

SOUTH OF SCOTLAND DESTINATION ALLIANCE

Segmentation research

Full report

OCTOBER 2021

.YONDER

Research summary

Holiday Aspirations

- + While under half plan to book a non-city UK holiday in the next 6 months – likelihood to do so increases significantly with time. Most are open to a holiday in the UK – but good weather and an opportunity to get away from day-to-day life is essential for the majority
- + Unprompted mention of South of Scotland is low – but many want to visit Scotland more generally. Prompted desire to visit the South of Scotland is higher
- + Cornwall, the Lake District and Cumbria and the Scottish Highlands are the most desirable places to visit
- + Many associate wildlife and nature, the outdoors, walking, visiting historical sites and open spaces with the South of Scotland, but associations are lower than with other locations – and many are uncertain

The South of Scotland

- + Opinions on the South of Scotland are rarely negative. Indeed, there is a shared belief that it has untapped potential and could be an easy, accessible way of exploring Scotland – but many are unsure
- + Despite this, there is a sizable proportion feel they might as well go to the Highlands and Islands if going to Scotland
- + Likelihood to choose tested South of Scotland activities is mixed – and drops dramatically when outside of the Summer months

Holiday preferences

- + Statistical analysis reveals that going to the coast / beach, exploring nature and wildlife and trying food and drink are the most appealing features of a holiday – all of which the South of Scotland has to offer
- + Summer months are the preferred months to travel – and most travel by car, expecting the journey to last between 2 and 5 hours
- + Respondents book holidays a few months in advance and expect their holiday to cost around £350pp

IMPORTANT

Methodology

Yonder Consulting conducted an online survey among 3,440 UK adults (excluding adults in the Scottish Borders and Dumfries and Galloway) between 31st August and 15th September 2021.

Quotas were set and weights applied in order to ensure the data were nationally representative of adults (18+) in UK.

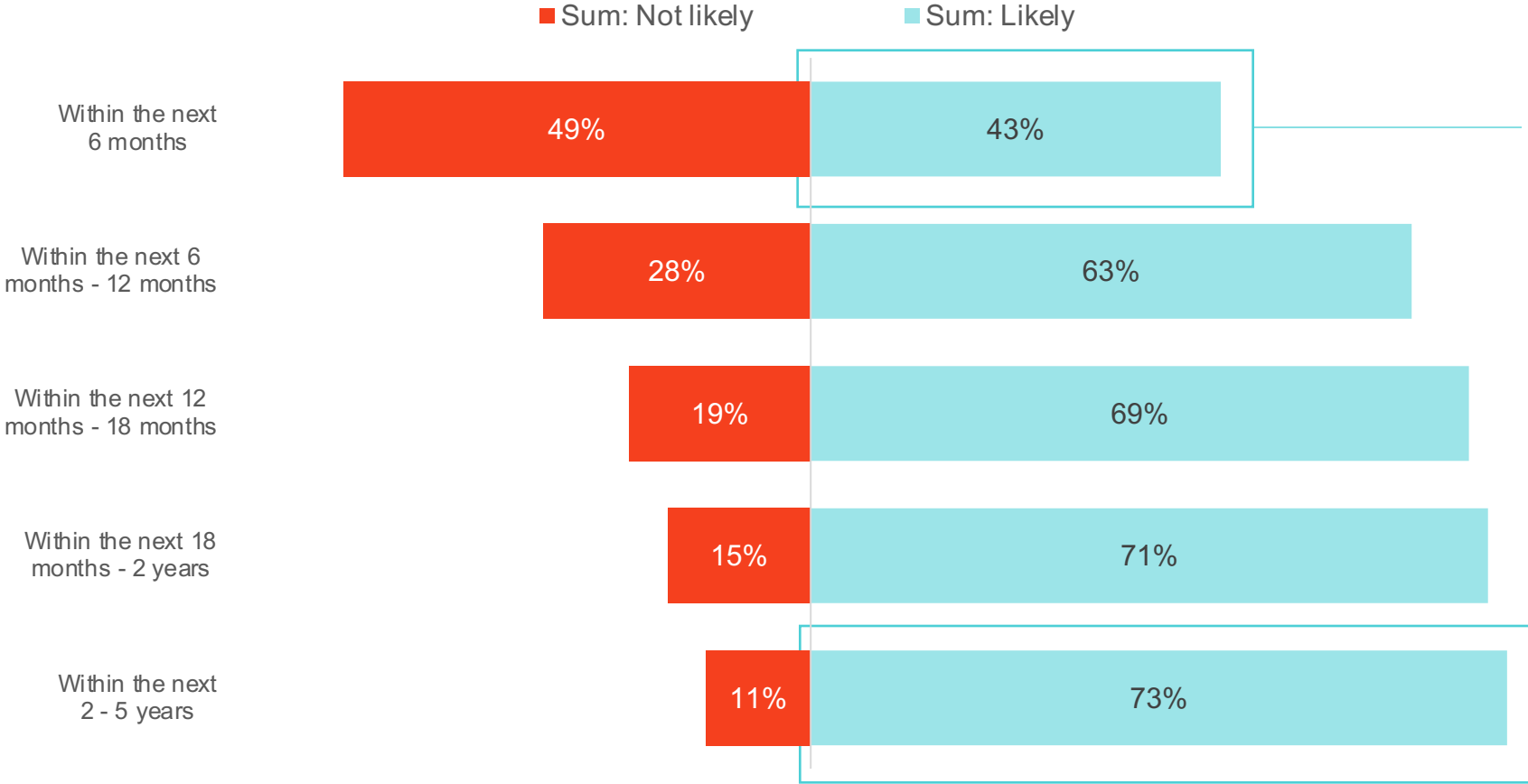
Percentages may not sum to 100% due to rounding.

Yonder is a member of the British Polling Council and abides by its rules. Yonder was formerly known as Populus, and changed trading names in October 2020. For more information, see www.yonderconsulting.com

Holiday aspirations

Likelihood to book a non-city UK holiday increases with time – with three-quarters likely to do so in the next 2-5 years

How likely or unlikely, if at all, are you to book a holiday in a non-city location within the UK within each of the following timeframes?

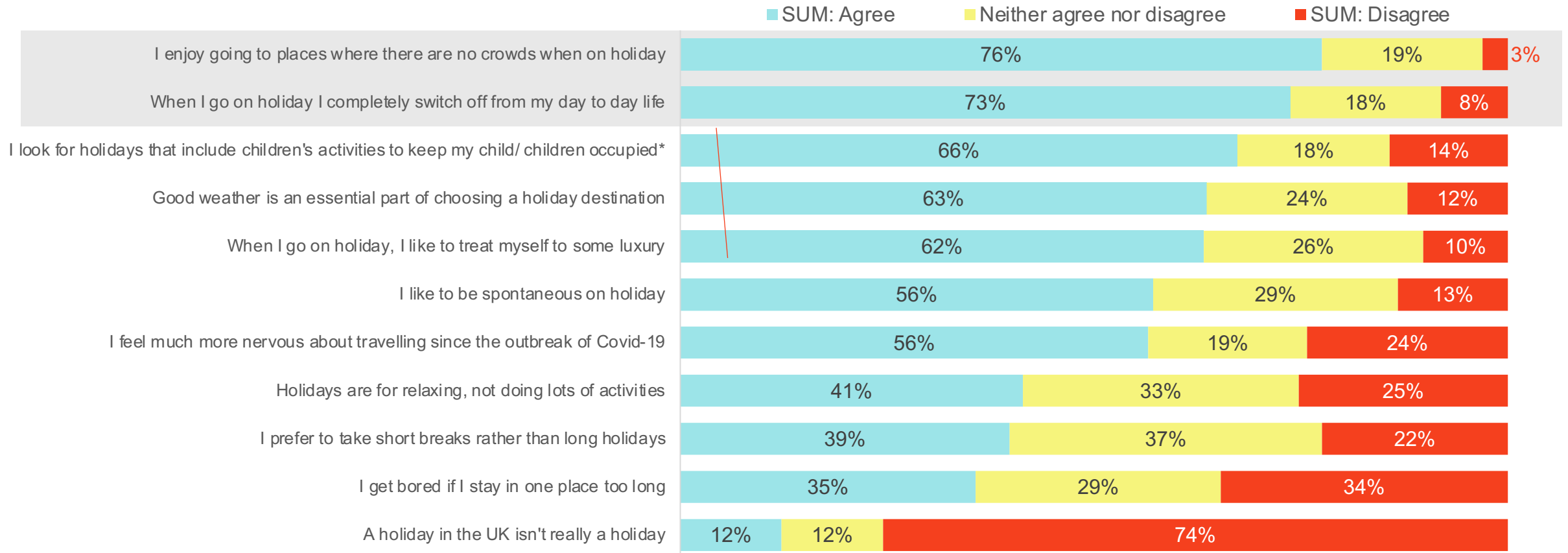


- + Just over **two-in-five** (43%) were **likely to book a non-city UK holiday** in the next six months – likely due to nervousness around Covid-19.
- + However, **likelihood to do so increased with time**, building to 73% within the next 2 – 5 years.

For the majority, holidays were an opportunity to get away from day to day life and crowds

+ Many like to **avoid crowds** when on holiday (76%), while a similar number, saw holidays as a chance to completely **switch off** from day to day life (73%)

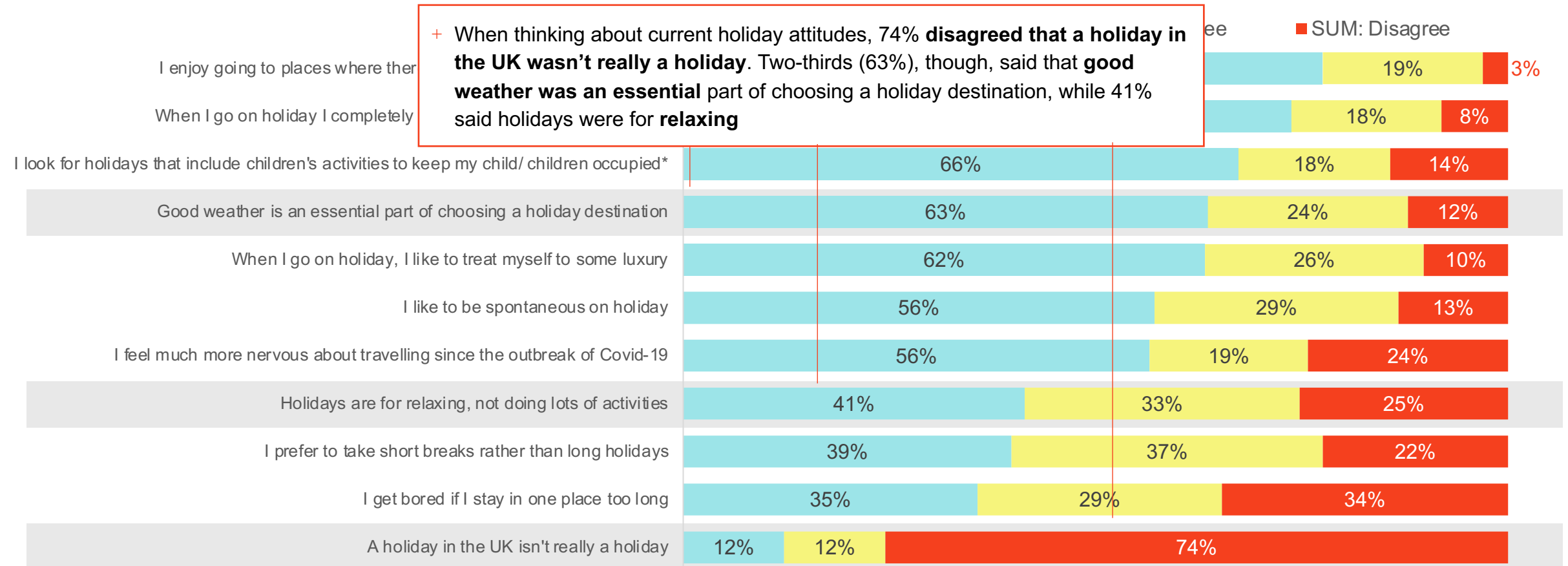
Thinking again about holidays, to what extent do you agree or disagree with each of the following statements?



SSDA - Clockface Segmentation
 Base: All (3,440), Parents (969)
 *NB asked of parents only

Most were open to a holiday in the UK – but good weather was essential for the majority

Thinking again about holidays, to what extent do you agree or disagree with each of the following statements?



SSDA - Clockface Segmentation

Base: All (3,440), Parents (969)

*NB asked of parents only

The South of Scotland

The customer decision journey: South of Scotland locations

Scottish Borders

Unprompted favourable:
<1%

Favourable:
46%

Have researched:
17%

Preference:
3%

Dumfries and Galloway

Unprompted favourable:
<1%

Favourable:
30%

Have researched:
15%

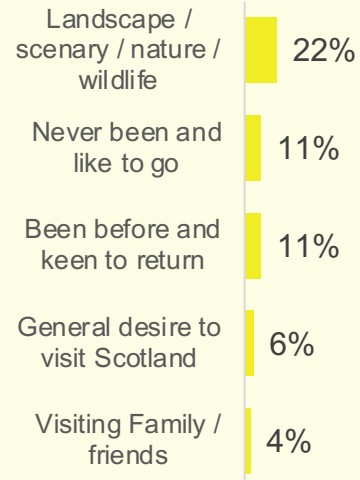
Preference:
2%

Dashboard: South of Scotland locations

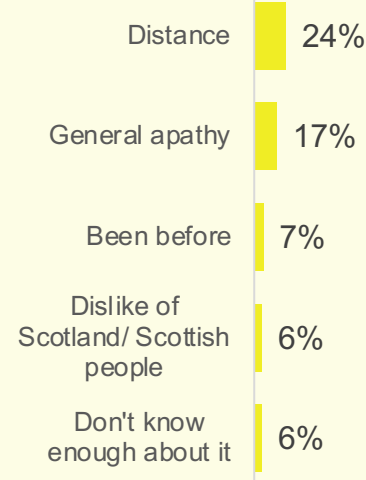
Scottish Borders

46% Would like to visit (prompted) **<1%** Unprompted mention
83% Of those wanting to visit who are likely to do so **17%** Of those wanting to visit who have researched doing so

Reasons for wanting to visit



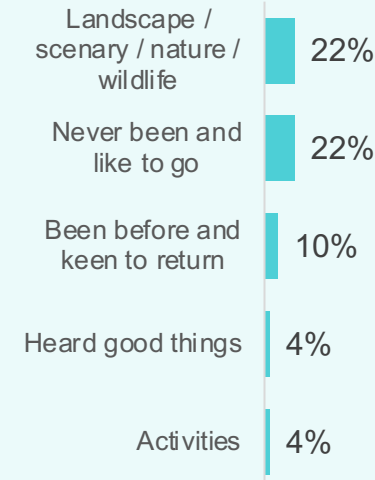
Reasons for not wanting to visit



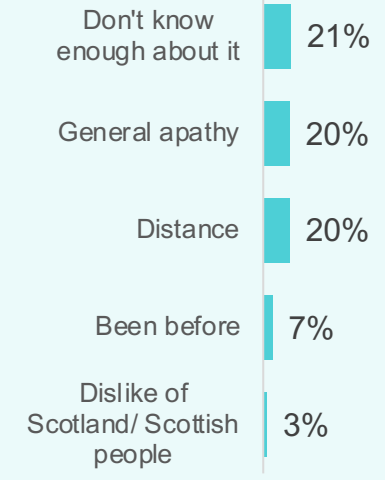
Dumfries and Galloway

30% Would like to visit (prompted) **<1%** Unprompted mention
82% Of those wanting to visit who are likely to do so **15%** Of those wanting to visit who have researched doing so

Reasons for wanting to visit



Reasons for not wanting to visit



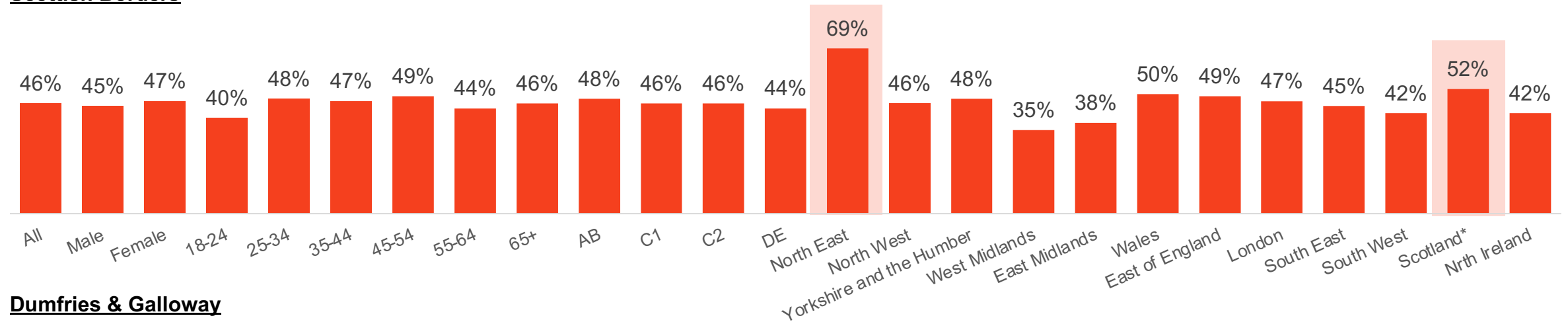
SSDA - Clockface Segmentation

Base: All (3,440), Those who want to visit each area (Scottish Borders = 1,582, Dumfries & Galloway = 1,032). Those who do not want to visit each area (Scottish Borders = 758, Dumfries & Galloway = 1,048).

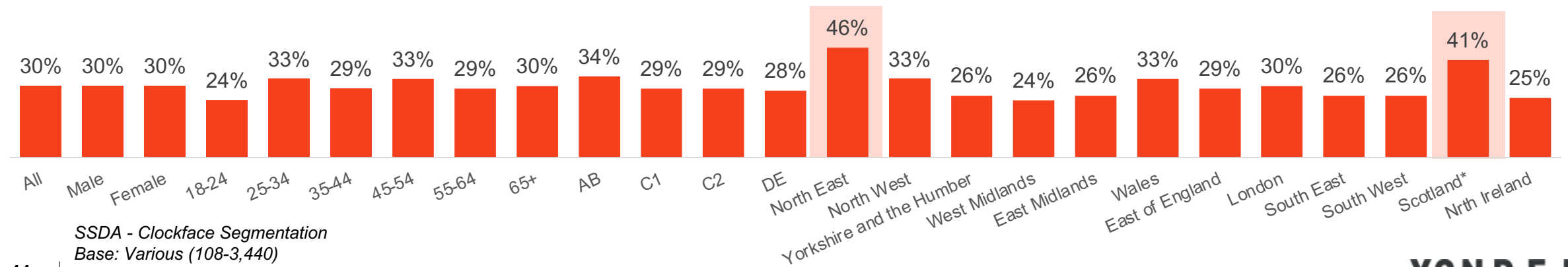
Those most likely to visit South of Scotland locations in the future include those in the North East and rest of Scotland

To what extent, if at all, would you like to visit each of the following UK locations on a holiday in the future? *Sum: Likely*

Scottish Borders



Dumfries & Galloway



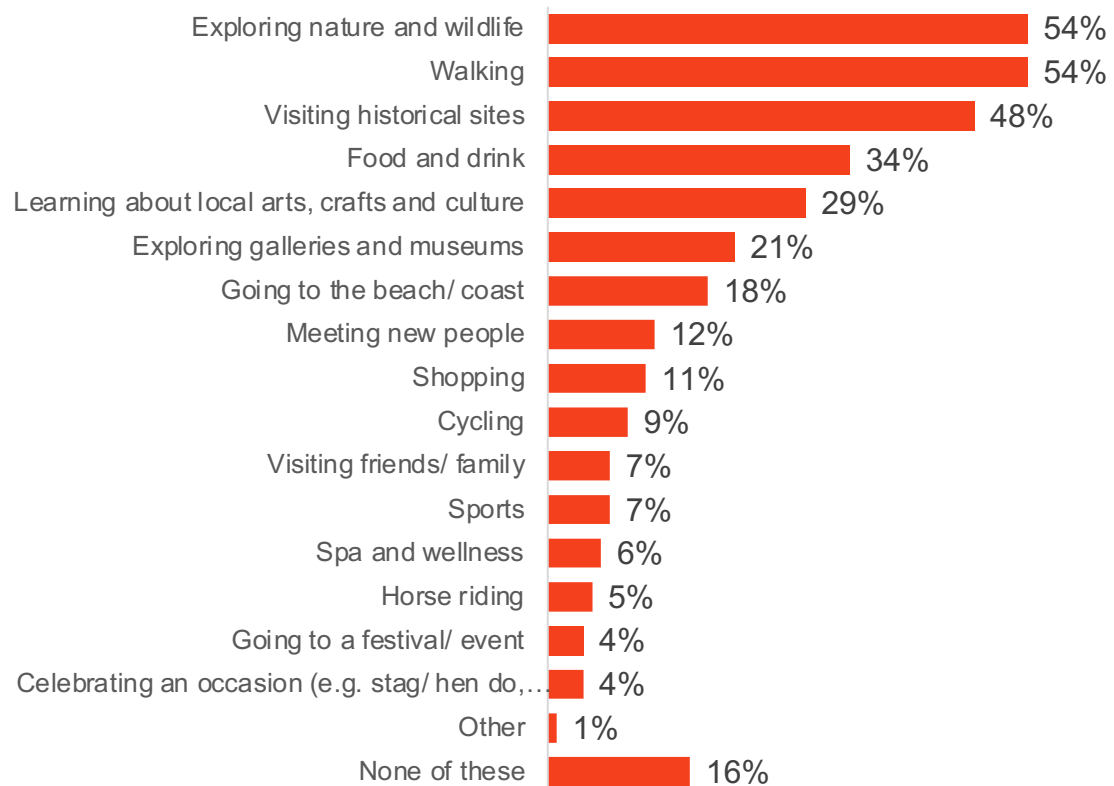
SSDA - Clockface Segmentation

Base: Various (108-3,440)

* NB Scotland excludes respondents in Dumfries & Galloway and Scottish Borders

The South of Scotland is associated with activities like exploring wildlife and nature, walking, and visiting historical sites

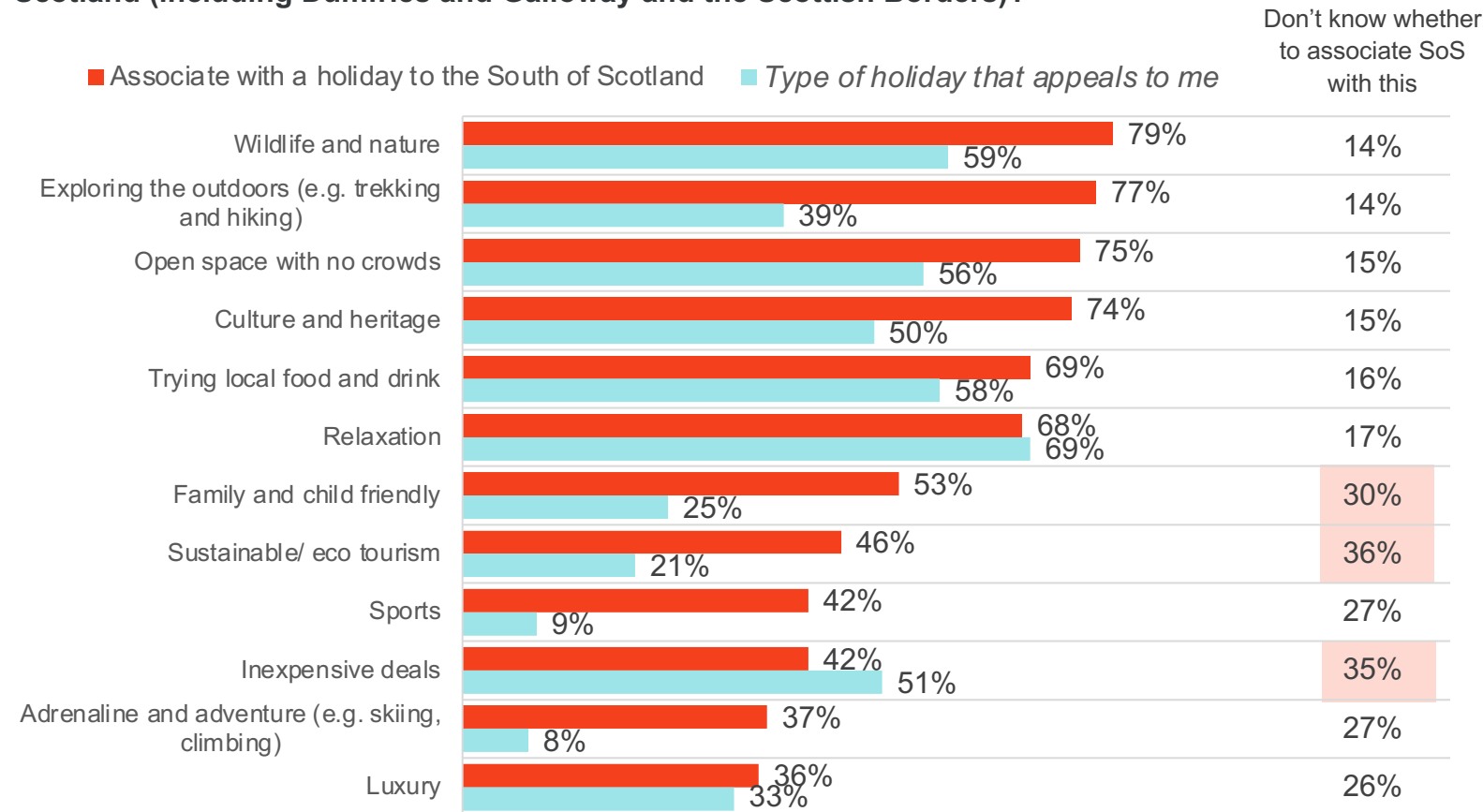
Which of the following activities, if any, do you most associate with a holiday to the South of Scotland (including Dumfries and Galloway and the Scottish Borders)?



- + The activities most associated with a holiday to the South of Scotland included exploring **nature and wildlife** (54%), **walking** (54%), visiting **historical sites** (48%) and enjoying **food and drink** (34%).
- + These four activities were also the activities most associated with The Cotswolds, the Lake District and Cumbria, and the Scottish Highlands.
- + Activities like learning about local arts, exploring galleries, cycling, sports and horse-riding, which are part of the South of Scotland offer, were had far weaker associations (29%, 21%, 9%, 7% and 5% respectively).

Many associate wildlife and nature, the outdoors, and open spaces with the SoS, but associations are lower than with other locations

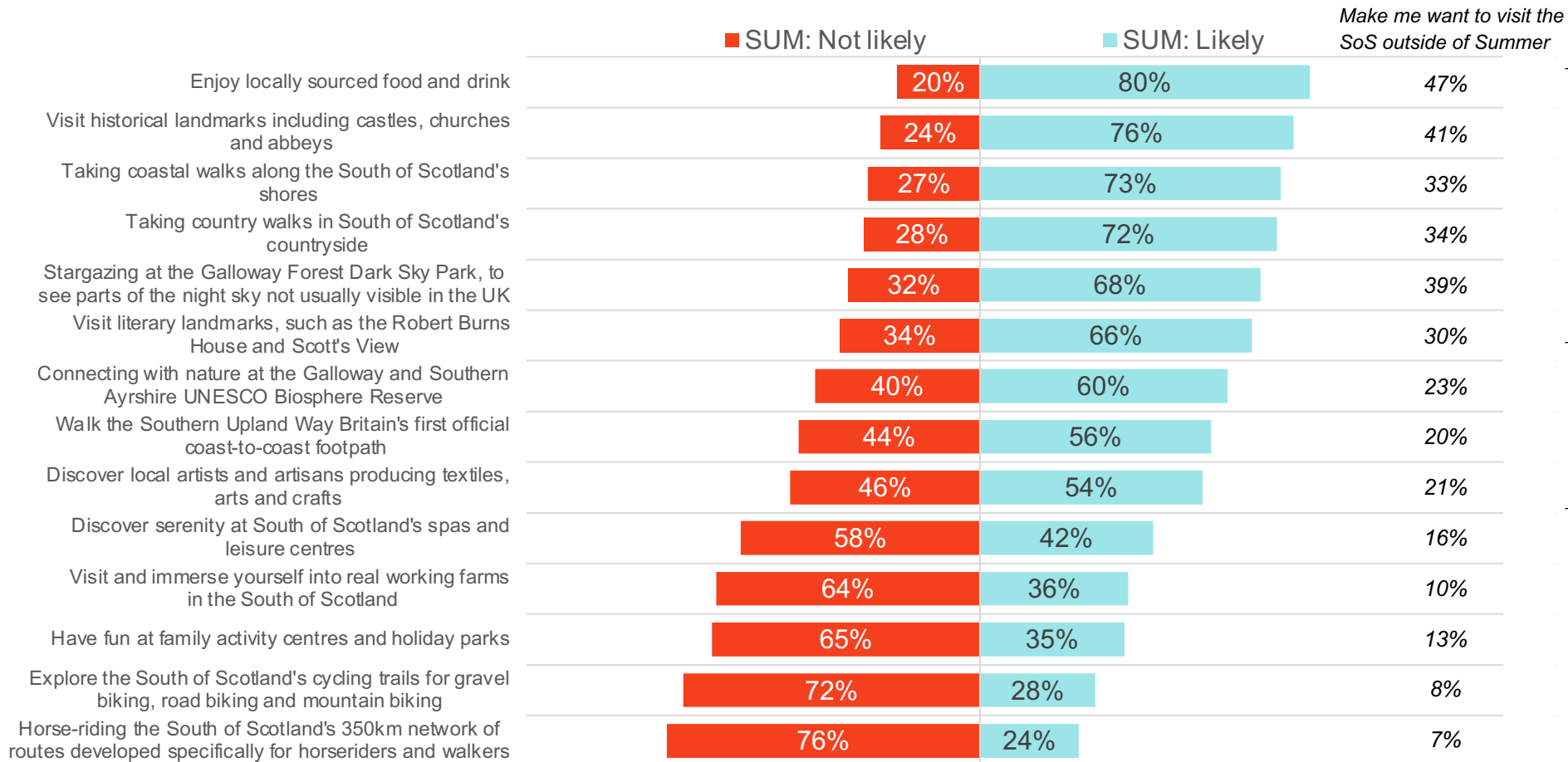
Which of the following activities, if any, do you most associate with a holiday to the South of Scotland (including Dumfries and Galloway and the Scottish Borders)?



- + The South of Scotland was most commonly associated with **wildlife and nature** (79%), exploring the **outdoors** (77%), **open space with no crowds** (75%) and culture and heritage (74%).
- + Quite a few are **unsure of associations** with the South of Scotland – 36% don't know about its sustainability, while 35% are unsure about whether it offers inexpensive deals (even though inexpensive deals would appeal to 51%).
- + **Associations are, across the board, lower than associations with places like Cornwall, Lake District & Cumbria and the Scottish Highlands**, where associations are in their 80s and 90s.

Likelihood to choose South of Scotland activities is mixed – and drops dramatically when outside of the Summer months

Looking at the following list of South of Scotland holidays, how likely or unlikely would you be to choose to do each of the following in the future?



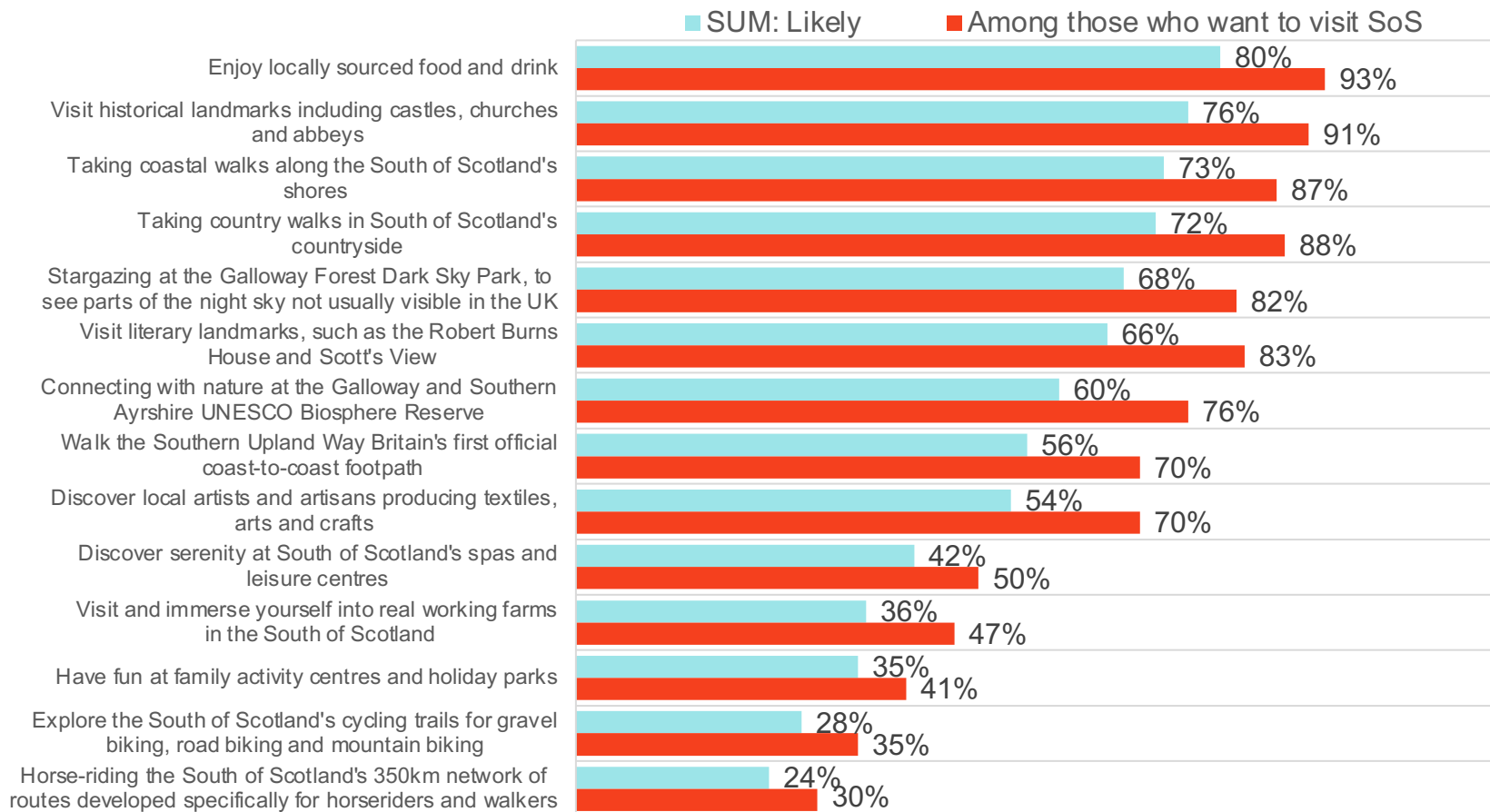
+ Activities that respondents would most likely do included enjoying locally sourced **food and drink** (80%), visiting **historical sites** (76%), taking **coastal walks** (73%) and taking **country walks** (72%).

+ Only 24% would be likely to go horse-riding, while 29% would be likely to explore Scotland's cycling trails.

+ **Likelihood drops dramatically** when asked if activities would make respondents want to **visit outside of summer**.

Those who want to visit the South of Scotland are more likely to choose to do all of the SoS activities

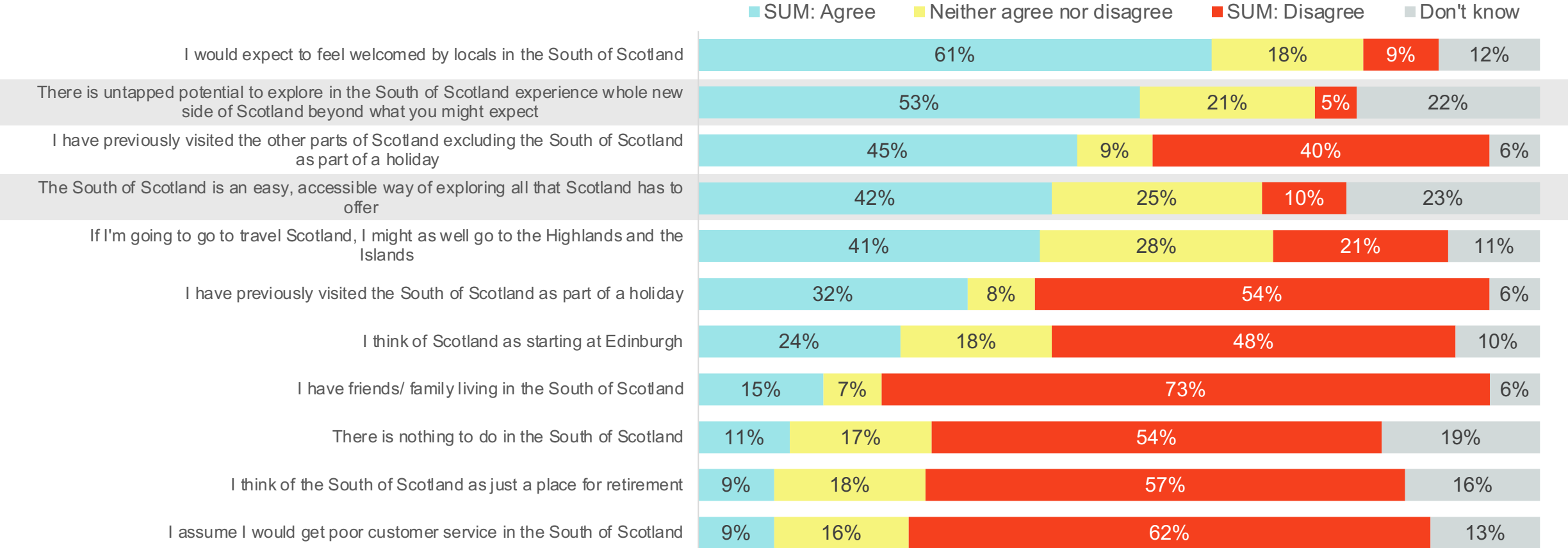
Looking at the following list of South of Scotland holidays, how likely or unlikely would you be to choose to do each of the following in the future?



- + The greatest uplift is for visiting **literary landmarks** (+17%), taking **country walks** (+16%) an, visiting the UNESCO **Biosphere Reserve** (+16%) and discovering **local artists and artisans** (+16%).
- + Activities with the lowest uplift include horse-riding (+6%), enjoying facility activity centres (+6%) and cycling (+7%).

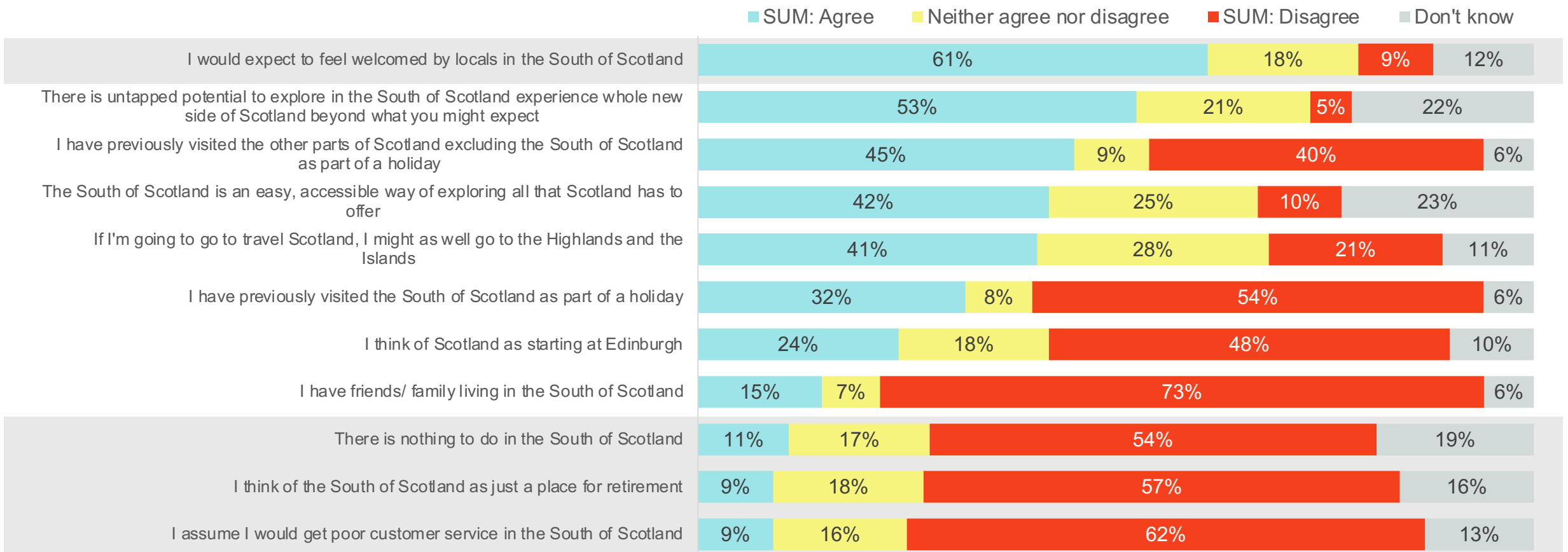
A plurality agree SoS has untapped potential and could be an easy, accessible way of exploring Scotland – but many are unsure

Thinking again about the South of Scotland (including Dumfries and Galloway and the Scottish Borders), to what extent do you agree or disagree with each of the following statements?



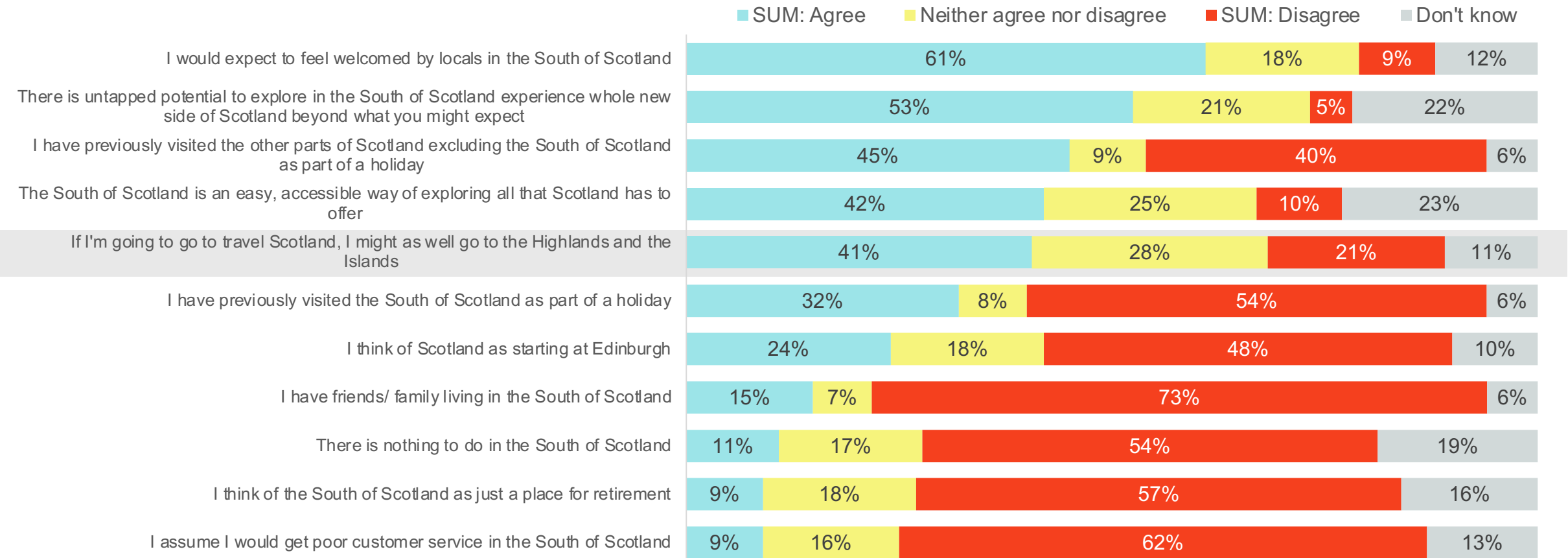
Opinions on the South of Scotland are rarely negative – few assume poor customer service, or think there is nothing to do

Thinking again about the South of Scotland (including Dumfries and Galloway and the Scottish Borders), to what extent do you agree or disagree with each of the following statements?



Despite this, there is a sizable proportion feel they might as well go to the Highlands and Islands if going to Scotland

Thinking again about the South of Scotland (including Dumfries and Galloway and the Scottish Borders), to what extent do you agree or disagree with each of the following statements?



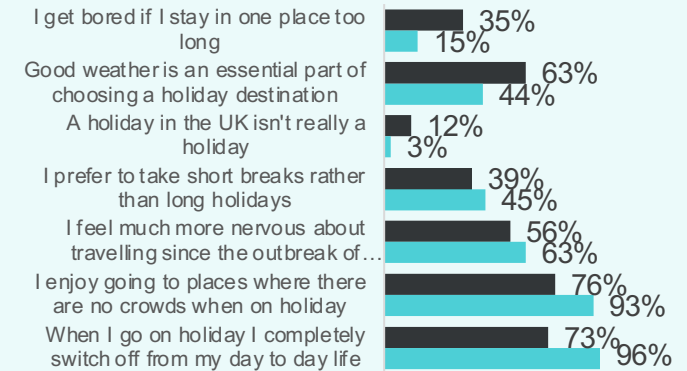
Segmentation

Metropolitan adventurers: 14% of the UK population

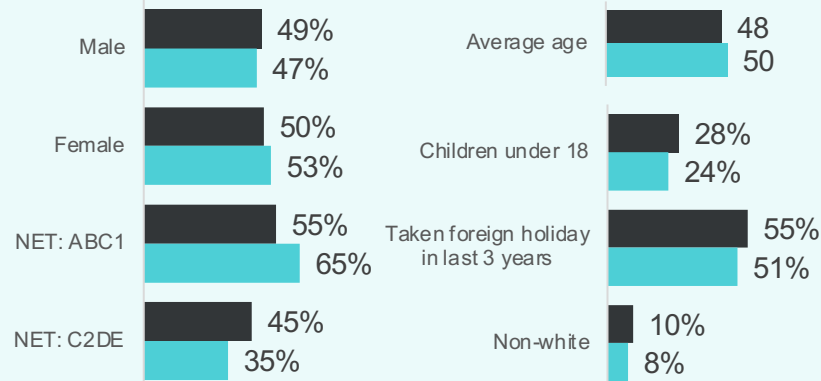
- + Affluent group who prefer short, quick breaks to switch off from day-to-day life and avoid crowds
- + They like wildlife and nature, historical sites, walking, exploring culture and heritage & enjoying open space
- + Most favourable towards visiting the South of Scotland (and other rural areas of Scotland)
- + Regardless of some Covid-19 nerves, are among the most likely to book holidays in the near future
- + Like sustainable and self-catered holidays and are the most likely to want to travel in October.
- + Visiting the UNESCO Biosphere & stargazing appeals to this group

Dumfries and Galloway favourable	42%
Scottish Borders favourable	60%
Average price per person	£354
Likely to book any non-city UK holiday in next 6 months	48%
Percentage of Scottish population	20%

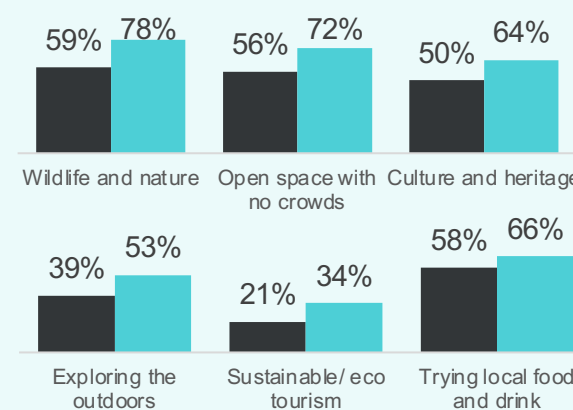
Holiday statements



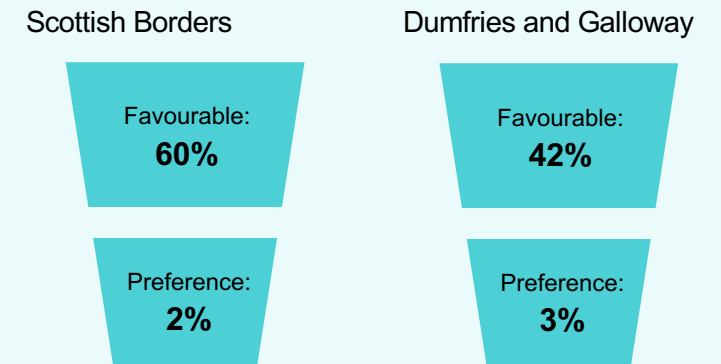
Demographics



Types of holiday that appeal



Customer decision journey

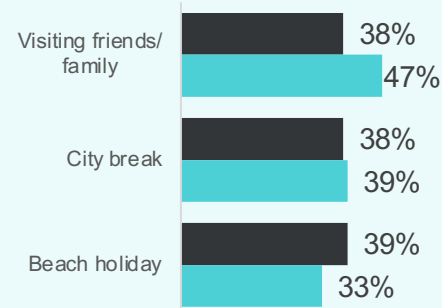


Metropolitan adventurers: 14% of the UK population

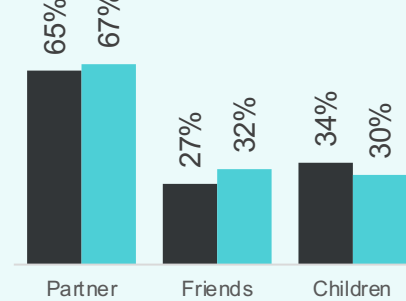
Favourable locations

1	Lake District & Cumbria	74%
2	Scottish Highlands	70%
3	Cornwall	70%
4	Devon	68%
5	Peak District	64%
9	Scottish Borders	60%
17	Dumfries & Galloway	42%

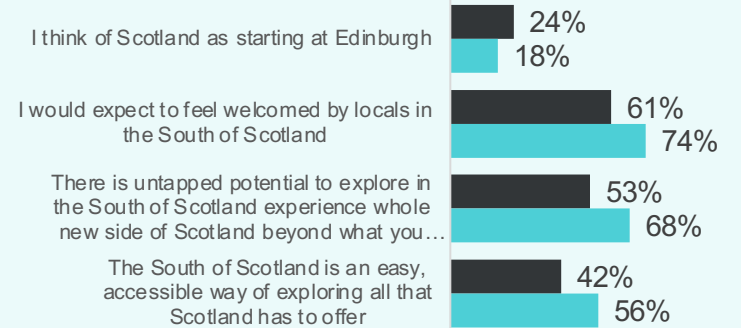
Previous holidays



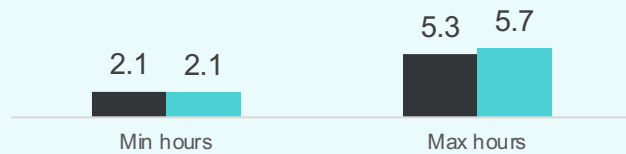
Travelling with...



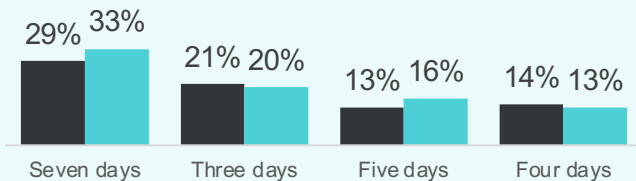
South of Scotland statements



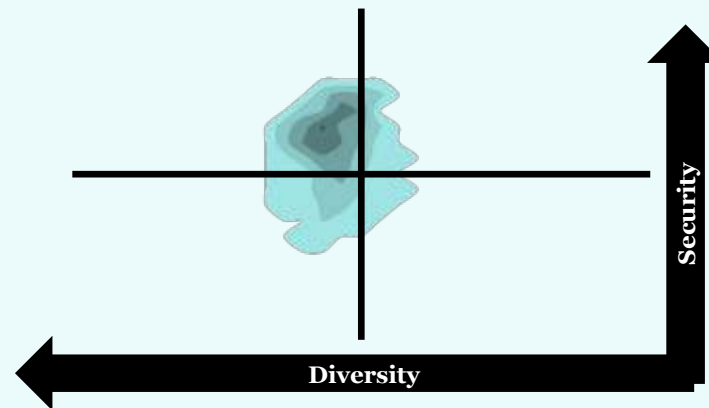
Expected travel time



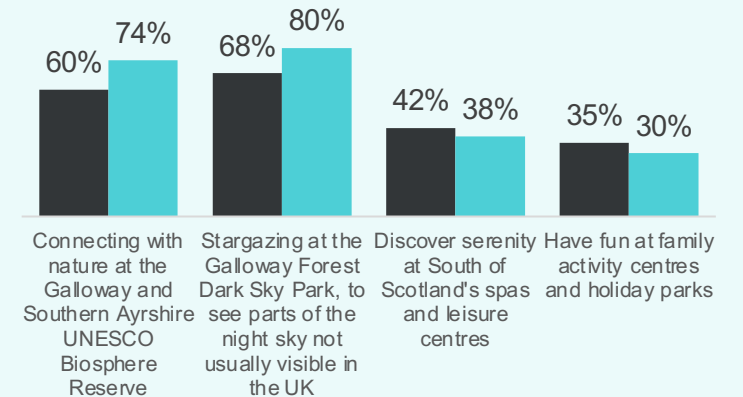
Typical holiday duration



On the Clockface



South of Scotland activities



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