

# NC500 Covid-19 Visitor Survey June 2020



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## Covid-19 Visitor Survey

The Covid-19 outbreak brought the tourism industry to a standstill following lockdowns across the world which have forced people to put travel plans on hold and knocked consumer confidence. This has affected tourism globally and had a particularly significant impact on regions such as the North Highlands whose fragile economy depends heavily on tourist related income. NC500 Ltd recently undertook a visitor survey to gain insight into the extent to which the coronavirus pandemic has impacted on visitor decision to visit the North Coast 500.

From our recent Business Impact Survey it is apparent that there is concern about the rate at which tourism in the Highlands will recover and how this will affect businesses around the route. The aim of this visitor survey was to obtain views of potential visitors in order to determine potential trends and predictions of visitor presence in the Highlands.

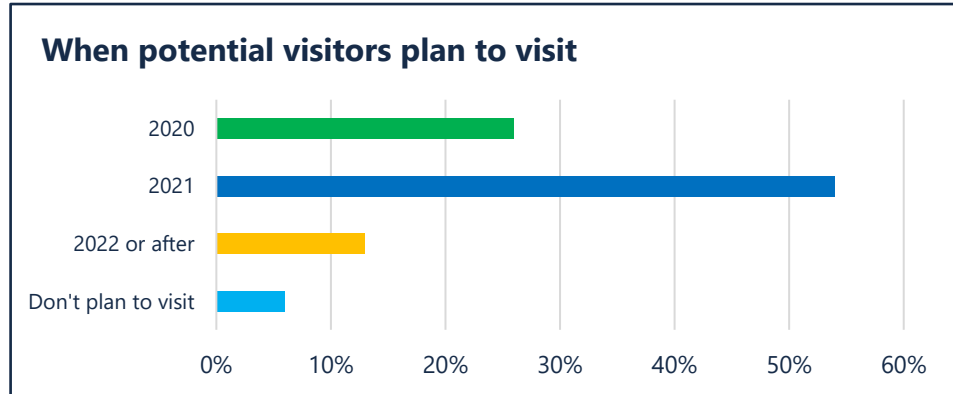
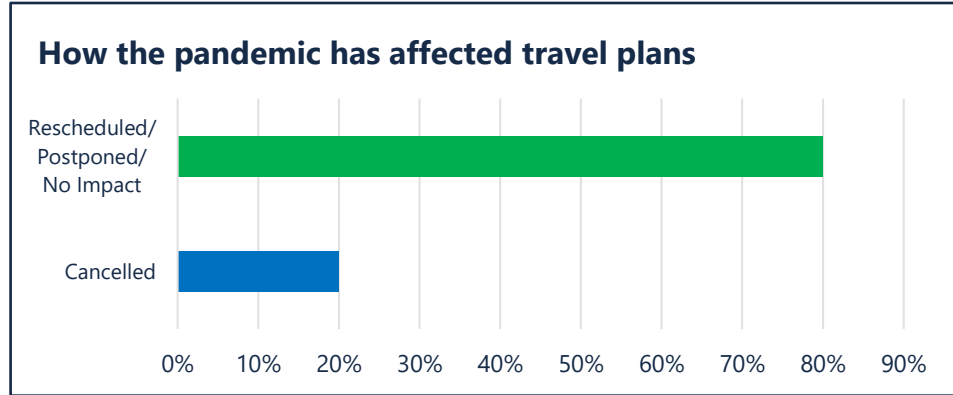
The survey was completed by 3737 subscribers and personal members.



# How has the pandemic affected intentions to visit the NC500?

The majority of respondents (80%) either postponed or rescheduled their trip or the pandemic had no impact on their original plans suggesting their trip was planned for next year or beyond. 20% of respondents have had to cancel their trips but only a very small proportion are no longer planning to visit at all (6%).

The survey showed that a fairly significant number of visitors still intend to visit during 2020, providing it is safe to do so, suggesting that potential visitors are confident in businesses around the route operating safely with social distancing measures in place. The survey also indicated a high level of interest for visiting in 2021 and beyond which is a positive sign for the recovery of the tourism industry in the North Highlands.

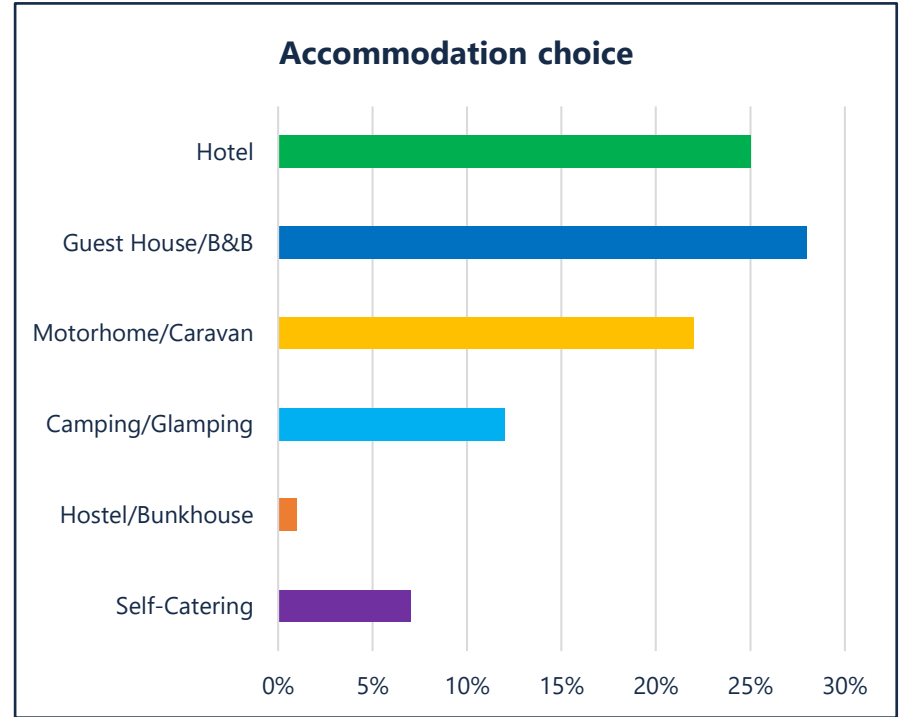


## How has the pandemic affected accommodation and transport?

Hotels, Guesthouses and B&Bs continue to be the most popular accommodation choice (53% collectively). There is a growing increase in potential visitors opting for Self-Catering, Camping and Glamping options, largely due to visitors wanting to stay in self-contained accommodation.

83% of respondents stated that Covid-19 has not affected their accommodation choice suggesting most are planning visits way into the future and for those who do plan to travel within the next year, the majority are comfortable with the accommodation they have chosen and believe it remains a safe choice.

For the smaller percentage whose accommodation choice has been affected by Covid-19 this appears to be due to uncertainty of business opening, ability and practicality regarding cleanliness and concerns of contact with other guests and/or staff.





# The effect of Covid-19 on accommodation and service use

Coronavirus related fears affected only 12% of visitors' choice of accommodation, however 31% indicated they would adjust plans to visit restaurants, activity providers and/or visitor attractions because of perceived concern.

Potential visitors indicated their main concerns/challenges were:

- **Uncertainty of businesses being open**
- **Inability to plan**
- **Lack of clear messaging and guidance** from authorities to make them feel secure
- Uncertainty that **social distancing measures** could be practiced effectively

Respondents suggested that measures such as **being able to track reviews and updates on Social Media** and having **agreed hygiene standards** and **transparent reporting** across the board for businesses would make them feel more confident.

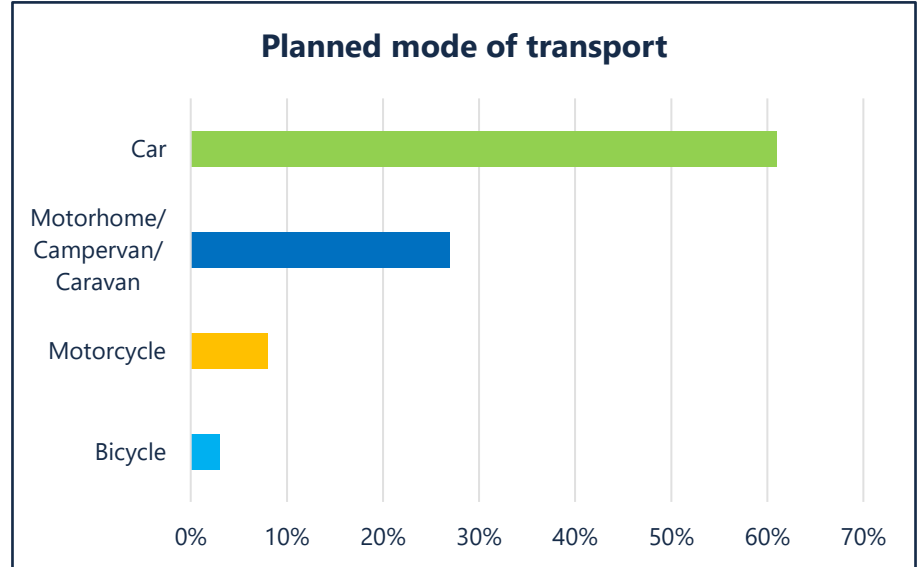
Further to this, the survey indicated that potential visitors felt most confidence in planning their trip while using the North Coast 500 website, VisitScotland and NC500 Social Media platforms highlighting the **importance for businesses of interacting and engaging with digital marketing**. The Business Survey indicated businesses felt there is a **need for clear, positive marketing** in order to build consumer confidence and keep strengthening the good reputation that the Highlands has for tourism excellence. NC500 will be working with businesses and consumers to deliver clear and positive marketing messages when the Scottish Government has said it is safe to do so.

## How do visitors plan to travel the NC500 and for how long?

Car remains by far the most popular mode of transport followed by Campervan, Motorcycle then Bicycle.

The findings from the survey indicate that visitors plan to take a longer time to do the route than in previous years. The **average number of days visitors plan to spend on the North Coast 500 increased from 9 to 11.**

This clearly highlights that for many visitors touring the North Coast 500 has become a major holiday commitment. This is a very encouraging trend in which we can see visitors engaging with all that the route has to offer.

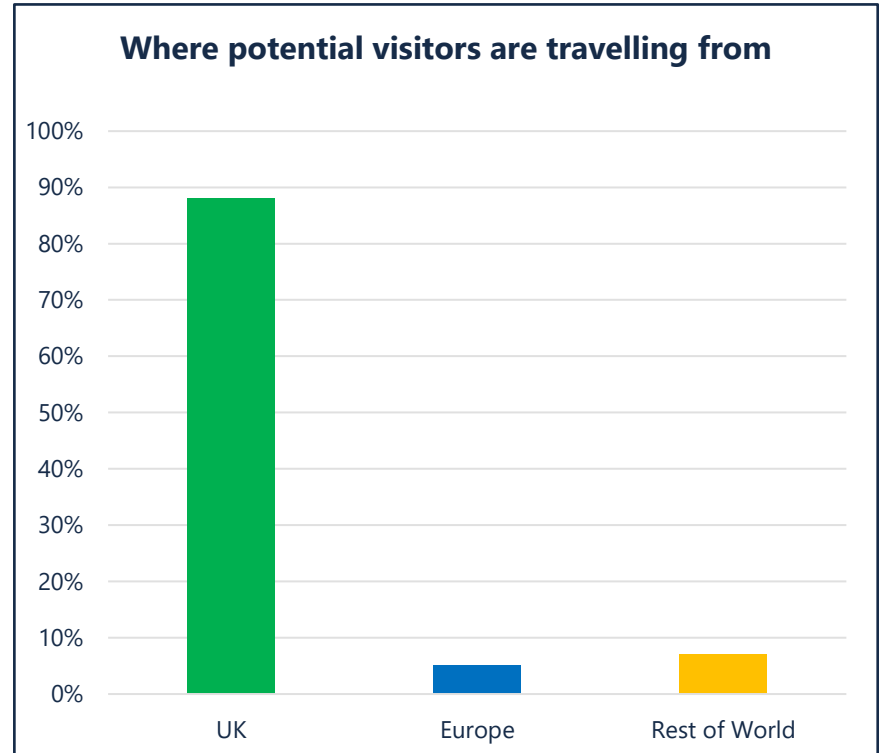


## Where are visitors travelling from?

The UK accounts for the largest proportion (88%) of potential visitors to the North Coast 500. This mirrors the experience of businesses around the route, there is positivity from businesses about not only a return in the domestic market but an increase post lockdown.

This alignment between consumer and business expectations is important with the likely increase in stay-cations and consumer confidence. We anticipate a collective ambition to make the North Coast 500 journey the best that it can be from businesses and from consumers to support the home tourism product.

Overseas visitors are still a vital part of the tourism sector in Scotland; they are on average a higher spending consumer and this survey indicates that they currently account for 12% of potential visitors planning a trip to the NC500.



## Discovering opportunities

Coronavirus has had a significant negative impact on the Scottish tourism industry seen in sharp focus for rural tourism businesses in the North Highlands. Consumers should be aware that tourism businesses in the North Highlands are working together to focus on how they are able to welcome visitors again when the Scottish Government says it is safe to do so.

This survey suggests that potential visitors are attracted to the open spaces, peace and tranquillity that the North Highlands offers. This in turn provides businesses with a great opportunity to promote themselves and the region as the destination of choice.

Prior to the current pandemic there was a growing trend in 'wellness tourism', and appreciation for the great outdoors, wide open spaces, outdoor activities and simple pleasures of enjoying seascapes, landscapes and local food.





# Managing impacts

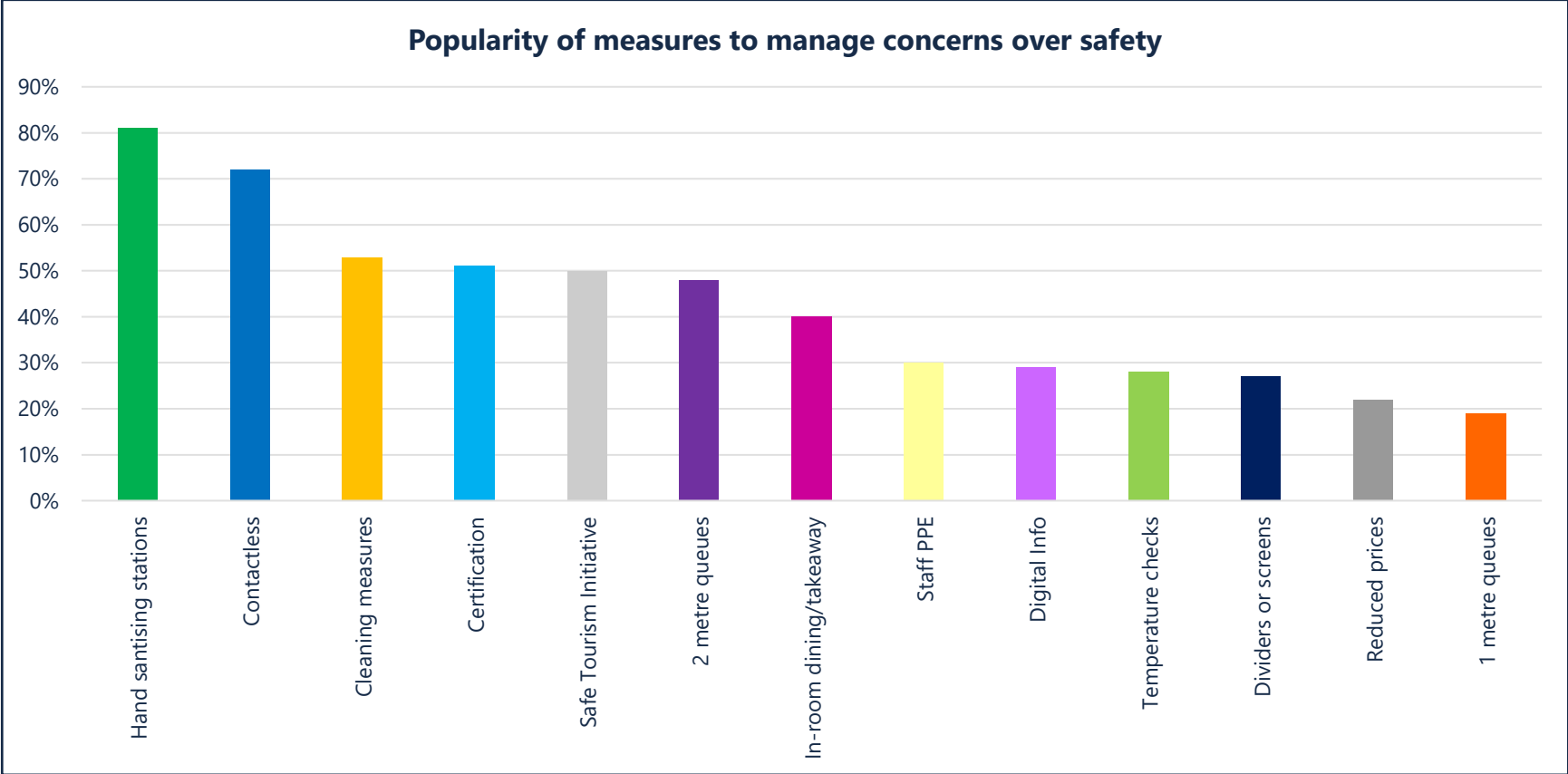
We asked what **measures would make visitors feels safer** when visiting businesses along the NC500. The most popular responses involved practical measures to increase cleanliness standards and minimise contact such as:

- **Hand sanitising** stations
- **Contactless** payment/check in
- **Certification** that premises adhere to cleaning protocols and/or **'safe tourism' initiative**
- 2 metre **social distancing** rules in place
- **In-room dining** options

Responses from the Business Impact Survey indicate most businesses along the route are planning on implementing similar measures already in order to increase the confidence of visitors and promote safety for staff and customers.

From the survey it is clear that the majority of potential visitors planning an NC500 trip do so online, highlighting the **importance of ensuring clear/consistent messaging** across multiple platforms with plenty of information on procedures so that visitors and communities feel safe.

# Managing impacts



## Conclusion

From the survey it is clear that the coronavirus pandemic has had an impact on how potential visitors travelling to the North Highlands plan to do so, however it is also clear that **people are still planning** on travelling to the region when it is safe to do so.

The **majority of respondents have postponed/rescheduled their trip** or the pandemic has had no impact because they were planning a trip next year and beyond. Less than 20% have cancelled completely (of these, only 6% do not plan to visit at all). The survey also indicated a high **level of interest for visiting in 2021 and beyond** which is a positive sign for recovery of the tourism industry in the North Highlands.

**88% of those planning to travel are from the domestic market** which echoes the sense from businesses that this market will bounce back when lockdown restrictions are eased. Whilst it appears that the majority of potential visitors planning a trip to the NC500 come from within the UK, it is **encouraging to see that people from Europe and the Rest of the World still plan to visit** when it is safe to travel again.

**Accommodation choice remains largely unchanged** despite coronavirus concerns with a slight rise in Self-Catering/Camping due to a **wish for self-contained accommodation**. Potential visitors are however concerned about the **impact on services** such as restaurants and activity providers.

The survey highlights that potential visitors would feel more confident if certain measures were put in place while they made their trip, and in particular the most effective were those that **increased cleanliness** and the ability to practice **social distancing**.

# Conclusion

As we have seen in previous studies since the inception of North Coast 500, the time visitors are taking to complete their trip is increasing. This survey indicates that the average **number of days people plan to take to do the route has increased from 9 to 11**, demonstrating an anticipated major holiday commitment to the North Coast 500.

Visitor views mirrored findings from the Business Survey on a range of topics including:

- Expected **resurgence in domestic market**
- The **need for social distancing measures** to be implemented for visitors, communities and businesses to feel safe
- The **need for clear and consistent messaging** on procedures

The platform visitors felt most confidence in using for planning their trip was the North Coast 500 website closely followed by NC500 Social Media channels, highlighting the importance for businesses and organisations to interact and engage with digital marketing outlets such as the NC500 website.

The positive findings of the survey indicate hope for the recovery of the Scottish tourism industry and businesses across the North Highlands.