

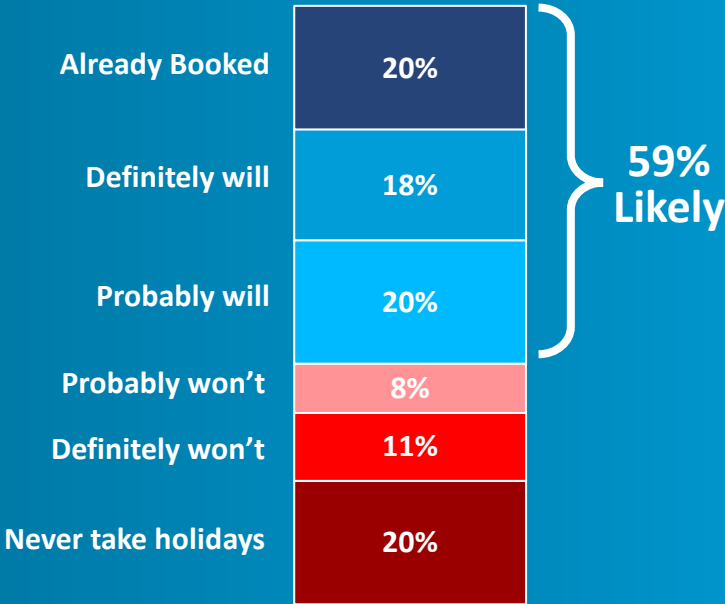


Three in five Scots will take at least one holiday this year – and although domestic destinations will benefit, Spain and its islands is our destination of choice

In the first wave of our nationally representative survey of over 1,000 Scottish adults from 56 Degree Insight, 'Scotland's Viewpoint', we were keen to understand their feelings about holidays this year – how much were they on the agenda and when, and which destinations were being considered?

The survey was conducted mid January, and at that point 59% of Scots claimed they are likely to take holidays or breaks this year. Indeed, one in five had already booked at least one break (20%), and although 18% had not yet booked, they said they would definitely be taking at least one holiday. And, with a further 20% claiming they would probably do so, this amounts to 59% of the Scottish adult population looking likely to take holidays this year. Of the remainder, some 19% of Scots said they were unlikely to take any holidays in 2022 (11% definitely wouldn't) and a further 20% said that they never take holidays – so 41% of Scots are not in the market for holidays in 2022.

59% of Scottish adults are likely to take a holiday in 2022



Source: Scotland's Viewpoint from 56 Degree Insight: Nationally representative survey of 1,010 Scottish adults 14th-16th January 2022

So, although the 59% likely to take holidays doesn't suggest full recovery to pre-pandemic travel levels where numbers were closer to 75-80%, it hopefully provides a degree of optimistic news for the beleaguered travel and tourism industry. And of course, it's not a consistent picture across the country. Disposable income, and whether or not there are children in the household are key drivers of whether or not to consider holidays this year:

Likely holidays **highest** among:

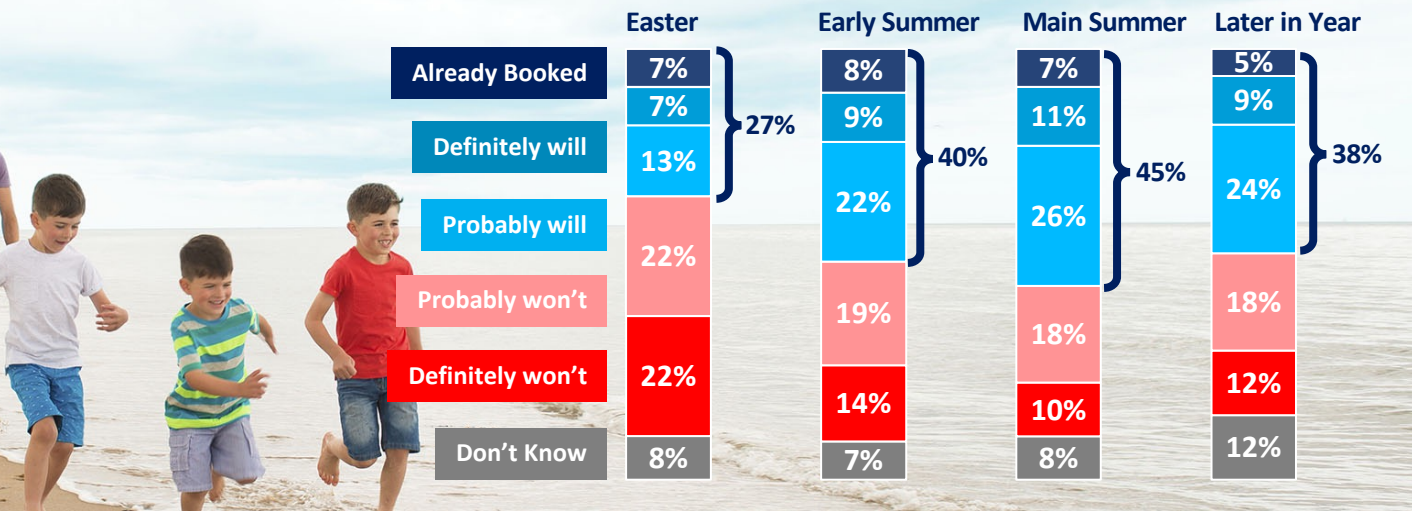
- Families with dependent children (67%)
- The over 65s (66%)
- Those with higher incomes – 66% of those in the AB socio-economic group
- Adults aged under 25 (62%)

Likely holidays **lowest** among:

- Those with the lowest incomes – 47% of those in the DE socio-economic group
- Those aged 55-64 (51%)
- Those aged 45-54 (54%)
- Those without any dependent children (56%)

We also asked Scots, at what time of year they'd take holidays and we see a spread of possibilities although, not surprisingly, they are especially focused around the summer period in particular:

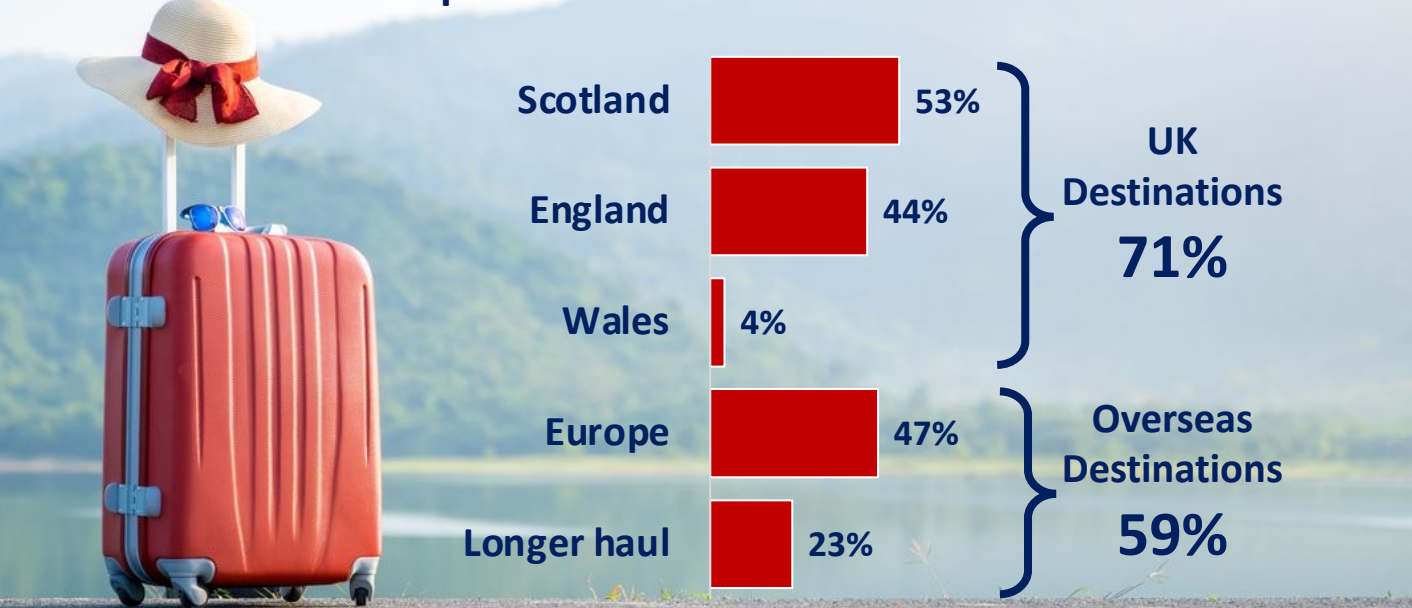
Most intend taking holidays during the main summer season



The main summer period (July and August), not surprisingly, is likely to benefit most – 45% of Scots are likely to take holidays then (and 55% of families). However earlier in the summer (May and June) are also popular with 40% planning trips then. And with Easter just a couple of months away, over a quarter of Scots are likely to take holidays then (27%) – and again, this period is especially likely to be popular amongst families (38% likely to take trips then). However, for just under four in ten, later in the year is also likely (38%).

So where are Scots planning to take their holidays this year? Amongst the 59% likely to take holidays, we asked them to list all of the destinations they were seriously considering for these breaks. Before we look at specific destination regions and overseas countries. firstly, let's examine where these holidays will be taken at the macro level:

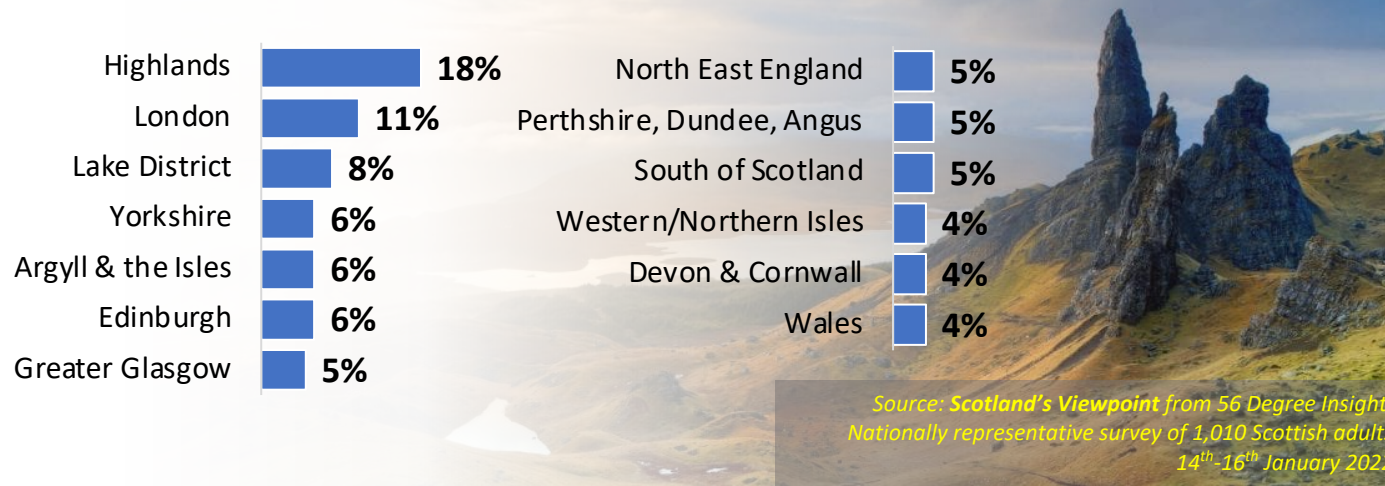
Scotland itself is the preferred destination choice for over half



Let's look at planned domestic holidays in the UK in more detail. Holidays in Scotland itself are especially appealing to empty nesters – 56% of those likely to take holidays will take them in Scotland this year. In comparison, only 48% of families will do so. England is relatively more popular amongst the family market, 48% of who are considering holidays there but of much lower appeal to young independents, pre kids, only 36% of who are considering holidays there (compared to 53% of them considering Scotland).

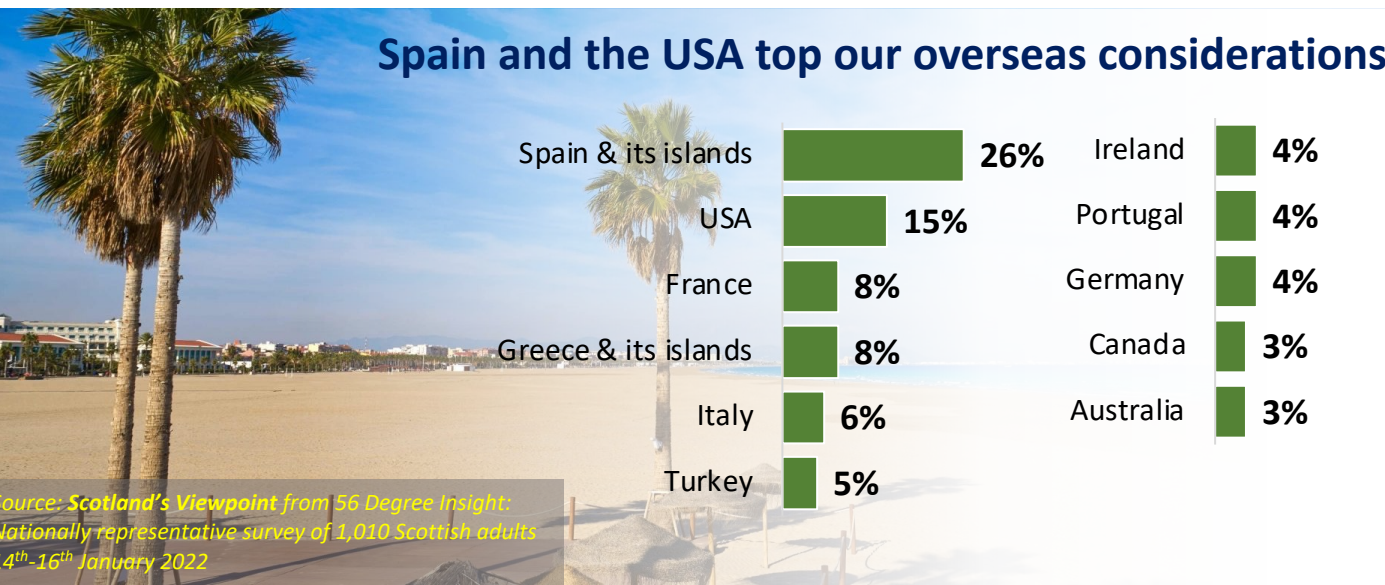
So, more specifically, which domestic (UK) destinations are we considering for 2022 holidays?

The Highlands and London are our top domestic considerations



Most popular amongst Scots is the Highlands (18%) – especially among Young Independents (22%) and those in the AB socio-economic grouping (23%). London is next most popular (11%) – especially amongst the 25-44 age groups (17%). The Lake District is the third most popular potential domestic destination (8% of those likely to holiday this year mentioning this region) and it is especially popular amongst those aged 65+ (13%). Argyll and the Isles, Edinburgh and Yorkshire fill places 4-6 in the domestic destination league table, each being mentioned by 6%, whilst Perthshire, Dundee and Angus, Glasgow, the South of Scotland (Borders and Dumfries & Galloway) and North East England each received mentions by 5%.

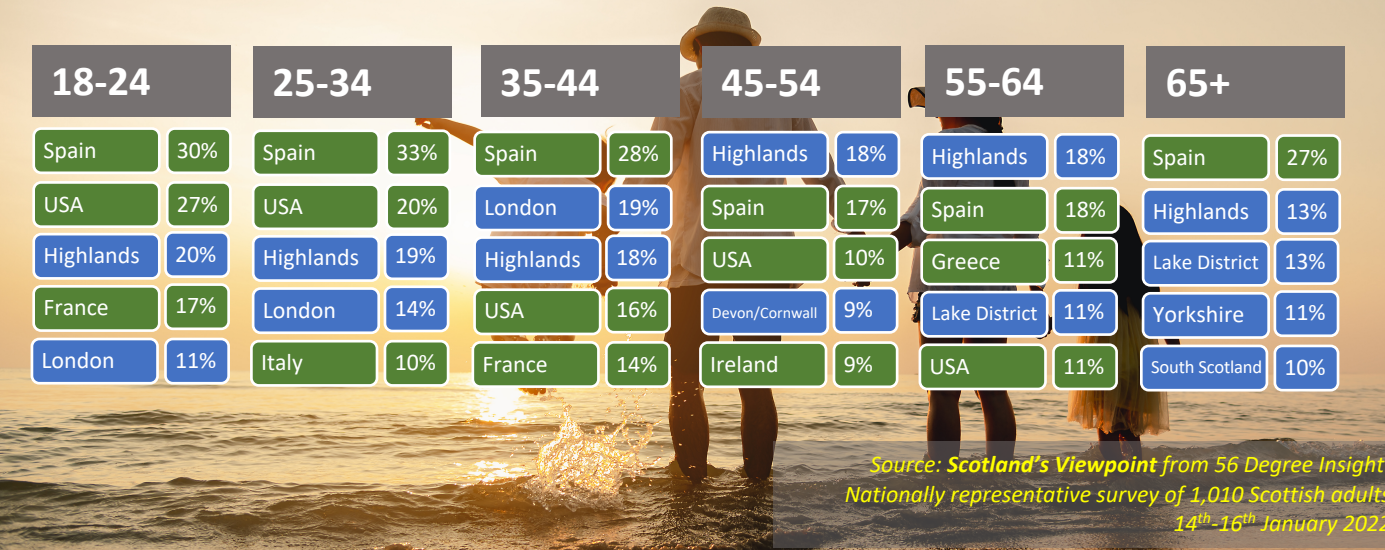
With 47% considering Europe and 23% even further afield, what are the most popular overseas destinations amongst Scots for 2022?



Well, the old favourite – Spain and its islands is the most popular overseas destination for Scots this year – over one in four who are likely to take a holiday this year, intend visiting Spain (26%). It is especially appealing to the pre-family under 35s, 33% of whom are planning to visit. Number two in our most popular overseas destinations is the United States – 15% of likely holidaytakers are planning to cross the Atlantic for a holiday in the USA this year, and this rises to over a quarter of the youngest adults – those aged under 25 (27%). France is our third most popular overseas choice for 2022 (8%) alongside Greece and the Greek islands (8%), just ahead of Italy (6%) and Turkey (5%).

Finally, let's look at the Top 5 destinations across each of our different age groups:


Although Spain is 'up there' for most, there are some variations in destination preferences by age group



Spain is the most popular choice for everyone under the age of 45 – but especially among the under 35s. It is notable that the Highlands and London are the only UK destinations in the top 5s for each of these three age groups with the USA, France and Italy being popular other choices.

For those aged 45-54 and 55-64, the Highlands joins Spain at the top of their lists as do other 'closer to home' destinations such as the Lake District, Devon and Cornwall and Ireland.

Although Spain is the most popular destination amongst the oldest age group, all of the other destinations in their top 5 are domestic and rural in nature.



Scotland's Viewpoint is a new, regular survey of 1,000 Scots – statistically representative of the Scottish adult population. It is conducted online over the course of 3 days. The first wave of the survey ran from over the weekend of 14th-17th January and future waves will be run at least quarterly. As well as some key tracking questions about Scottish public opinion, we also offer space on the survey for client-confidential polling of the Scottish population. Please get in touch with either Jim or Duncan for more information:

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