

Insight Department:
Listening to children and their parents
Exploring Scotland's appeal as a family
holiday destination

Topic Paper | October 2019

Welcome

MAKING TIME TO MAKE MEMORIES

Take the wild beauty of the Scottish landscape and the cultural vibrancy of our cities, add a stunning array of magnificent castles, beautiful beaches and more than our fair share of 'horrible histories', and finally mix in an endless choice of indoor and outdoor activities, from interactive visitor centres to adrenalin-fuelled land and water sports. When you put it all together, it's fair to say that Scotland is perfectly positioned to deliver an ideal family holiday.

For families today, life is fast paced and complex. Parents constantly juggle their own working commitments with their young people's busy school lives and extra-curricular activities. All too often, conversations focus on daily routines and immediate needs (who has to be where, by when and with what!) and quality time together is lost. Holidays and short breaks offer families the much-needed opportunity to put the brakes on their busy schedules and escape for a while, reconnecting with each other and making memories together.

Research reveals the positive impact of a family holiday on children's development and family life, but with so many locations to choose from, how can we encourage families to choose Scotland? For the first time, we used research to speak directly to children, as well as their parents, to find out what we should be telling families who are considering Scotland for their next break.

USING INSIGHT TO INFORM OUR TOURISM OFFERING

In partnership with Boxclever, we conducted research with over 300 UK children aged between 8 and 12 years (and over 300 parents too) to find out what – in their opinion – makes a great family holiday and we've used this insight to explore Scotland's strengths and weaknesses as a family destination.

Hearing directly from children about what *they* think Scotland can offer them will help our tourism industry focus on Scotland's strengths when marketing to current and potential family visitors.

The purpose of this Topic Paper is to highlight our research findings, informed by additional markets insight and opinion, to help everyone involved in delivering a family tourism experience in Scotland. This paper focuses on families with young children, rather than teenagers.

Further research Topic papers are available on www.visitscotland.org.

Overview

- Parents & children's holiday needs are aligned – children's interest in everyday life shape their holiday requirements & many children have some or even a big influence on their parents' choice of destination
- Affordability, easy transport access and nostalgia are important decision making triggers for parents considering a UK holiday destination
- Children and parents are keen to access 'whole family' activities on UK holidays, not just kids only things to do. This can be everyday activities together (eg going bowling, playing football, swimming) as well as something new and adventurous. Togetherness is critically important to today's busy families
- For young people aged 8-12 years, holidays that support exploration and self-discovery are important
- For parents access to countryside/the outdoors was the top most important factor when looking at possible holiday destinations
- Scotland is ideally placed to position itself as a holiday destination that promotes family togetherness through our natural environment and the activities and shared experiences we can offer



Planning a family holiday in the UK



UK families took 1.9 million overnight family holidays in Scotland in 2018, an increase of 14% on 2017



This represents 29% of all domestic (Scotland) overnight holiday trips



2014 was a peak year, reaching 2 million family overnight trips, 31% of all domestic holiday trips.

Source: Great Britain Tourism Survey (GBTS)

Planning a family holiday needs to address a number of factors, particularly with young children on board. How do you get there and how long will it take? Where will you stay and how much will it cost? Are there enough things to do to keep everyone amused? And even... what will you do with the family dog?

DOMESTIC DESTINATIONS

In terms of appeal, London remains a must-see destination for many UK families but children also want to visit warm beach destinations with the South Coast of England (Devon, Cornwall and the Isle of Wight) featuring highly on the wish list. For families living further north (Scotland and the North of England) there is a willingness to travel for longer in pursuit of warm weather. Our research revealed associations being made with Devon and Cornwall in particular as ideal destinations for beach holidays, offering surfing, unspoilt landscapes and a slower pace of life. However, these are features that a break in Scotland can offer too – and while we can't compete with our southern neighbours on weather, we do have the opportunity to tempt families to Scotland for **exciting outdoor activities and wilder adventures**.

TYPICAL FAMILY HOLIDAYS IN THE UK

Family holiday destination type	Key features
Caravan park	<ul style="list-style-type: none"> • Around 2 hours from home, usually by car • Delivers on the outdoors, freedom, entertainment, making friends, kids clubs, multi-generational family breaks
City break	<ul style="list-style-type: none"> • Between 2 and 4 hours from home, by car or train • Delivers on entertainment, iconic attractions, theme parks, shopping, events, hectic holidays
Countryside and seaside	<ul style="list-style-type: none"> • Between 2 and 4 hours from home, usually by car • Delivers on beach, freedom, the outdoors, exploration, multi-generational breaks, adventure, relaxation
Centre Parcs	<ul style="list-style-type: none"> • Between 2 and 4 hours from home, usually by car • Delivers on adrenalin, the outdoors, entertainment, multi-generational breaks, activities, relaxation

Source: VisitScotland research

DECISION MAKERS

For parents considering a UK holiday destination, three key triggers around decision-making were revealed:

- ▶ **Affordability**
 - less expensive than abroad
 - take the dog to avoid kennel costs
 - travel by car instead of plane

- ▶ **Easy transport access**
 - avoid flying (which many dislike)
 - familiarity with roads
 - ability to stop en route (good for children and grandparents too!)

- ▶ **Nostalgia**
 - revisit childhood places
 - pass on positive memories
 - share values and experiences with the younger generation

Our research also explored the influence that children have on the choice of holiday destination. For 69% of families interviewed, children have *some* influence and for 21%, children have a *big* influence, revealing a genuine need to ensure that Scotland’s tourism offer takes the views and preferences of children into consideration. In fact, our discussions with families revealed that while parents ultimately decide on the holiday destination, they’ll often involve their children in choosing accommodation and activities.



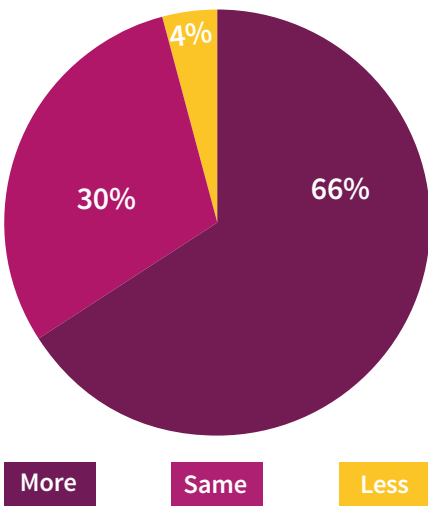
POUND STRETCHERS

Affordability – particularly for families with young children – is a primary consideration when booking a holiday or short break and 66% of the parents interviewed felt that a week's holiday abroad would cost more than a week's holiday in the UK.

We also asked families to share how much they'd budget for a week's family holiday in the UK, including travel, accommodation, food and activities.

49% reveal a weekly spend of between £1,000 and £1,999

If you were going on a family holiday abroad for a week would you anticipate the amount of money you budget for this to be...








Source: VisitScotland research



What makes a modern family?

The days of the typical (and traditional) 'nuclear' family – comprising Mum, Dad and two children – are gone and modern families today come in many shapes and sizes. Market intelligence agency, Mintel, encourages us to consider this when targeting the family holiday market, ensuring that we embrace the broadest 'family holiday' spectrum.

	<p>Lone wolves For single or solo parents, or for one partner taking the children away while the other remains at home, mums are more likely than dads to travel alone with the children.</p>
	<p>Boomerang Generation With younger adults staying longer in the family home, or returning home after university or college, new patterns of family holiday reveal 16-24 year olds often travelling with their parents.</p>
	<p>Sandwich Generation Reflecting population growth at each end of the age spectrum, responsibility for both children and ageing parents is leading to a greater demand for multi-generation family holidays.</p>
	<p>Grandparents The increasing role of grandparents in the family dynamic is leading to a rise in grandparents taking their grandchildren away on their own, without the parents.</p>
	<p>PANKs & PUNKs 'Professional Aunts/Uncles with No Kids' often spend leisure time with their siblings' children, and this can include taking them away on themed holidays and short breaks.</p>

Source: Mintel, The UK Family Market www.mintel.com

AND GRANNY CAME TOO...

Our own research revealed that 51% of parents typically go on holiday just with their children or stepchildren but 32% go on holiday with grandparents too. However, 65% of younger children thought their parents were the ideal people to go on holiday while only 3% would choose their grandparents as ideal holiday companions, putting their older relatives behind their friends, friends' parents and cousins, aunts and uncles!

Dialing up the family fun factor

Children’s interests shape their holiday requirements – pursuing an existing hobby or trying out something new, visiting places they’ve read about or locations they’ve seen in films. This means that parents’ and children’s holiday needs should be aligned and our research suggests that a ‘good’ family holiday is one that reflects and extends children’s passions.

Supporting exploration and self-discovery among 8-12 year old age group while giving parents a rewarding break from routine is also key. The 8-12 year old age group are increasingly independent in their thinking and skills, often enjoying greater freedom within their home lives (from unsupervised bike rides to being allowed a mobile phone) and holidays that offer the opportunity to explore and discover (without a parent holding their hand!) will appeal.

CORE PASSIONS OF 8-12 YEAR OLDS







	Sport		Being sociable
	The outdoors		History
	Animals		Having fun

TOP MARKS...

Our research explored a number of factors and asked children and their parents (separately) how they would rate the importance of these when going on holiday (children) and when looking at possible destinations (parents).

“I really loved going to the pool in Dundee, it was just fun to do that all together.”

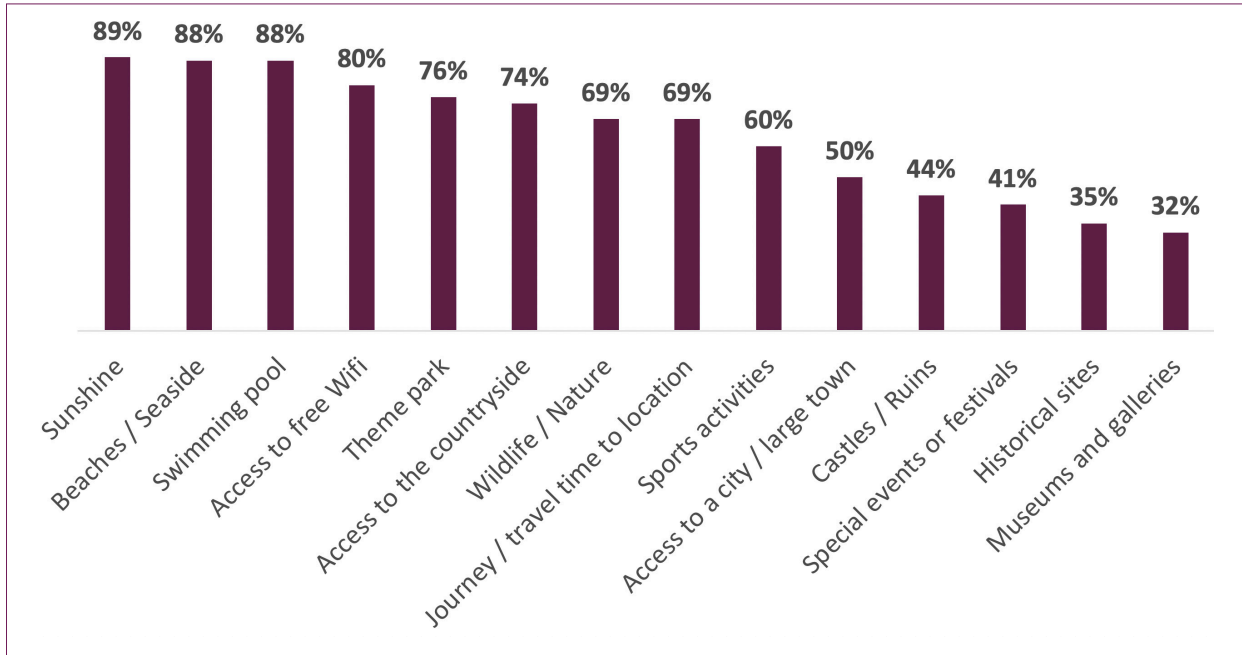
For children aged 8-12, **sunshine** was the most important factor 89%, followed by **beaches/seaside** 88% and **swimming pools** 88%. For the parents, access to the **countryside/outdoors** came top 86%, **beaches/seaside** (in common with the children) came second at 84% and **sunshine** came third 82%.

The Top 3 factors that are Important for holidays are:					
For Children Aged 8-12			For Parents		
	Sunshine	89%		Access to countryside/outdoors	86%
	Beaches/seaside	88%		Beaches/seaside	84%
	Swimming pool	88%		Sunshine	82%

Source: VisitScotland research

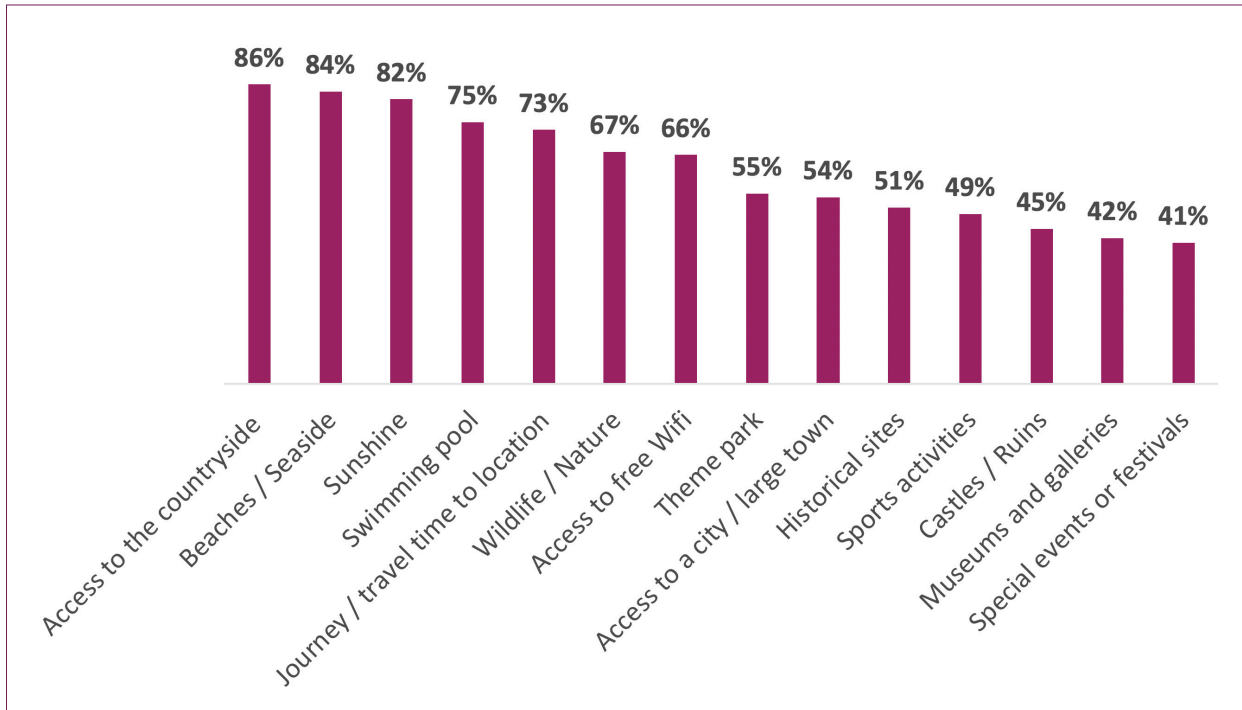
INSIGHT DEPARTMENT: EXPLORING SCOTLAND’S APPEAL AS A FAMILY HOLIDAY DESTINATION

FACTORS IMPORTANT IF YOU WERE GOING ON HOLIDAY – CHILDREN 8-12 YEAR OLDS



How important are each of the following if you were going on holiday. Base: All Children (305)

FACTORS IMPORTANT IF YOU WERE GOING ON HOLIDAY – PARENTS



How important are each of the following factors when looking at possible holiday destinations and places to stay? Base: All parents (305)

Togetherhness is the key ingredient

What clearly emerged from our research is that while fun is certainly a critical element of the family holiday, spending quality time together is the most valuable experience for parents and children alike.

56% of parents (and 63% of mothers) taking part in our research seek 'togetherness – spending quality time with my family' and 42% seek 'having a break from our normal household routines' in their holiday. In other words, away from the daily routine at home, shared family fun (suited to all ages and abilities and not just geared around children's activities) is a key component of the family holiday and this can include everyday activities such as swimming, bowling or a night at the movies as well as more adventurous pursuits that aren't available at home.

WHAT ARE PARENTS LOOKING FOR FROM A FAMILY HOLIDAY EXPERIENCE

	Togetherness		New activities as well as the chance to share everyday activities
	Whole family shared activities – not just 'kids only'		Fun, fun, fun!
	Sharing an exciting adventure		Independence and opportunities for exploration for children
	Access to the outdoors and opportunities for exploration		Experiences and activities that reflect children's passions and interests

DISCONNECT THE WI-FI (OCCASIONALLY!) TO RECONNECT THE FAMILY

The children taking part in our research revealed themselves to be avid gamers and YouTube users. Although access to Wi-Fi comes in at number four in the list of factors that children think are important on holiday, discussions with parents revealed a definite desire to reduce screen time. But 3% of children cited 'getting away from technology' as one of the things they most enjoyed about being on holiday. Technology may be part and parcel of family life today, but sharing new experiences and making memories are about connecting with the family and putting the internet on the back burner.

"My favourite thing was probably playing football with my Dad!"

"I love the sound of the activities we could all do together as a family. Things that are fun, not too challenging, and that we'd never do at home."

Straight from the horse's mouth

Children are never afraid to tell it like it is, so talking directly to our research group of 8-12 years old allowed us to gather insight into perceptions of Scotland as a family holiday destination – both encouraging and challenging – ‘straight from the horse’s mouth’.

WORDS CHILDREN USE TO DESCRIBE SCOTLAND

far away	41%	fun	26%
cold	38%	old	22%
adventurous	36%	magical	15%
green	30%	grey	10%
exciting	27%	boring	8%
peaceful	27%	empty	1%



Our research indicated that children who don't live in Scotland are interested in visiting based on family connections, a love of the outdoors and an interest in history. They tend to think in more general terms than children who already live in Scotland and are interested in specific locations.

“The castles in Scotland are supposed to be amazing so I'd really like to see them. I really like finding out about old buildings.”

Boy, Year 5, London

“I would like to go to the Isle of Cumbrae. There's a water park that's exciting and loads of cool places to go.”

Boy, Primary 5, Glasgow

INSIGHT DEPARTMENT: EXPLORING SCOTLAND’S APPEAL AS A FAMILY HOLIDAY DESTINATION

Speaking to children who’ve already visited Scotland, the aspects they enjoyed most on their holiday included the outdoors, scenery, castles and festivals, and our research revealed that visiting Scotland certainly delivers feelings of freedom, revitalisation and adventure. Moreover, for these younger visitors, their favourite holiday experiences reflect the appeal of whole family activities – having fun, experiencing nature and exploring the outdoors – underpinned by shared family time.

From a marketing perspective, we are ideally placed to position Scotland as a holiday destination that promotes family togetherness through our natural environment and the activities and experiences we can offer.

“I like to go camping in Scotland with my Dad because I want to see nature – like owls, birds and other animals in the wild. Camping is great fun and I like spending time with my Dad.”

Activities that children would like to do on holiday in Scotland			
Swimming	60%	Soft play centre	27%
Go to a zoo/safari park/farm	52%	Horse riding	26%
Theme park	48%	Climbing	25%
Explore castles/monuments	41%	Visit museums/art galleries	25%
Shopping	39%	Go to a disco/music	23%
Walking/hiking in the countryside	39%	Go to festival	16%
Build sandcastles	38%	Go to theatre	15%
Cycling/mountain biking	33%	Go to concert	14%
Visit famous places from books and films	30%	Skating	10%
Water sports	30%	Surfing	10%

Which of these activities would you like to do on holiday in Scotland? Base: All Children (305)
Source: VisitScotland research



APPEALING TO THE ‘INSTA GENERATION’

Moving away from general activities, we asked our young research participants which *specific* activities – ones that Scotland is uniquely placed to offer - they’d like to pursue. From the natural world to cutting edge technology and from modern culture to history and heritage, Scotland has much to offer young visitors and to optimise our appeal to this age group, it’s important to remember we are talking to the ‘insta generation’ where ‘experiential is everything’. Imagery should suggest new, different and exciting experiences that are instantly worth sharing!

Which if any of the following would you like to do?	
Visit sandy white beaches where you can fly kites, explore rock pool	69%
Visit a science centre and discover how everything in the world work	55%
Be in nature, spot wildlife and creatures or even a monster	54%
Climb aboard the famous Harry Potter Hogwarts Express train!	53%
Go camping and sleep under the stars	49%
Explore ancient castles and learn about the past	43%
Cycle down woodland trails, away from the roads, as fast as you can!	39%
Visit a haunted house with plenty of ghost stories to be told	38%
Paddle board or sail down a river, feel excited doing water sports	36%
None of these	3%

Q. We’re now going to show you some things that people who go on holiday to Scotland could do. Which of these would you like to do? Please choose all the ones that you would like to visit. Base All Children (305)

TIME FOR BED!

As well as ensuring that our key locations offer interest and engagement, young people are interested in staying in exciting accommodation too. When asked where they would like stay in Scotland, 70% opted for a wooden tree house, 60% for an eco-friendly wigwam out in the wild and 52% in a castle, feeling like royalty.



Summary

Doing our homework

USING INSIGHT TO INSPIRE

Scotland may share some tourism products with other domestic destinations but our research reveals that there are opportunities for Scotland to tempt families for a wilder adventure. Scotland is ideally positioned to attract and retain young visitors and their parents by focusing on:

- Adventurous activities
- Sporting events
- Interactive history
- Beaches and the seaside
- Nature and the outdoors
- Wildlife
- Festivals and events

KEY POINTS TO CONSIDER WHEN MARKETING TO CURRENT AND POTENTIAL FAMILY VISITORS

- owning the space for action-packed fun, creating a strong association with the outdoors and highlighting the wealth of shared family activities that Scotland offers
- dialing up the benefits of a family holiday – “togetherness”, spending quality time together, sharing new and familiar experiences, supporting exploration and self-discovery for young people, making memories to last a lifetime (and dialing down the Wi-Fi!)
- considering Scotland's key strengths – wildlife, nature and the great outdoors; castles, ruins and iconic landmarks (all loved by those who have visited Scotland) – with a clear message about freedom, revitalisation and adventure
- focusing on imagery and experience that appeals to young people, firing their imaginations and encouraging them to engage with exciting locations, new experiences and novelty accommodation. Static landscape or scenery imagery appeals less
- tapping into the school curriculum and considering its influence on young people's interests and passions

Appendix: Sources and their interpretation

The following sources were used in the development of this Topic Paper.

Hearing from Children and their Parents on Family Holidays Boxclever for VisitScotland (2018)

This research captured the views and preferences of UK 8-12 year olds and their parents. The research involved three stages:

1. triad workshop with children, held in Glasgow, Manchester and London
2. tele depths with parents, and
3. an online survey of 305 children and 305 parents.

In addition, several expert interviews were undertaken

The UK Families Market Mintel (2016)

www.mintel.com

Market intelligence agency, Mintel, encourage us to consider how broad the family holiday spectrum is in today's world. When targeting families, we should consider not just the traditional nuclear family of two adults and two children, but a broader, more diverse family holiday market.

Great Britain Tourism Survey (GBTS)





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October 2019

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