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DOMESTIC SENTIMENT TRACKER SCOTLAND SUMMARY

Based on fieldwork from February to April 2024

May 2024

CONTENTS

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 69th 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 67-69 (February to April) with references to previous waves where applicable.

The cost-of-living crisis and travel

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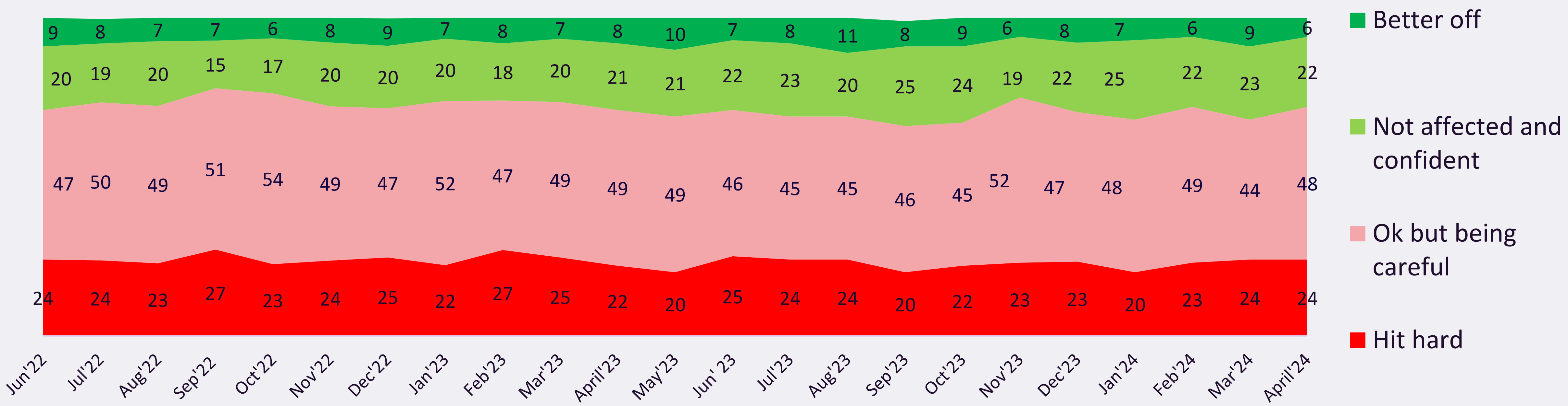
Key finding 1: The cost-of-living crisis and travel

The cost-of-living crisis is still strongly influencing domestic trip-taking

There are no clear changes in the personal impact of the cost-of-living crisis. Around 7 in 10 'cautious and careful' or 'hit hard'.

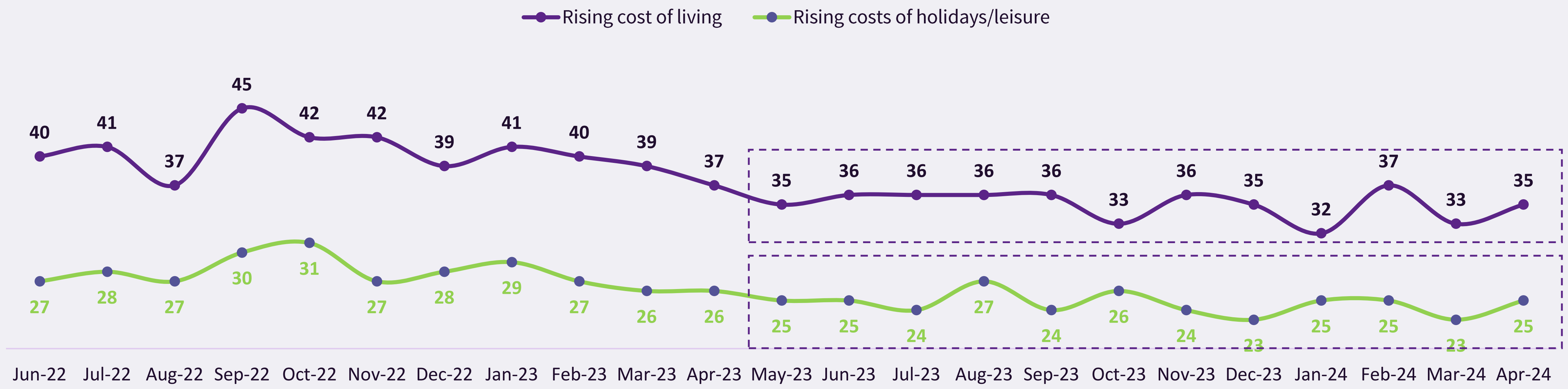
Impact of the cost-of-living crisis (%)



Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.253

‘Rising cost of living’ as a barrier to domestic travel has stayed pretty stable in the last year, further reinforcing the sense of stasis

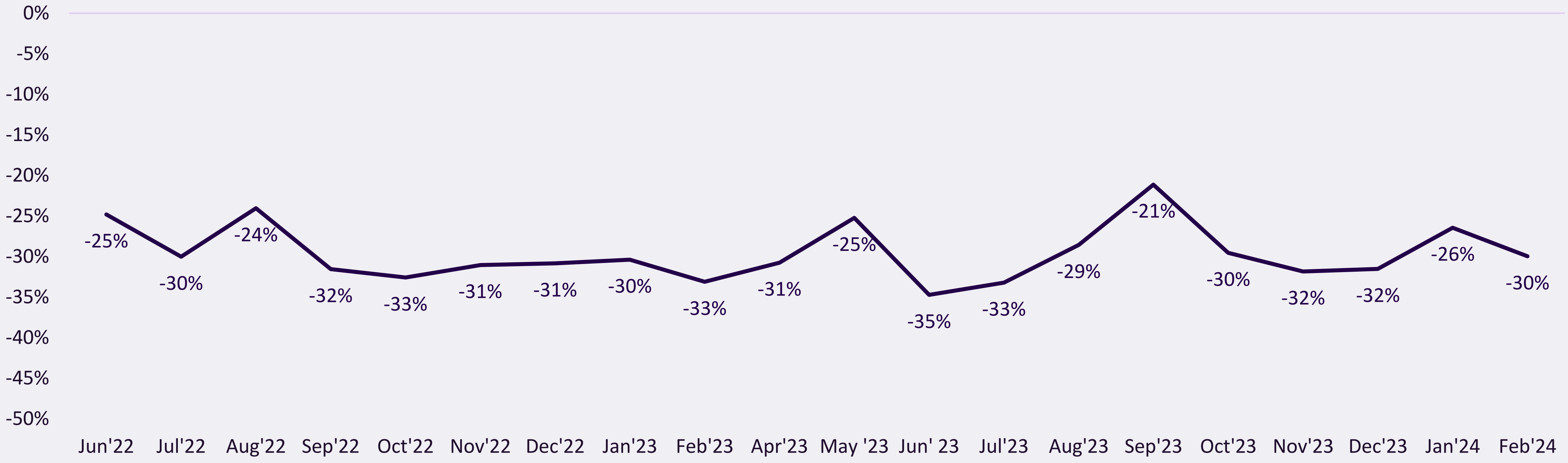
Selected financial barriers to taking a domestic holiday (%)



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=1,755

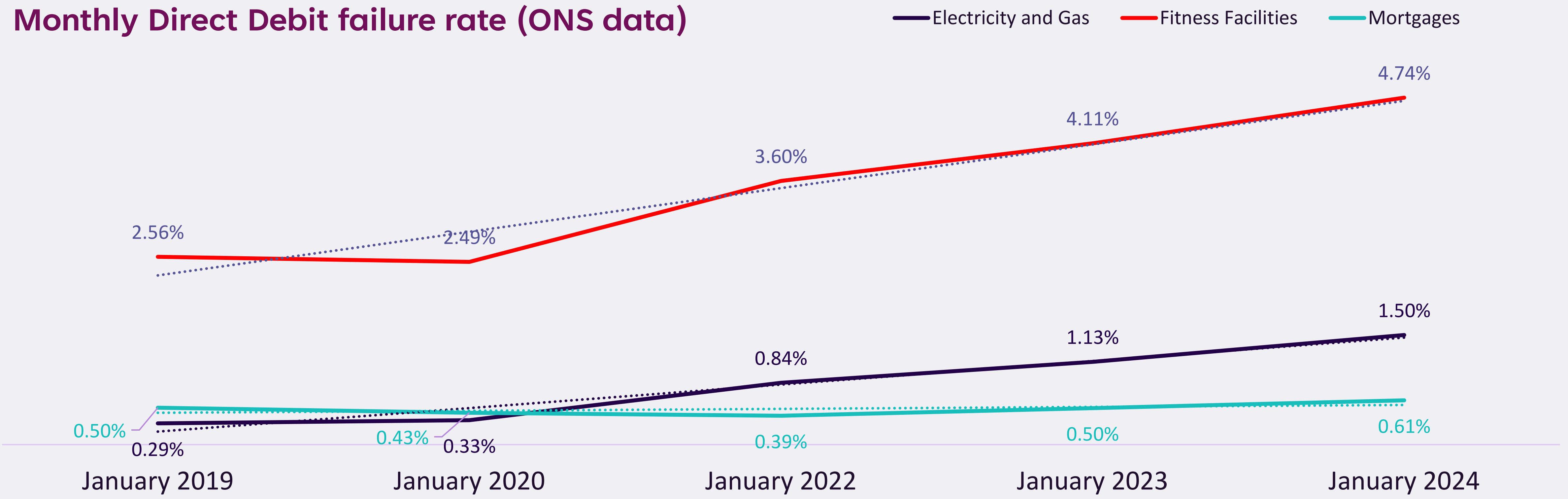
With 'personal savings' consistently lower than a year earlier, it's possible that the impact could get worse

Personal savings compared to a year ago (Net : More minus less)



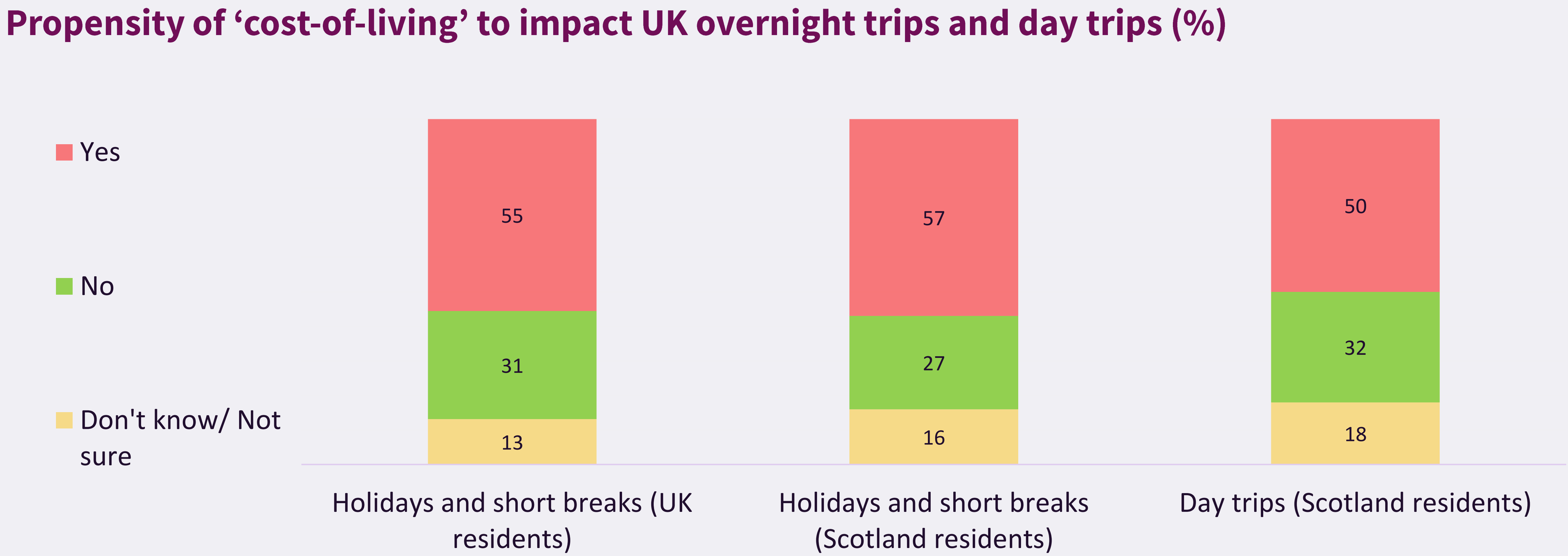
Q18b: Do you have more, less or about the same amount of personal savings compared to this time last year?
Base: All UK respondents. n=1,760

ONS data demonstrates that failed 'direct debits' are on the increase. Although from a small base, this may imply rising challenges for discretionary leisure spend



Source: ONS

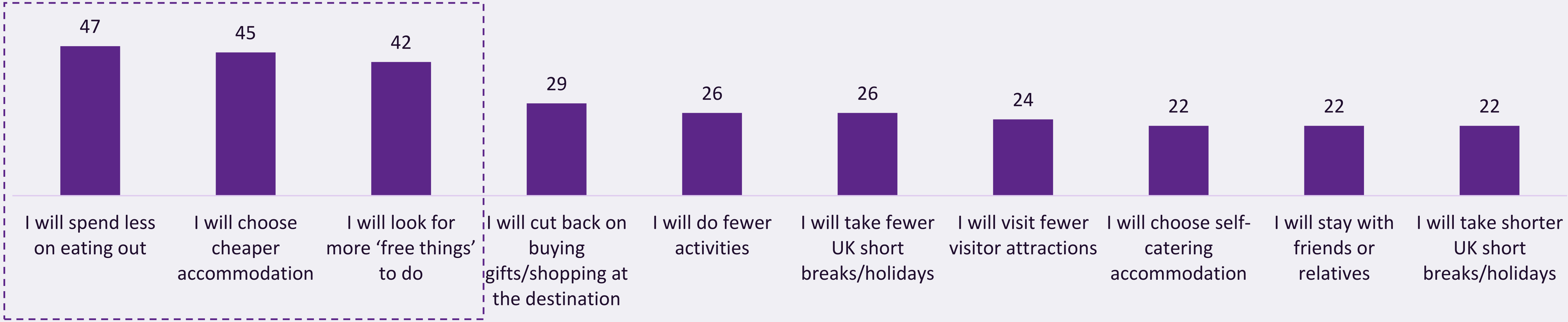
It’s no surprise that over half of the UK and Scottish population anticipate the cost-of-living to impact their overnight trips and day trips



VB7iii. Just to check, is the ‘cost of living crisis’ likely to influence your UK short breaks or holidays/day trips in the next six months?
Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.253

‘Spending less on eating out’, ‘choosing cheaper accommodation’ and ‘looking for more free things to do’ are the key ways the public anticipate cutting back

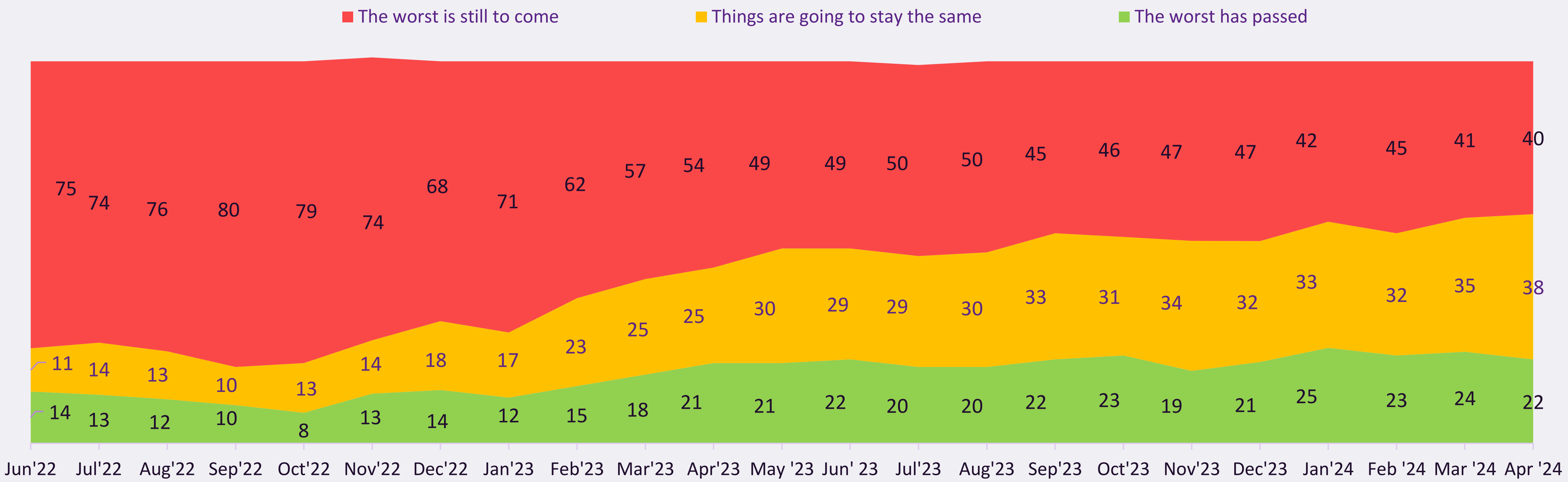
‘Cost-of-living’ impact on UK holidays and short breaks (%)



VB7iii. 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=c.1,750. All Scotland respondents n=c.253

There are some signs of improvement. The public are less pessimistic about the future than at any point since June 2022 (although few think things will get better)

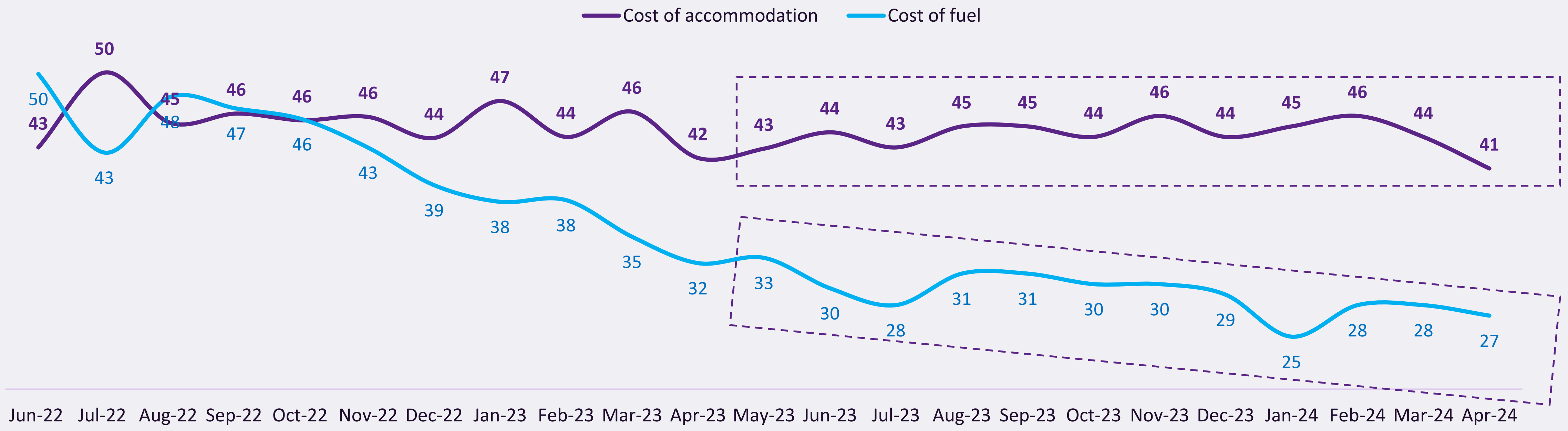
Perceptions of the cost-of-living crisis over time (%)



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

'Cost of fuel' as a barrier continues to inch down and we've even seen a fall in 'cost of accommodation' (although this should be viewed over a longer period)

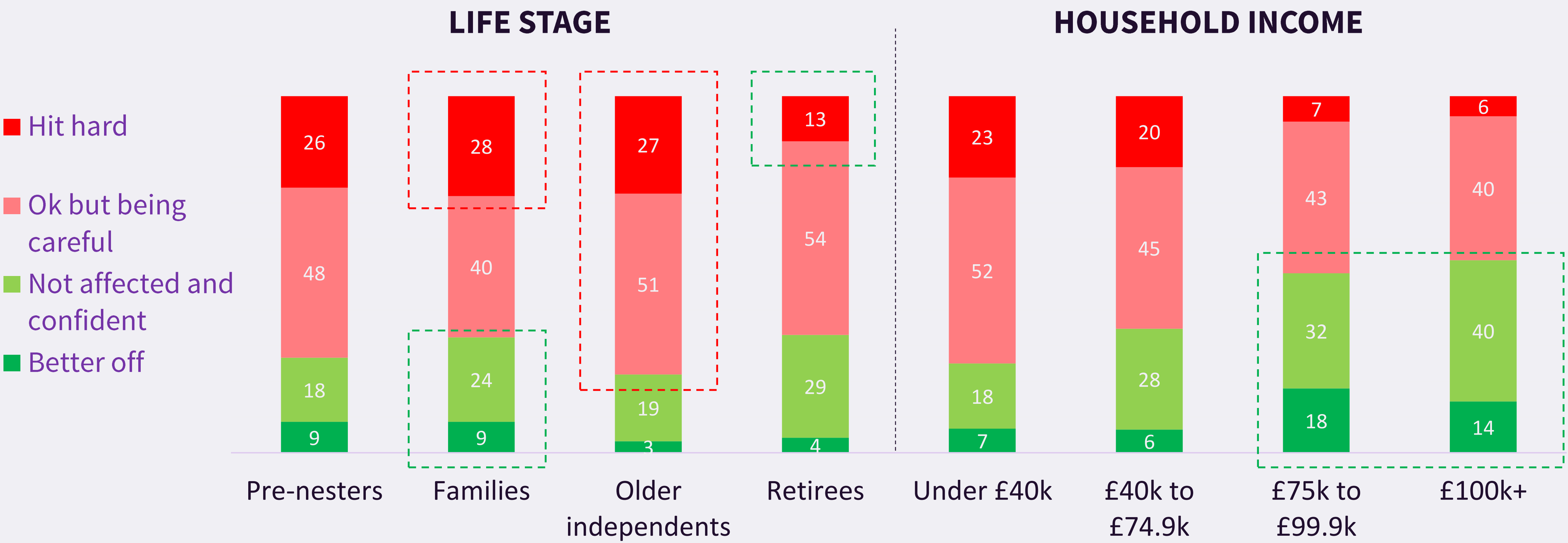
Selected cost barriers (%)



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=1,760

The impact across life stages differs considerably. Retirees the least negatively impacted and older independents the most. Higher incomes are also unsurprisingly less impacted.

Financial segments by individual groups (%)



Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: Pre-nesters n=329; Families n=565; Older Independents n=511; Retirees n=350; Under £40k n=316; £40k to £74.9k n=227; £75k to £99.9k n=49; £100k+ n=30

Trip intentions from April to September

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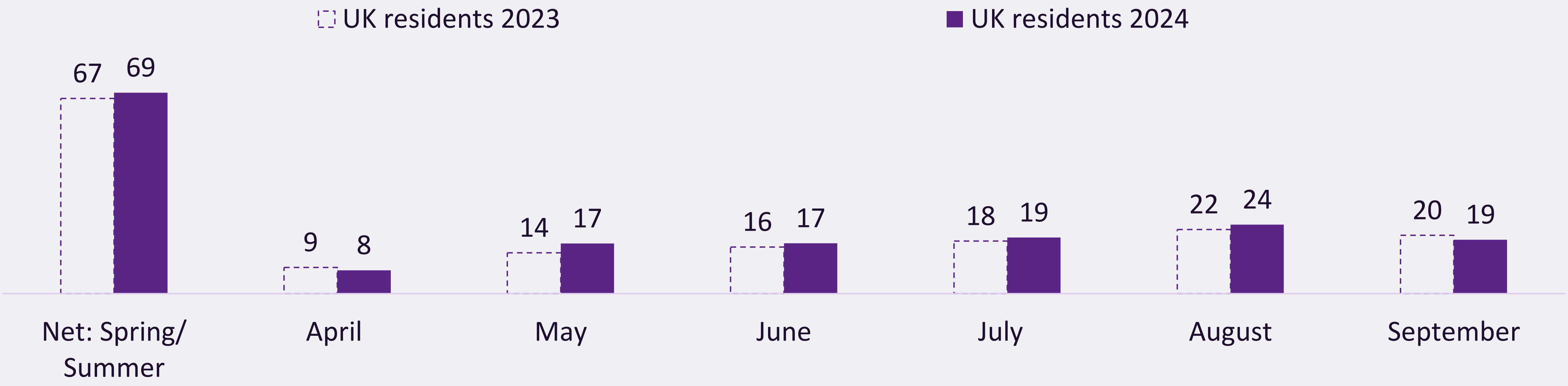
Key finding 2: Overall trip intentions from April to September

There are signs of a slow-down in domestic trip-taking this spring and summer

The picture over spring/summer is relatively flat. This is a contrast to previous waves where intentions have been higher than the year before

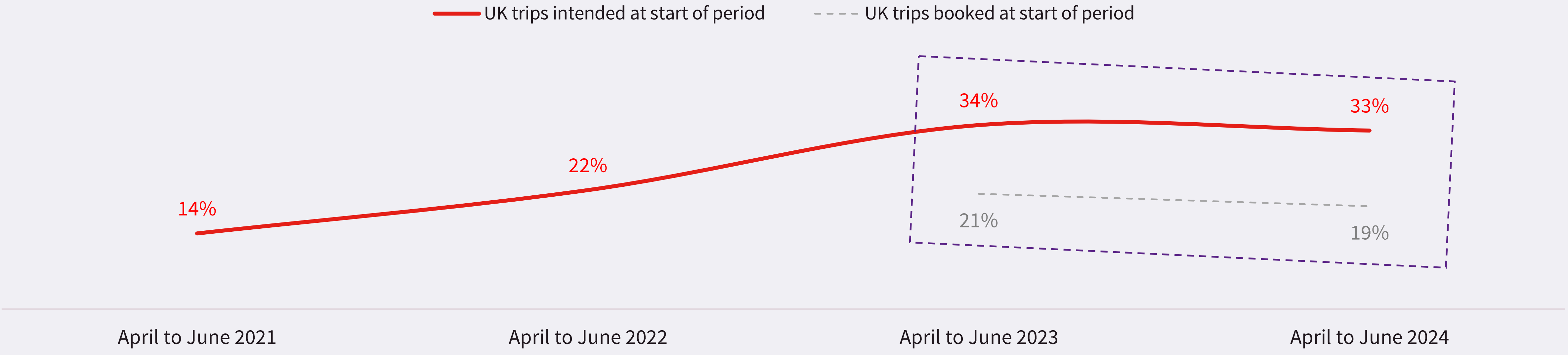
Domestic trip intention (%)



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?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,760; All Scotland respondents n=270

The short-term ‘spring’ picture shows a slight decline in intentions and actual bookings. Again this may represent a slow-down in domestic trip-taking

Domestic trip intention and bookings (%)

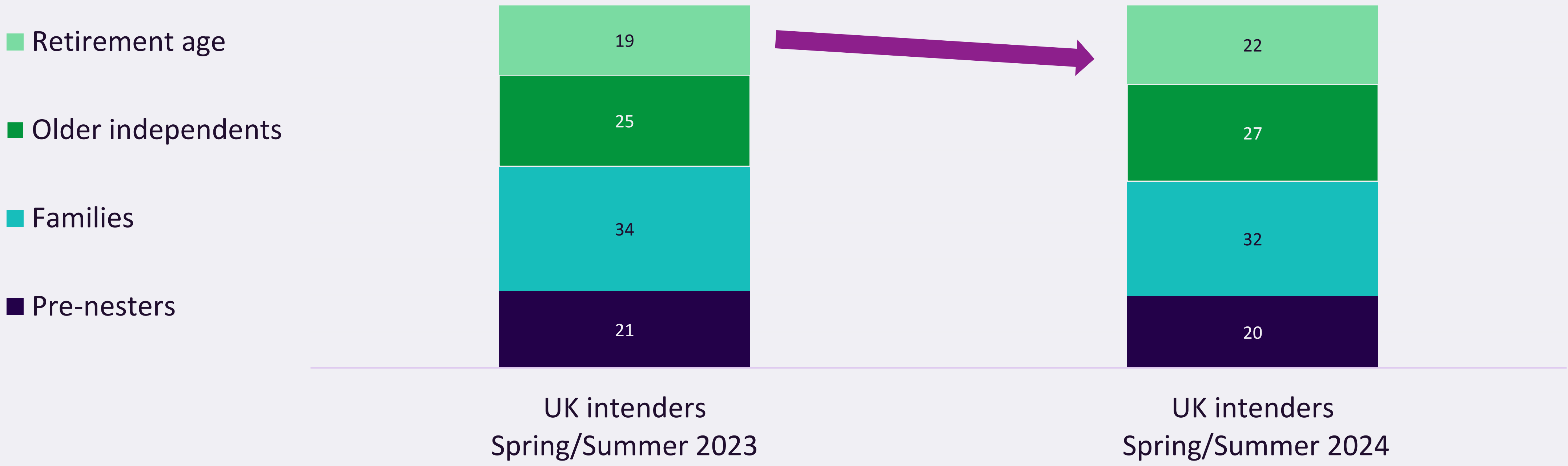


VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2enew: Which of the following best describe how close you are to booking your next overnight UK trip in [pipe: hVB3]? Base: All UK respondents. n=1750 each wave

*Actual trips taken is only available from April 2021 up to March 2024. Please note questionnaire was updated in April 2023 so there may be some artificial uplift

There's a possibility that the drivers for this stability are a return to normality, profiles barely changing since 2023. Where there is change, it's to a slightly older profile

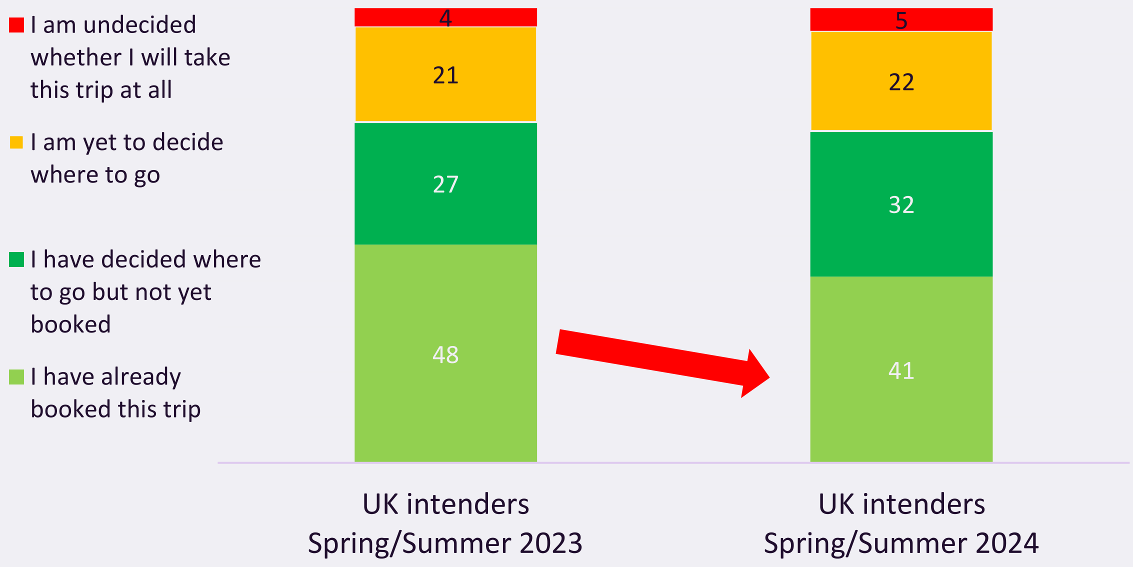
UK intenders by life stage (%)



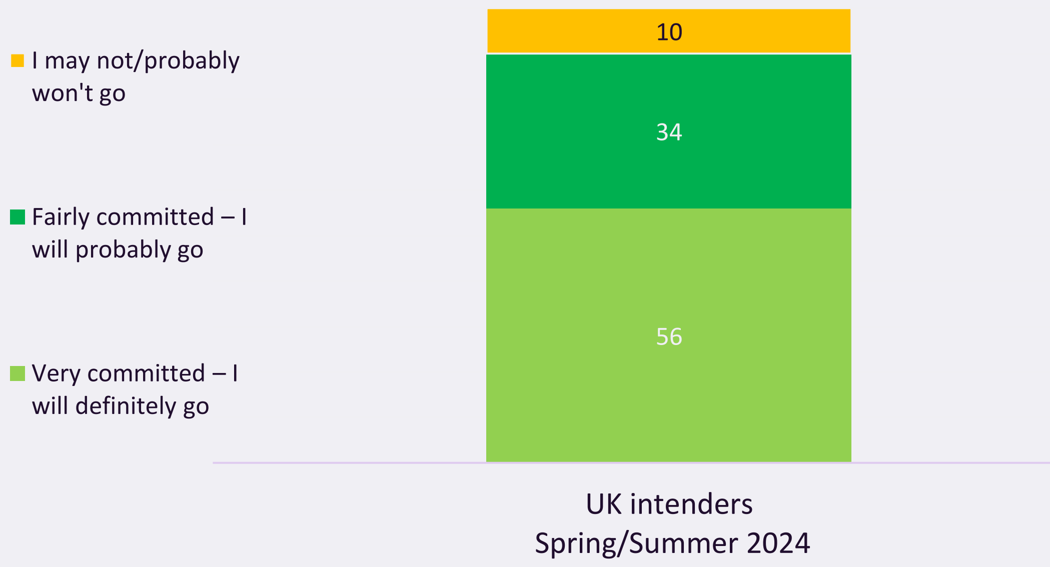
Source: Demographic questions. Base: UK population n=1,755; UK intenders Spring/Summer 2023 n=1,177; UK intenders Spring/Summer 2024 n=1,212; Overseas intenders Spring/Summer 2023 n=670; Overseas intenders Spring/Summer 2024 n=758

Evidence of a potential slow-down is underlined by a drop in bookings vs. the same time last year, and only half 'very committed' to taking a trip.

Overnight UK trip booking status (%)



Overnight UK commitment levels (%)



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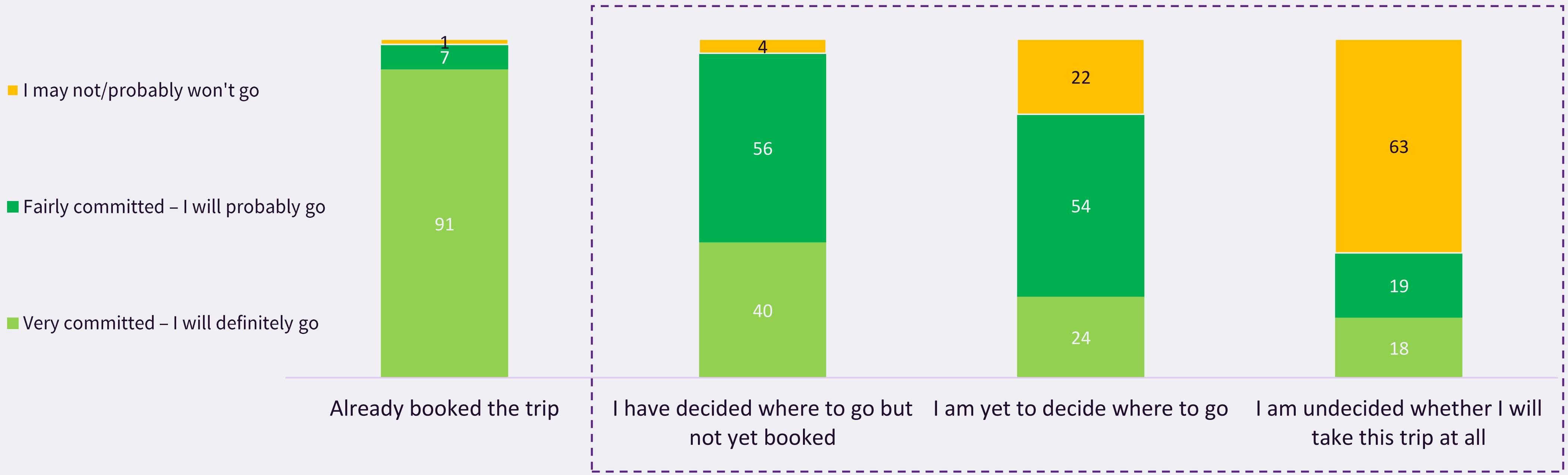
VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>? Base: UK intenders Spring/Summer 2023 n=1,177; UK intenders Spring/Summer 2024 n=1,212; Overseas intenders Spring/Summer 2023 n=670; Overseas intenders Spring/Summer 2024 n=758

Commitment levels are particularly low amongst those that have not booked the trip, suggesting that they will need some convincing and support to follow through

Overnight UK commitment levels by booking status (%)



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VB2ei. How committed are you to taking this next trip in <INSERT MONTH FROM VB2A>? Base: Already booked the trip n=490; Decided where but not yet booked n=383; Yet to decide where to go n=274; Undecided whether I will take the trip at all n=53

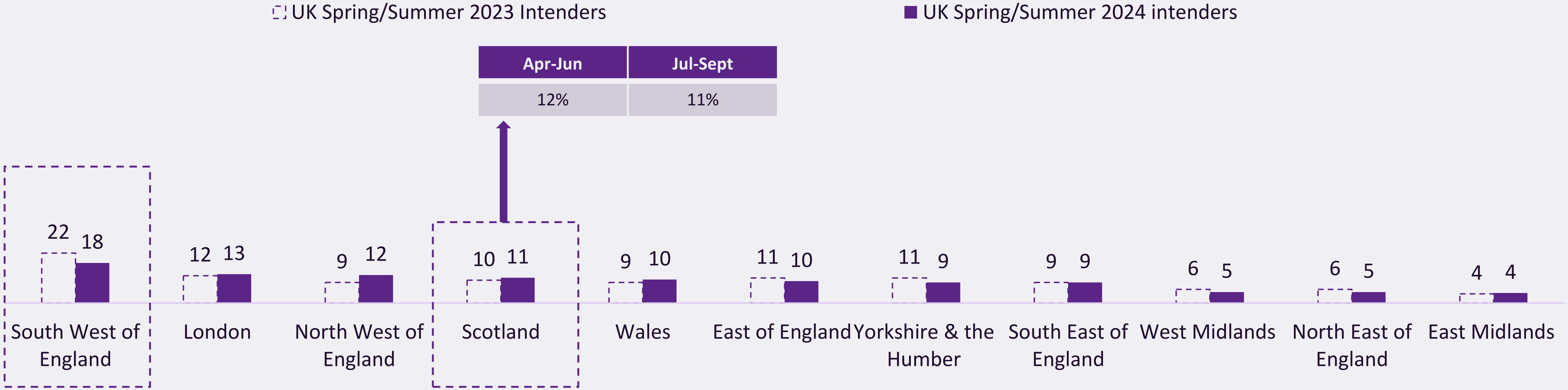
Key finding 3: Scotland trip composition – signs of cutting back

Scotland intentions are strong but trip-takers are likely to cut back relative to last year

Scotland intentions are holding strong across the spring and summer. ‘Beach destinations’ such as the South West of England may be suffering more

Destination for domestic spring/summer trip (%)

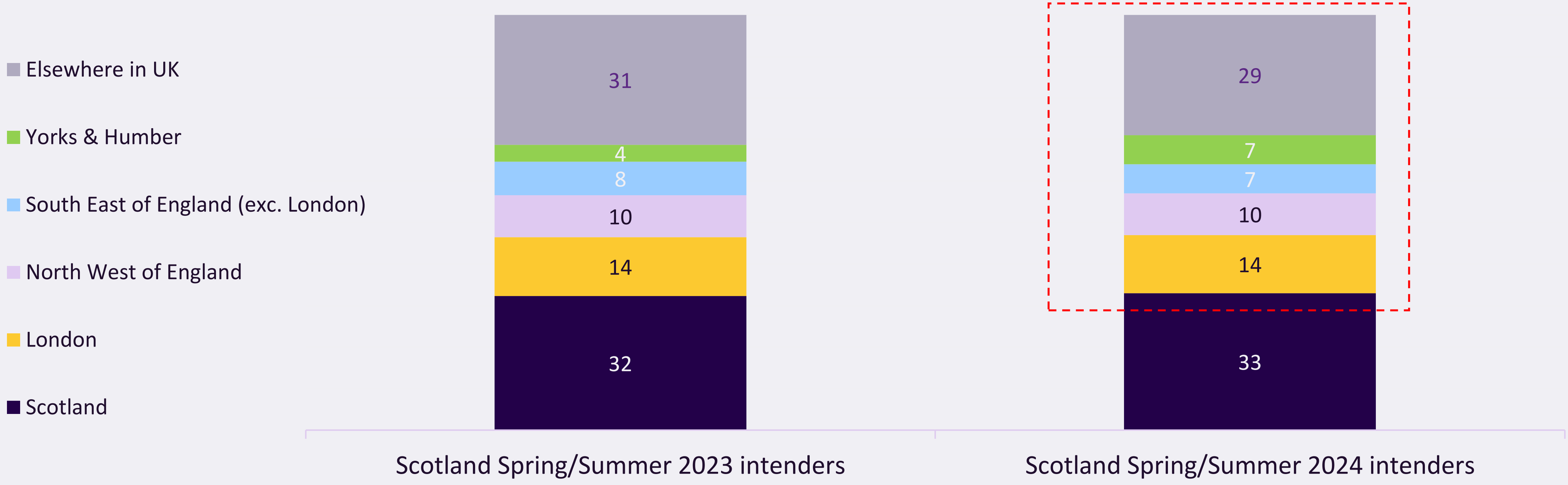
Apr-Jun	Jul-Sept
12%	11%



QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: UK Spring/Summer 2023 intenders n=1,115; UK Spring/Summer 2024 intenders n=1,148; Scotland resident Spring/Summer 2024 intenders n=157

The majority of Scotland trip intenders are set to come from outside of Scotland, London, North West of England and South East of England driving the strongest numbers

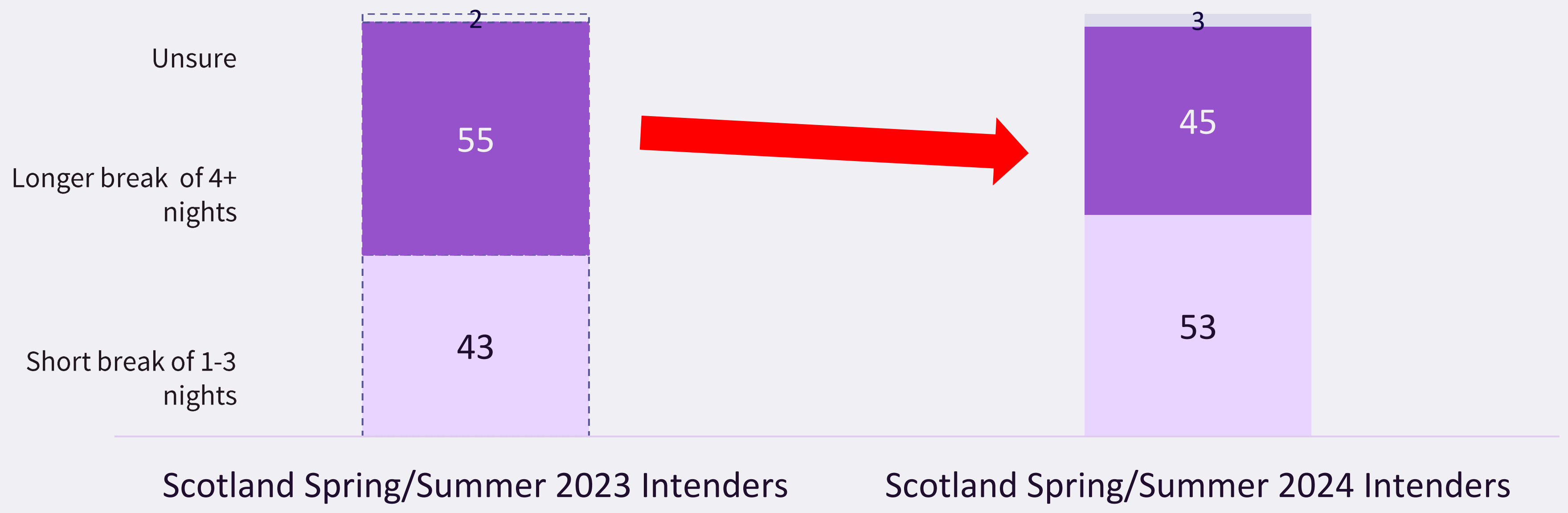
Origin of Scotland intenders (%)



Source: Demographics.
Base: All respondents. All Scotland Spring/Summer 2023 intenders n=419; All Scotland Spring/Summer 2024 intenders n=485; All Scotland resident Spring/Summer 2024 intenders n=225

However, trip lengths are set to be shorter than in 2023. Scotland short breaks more likely than longer breaks

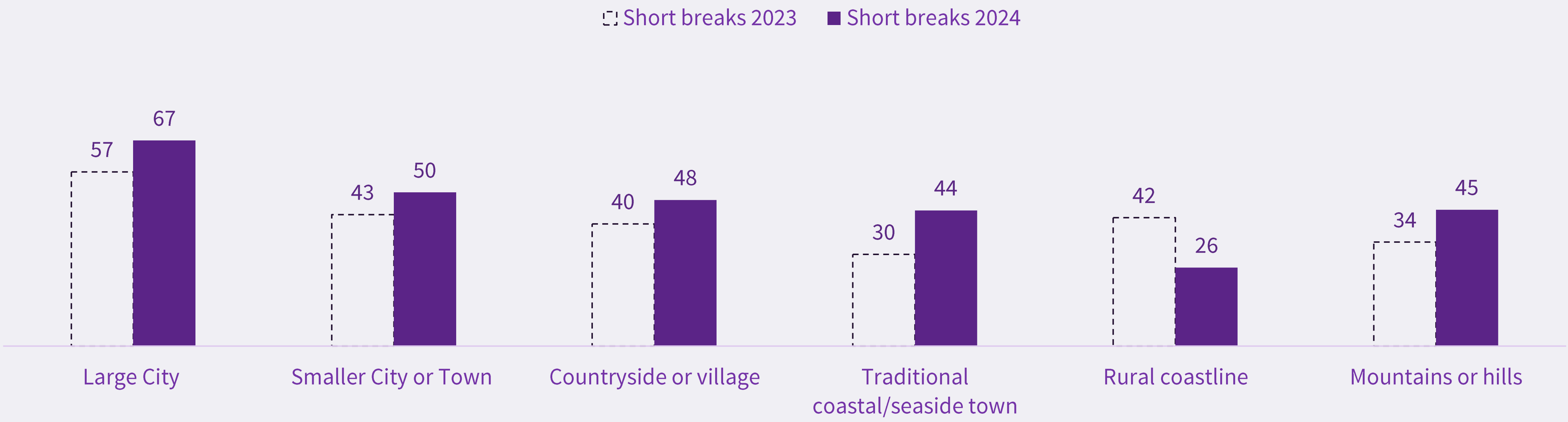
Length of next Scotland Spring/Summer domestic trip (%)



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 Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland resident Spring/Summer 2024 intenders n=201

Trip length does vary by destination type but all (other than rural coastline trips) are set to experience a shift to shorter breaks

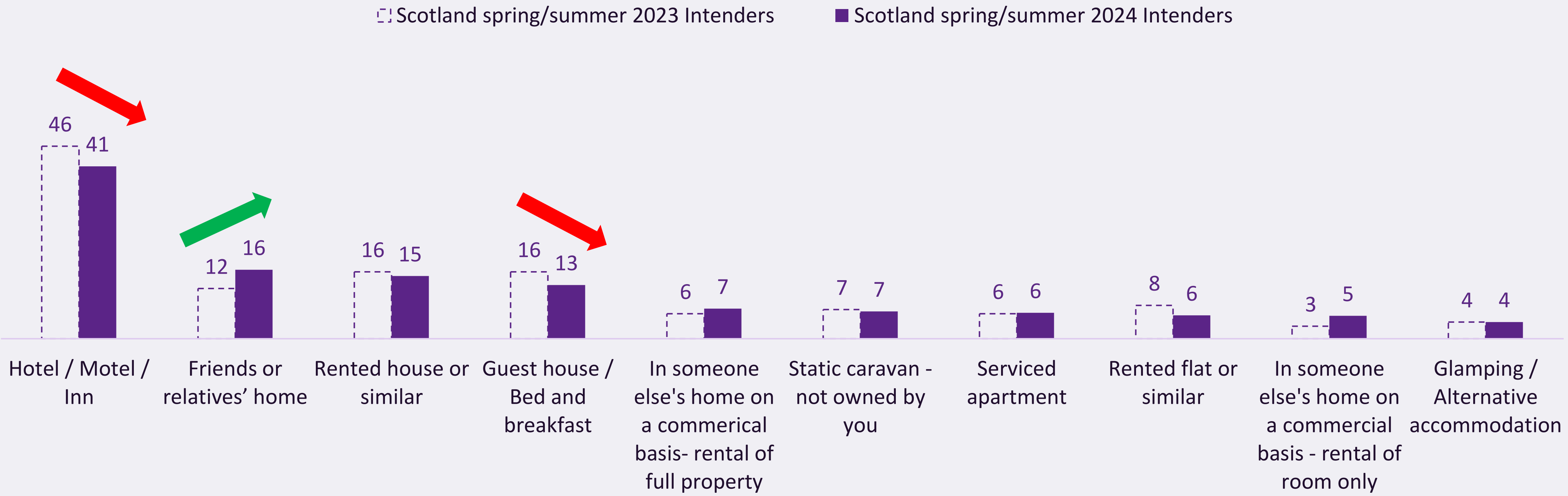
Length of Scottish trip by destination type (%)



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. Large city n=101; countryside or village n=109; Traditional coastal/seaside town n=84; rural coastline n=82; mountains or hills n=87

Intention to stay in a hotel has declined for the third consecutive wave, with guest house also dropping. Cheaper options like friends or relatives and someone else's home on a commercial basis has increased for the second consecutive wave.

Accommodation on Scotland trip (%)

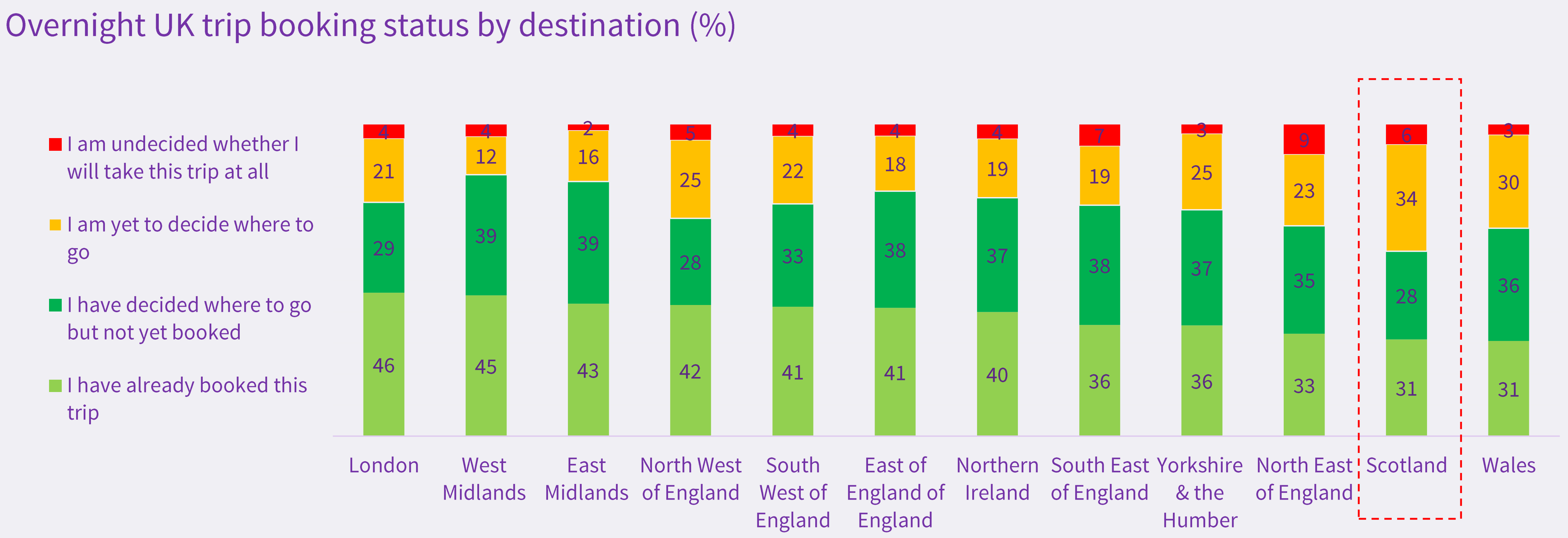


QVB6a. What type/s of accommodation do you expect to be staying during your UK trip in <insert month>?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland resident Spring/Summer 2024 intenders n=201

Key finding 4: Scotland trip vulnerability

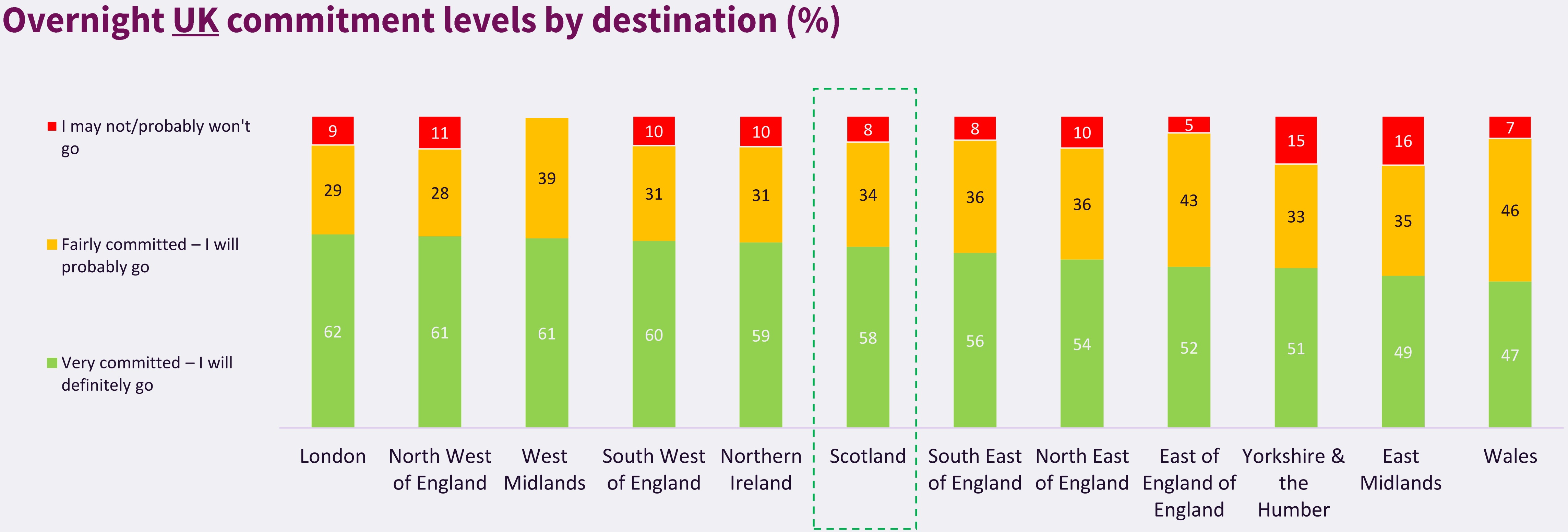
Scotland trips are more vulnerable than the majority of other UK destinations

However, Scotland is the destination in the UK with the lowest 'already booked' and the highest 'yet to decide where to go'. This makes trips very vulnerable.



VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>? Base: UK intenders Spring/Summer 2024. London n=201; West Mids n=60; NW Eng n=141; East Mids n=53; SW Eng n=206; SE Eng n=97; Yorks & Humber n=108; NI n=33*; Wales n=142; NE Eng n=60; Scotland n=162

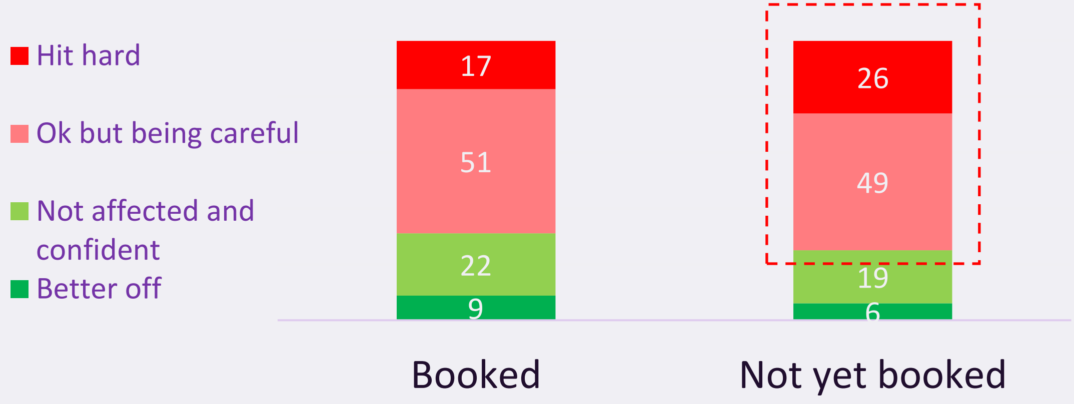
On a more reassuring note, commitment to taking a Scotland trip is high, only marginally behind London. However, there is a strong need to convert commitment into booking



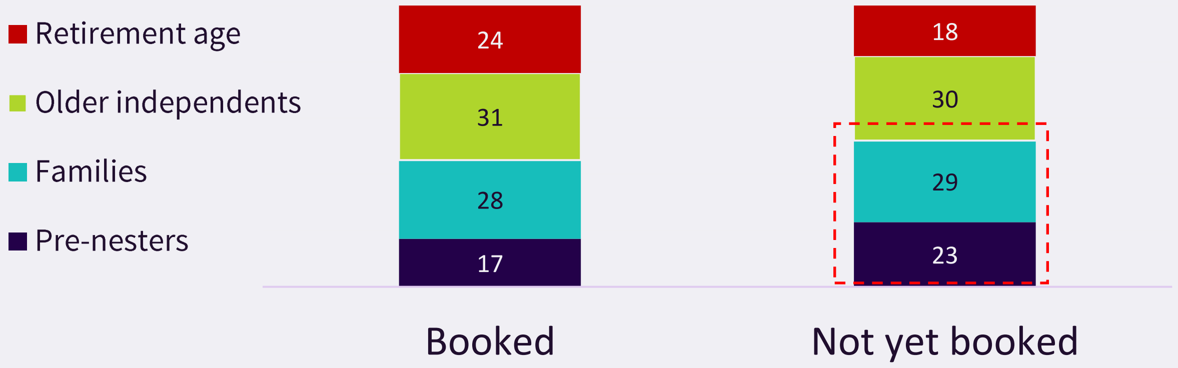
VB2ei. How committed are you to taking this next trip in <INSERT MONTH FROM VB2A>? Base: UK intenders Spring/Summer 2024. London n=201; West Mids n=60; NW Eng n=141; East Mids n=53; SW Eng n=206; SE Eng n=97; Yorks & Humber n=108; NI n=33*; Wales n=142; NE Eng n=60; Scotland n=162

The non-bookers are more likely to be financially stretched, younger and living outside Scotland. Being that non-Scotland residents stay longer and spend more, it is important to convert non-bookers to booking

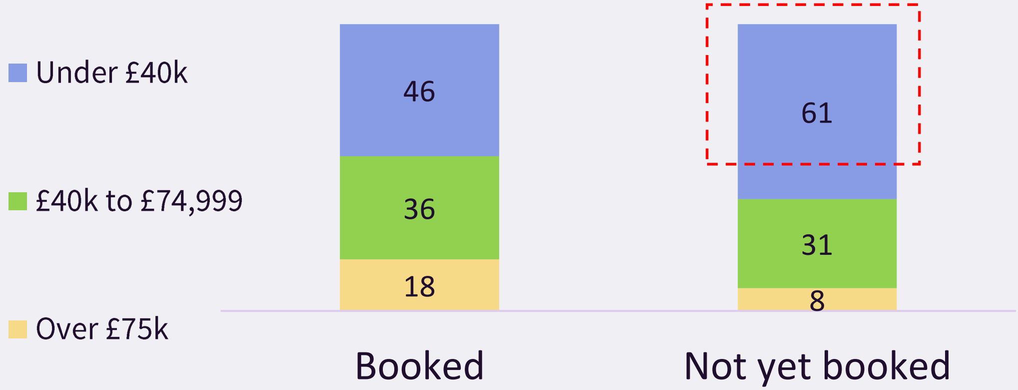
Impact of cost-of-living crisis (%)



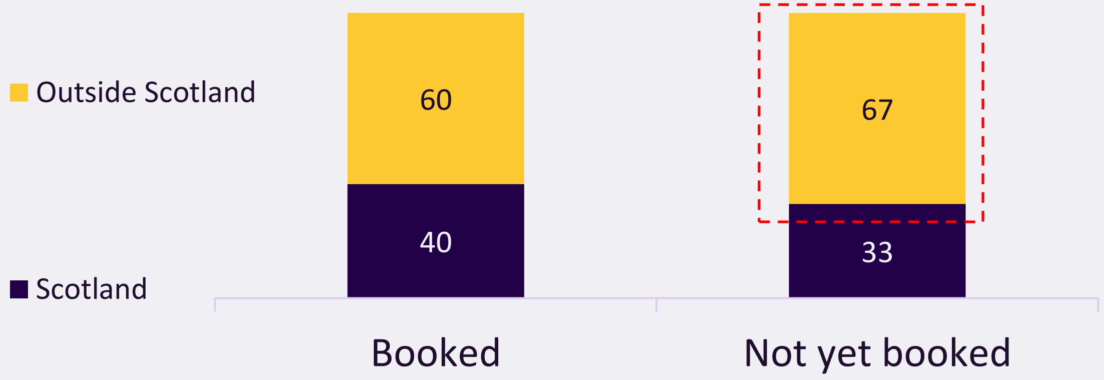
Life stage (%)



Household income (%)



Origin (%)



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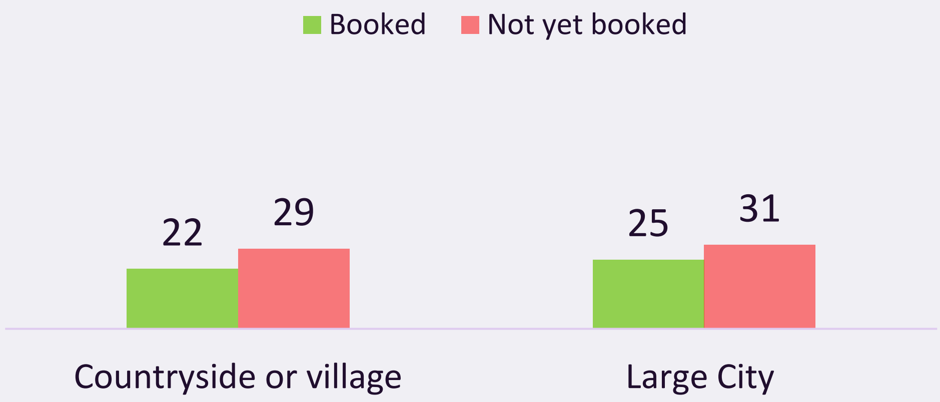
Already booked trip n=124; Not booked trip n=276

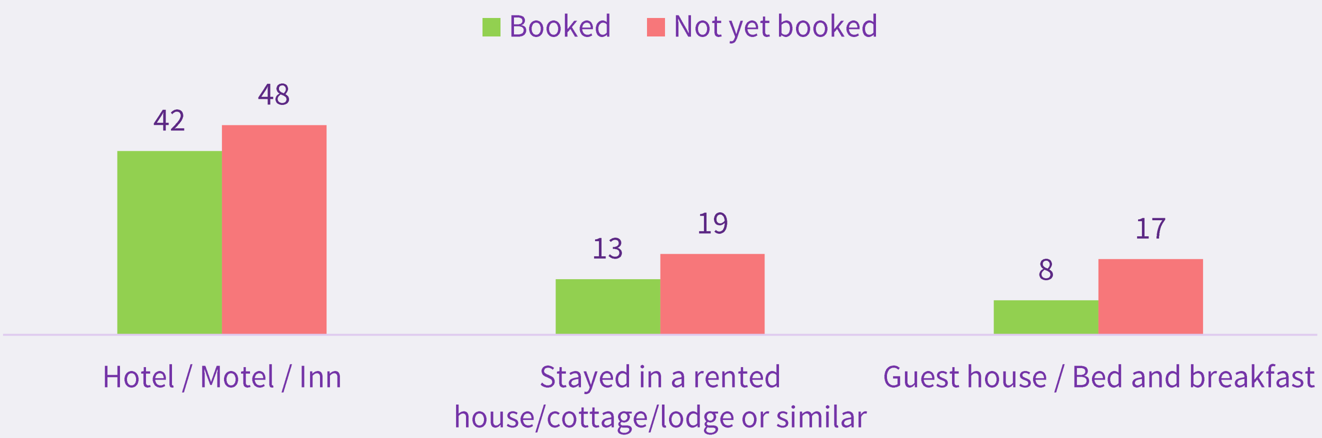
bva Bdrc

Non-bookers are split between Edinburgh and The Highlands, staying in hotels, rented cottages and B&Bs. Wales and London are the strongest competitor destinations.

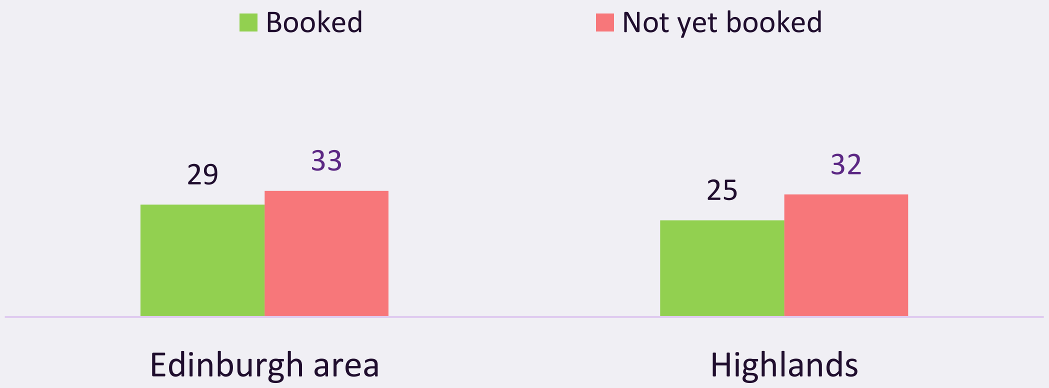
Destination type (%)



Accommodation type (%)



Area of Scotland (%)



Leading alternative destinations (%)


Wales


London

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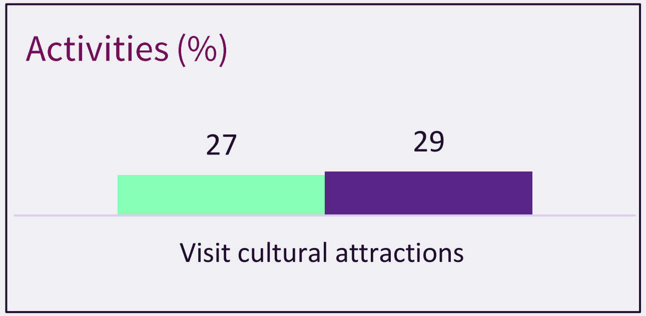
Already booked trip n=124; Not booked trip n=276

bva Bdrc

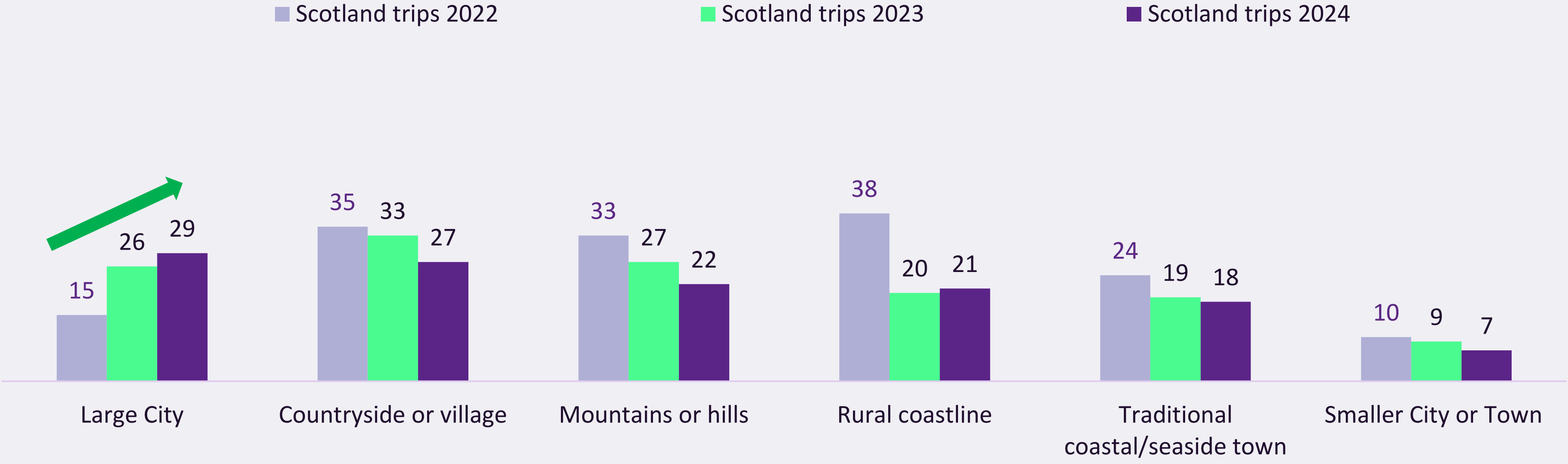
Key finding 5: The appeal of large cities

The appeal of large cities continues to grow. However, if non-Scottish intenders do not book their trips, Scotland's large cities are also the most vulnerable

The intention to visit Scotland's large cities continues to increase, doubling compared to 2022. Rural spaces are less popular, but perhaps we are simply seeing a return to normality following the pandemic



Destination type for Scotland trip (%)

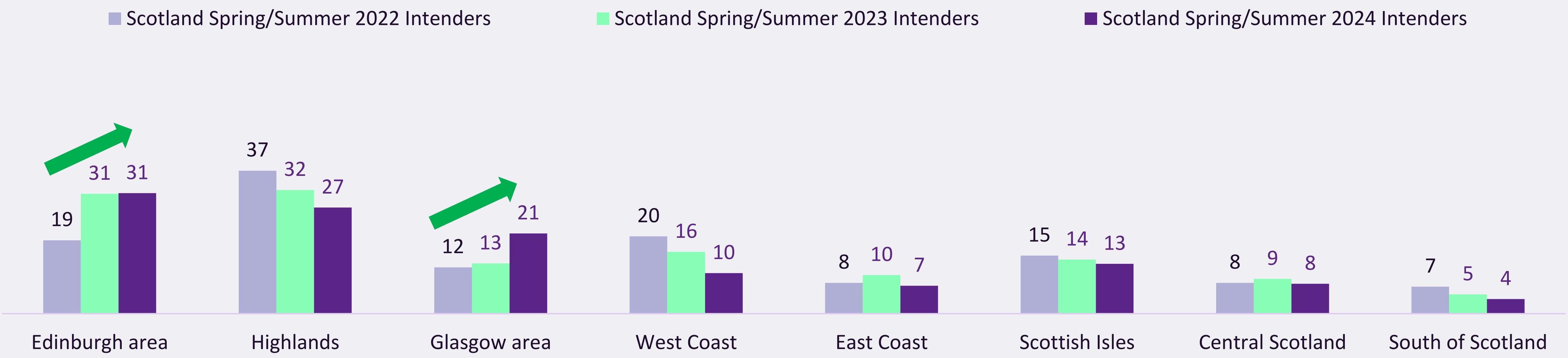


QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?

Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland resident Spring/Summer 2024 intenders n=201

Edinburgh is the main recipient of the rise since 2022, but the Glasgow area also appears to be benefitting. The Highlands and other rural areas are doing less well.

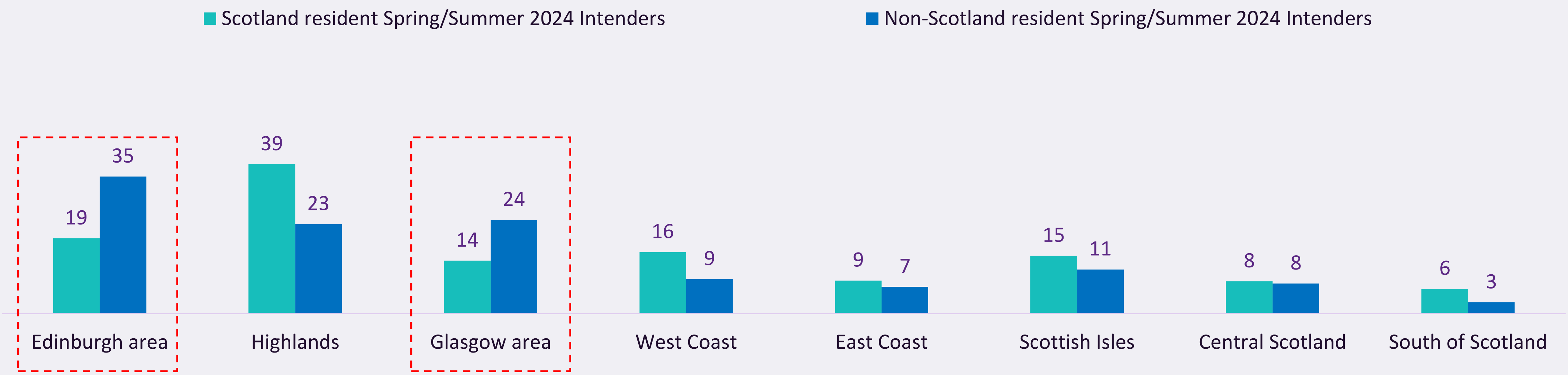
Scotland destination for spring/summer trip (%)



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 Spring/Summer 2023 intenders n=419; All Scotland Spring/Summer 2024 intenders n=485

It's important to remember that intended destination varies considerably by region of origin. If non-Scottish intenders do not follow through with trips, actual stays in Edinburgh are likely to drop

Scotland destination by region of residence (%)



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QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All Scotland resident Spring/Summer 2024 intenders n=225; All Scotland non-resident Spring/Summer 2024 intenders n=260

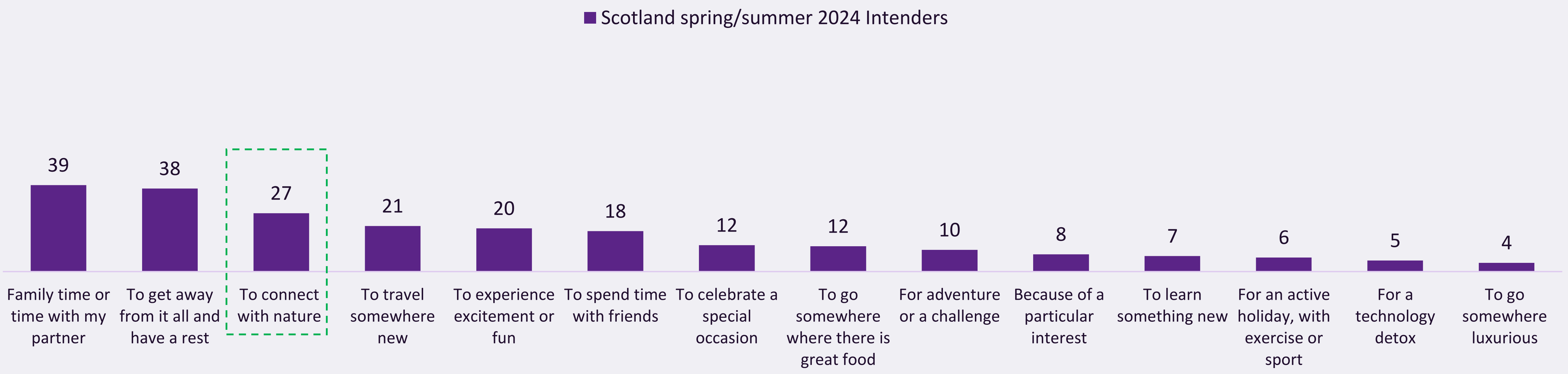
bva Bdrc

Key finding 6: Motivations and activities

Scotland intenders have a range of motivations and activities, and profiles differ hugely within them

Scotland domestic intenders visit Scotland for a range of reasons. Connecting with nature is the leading most ‘tangible’ reason.

Motivations for Scotland Spring/Summer overnight trip (%)

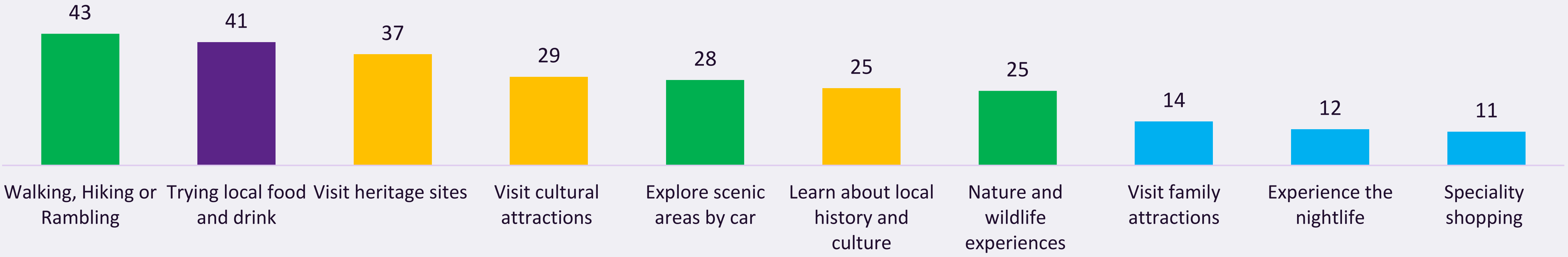


VB6fii. Which of the following best describe your motivation/s for this trip? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland resident Spring/Summer 2024 intenders n=201

Nature, food and heritage are the key activities that domestic trip-takers intend to explore. Fun and adventure also makes up a sizeable minority.

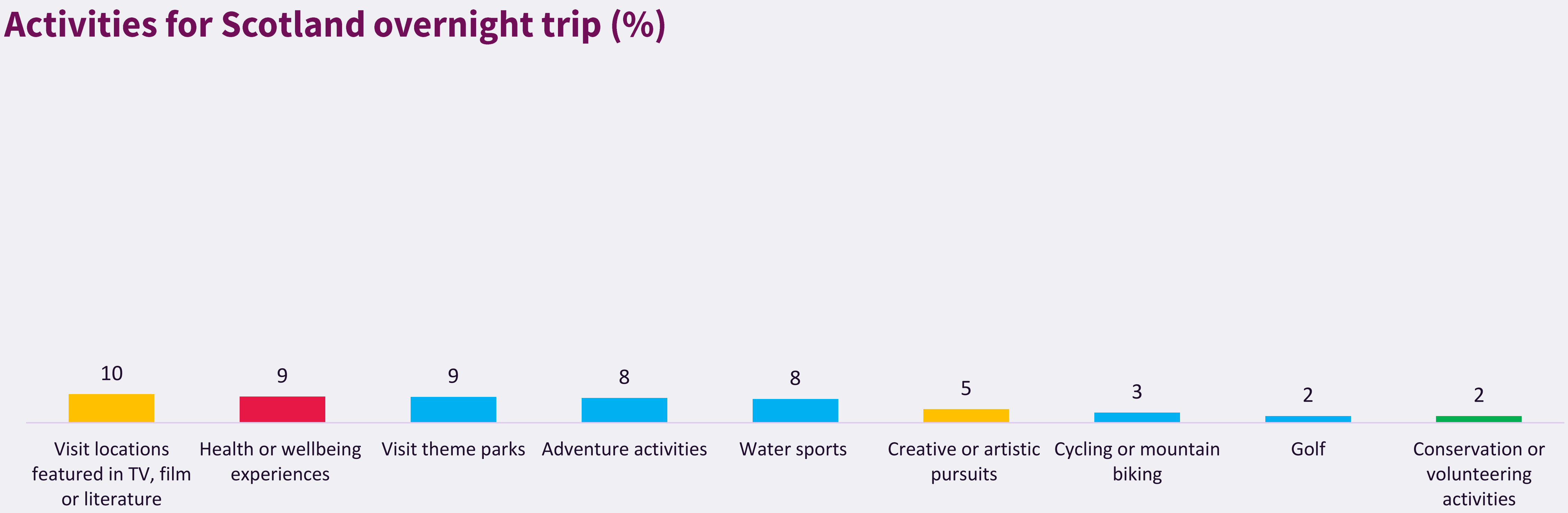
Activities for Scotland overnight trip (%)

Net categories	Percentage
Nature focus	64%
Heritage and culture	60%
Food drink and retail	45%
Fun, sport and adventure	31%



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 Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland resident Spring/Summer 2024 intenders n=201

Trip-takers also explore a range of other activities



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 Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland resident Spring/Summer 2024 intenders n=201

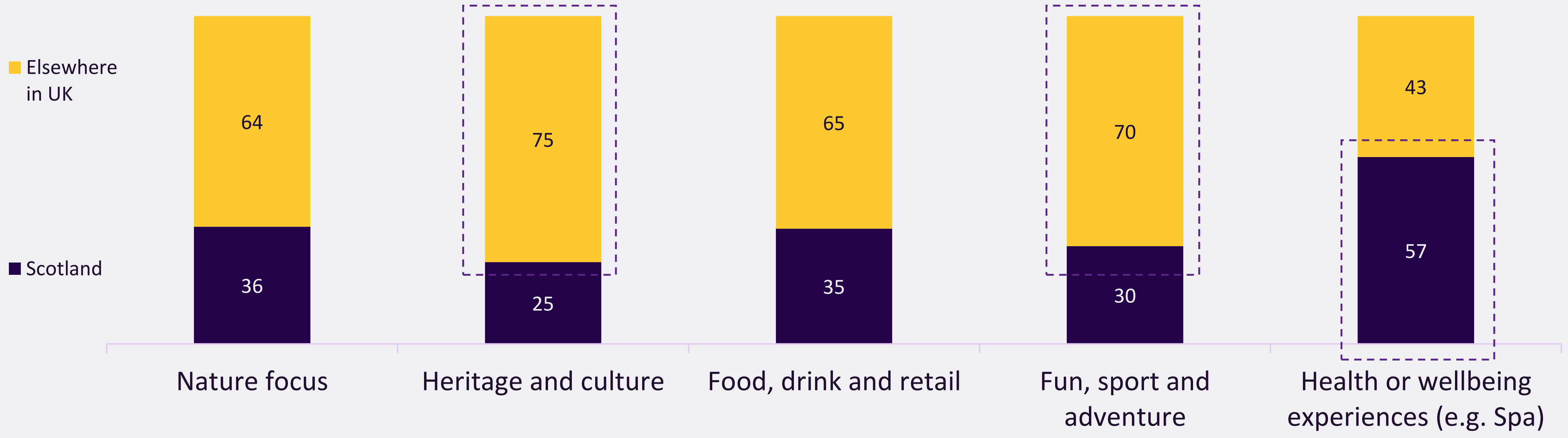
There is a wide spectrum of ages across activities amongst Scotland intenders. Nature, heritage, retail and catering favouring older age groups, and adventure younger

Activities by life stage (%)

Demographics. Nature focus n=255; Heritage and culture n=229; Retail and catering n=185; Sport and adventure n=89; Health or wellbeing experiences n=44

Origins also differs by activity, 'heritage and culture' and 'fun, sport and adventure' dominated by non-Scotland-residents

Activities in Scotland by region of origin (%)



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Demographics. Nature focus n=255; Heritage and culture n=229; Retail and catering n=185; Sport and adventure n=89; Health or wellbeing experiences n=44

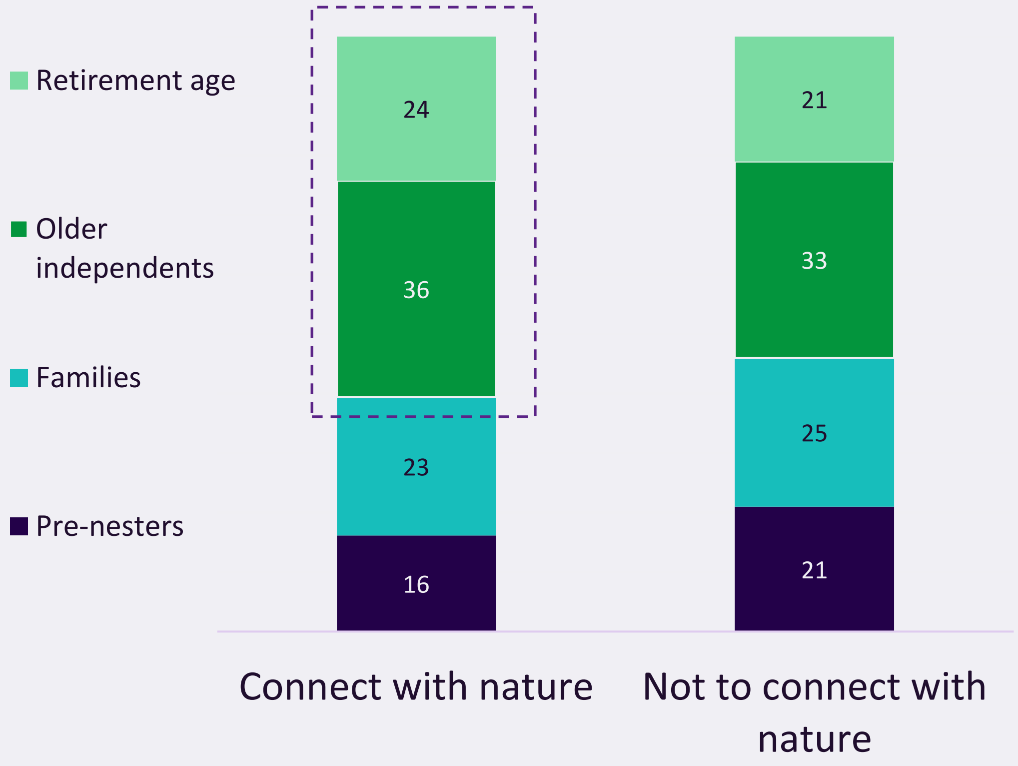
bva Bdrc

Key finding 7: Focussing on the nature intender

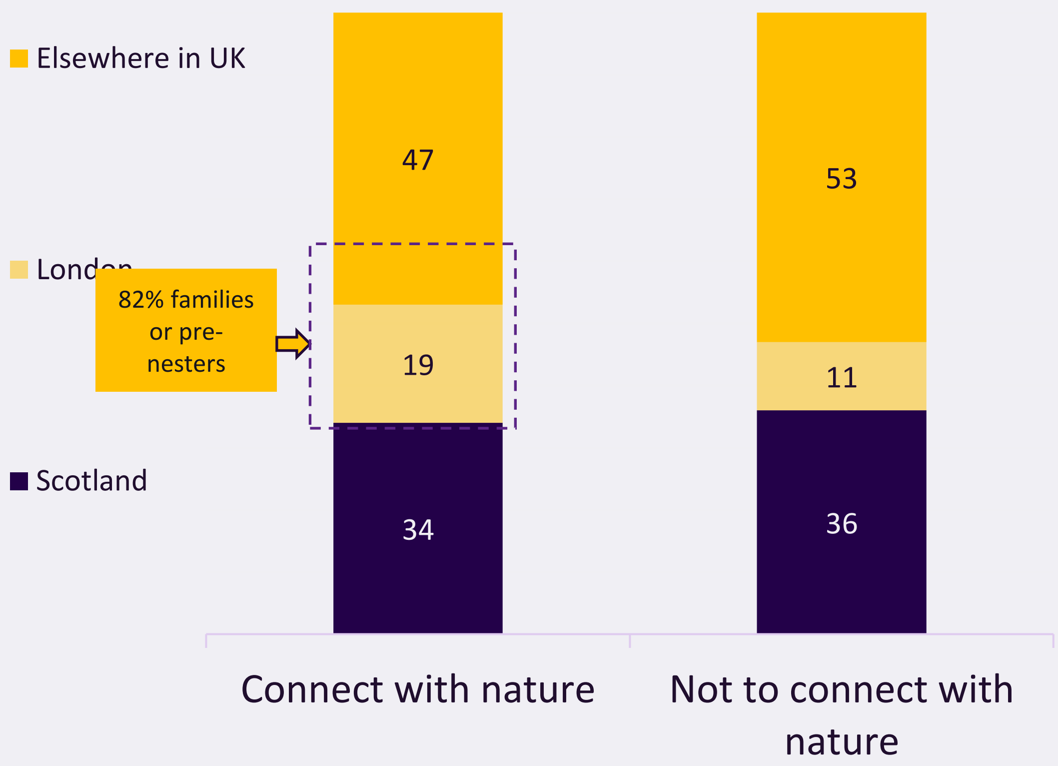
The nature-intender is the most valuable and seeks to combine their trip with culture and adventure.

A range of life stages seek to connect with nature in Scotland but they are more likely to be older. They index high amongst Londoners who are much more likely to be younger

Life stage (%)



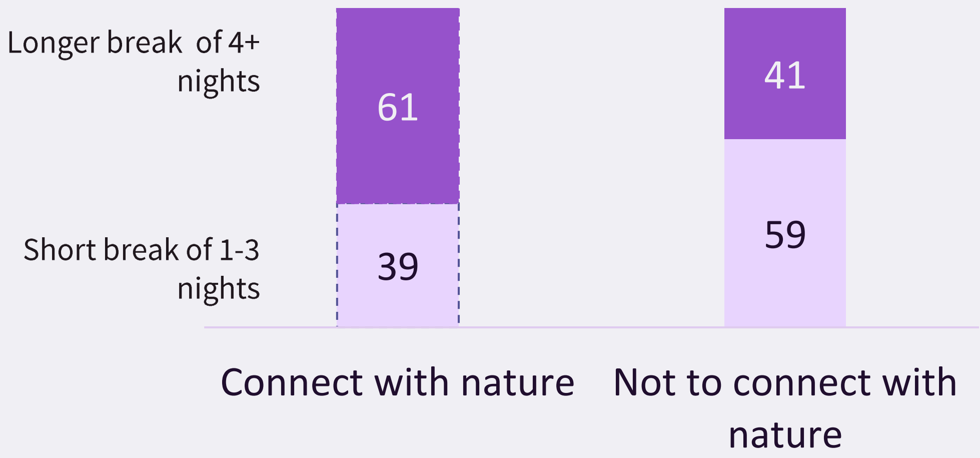
Origin (%)



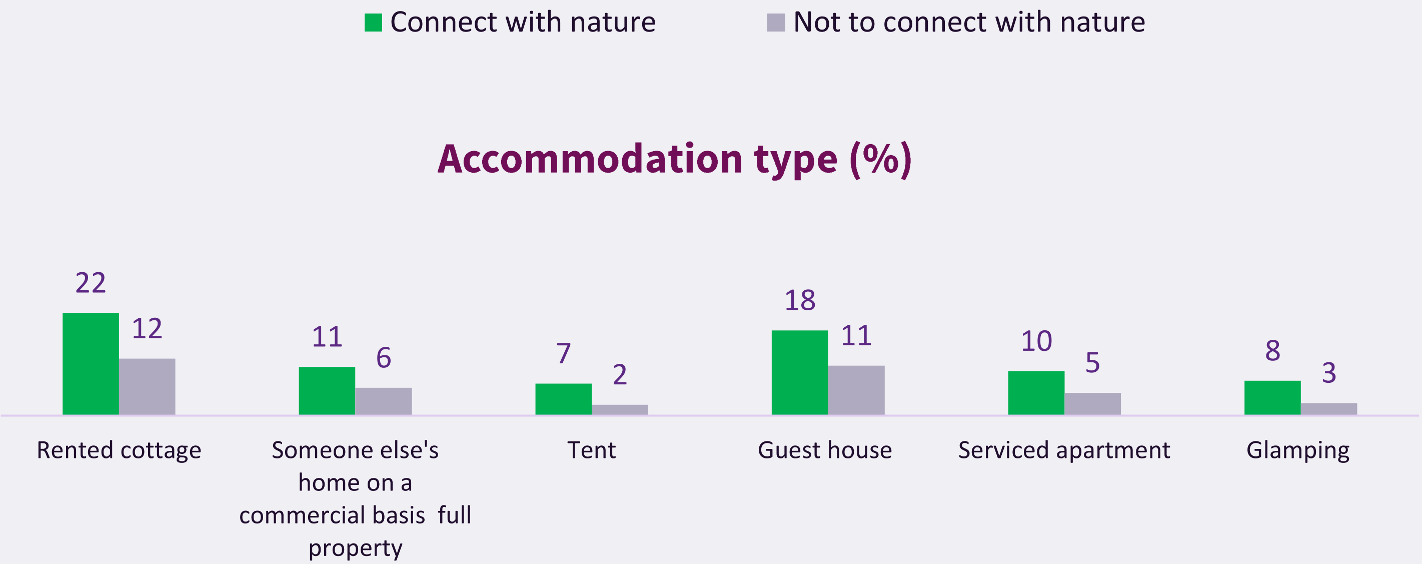
To connect with nature n=132; Not to connection with nature n=353

Nature trips are more likely to be rural, longer holidays, with a partner, friends and pet and in rented cottages, someone else's home on a commercial basis, tents, guest houses, serviced apartments or glamping

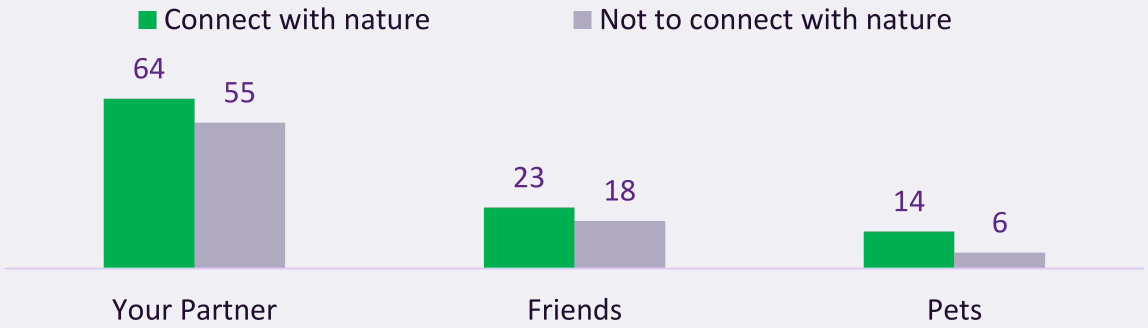
Length of trip (%)



Accommodation type (%)

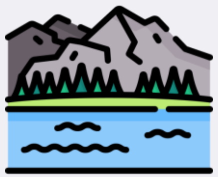


Visitor party (%)



Leading alternative destinations (%)


Wales


North West of England

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To connect with nature n=132; Not to connection with nature n=353

bva Bdrc

The majority of nature-focussed visitors primarily seek to engage heritage and culture as well. Adventure and food and drink are also important

Net categories	Percentage
Nature focus	100%
Heritage and culture	72%
Retail and catering	52%
Fun, sport and adventure	43%

Scotland activities amongst those seeking to connect with nature (%)

To connect with nature n=132

SUMMARY OF FINDINGS

SUMMARY OF KEY FINDINGS

The cost-of-living crisis is still strongly influencing domestic trip-taking

There are signs of a slow-down in domestic trip-taking this spring and summer

Scotland intentions are strong but trip-takers are likely to cut back relative to last year

Scotland trips are more vulnerable than the majority of other UK destinations

The appeal of large cities continues to grow. However, if non-Scottish intenders do not book their trips, Scotland's large cities are also the most vulnerable

Scotland intenders have a range of motivations and activities, and profiles differ hugely within them

The nature-intender is the most valuable and seeks to combine their trip with culture and adventure.

Appendix: Methodology and other information

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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 household income.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then 'boosted' in Scotland and Wales 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 57-59 of the domestic sentiment tracker

Quality and accreditation

BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.

- Adherence to the standard is independently audited once per year
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements

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