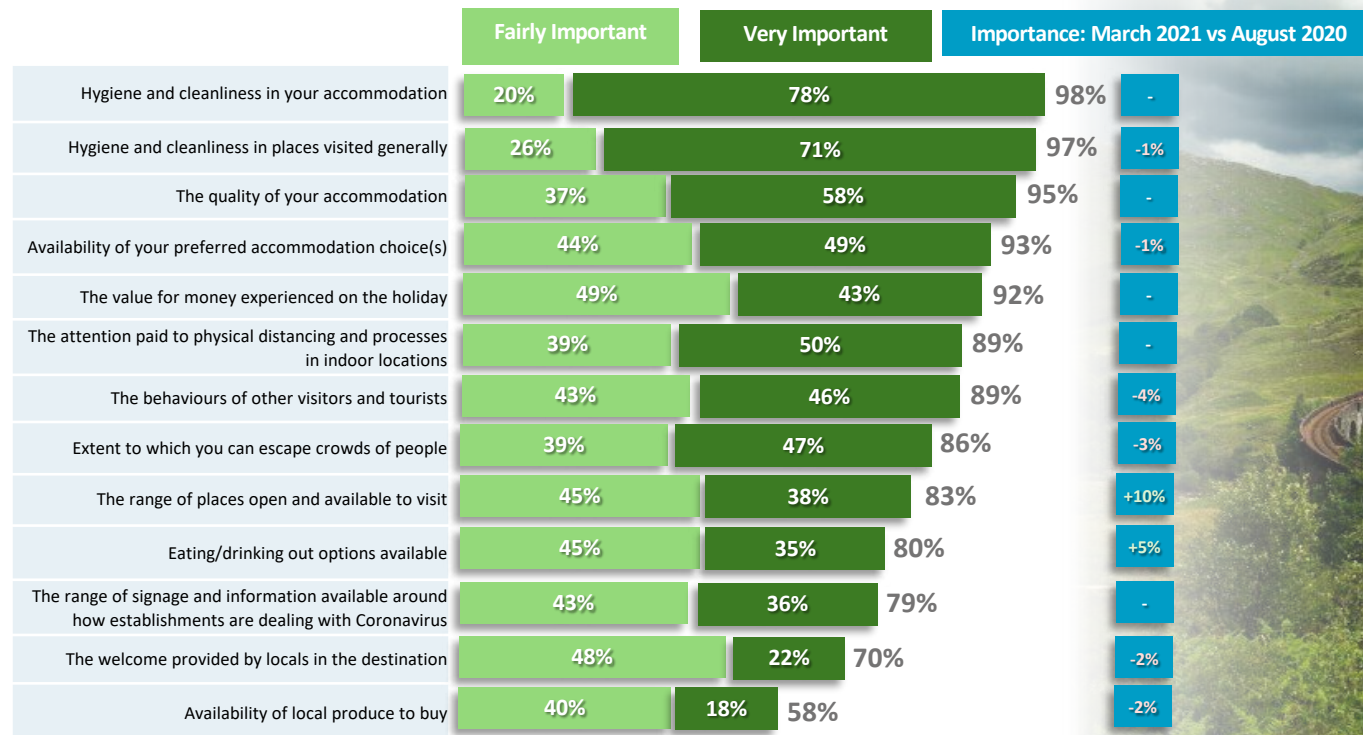
LEVELS OF CONFIDENCE THAT THEY WILL BE ABLE TO TAKE A SCOTTISH HOLIDAY IN 2021:

Amongst the 7 in 10 Scots who have booked, are planning, seriously considering or even just thinking about a 2021 staycation, just over half of them are confident that the holiday will be possible (56%)



WHAT'S IMPORTANT ON A SCOTTISH HOLIDAY IN 2021?

Hygiene and cleanliness top the list as the most important factors to be adequately addressed on a Scottish staycation in 2021– a similar response for 2020 holidays last August



HOW SCOTS ARE FEELING ABOUT OTHER ASPECTS OF A SCOTTISH STAYCATION, MARCH 2021:

As in 2020, many Scots are keen to lend their support to the tourism industry by booking a holiday as soon as they can – and three quarters would happily go ‘off the beaten track’



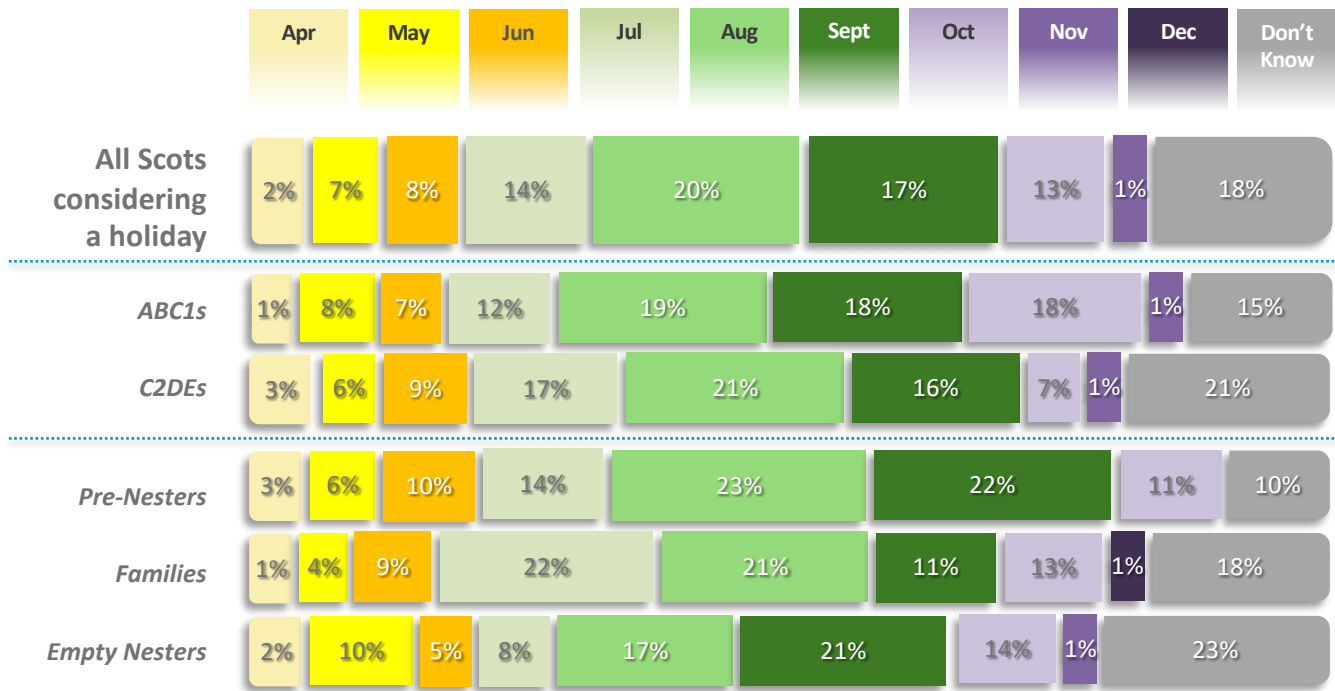


The anatomy of Scottish staycations in 2021



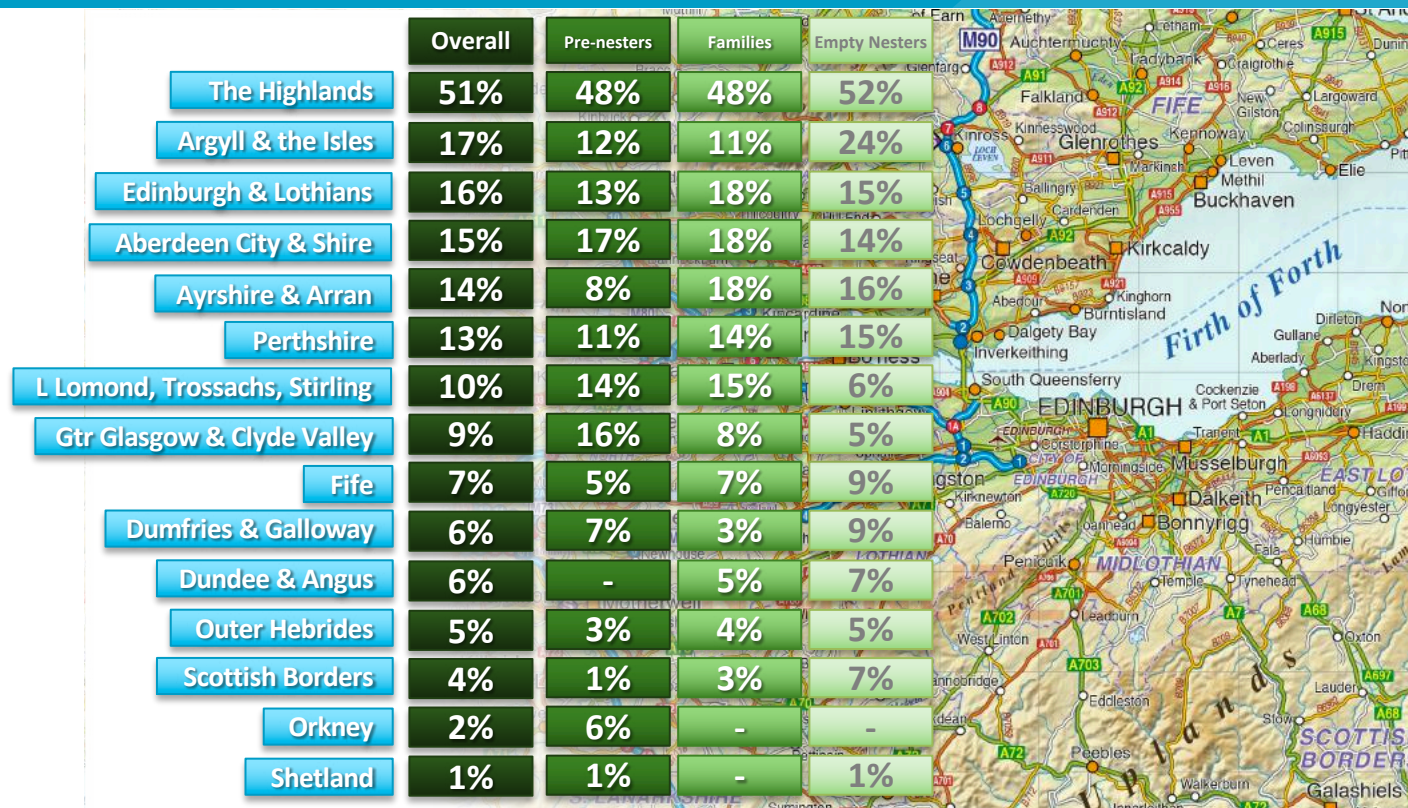
THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021 – WHEN SCOTTISH BREAKS MIGHT BE TAKEN:

Although 9% anticipate taking a holiday before the end of May, around half are expected to be in the July-September period



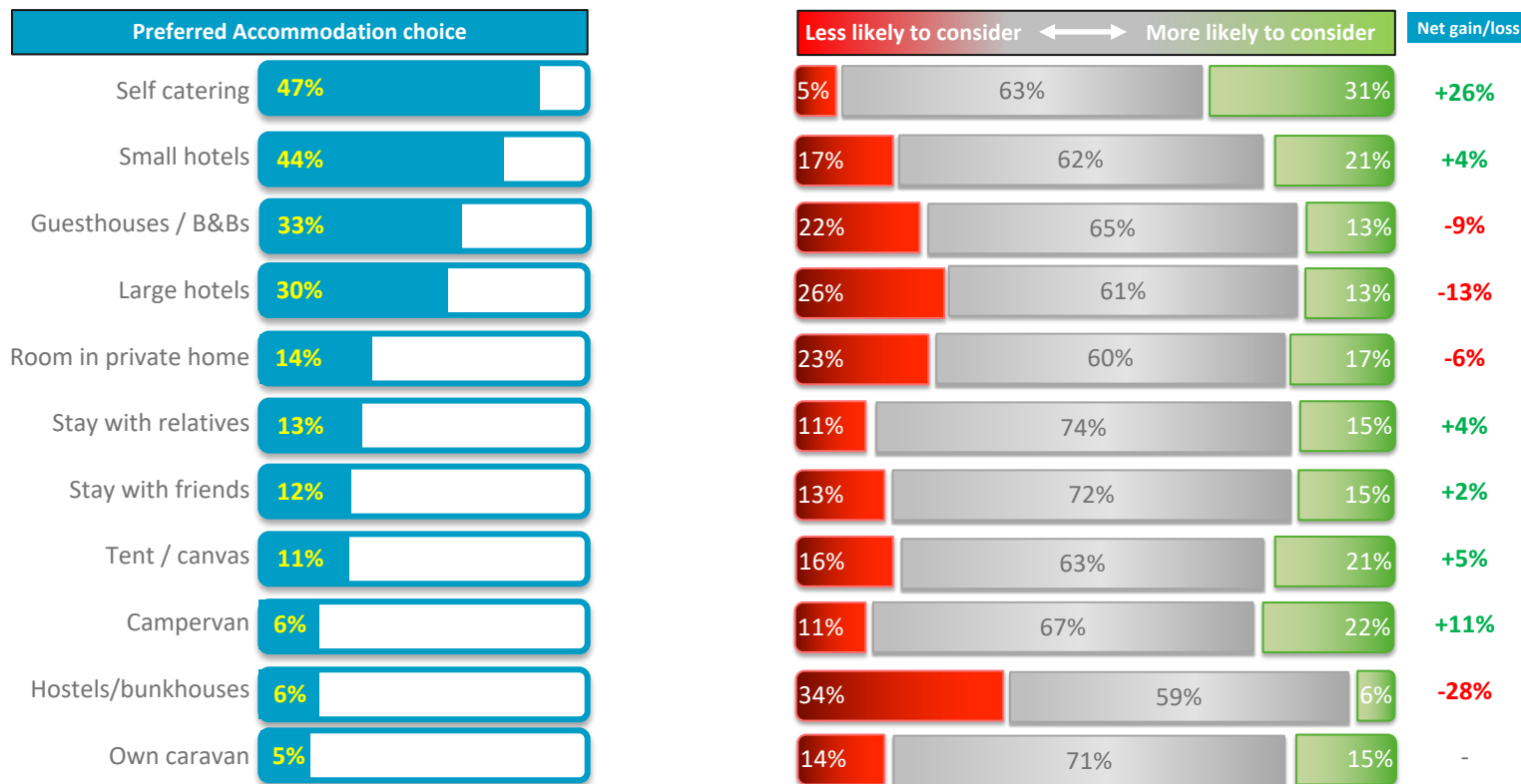
THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021 – WHERE THESE HOLIDAYS WILL BE TAKEN

Rural locations hold greatest appeal for Scots holidays in 2021 with the Highlands leading the way, followed by Argyll, Edinburgh & Lothians, Aberdeenshire, Ayrshire & Arran and Perthshire

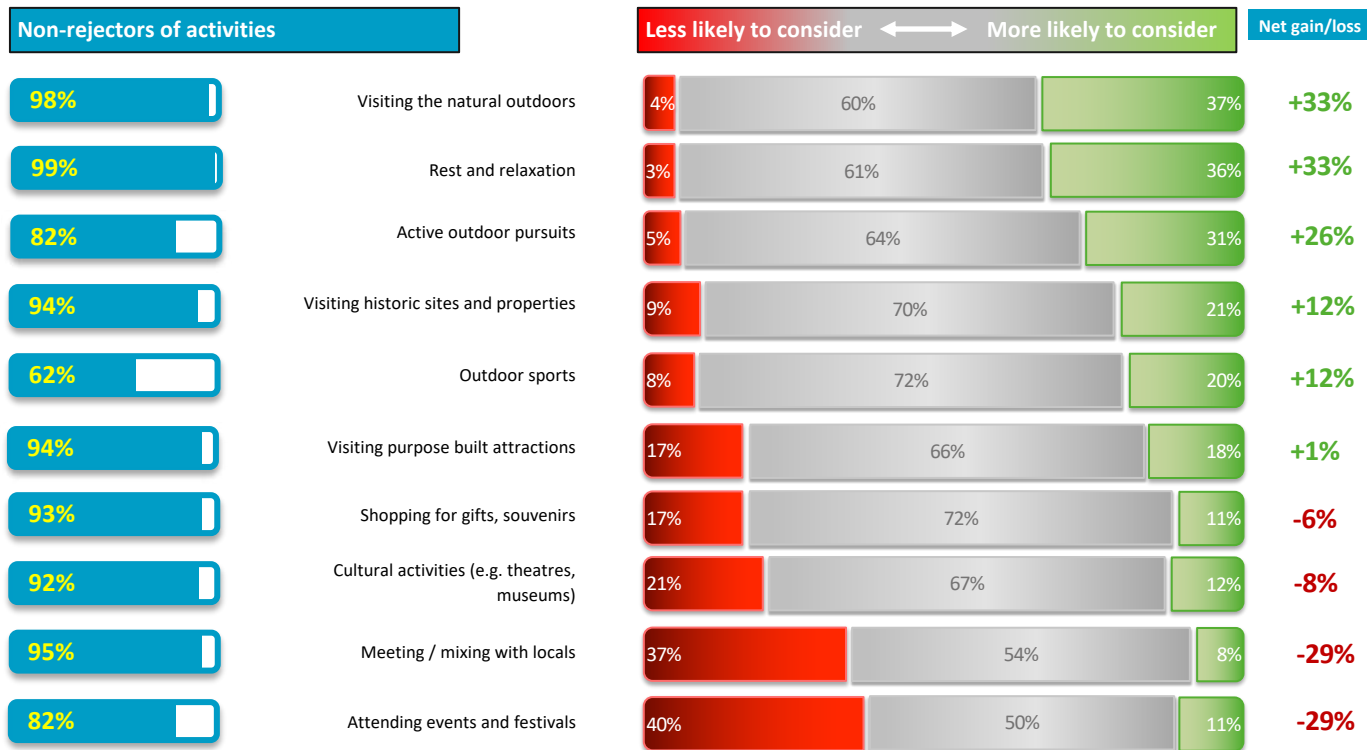


THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021: ACCOMMODATION CHOICES

As was the case in 2020, self-catering is the most popular form of accommodation that Scots will choose (47%) with a major swing to self-catering from pre-Pandemic accommodation choices

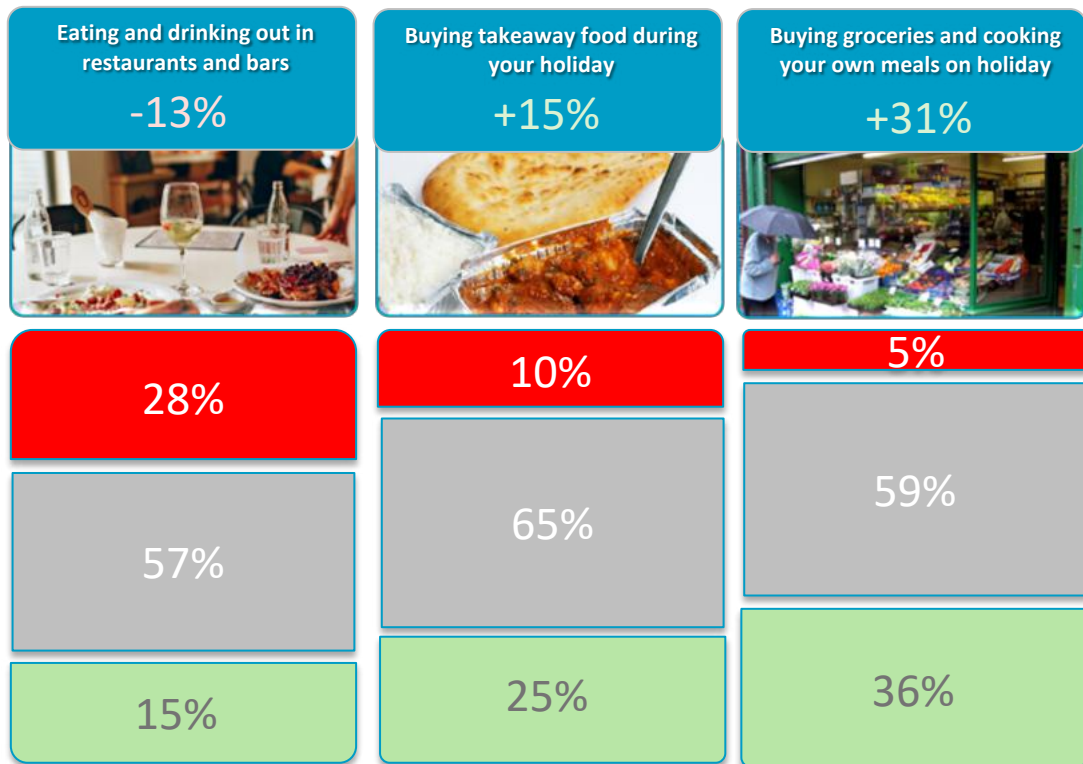


The natural outdoors, rest and relaxation and outdoor pursuits will have greater appeal on a 2021 Scottish break; events and meeting locals have much reduced appeal



THE ANATOMY OF THE SCOTTISH STAYCATION IN 2021 – EATING AND DRINKING

Reflecting the trends we saw in 2020, on a Scottish staycation there is a likely move away from eating in restaurants and bars to cooking at the holiday home and takeaways



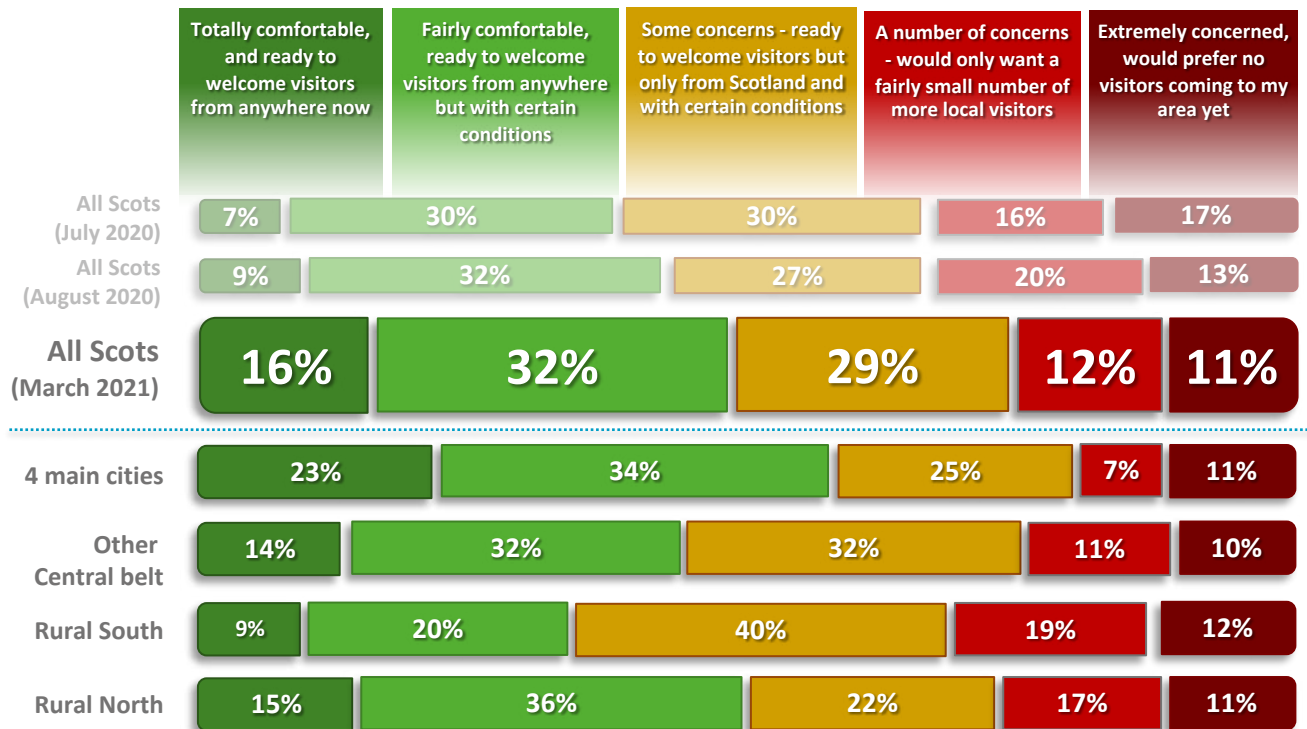


Impact on communities



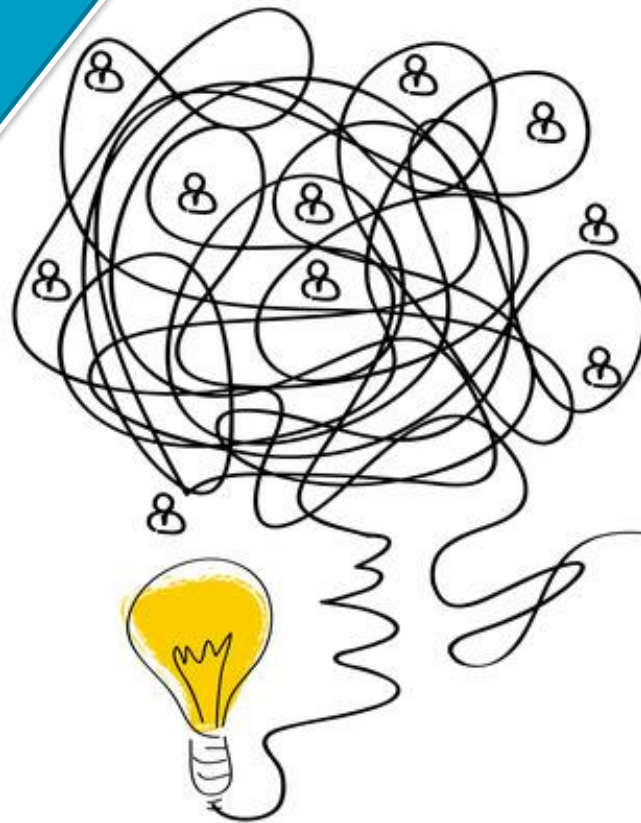
THE VIEWS OF LOCAL COMMUNITIES ABOUT TOURISM IN 2021:

Although Scots are keen to take holidays at home, a feeling of nervousness about tourists coming into their own communities remains – though less so than in 2020





In Summary.....



IN SUMMARY.....(1)



Whilst there is room for some optimism, the latest Scottish Tourism Index demonstrates that there are a number of challenges ahead to ensure home-base holidays (staycations) can provide the tourism industry with the much needed boost it needs in 2021

- Over a fifth of Scots are simply not thinking about holidays yet (22%) and 27% feel that holidays are something they won't be planning for some time. These groups remained concerned about risks of transmission and would like to wait until the vaccine rollout and declining cases reach a level where they feel completely safe.
- However, the remaining half of the population are more positive about taking a holiday this year – indeed 1 in 8 (12%) are desperate for a holiday and will take one as soon as they can. Members of this group feel they need to travel, to escape from the difficulties of the last 12 months.
- Almost half (46%) of Scots are very likely or definite about taking a home holiday this year – and a further 24% are fairly likely – 7 in 10 Scots overall. This compares with around two in five likely to go elsewhere in the UK (42%), three in ten into Europe (29%) and 11% further afield.
- However the uncertainty of what will be possible this year means that only a small proportion of Scots have already booked a 2021 staycation (5%) while a larger percentage (32%) are just at the planning or consideration stages.
- When asked to rate the importance of a different factors if they were to take a Scottish staycation high standards of hygiene and cleanliness were rated most highly. Mitigations to aid social distancing remain important but notably less so than in the summer of 2020. More important in 2021 were reassurances that there would be a range of places open to visit and where it would be possible to eat and drink.



IN SUMMARY.....(2)



- While 17% of Scottish staycations are expected to be taken before the end of June, a larger percentage (51%) are expected to take place between July and the end of September, and 14% in the last quarter. Reflecting the uncertainty amongst consumers, 18% of those planning a trip are unsure of when.
- As in 2020, rural locations continue to hold greatest appeal with the Highlands leading the way, followed by Argyll, Edinburgh & Lothians, Aberdeenshire, Ayrshire & Arran and Perthshire.
- Also reflecting demand in 2020, self-catering accommodation continues to be the most popular for holidays planned for 2021 with 47% intending to stay in this type of accommodation. Small hotels are likely to be used by 44%, guesthouses/B&Bs by 33% and large hotels by 30% - and all other types of accommodation by less than 15% in each case.
- Underlying these percentages there are shifts in accommodation preferences compared with pre-COVID. Self-catering in particular now has much greater appeal (+25% swing) as do campervans (+11%).
- In terms of activities undertaken on holidays, 33% of Scots are more likely to consider visiting the natural outdoors on a Scottish holiday post-COVID-19, and a similar percentage are more likely to seek rest and relaxation. More active pursuits such as walking and cycling are also more popular with +26% appeal. In contrast indoor activities such as visits to arts and cultural venues and shopping for gifts and souvenirs will still have reduced appeal.
- Considering Scottish community attitudes to the re-opening of tourism, although a degree of reticence remains (23% would at most only want small numbers of visitors), compared to 2020 there is a more relaxed attitude towards visitors generally with almost half (48%) of the population feeling comfortable and ready to welcome visitors.



Questions....

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Download the Report here:

www.56degreeinsight.com/scottish-tourism-index

Any questions? A follow-up discussion?

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