# Domestic Sentiment Tracker: Scotland Level Summary

## Summer and Autumn 2023

## Fieldwork: April to June 2023

## 18th July 2023

# INTRODUCTION AND METHODOLGY

# INTRODUCTION

- The Domestic Sentiment Tracker has been running since May 2020. It explores the likelihood of UK residents to travel both within the UK (and abroad) and when and where they plan to go.

- The study has evolved from tracking intentions during the pandemic to exploring the impact of new barriers such as the cost-of-living crisis on sentiment and the propensity to travel. The research also looks at future intentions to take trips.

- The research is commissioned by VisitEngland, VisitScotland and Visit Wales and is conducted by BVA BDRC.

- Reports are available at a UK level and at a Scotland level.

- The latest report for Scotland looks at UK residents planned travel for the period July to September 2023 and looks ahead to October to December 2023. The report looks at those who state they intend to visit Scotland and also the intentions of those resident in Scotland.

# METHODOLOGY AND BACKGROUND

## Background

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. Each wave 1,750 surveys are completed within which 250 are Scotland residents.

## Frequency

The research is currently on its 59th wave. The first wave having been conducted in May 2020, with a weekly, fortnightly and now monthly cadence thereafter.

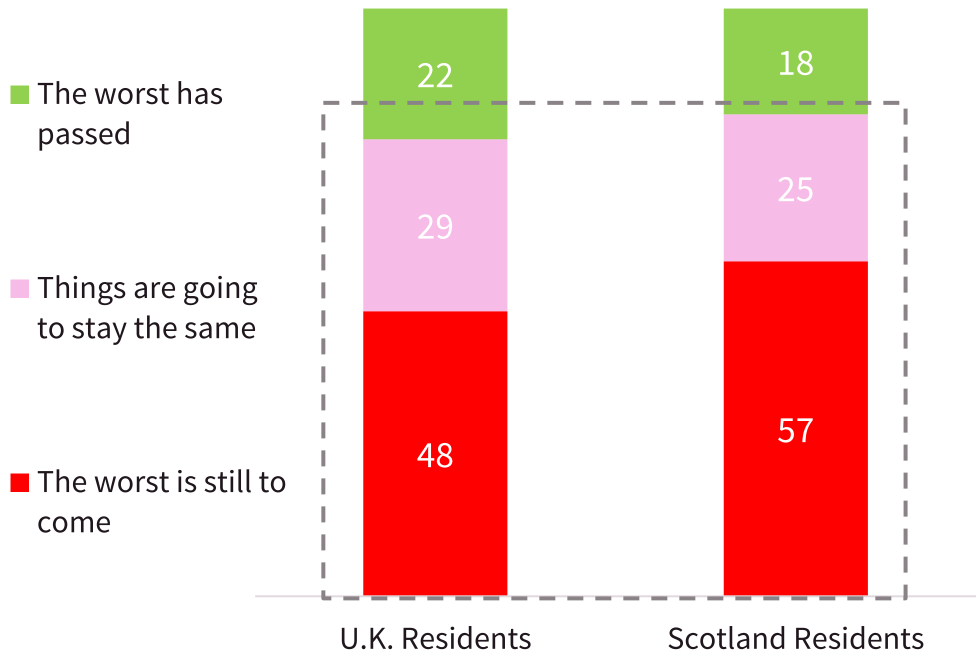
## This report

This presentation is based on research conducted in Waves 57 to 59 (April to June) with references to previous waves where applicable.

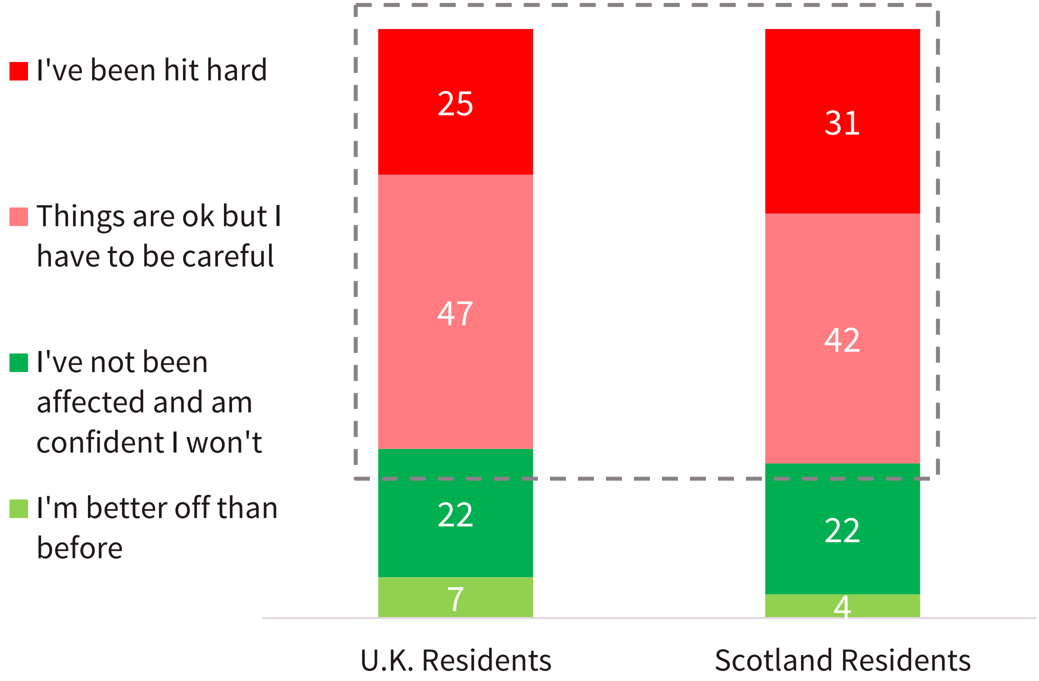
# CURRENT ATTITUDES TO THE COST-OF-LIVING CRISIS

# BOTH THE UK PUBLIC AND SCOTTISH PUBLIC ARE STILL BROADLY PESSIMISTIC IN RELATION TO THE COST OF LIVING CRISIS AND THE IMPACT ON THEM PERSONALLY, THE SCOTTISH PUBLIC MORE SO.

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



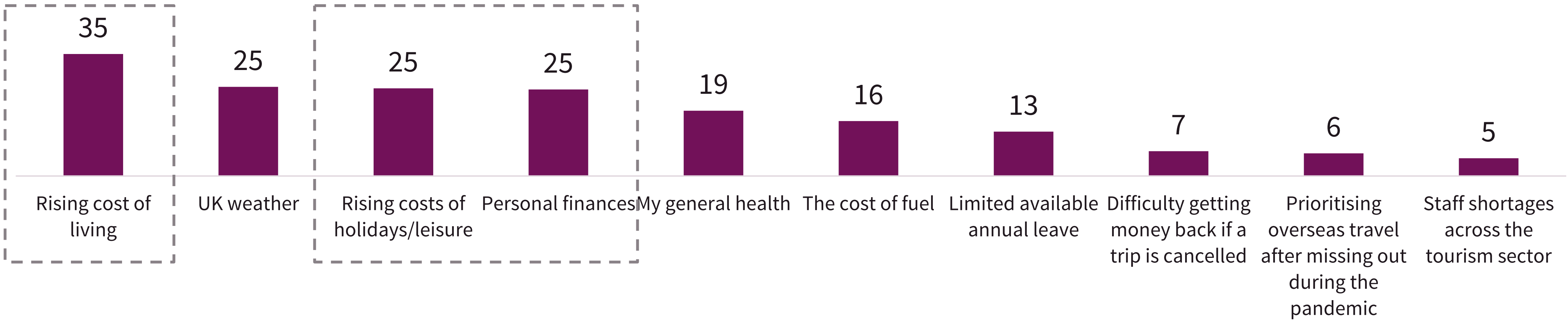

## Impact of the cost of living crisis (%)




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?
Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: All UK respondents. n=2,011; All Scotland respondents n=260. Pre-nesters n=382; Families n=627; Older Independents n=525; Retirees n=221;

# UNSURPRISINGLY, FINANCES CONTINUE TO BE THE MAIN BARRIERS TO TAKING A DOMESTIC HOLIDAY OR SHORT BREAK.

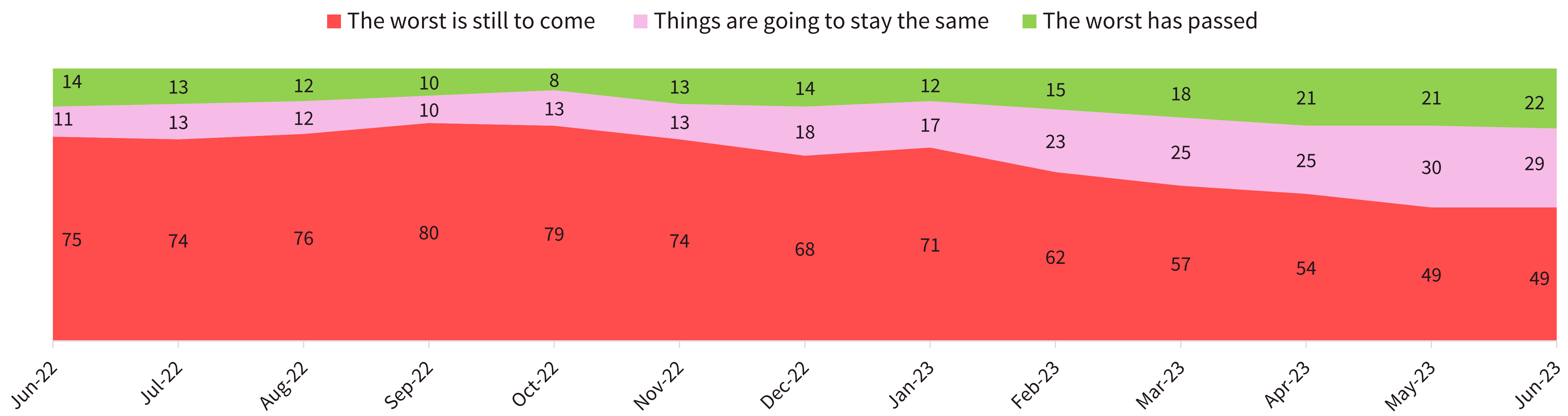
## Top 10 Barriers to taking an overnight UK trip in next 6 months (%)




VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=2,011; All Scotland respondents n=260.

# POSITIVELY HOWEVER, THE PROPORTION THINKING 'THE WORST IS STILL TO COME' HAS DECLINED STEADILY SINCE THE START OF THE YEAR, WITH AN INCREASING MINORITY THINKING 'THE WORST HAS PASSED'

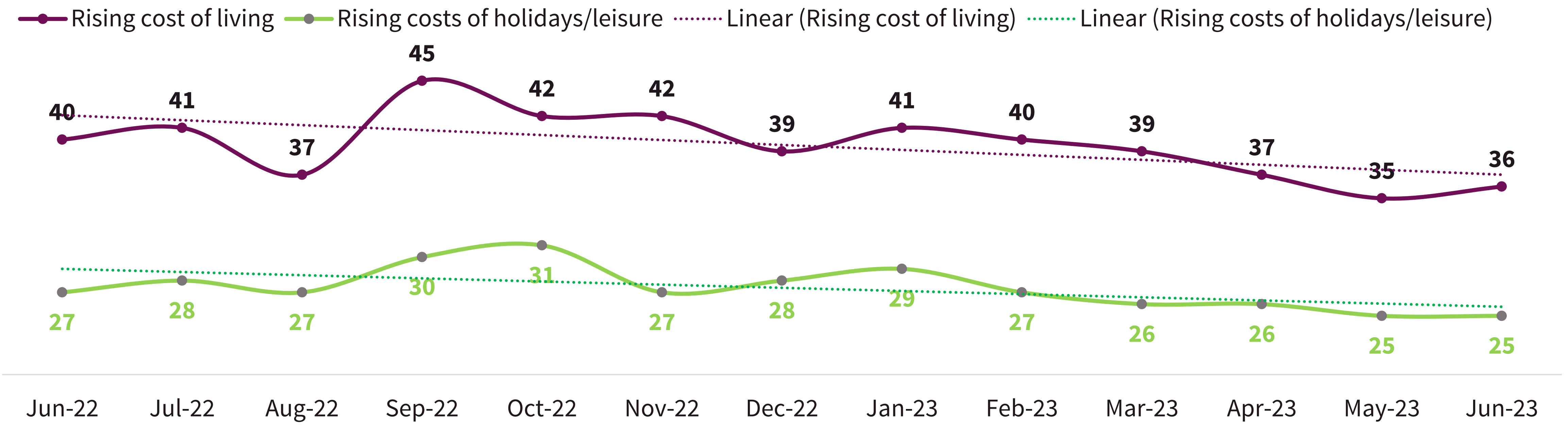
## Perceptions of the cost-of-living crisis (%)




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

# THERE HAS ALSO BEEN A STEADY DECLINE IN THE PROPORTION SEEING 'THE RISING COST OF LIVING' 'RISING COSTS OF HOLIDAYS/LEISURE' AS A FINANCIAL BARRIER TO TAKING A TRIP

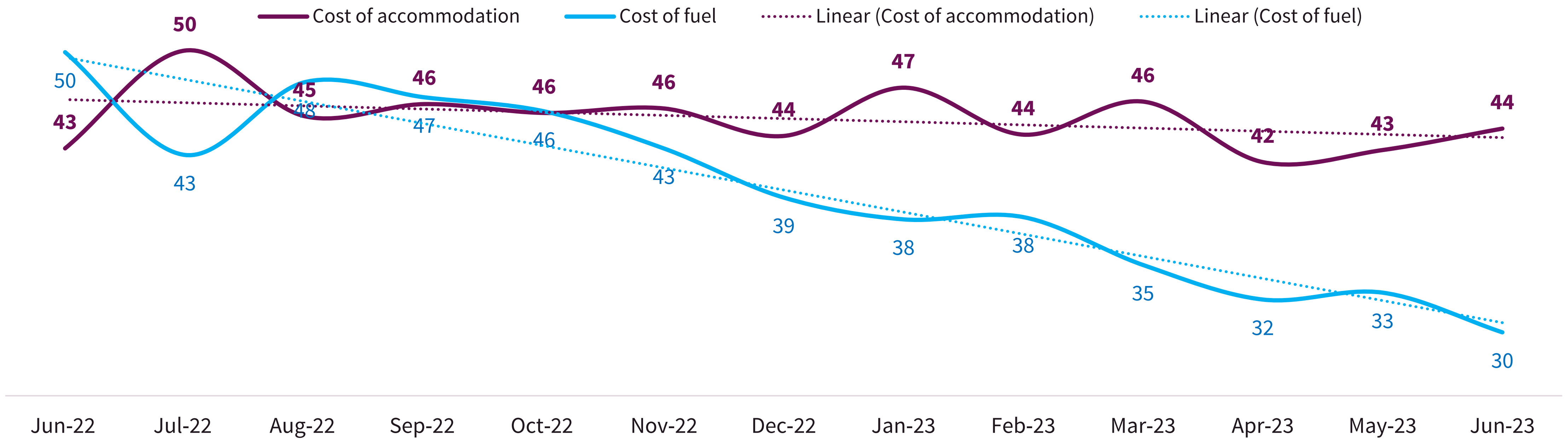
## Selected financial barriers to an overnight trip in the UK in next 6 months (%)




VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=2,011

# MOST NOTABLY, 'COST OF FUEL' AS A BARRIER HAS DROPPED SIGNIFICANTLY. THIS IS POSITIVE NEWS FOR SCOTTISH DESTINATIONS, THE MAJORITY OF DOMESTIC VISITORS TRAVELLING BY CAR.

## Selected individual costs barriers to taking UK holidays and short breaks in next 6 months (%)

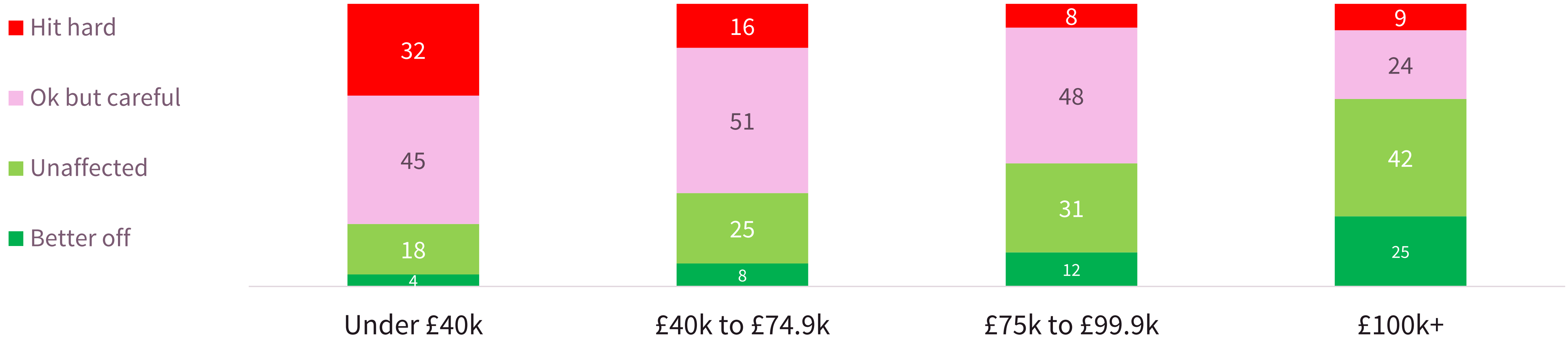



VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=2,011

# IT SHOULD ALSO BE NOTED THAT THE COST-OF-LIVING DOES NOT IMPACT EVERYONE EQUALLY. HIGHER HOUSEHOLD INCOMES IMPACTED SIGNIFICANTLY LESS

Retirees also **less likely** to be hit hard

## Impact by household income (%)



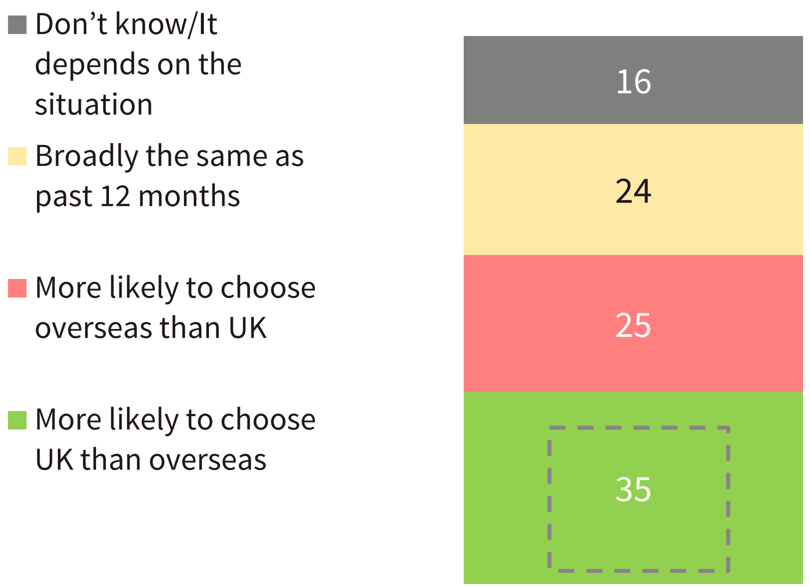

Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Under £40k n=1073; £40k to £74.9k n=578; £75k to £99.9k n=140; £100k+ n=108

# IMPLICATIONS OF THE COST-OF-LIVING CRISIS ON DOMESTIC TRAVEL

# IMPLICATION 1: CONCERNS AROUND FINANCES ARE STILL NUDGING PEOPLE FROM OVERSEAS TO UK TRAVEL

The UK public continue to see domestic travel as a cheaper alternative to overseas

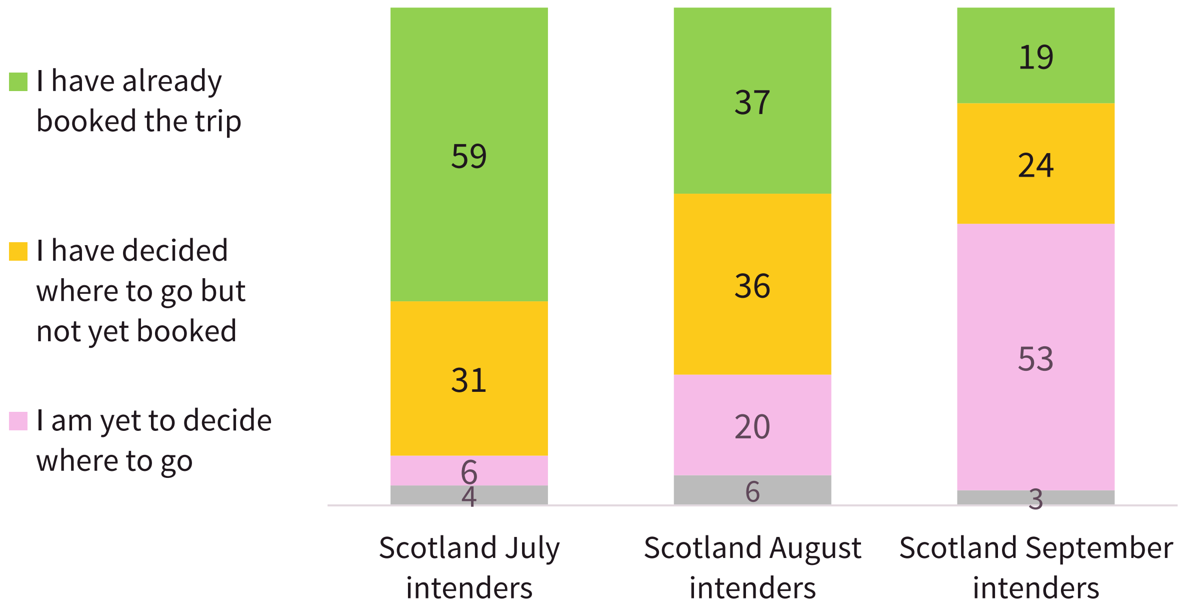
## UK versus overseas preference vs. 12 months ago (%)



# IMPLICATION 2: DECISION-MAKING CONTINUES TO BE LAST MINUTE, CONTINUING A TREND THAT STARTED IN THE PANDEMIC

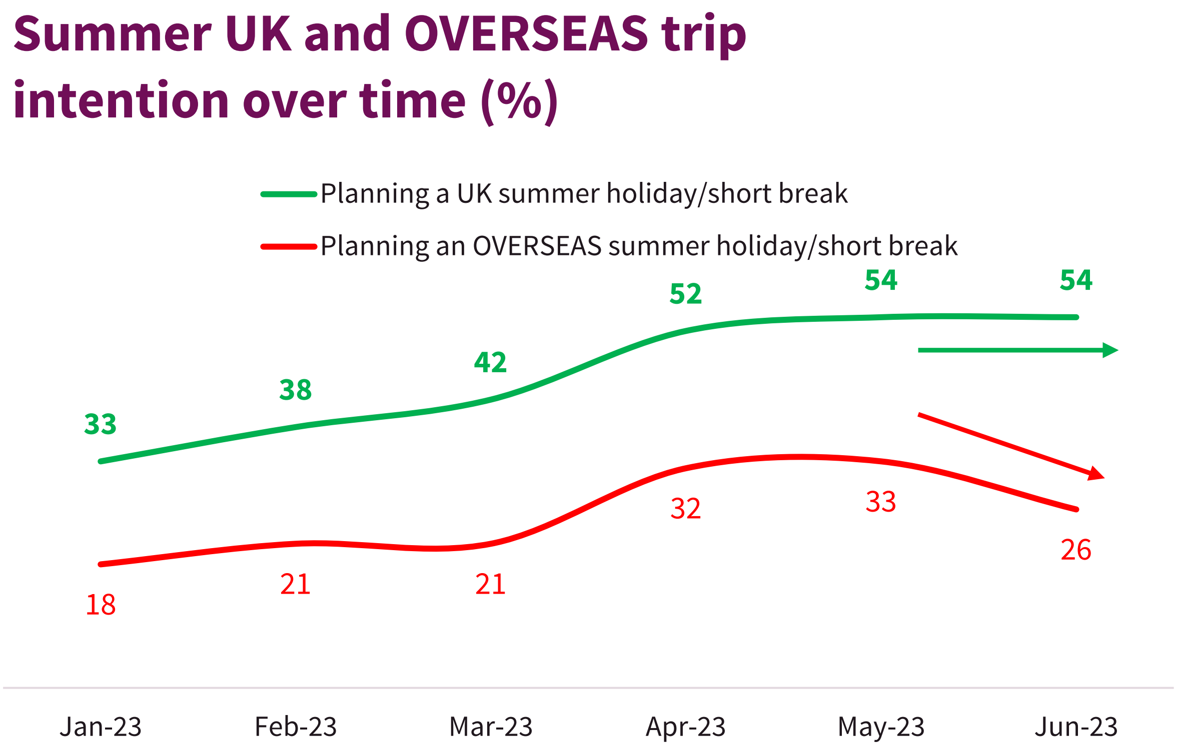
The majority of August and September Scotland trips are not yet booked

**Booking status of summer Scotland trips (%)**



# IMPLICATION 3: LAST-MINUTE DECISION-MAKING MEANS SOME PEOPLE ARE SWAPPING OVERSEAS FOR UK CLOSER TO THE TIME

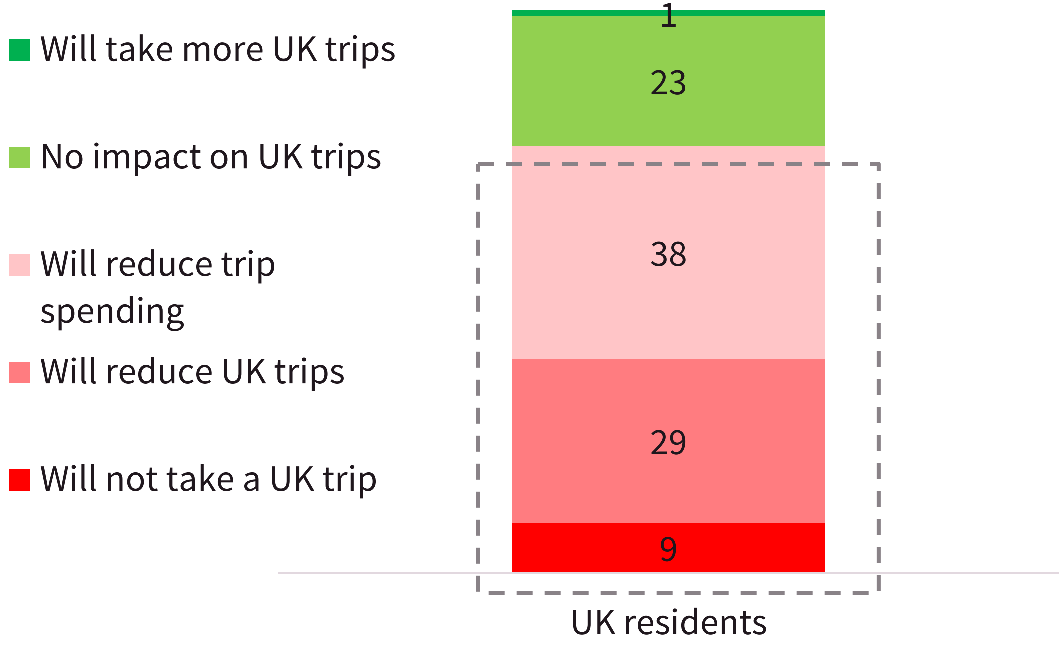
Overseas summer intention has dropped in recent months, whilst UK intention remains strong



# IMPLICATION 4: THE PUBLIC ARE MORE LIKELY TO CUT BACK ON WHAT THEY DO ON A TRIP, THAN STOP TAKING UK TRIPS AT ALL

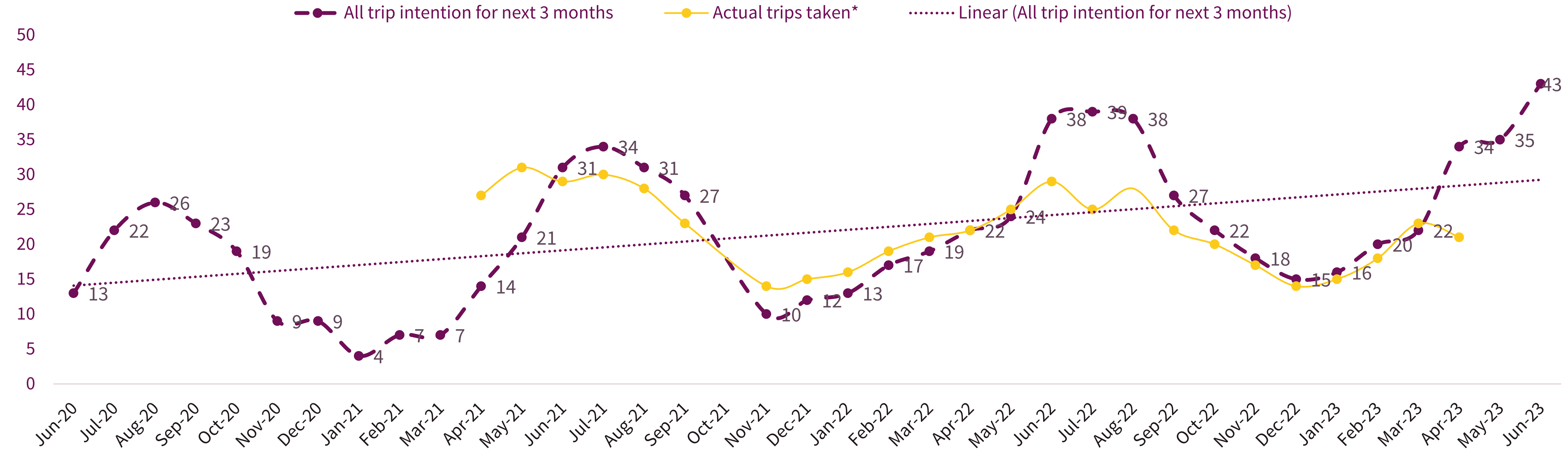
Only 1 in 11 UK residents will not take a UK trip, but 2 in 3 will cut back on the trips in some way

**'Cost-of-living' impact on UK holidays and short breaks (%)**



# IMPLICATION 5 : WE ARE CONTINUING TO SEE STRONG DOMESTIC TRIP INTENTIONS TO TAKE DOMESTIC HOLIDAYS COMPARED TO PREVIOUS YEARS

## Incidence of UK short breaks or holidays intended within next 3 months (%)




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=1750 each wave
*Actual trips taken is only available from April 2021 up to December 2022. Please note questionnaire was updated in April 2023 so there may be some artificial uplift

# IMPLICATION 6: THERE WILL BE CUT-BACKS ON ACCOMMODATION SPEND, EATING OUT AND THINGS TO DO

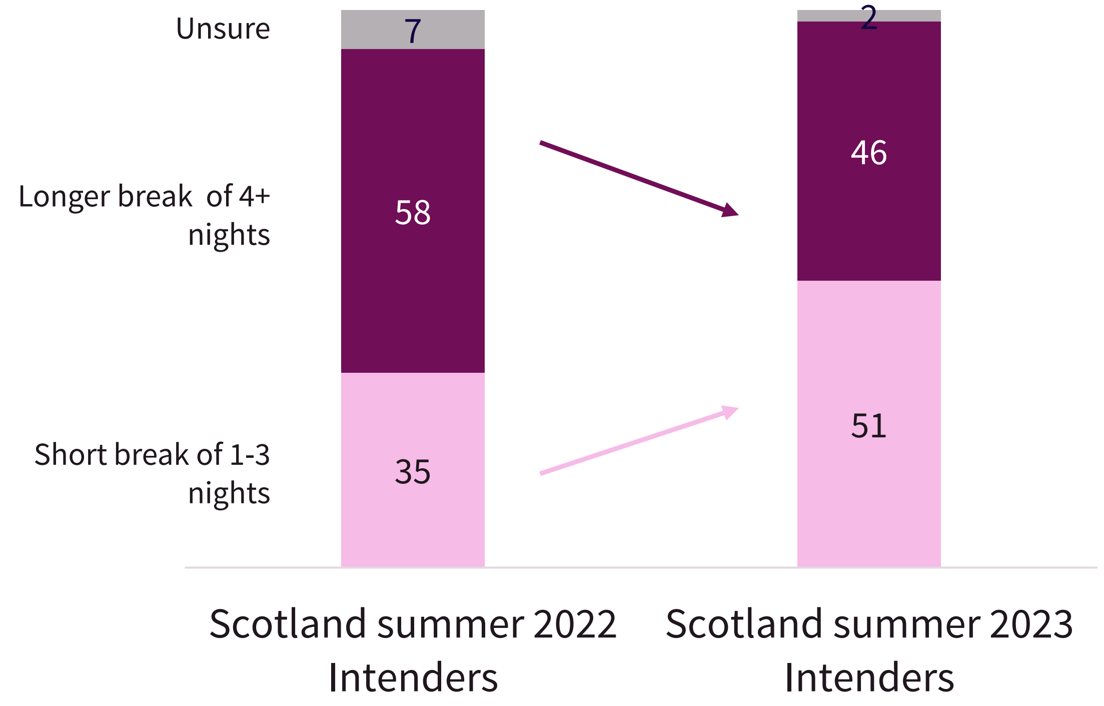
Whilst footfall at destinations may stay strong, overall spend is likely to be lower

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

# IMPLICATION 7: TRIPS ARE MORE LIKELY TO BE SHORT-BREAKS THAN LONGER BREAKS

Only 1 in 10 UK residents will not take a UK trip, but 2 in 3 will cut back on the trips in some way

**Length of next summer holiday or short break in Scotland (%)**

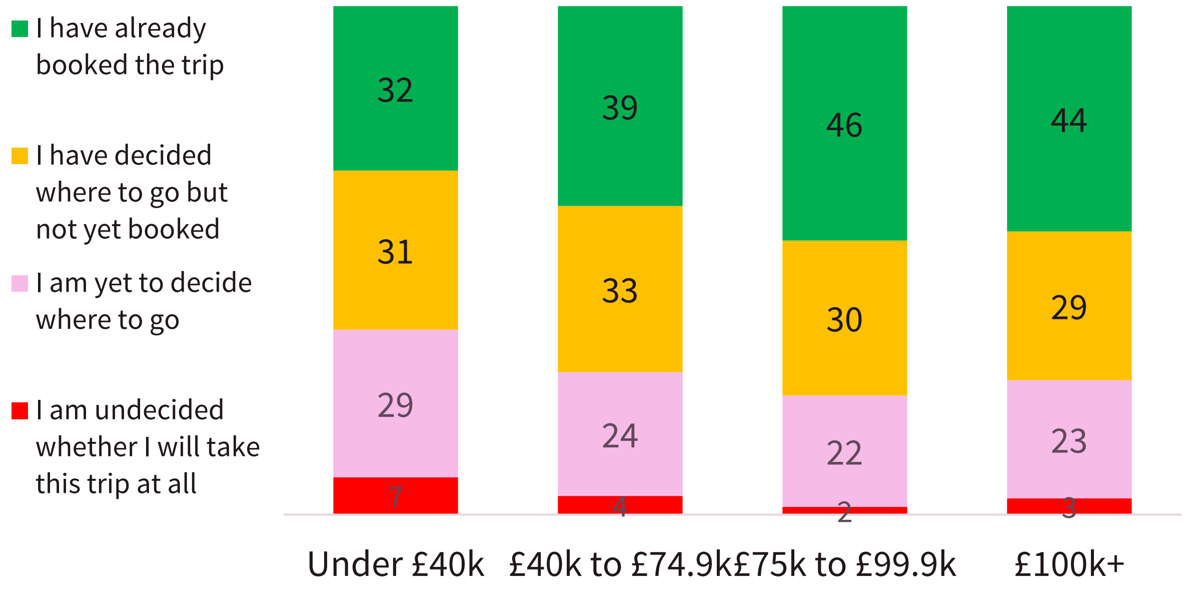



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland summer 2022 intenders n=142; All Scotland summer 2023 intenders n=267

# IMPLICATION 8: BOOKING BEHAVIOUR DIFFERS BY HOUSEHOLD INCOME GROUP

More affluent trip-intenders are more likely to book ahead

**Booking status of summer trips by household income (%)**

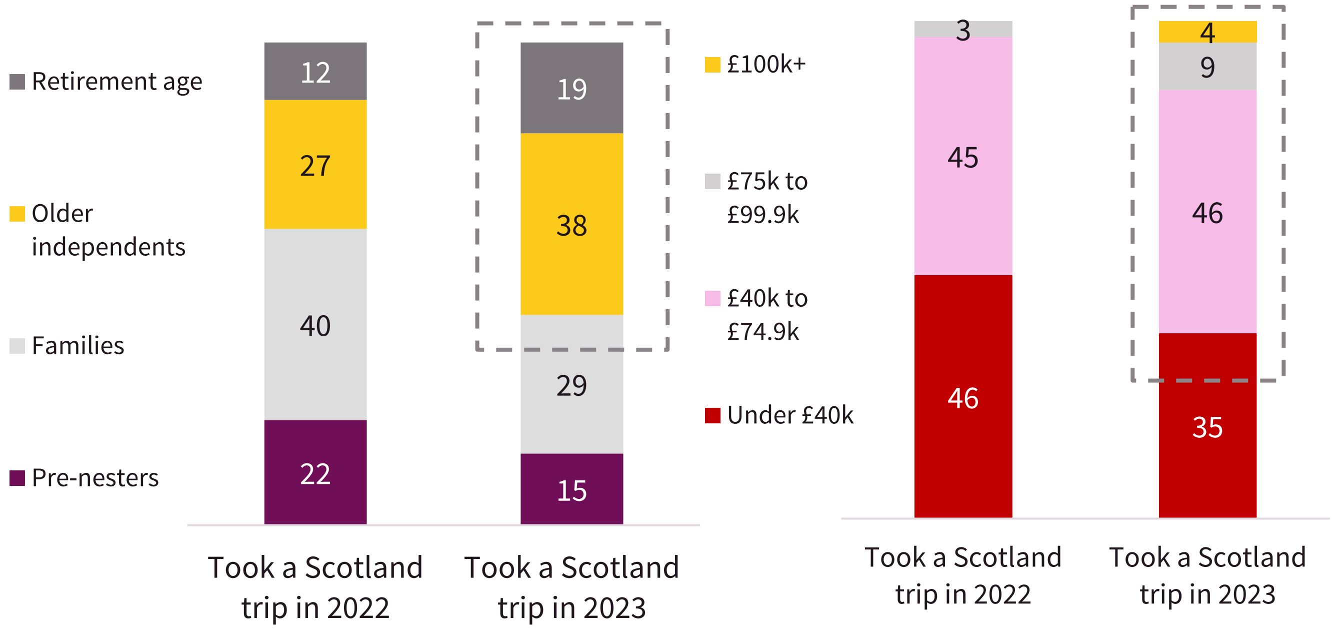



VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>?
Under £40k n=1,154; £40k to £74.9k n=730; £75k to £99.9k n=190; £100k+ n=129

# IMPLICATION 9: TRIP-TAKING PROFILES THIS YEAR ARE ALSO DIFFERENT BY SUB-GROUP

Older and more affluent trip-intenders are also more likely to follow-through and take trips

**Scotland trip-takers between January and May 2023 (%)**

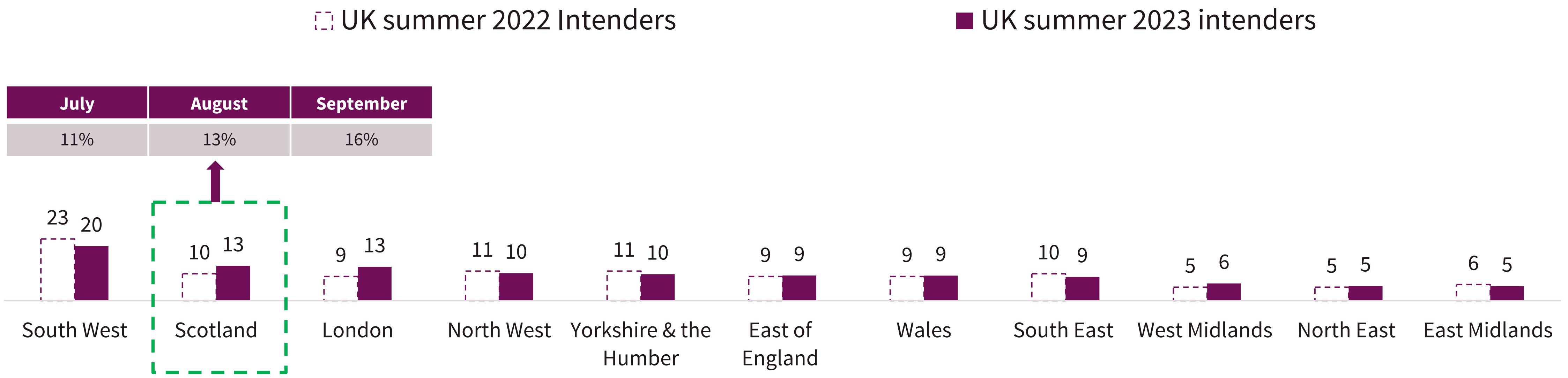


# SCOTLAND SUMMER 2023 TRIP INTENDER BEHAVIOUR

# THIS SUMMER, SCOTLAND IS THE JOINT 2ND MOST PREFERRED UK DESTINATION, WITH INTENTION ABOVE 2022 LEVELS. INTENTION TO VISIT SCOTLAND IS HIGHER IN SEPTEMBER, AND LOWEST IN JULY.

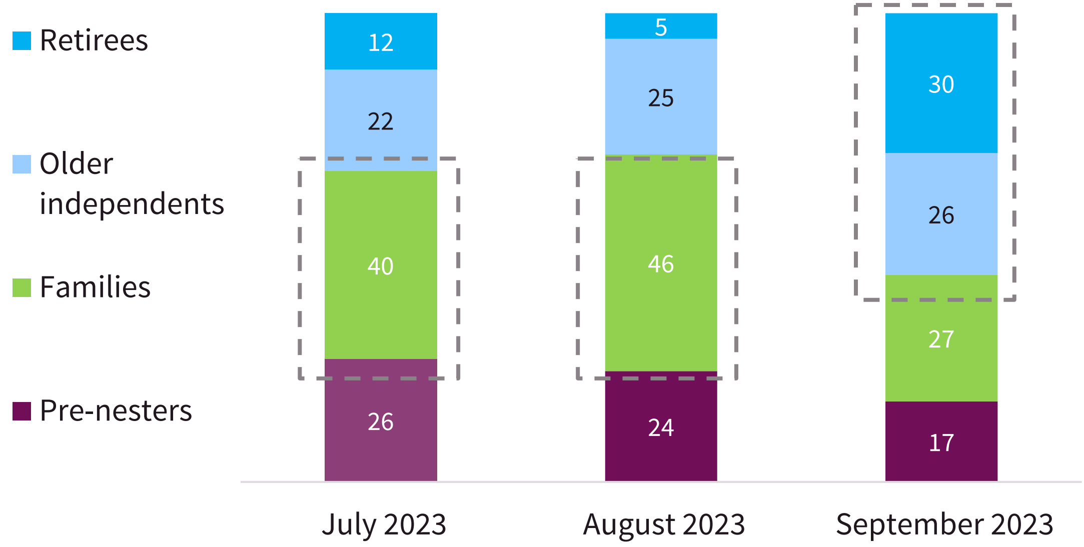
## Where planning on staying on next UK overnight trip in summer (July to September) (%)

| July | August | September |
|---|---|---|
| 11% | 13% | 16% |

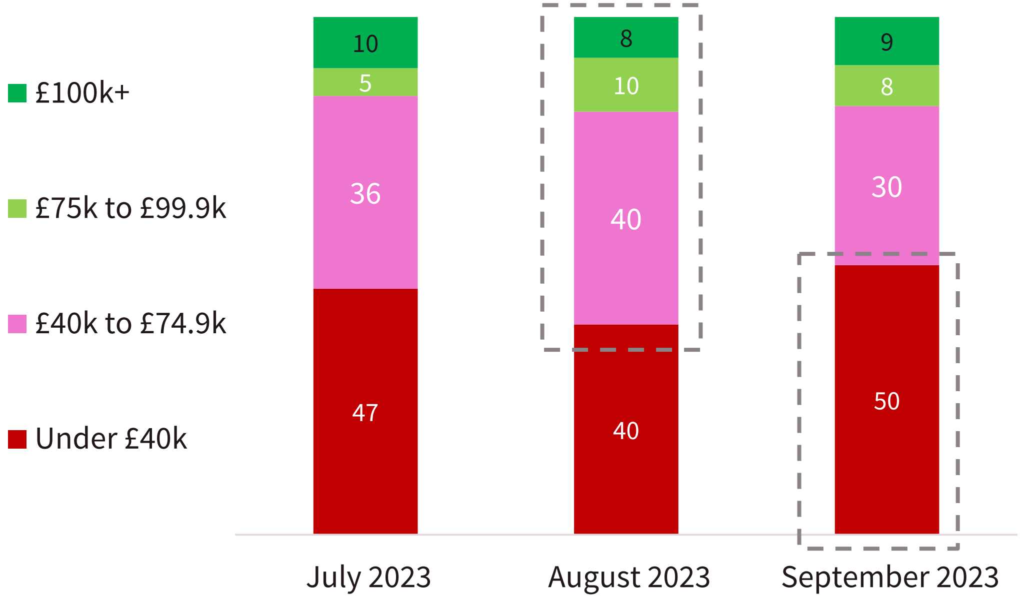


# THE LIFE STAGE PROFILE OF SCOTLAND INTENDERS DIFFERS CONSIDERABLY BY MONTH OF PLANNED TRIP, FAMILIES DOMINATING IN JULY AND AUGUST; OLDER LIFE STAGES IN SEPTEMBER

## Scotland summer intenders by life stage by month (%)

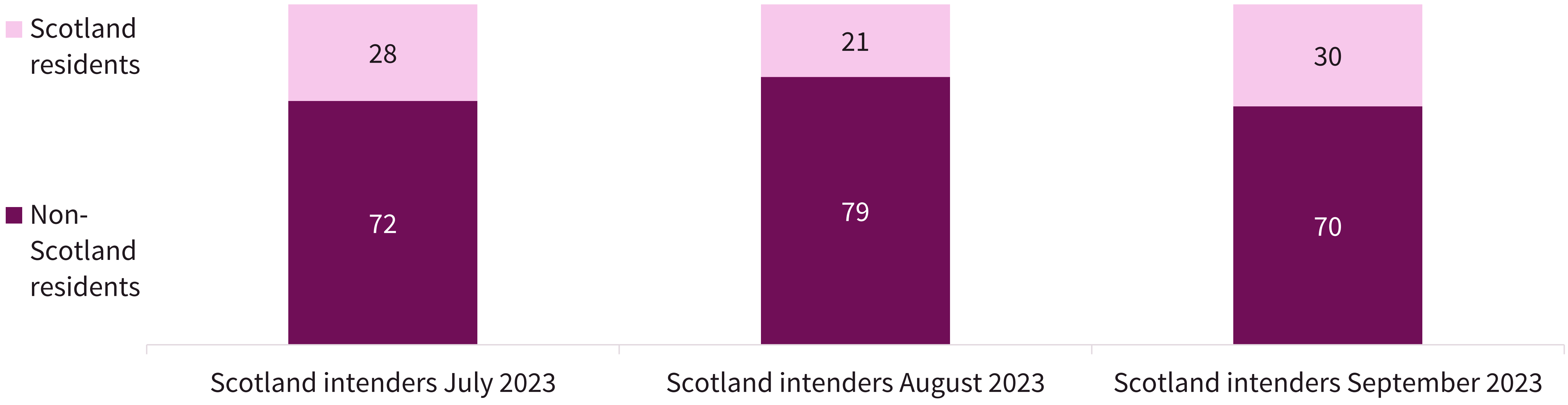



## Scotland summer intenders by household income by month (%)



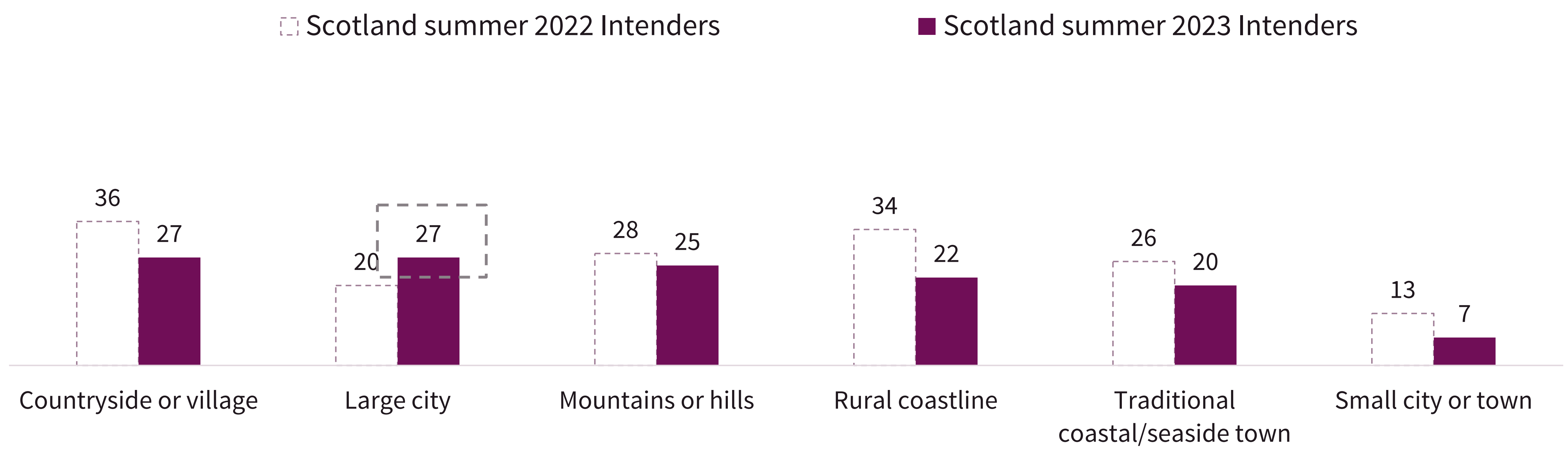
# THE MAJORITY OF SCOTLAND TRIP-TAKERS ARE LIKELY TO COME FROM OUTSIDE OF SCOTLAND FOR EACH SUMMER MONTH, ALTHOUGH LESS SO IN JULY AND SEPTEMBER

## Origin of Scotland intenders by region of residence (%)



# A RANGE OF DESTINATION TYPES APPEAL TO SCOTLAND INTENDERS, BUT WE ARE SEEING A CONTINUED MOVE TOWARDS 'CITY BREAKS' COMPARED TO 2022

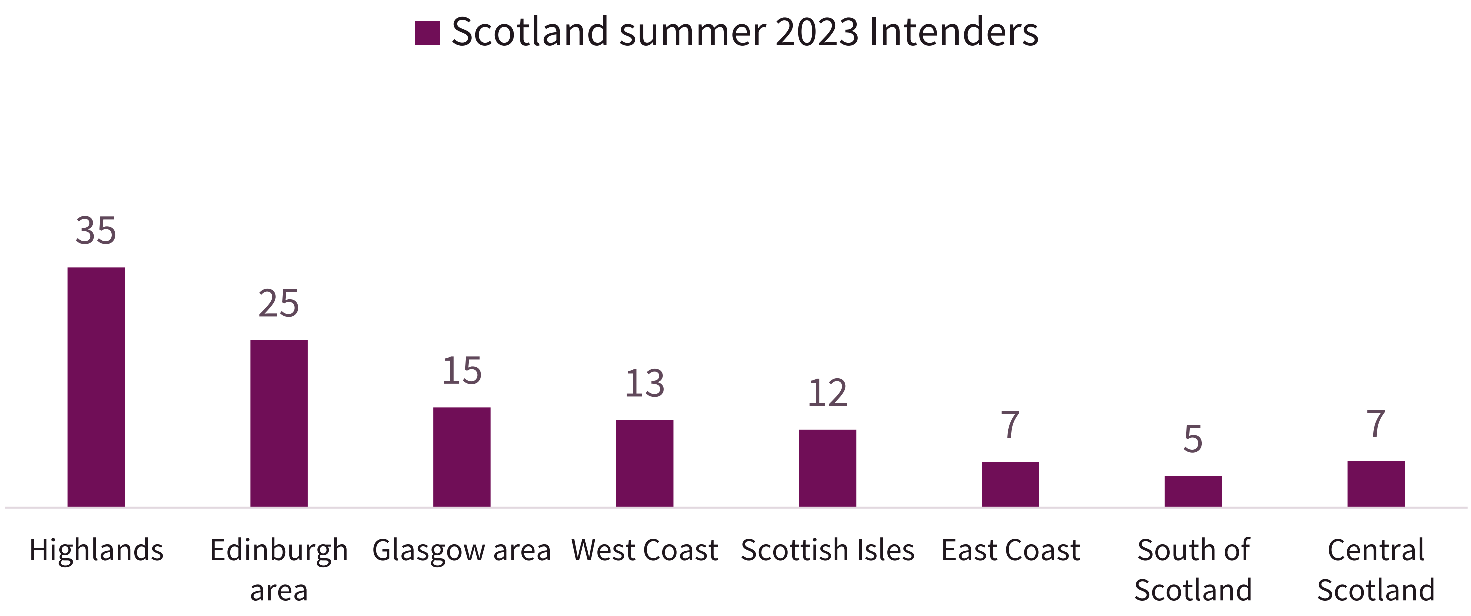
## Main type of destination for Scotland summer intenders (%)




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 summer 2022 intenders n=142; All Scotland summer 2023 intenders n=267; All Scotland summer 2023 resident intenders n=137.

# THE HIGHLANDS REMAINS THE MOST POPULAR DESTINATION OVERALL, FOLLOWED BY EDINBURGH - ALTHOUGH THERE IS CONSIDERABLE DIFFERENCE BY MONTH

## Planned destination for next Scotland trip for summer intenders (%)



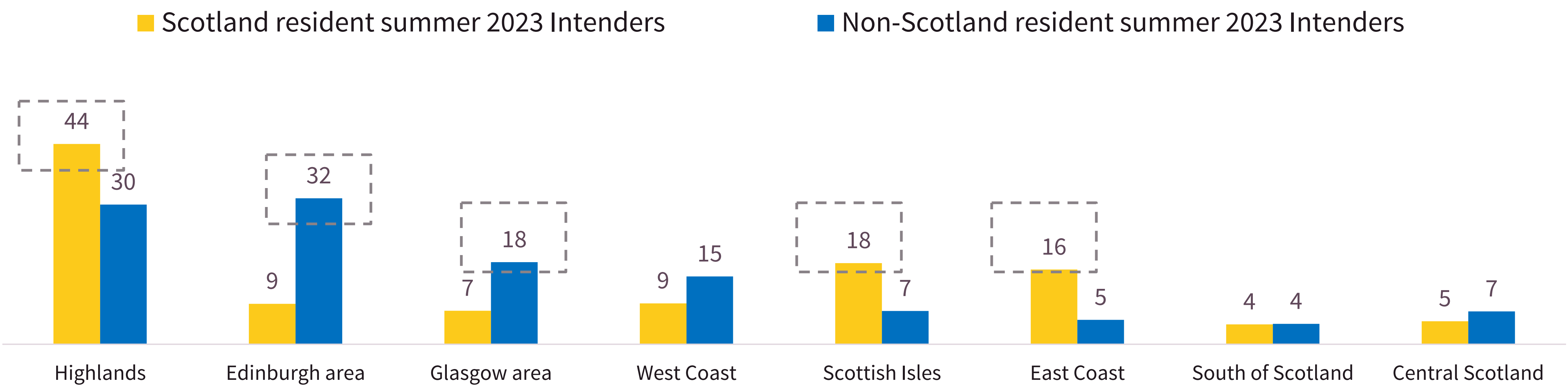

## Destinations by month of trip

| Scotland Summer 2023 intenders | | | |
|---|---|---|---|
| | July | August | September |
| Highlands | 32% | 29% | 45% |
| Edinburgh area | 26% | 30% | 18% |
| Glasgow area | 18% | 18% | 9% |
| West Coast | 10% | 18% | 10% |
| Scottish Isles | 8% | 8% | 19% |
| Central Scotland | 6% | 6% | 9% |
| East Coast | 10% | 4% | 6% |
| South of Scotland | 7% | 2% | 5% |

QVB5ix. 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 summer 2022 intenders n=137; All Scotland summer 2023 intenders n=331; All Scotland summer 2023 resident intenders n=151; July n=79; August n=123; September n=93

# PLACE OF RESIDENCE ALSO STRONGLY DICTATES DESTINATION PREFERENCE. THOSE LIVING OUTSIDE OF SCOTLAND MUCH MORE LIKELY TO VISIT EDINBURGH

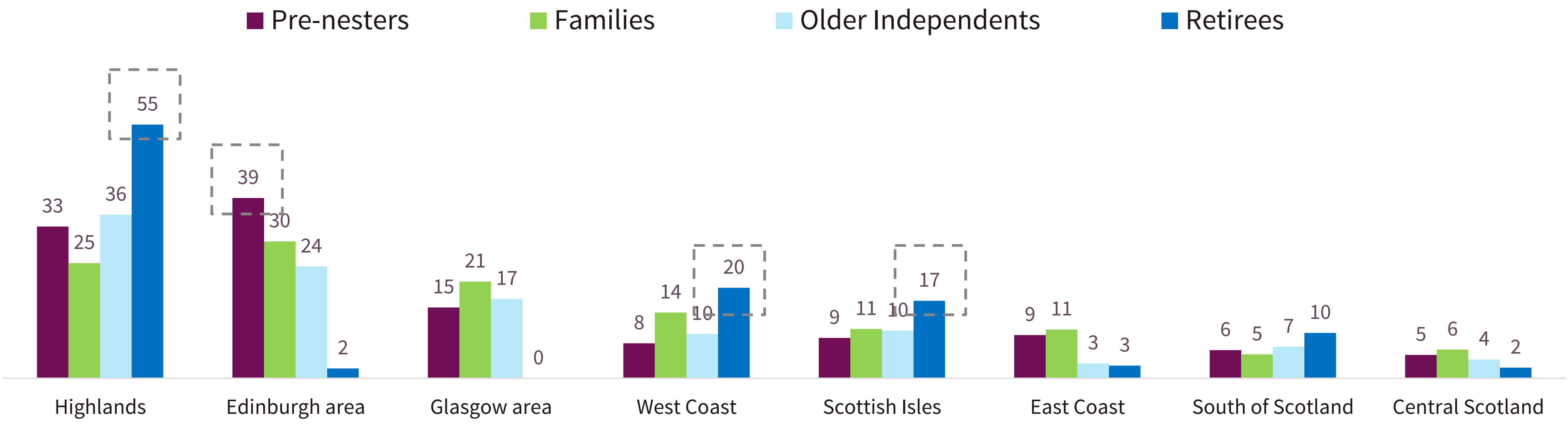
## **Planned destination for next Scotland trip for summer intenders by place of residence (%)**




QVB5ix. 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 summer 2023 resident intenders n=151; non-Scotland residents n=180

# LIFE STAGE ALSO HAS A STRONG IMPACT ON DESTINATION PREFERENCE. RETIREES SHOWING A STRONG PREFERENCE FOR MORE RURAL AREAS, YOUNGER LIFE STAGES FOR URBAN DESTINATIONS

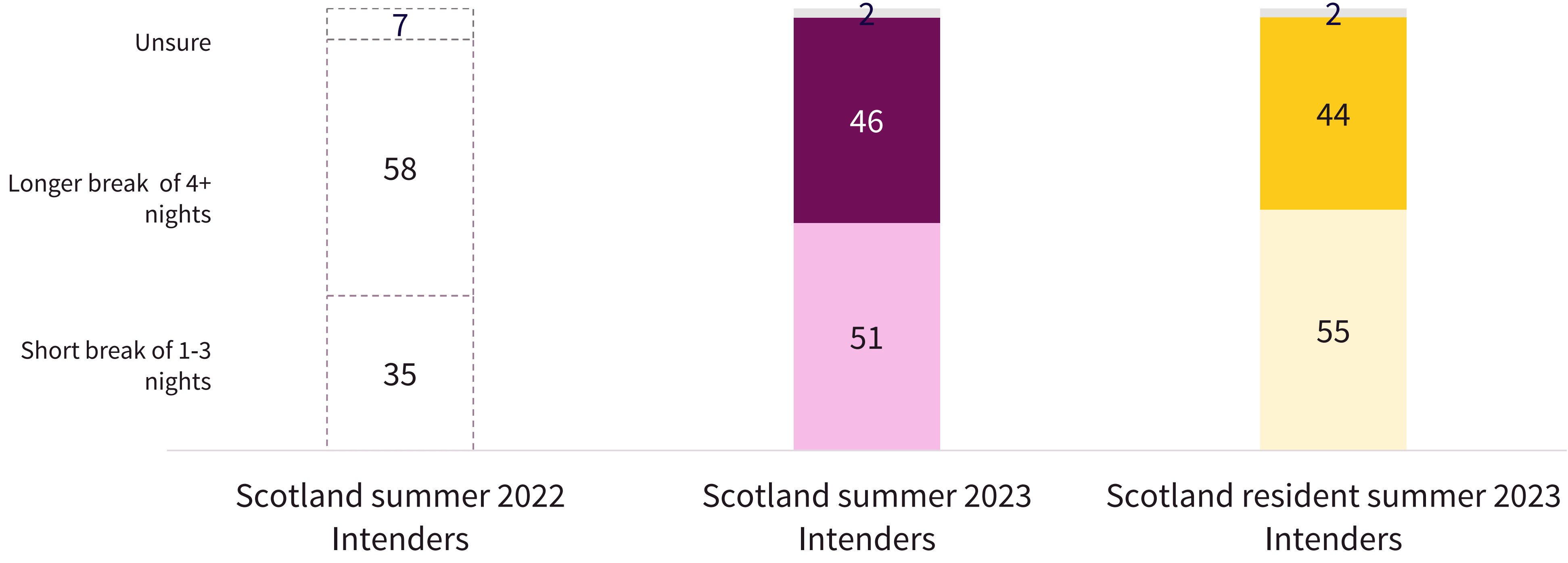
## Planned destination for next Scotland trip for summer intenders by life stage (%)




QVB5ix. 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. Pre-nesters n=75; Families n=136; Older Independents n=86; Retirees n=34*;
*low base size: treat with caution

# As outlined earlier in this report, trips are set to be shorter in length than in 2022, particularly amongst Scotland residents

## Length of next summer holiday or short break in Scotland (%)

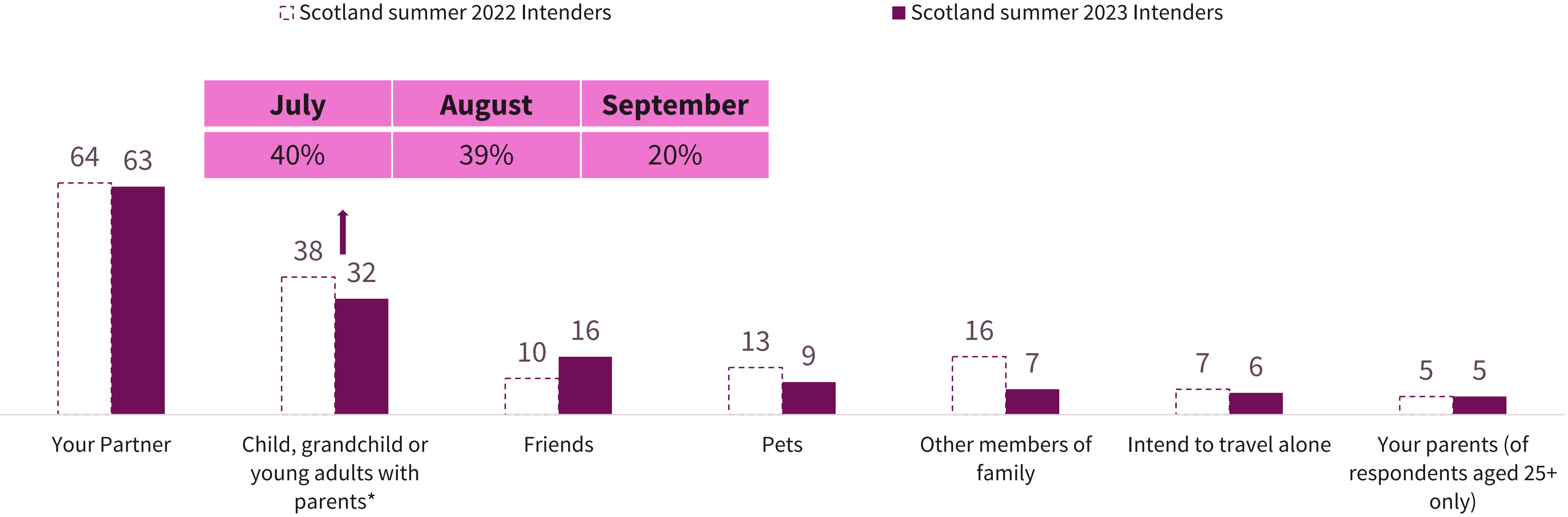



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland summer 2022 intenders n=142; All Scotland summer 2023 intenders n=267; All Scotland summer 2023 resident intenders n=137.

# ‘PARTNER’ IS THE MOST COMMON ACCOMPANYING PARTY MEMBER FOR A TRIP IN SCOTLAND THIS SUMMER, FOLLOWED BY ‘CHILD, GRANDCHILD OR YOUNG ADULTS WITH PARENTS’

## Visitor party make-up for Scotland summer intenders (%)

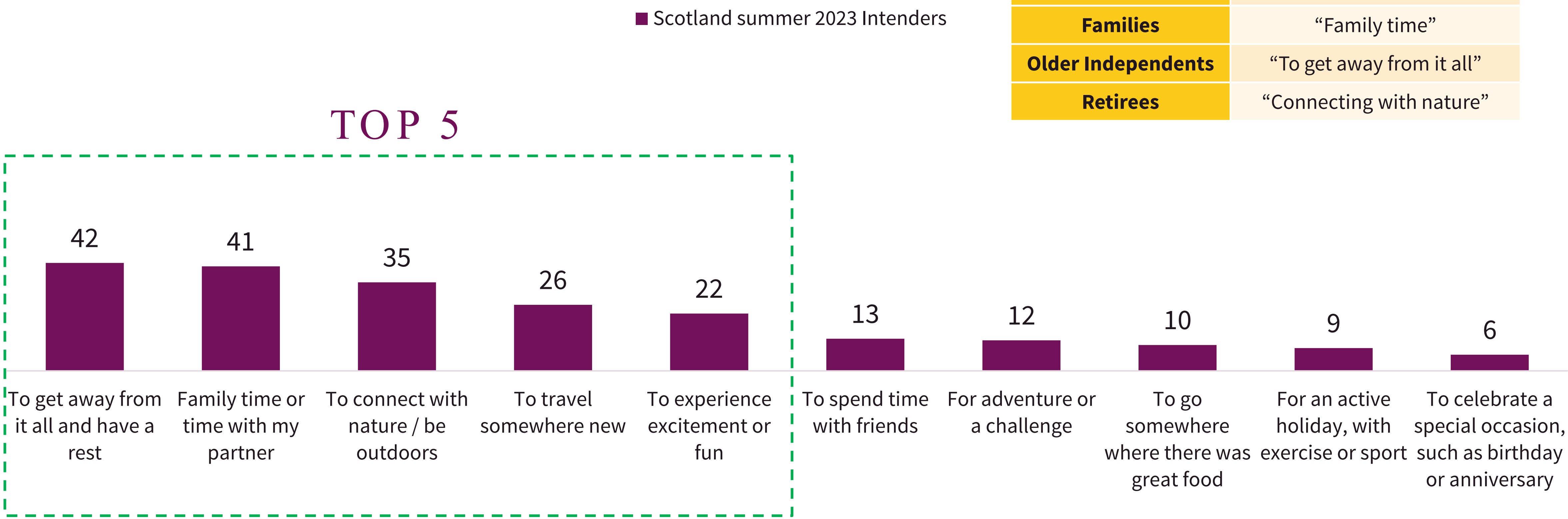
| July | August | September |
|---|---|---|
| 40% | 39% | 20% |




QVB4d. With whom are you likely to be spending your holiday?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland summer 2022 intenders n=142; All Scotland summer 2023 intenders n=267; All Scotland summer 2023 resident intenders n=137. July n=97; August n=94; September n=76

# ESCAPE, FAMILY TIME, NATURE, AND A SENSE OF EXCITEMENT OR NEWNESS ARE THE LEADING MOTIVATIONS BUT THERE IS SOME VARIATION BY LIFE STAGE

## Motivations for Scotland summer overnight trip (%)



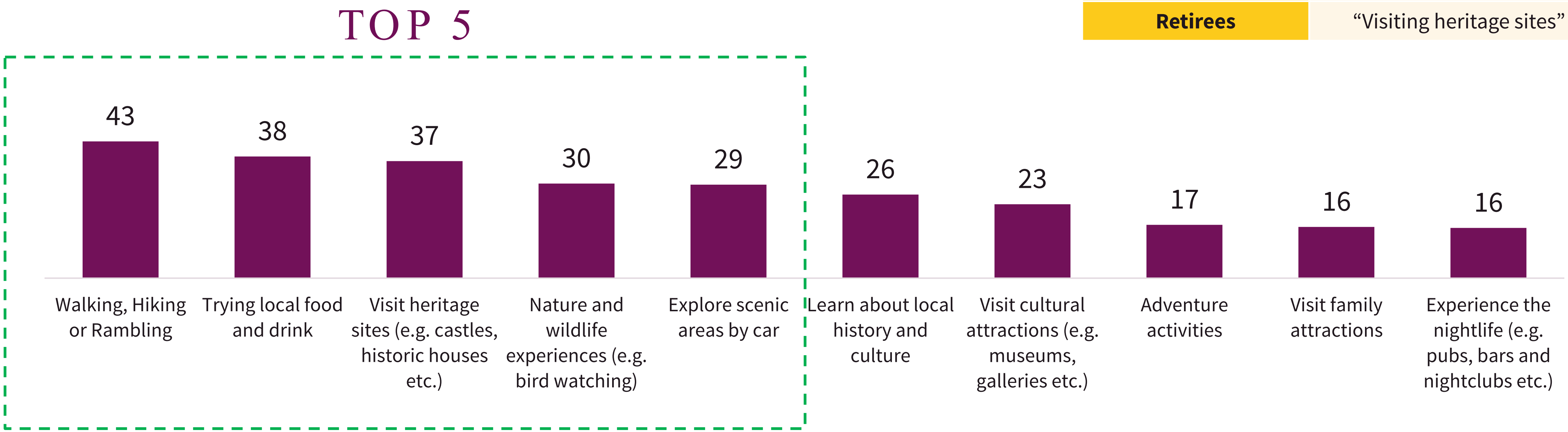

| High-indexing motivations by life stage | |
|---|---|
| **Pre-nesters** | "Excitement or fun" |
| **Families** | "Family time" |
| **Older Independents** | "To get away from it all" |
| **Retirees** | "Connecting with nature" |

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 summer 2023 intenders n=267
Question not asked in 2022

# NATURE, FOOD AND DRINK, HERITAGE AND EXPLORATION DOMINATE TRIP ACTIVITIES. AGAIN THERE ARE NOTABLE DIFFERENCES BY LIFE STAGE

## Activities for Scotland holidays and short breaks in summer (%)

■ Scotland summer 2023 Intenders

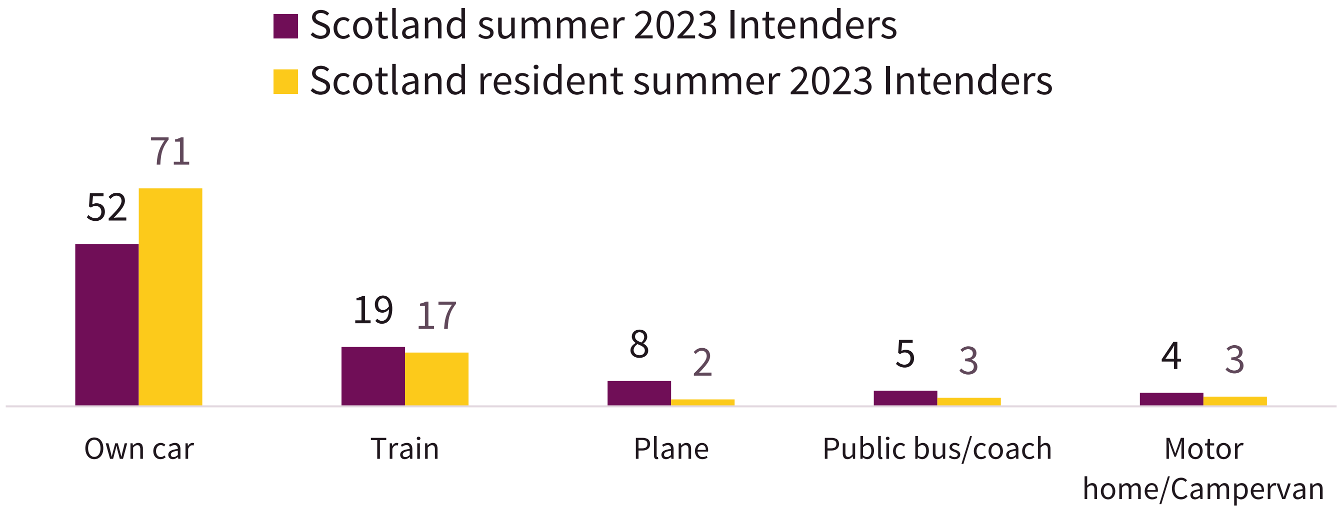



| High-indexing activities by life stage | |
|---|---|
| **Pre-nesters** | "Experiencing nightlife" |
| **Families** | "Family attractions" |
| **Older Independents** | "Walking, hiking or rambling" |
| **Retirees** | "Visiting heritage sites" |

VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Scotland. Base: All intenders planning to take a trip exclusively in Scotland. All Scotland summer 2023 intenders n=267
Question not asked in 2022

# ‘OWN CAR’ DOMINATES MODE OF TRAVEL TO SCOTLAND SUMMER DESTINATION, BUT THERE IS VARIATION BY REGION OF RESIDENCE

## Top 5 main modes of travel of destination for Scotland trip in summer (%)



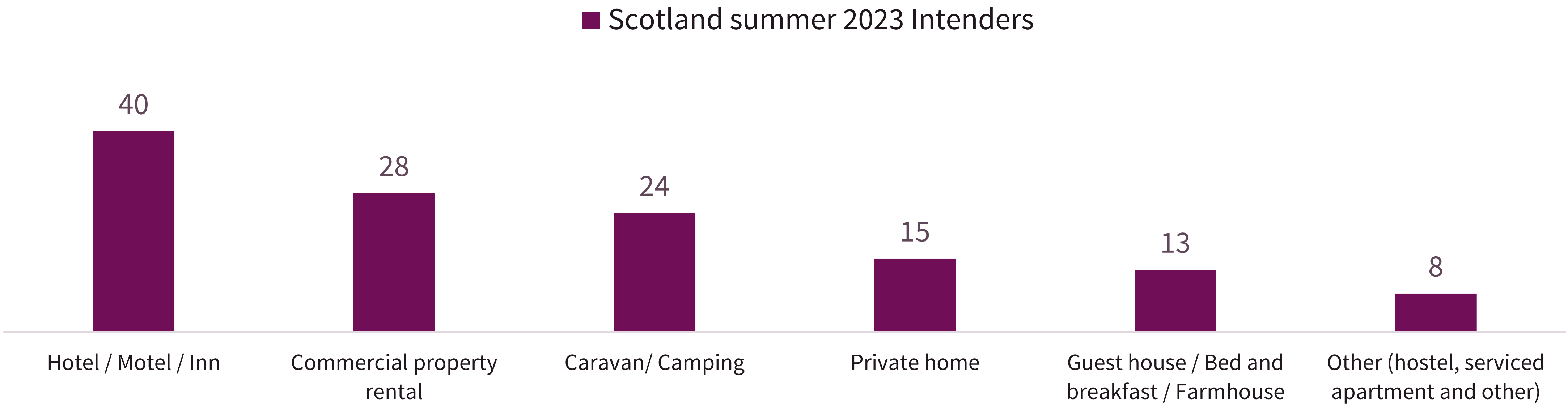

## Mode of transport by region of residence

| Scotland Summer 2023 intenders | | | |
|---|---|---|---|
| | North of England and Midlands | London and South East | Wales and South West |
| Own car | 64% | 25% | 33% |
| Train | 10% | 39% | 6% |
| Plane | 7% | 24% | 17% |
| Public bus/coach | 6% | 7% | 7% |
| Motor home/ Campervan | 7% | 0% | 10% |
| Private coach/bus | 0% | 2% | 25% |

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 summer 2022 intenders n=142; All Scotland summer 2023 intenders n=267; All Scotland summer 2023 resident intenders n=137; North of England n=69; London and South East n=37*; Wales and South West n=19*

# ‘HOTEL/MOTEL/INN’, IS THE NUMBER ONE ACCOMMODATION TYPE FOR INTENDED TRIPS IN SUMMER FOLLOWED BY ‘COMMERCIAL PROPERTY RENTAL’ AND ‘CARAVAN/CAMPING’.

## Accommodation planning on staying in on next UK overnight trip for Scotland summer intenders (%)



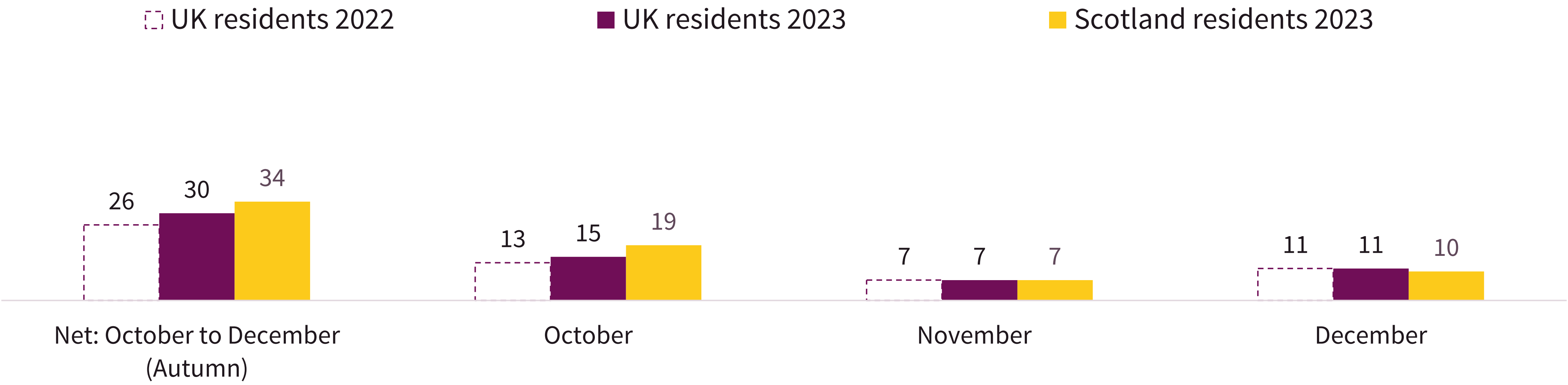
# NOTABLE DIFFERENCES BY DESTINATION TYPE

| CITY OR LARGE TOWN | COUNTRYSIDE OR VILLAGE | TRADITIONAL COASTAL TOWN | RURAL COASTLINE | MOUNTAINS OR HILLS |
|---|---|---|---|---|
| **Profile**<br>• Younger<br>• Higher income | **Profile**<br>• Older<br>• Lower income | **Profile**<br>• Majority older<br>• Average income | **Profile**<br>• Older<br>• Average income | **Profile**<br>• Older<br>• Lower income |
| **Motivations/activities**<br>• Time with friends<br>• Trying food and drink<br>• History and culture | **Motivations/activities**<br>• Family time<br>• Getting away from it all<br>• Nature-based activities<br>• Heritage & exploration | **Motivations/activities**<br>• Family time<br>• Getting away from it all<br>• Nature-based activities<br>• Exploring by car | **Motivations/activities**<br>• Nature-based activities<br>• Going somewhere new<br>• Heritage<br>• Adventure | **Motivations/activities**<br>• Nature-based activities<br>• Going somewhere new<br>• Heritage & adventure<br>• Exploring by car |
| **Trip composition**<br>• Travel with friends<br>• Shorter trip length<br>• Staying in a hotel | **Trip composition**<br>• Travel with pets<br>• Longer trips<br>• Staying in commercial rental and B&B | **Trip composition**<br>• Travel with partner, children and pets<br>• Slightly Longer trips<br>• Caravan/camping | **Trip composition**<br>• Travel with partner, and parents<br>• Slightly Longer trips | **Trip composition**<br>• Travel pets<br>• Longer trips<br>• Staying in commercial rental and camping |

# AUTUMN INTENTION SNAPSHOT

# SIMILAR TO SUMMER 2023, 'AUTUMN 2023' TRIP INTENTIONS ARE STRONG RELATIVE TO 2022

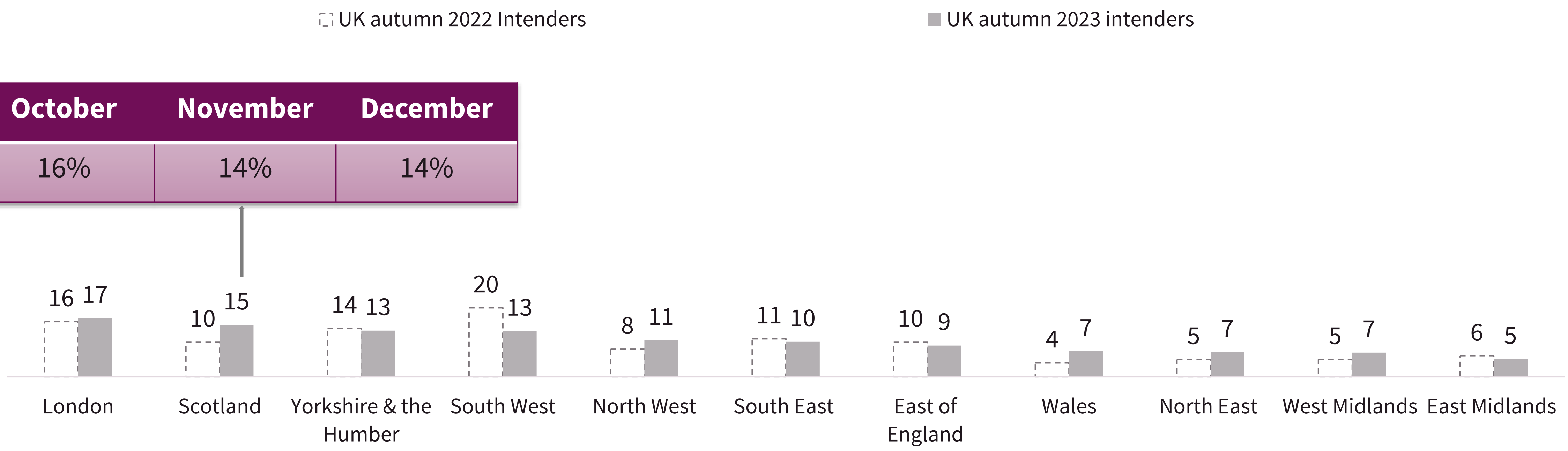
## Proportion anticipating going on any overnight UK trips (%)



# INTENTIONS TO VISIT SCOTLAND SPECIFICALLY ARE ALSO STRONG THIS AUTUMN, ACROSS EACH MONTH

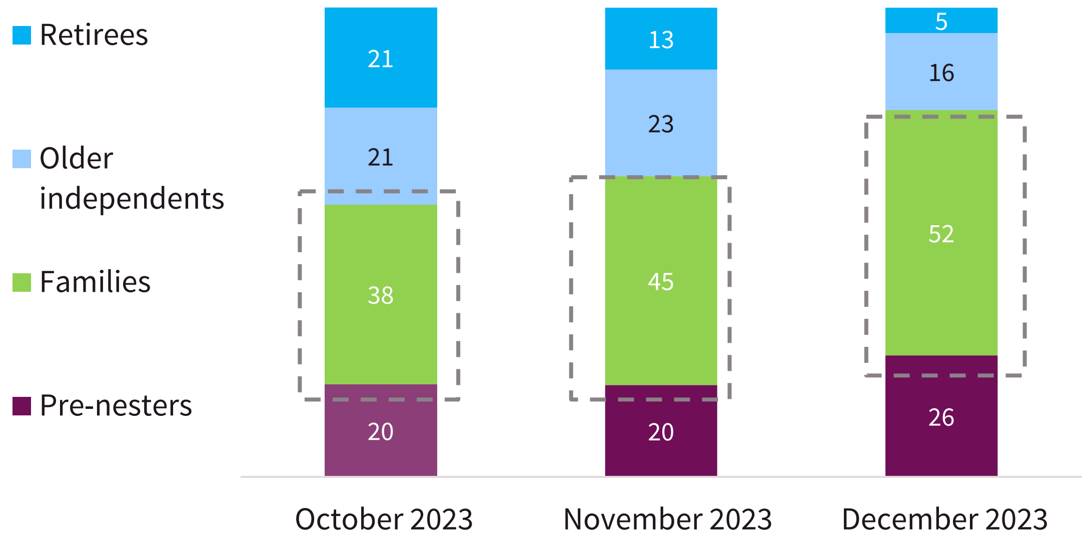
## Where planning on staying on next UK overnight trip in autumn (October to December) (%)

| October | November | December |
|---|---|---|
| 16% | 14% | 14% |

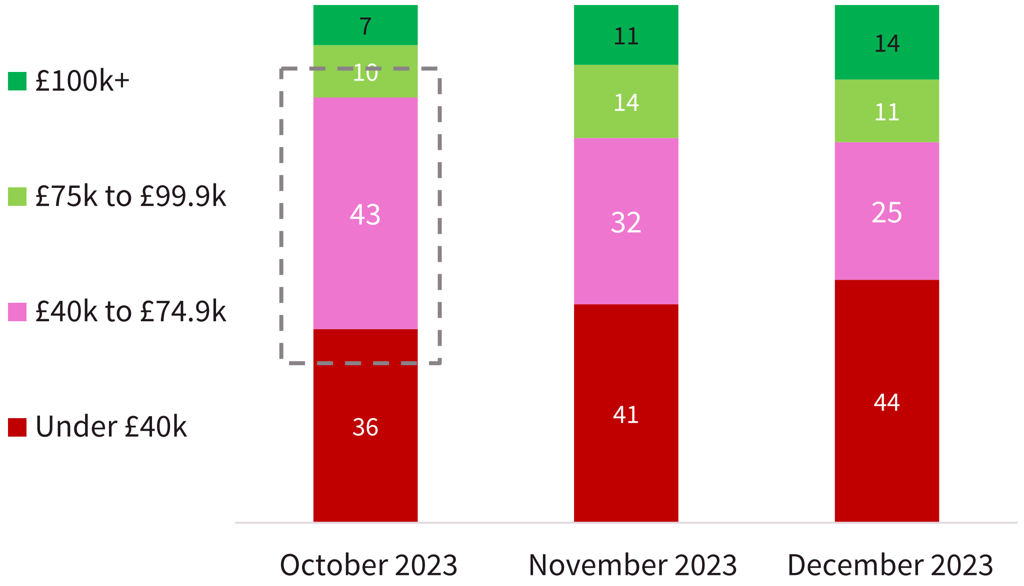


# FAMILIES DOMINATE ACROSS EACH MONTH, ALTHOUGH IT'S LIKELY THAT OCTOBER AND DECEMBER HAVE OLDER PROFILES OUTSIDE THE SCHOOL HOLIDAYS

## Scotland Autumn intenders by life stage by month (%)

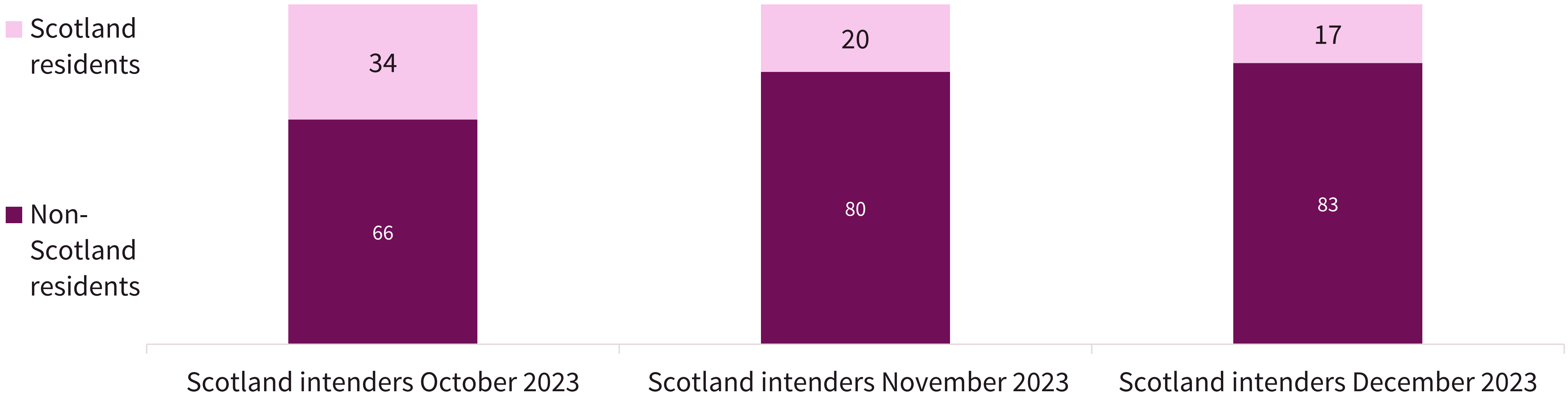



## Scotland autumn intenders by household income by month (%)



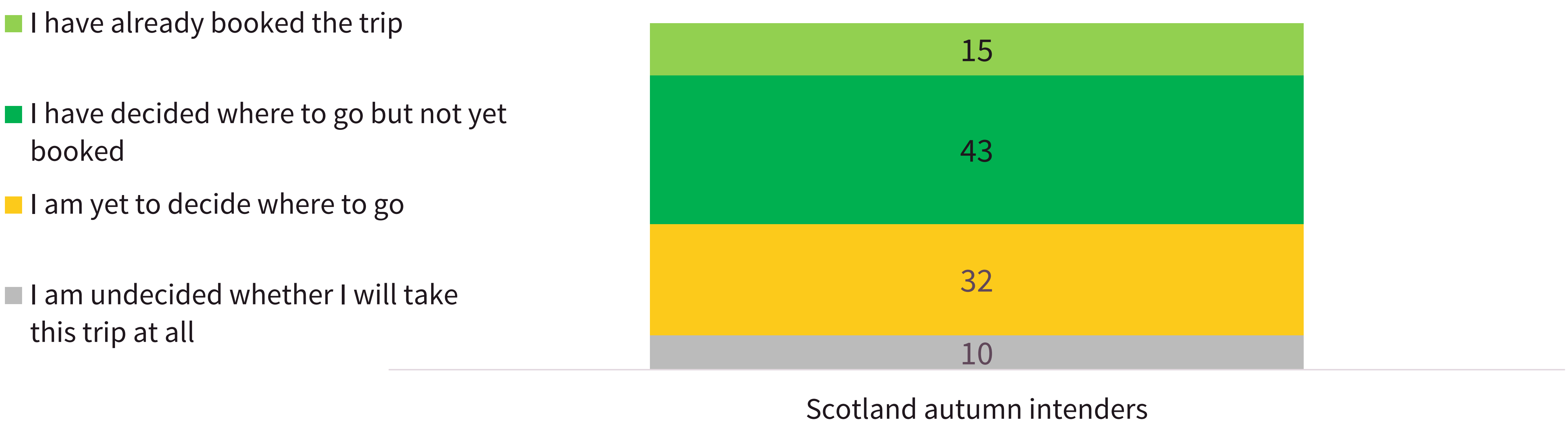
# AS IN THE SUMMER, THE MAJORITY OF SCOTLAND TRIP-TAKERS ARE LIKELY TO COME FROM OUTSIDE OF SCOTLAND, ALTHOUGH THIS IS LESS LIKELY IN OCTOBER

## Origin of Scotland intenders by region of residence (%)



# HOWEVER, ONLY A SMALL PROPORTION HAVE BOOKED THEIR TRIP, MEANING ACTUAL BOOKINGS WILL BE SUBJECT TO CIRCUMSTANCE

## Booking status of next intended UK overnight trip (%)



# SUMMARY

# SUMMARY OF IMPLICATIONS

THE UK PUBLIC ARE STILL FAVOURING UK OVER OVERSEAS TRIPS

DECISION-MAKING CONTINUES TO BE LAST-MINUTE

TRIP INTENTION IS STRONG - THE PUBLIC ARE CUTTING BACK ON SPEND RATHER THAN GIVING UP ON DOMESTIC TRIP TAKING

CUT-BACKS ARE MOST LIKELY ON ACCOMMODATION, EATING OUT AND THINGS TO DO

TRIPS ARE LIKELY TO BE SHORTER THAN IN 2022

MORE AFFLUENT TRIP-TAKERS ARE MORE LIKELY TO BOOK EARLY AND GO ON TRIPS

# APPENDIX

**Disclaimer:**

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**July 2023**