



Destination UK – focus on Scotland

Driving growth in the UK hospitality and leisure sector

A word from Jamie Grant

Connecting with British holidaymakers is more important than ever for hospitality and leisure providers as these are the customers who are more likely to visit again in the future.

These findings represent a fantastic opportunity for the businesses within Scotland's already thriving hospitality and leisure industry to really target their offerings to the changing desires of both our international and domestic visitors. This report looks at the changes affecting Scotland and the lessons that can be learnt from these. To read the full report detailing the UK as a whole, please click on the link at the bottom of this page.



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[Click here to read the full report.](#)

Focus on Scotland

The future for the Scottish hospitality industry is very bright, according to our recent study of holiday trends.

Scotland's set for a bumper year

We surveyed more than 2,000 UK holidaymakers and the results showed that 35% of those taking holidays could easily go overseas but choose to remain in the UK. This is hugely positive for Britain's economy and providers, demonstrating that holidaying in the UK is chosen on the basis of quality, value and convenience. Half of those surveyed described holidaying in the UK as 'hassle free' due to the familiarity of the food, language and travel options.

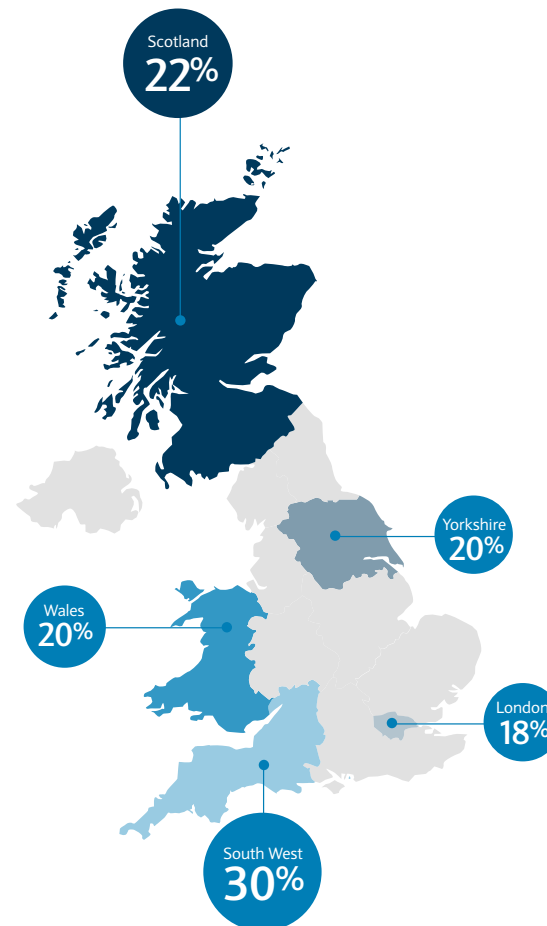
44% of international visitors we spoke to said they wanted to visit Scotland's attractions

Of all UK holiday locations, Scotland was the second most popular destination for domestic visitors, with 22% of those surveyed stating they'd like to visit. Similarly, 44% of international visitors we spoke to said they wanted to visit our attractions – second only to London.

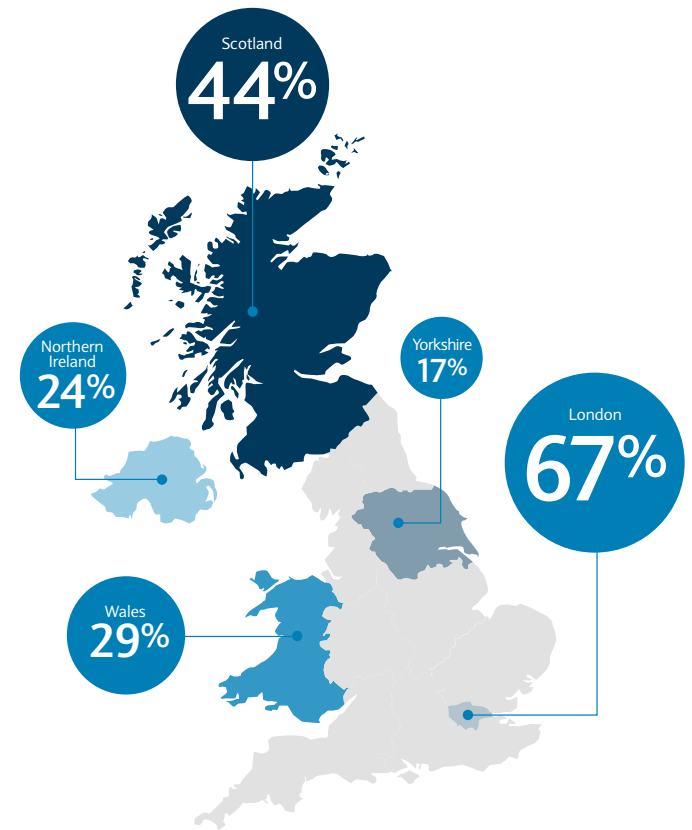
Out of the 22% of domestic holidaymakers who hope to spend their time in Scotland, 48% of them would like to visit the cities of culture and engaging history and 39% would go to admire the appealing landscapes Scotland has been long renowned for.

Which regions in the UK are you planning on visiting? (Top 5)

UK visitors



International visitors



A very Scottish staycation

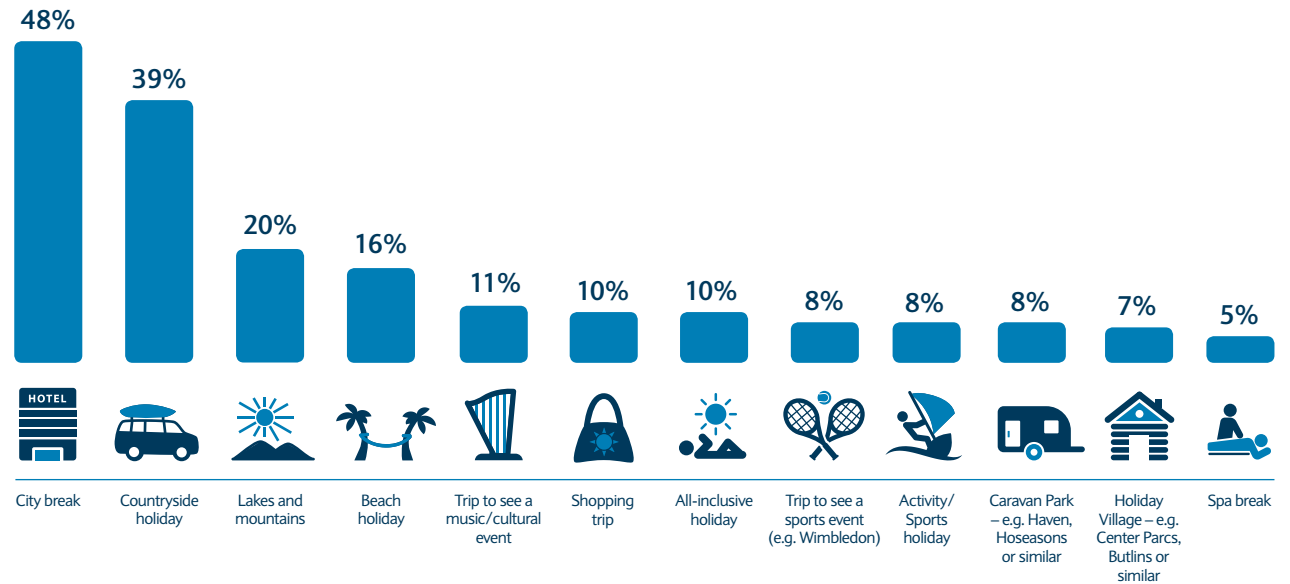
The increase in British holidaymakers' budgets for domestic trips has given rise to 30% of people spending more on leisure activities than in previous years and taking short breaks within the UK in addition to a main overseas holiday. Out of the 54% from Scotland taking these second short-break holidays, 26% felt that holidays in the UK are now more affordable and better value for money.

Despite the popularity of the staycation growing over the past years and Scotland being one of the top destinations with domestic visitors, it also remains the prime holiday spot for the Scottish themselves, with 66% holidaying closer to home than the rest of us. 71% of those in Edinburgh choose to stay in Scotland for their holiday, with Glasgow coming a close second at 59%.

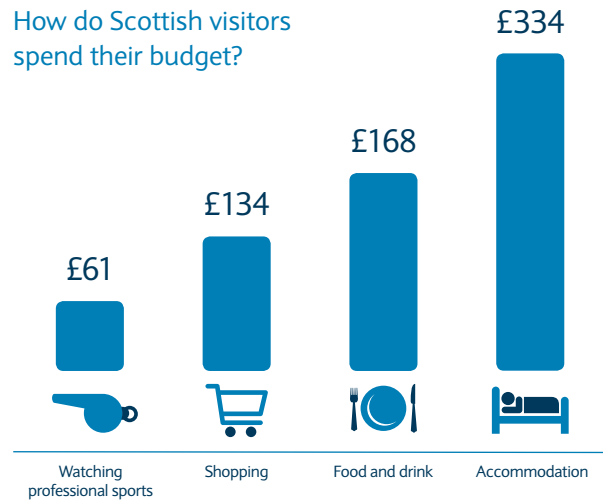
A taste for Scotland

While self-catered apartments are becoming more popular with the rise of providers such as Airbnb, 36% of visitors from Scotland still prefer to book a mid-market hotel. Only 7% of holidaymakers would book luxury and 5 star hotels, with 71% saying that having a 24/7 concierge or new technology within the rooms would have no impact on the hotels they book. Scottish holidaymakers spend an average of £334 on hotels and accommodation, higher than the domestic visitor's average of £309 per holiday.

What type of holiday are you planning in the UK this year?



How do Scottish visitors spend their budget?



The results of the survey show that eating out and shopping are the areas Scottish visitors are most likely to spend their remaining budget on. Overall we see a 22% spending increase in comparison to 2016, with 4% of people having significantly more to spend on experiences than in previous years.

When asked about the most important motivations for taking a break in the UK, 49% of Scottish holidaymakers said spending time with the family was very important, while 31% saw escapism/distraction as the most important driver. Taking an education/learning break was seen as quite important by 43% of visitors. However, 45% thought a holiday where new skills could be experienced was not very important.

Strategies for success

To take advantage of increasing domestic and inbound tourism, businesses might consider the following:



Be proud of Scotland

The country retains its strong attraction as a holiday destination with renowned history and culture, to both domestic and international travellers. The political turmoil has had little impact on travel to Scotland. The industry should be proud of, and leverage, the country's cultural assets to attract and retain visitors.



One size doesn't fit all

Different demographic groups have diverse requirements and preferences when it comes to holidays and leisure experiences. For example, some offerings, such as mobile check-in, may only appeal to certain groups of people. Hospitality and leisure providers need to develop a range of products and services to match different expectations.



Connect locally

Our survey shows that one third (30%) of holidaymakers expect to spend more on leisure activities this year than in prior years. Shopping accounts for the third-largest proportion of spending after hotel, food and drink spend.

Leisure operators should connect with local providers and retailers to develop packages of offerings that offer wider and richer choices.



Adaptable customer experience

The rise of online and mobile booking continues apace, with over three-quarters (76%) of consumers willing to book online. However, 15% of visitors still prefer to book in person or by telephone – rising to 24% of consumers over 65.

While it is obviously vital to develop user-friendly and streamlined online booking for consumers, it is important not to overlook traditional booking methods, such as face-to-face and telephone booking.



Cater for international tastes

Overseas holidaymakers can have different social and religious requirements from domestic travellers. Having services recognising these needs, such as free shuttle buses to airports, could help operators stand out from the competition. Start with simple offerings, such as free WiFi.



Act decisively on feedback

Feedback takes many forms, from face to face to online, and it has become increasingly important for businesses to understand and react to it, and promptly.

A robust strategy for tracking and responding to feedback will ultimately enhance the guest experience and help improve the possibility of repeat visits, as well as referrals and recommendations of your business to other consumers. The skill is to identify what the most appropriate type of feedback is and to then have an effective process to manage and respond to it.

Key Takeaways

- The increased convenience and value for money of holidaying in the UK are driving a rise in the number of staycations for Britons, with more than one in three expecting to spend more time on holiday in the UK this year
- Short breaks are the main types of holiday for domestic visitors, with 22% planning to have their holiday in Scotland. Scotland remains a firm favourite destination for 66% of Scottish holidaymakers
- Scotland has significant appeal for international travellers, with 44% choosing here as their main destination
- While there is a trend in booking through providers such as Airbnb, mid-market hotels remain the most popular hotel type that 36% of Scottish visitors book
- Scottish tourism providers need to consider visitor preferences from all over the UK to encourage Scotland's appeal south of the border
- Holidaymakers from Scotland spend more than the average domestic visitor on the majority of hospitality and leisure activities, including shopping, food and drink, and watching professional sports
- 49% of Scottish holidaymakers said spending time with the family was a very important motivation for taking a break in the UK.

Click [here](#) to read the full report or, alternatively, to find out more about how Barclays can support your business, please call 0800 015 4242* or visit barclayscorporate.com

*Calls to 0800 numbers are free from UK landlines and personal mobiles, otherwise call charges may apply.
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About this research

The research is based on a bespoke survey on British and international holidaymakers from Opinium. The total sample size for the domestic market was 2,010 UK adults (aged 18+) who holiday in the UK. The fieldwork was undertaken between 20 February and 2 March 2017. The international survey was based on online interviews with 1,004 US adults, 1,003 German adults, 1,001 French adults, 1,003 Russian adults, 502 Saudi Arabian adults, 1,004 Australian adults, 1,004 Republic of Ireland adults and 1,002 Chinese adults (aged 18+) who have travelled internationally in the last five years. The fieldwork was undertaken from 22 February to 9 March 2017.

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