

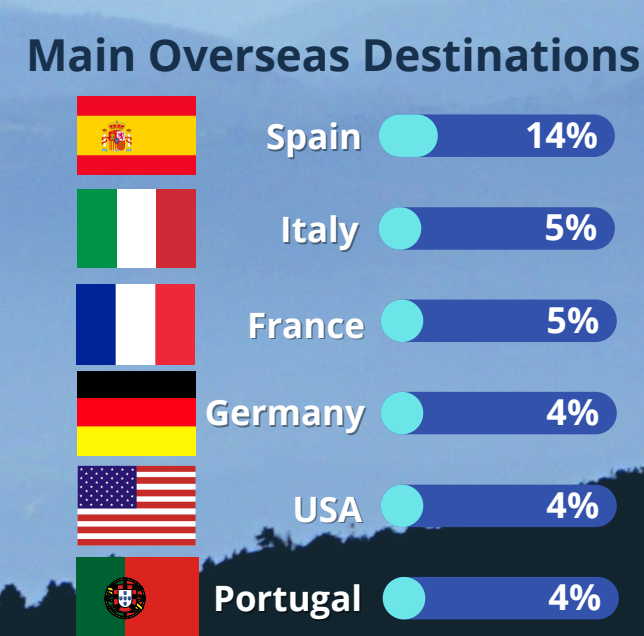
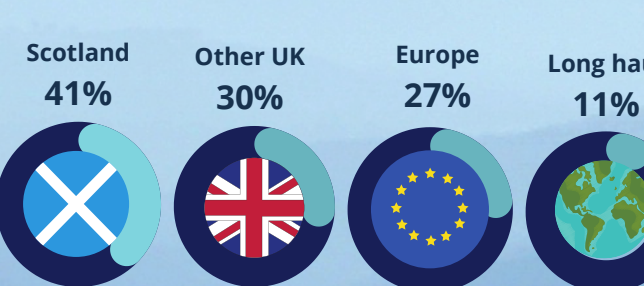
# 72%

of Scots expect to take holidays this year

+13% compared with January expectations



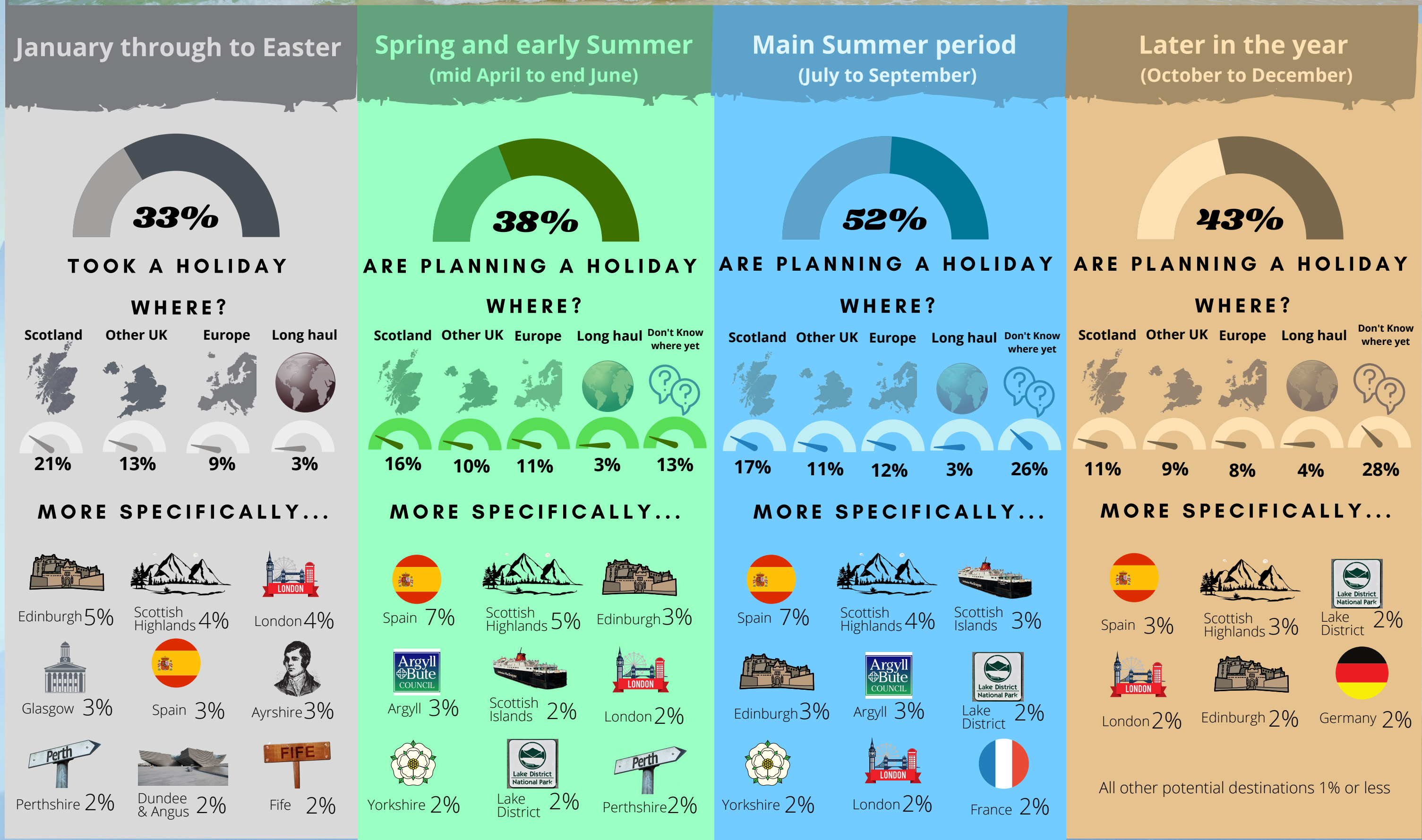
41% of Scots are planning a holiday in Scotland with Spain the main overseas destination



## Scottish Tourism Index - April 2022

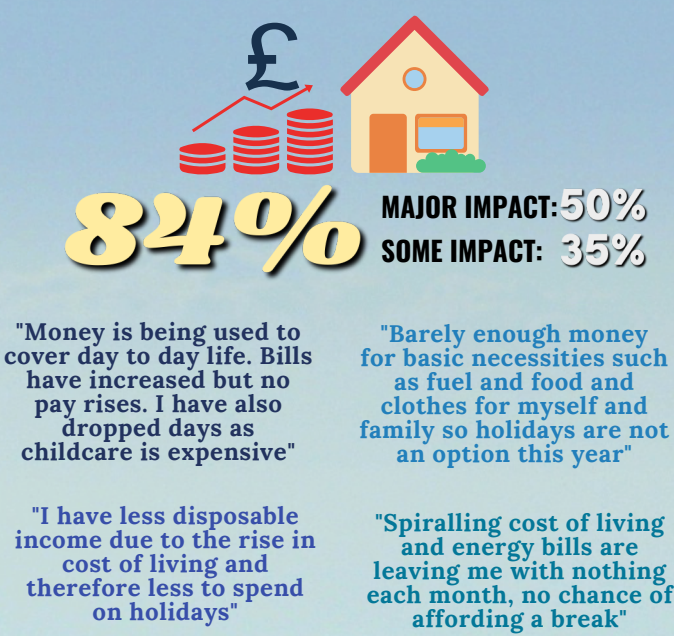
# HOLIDAYS & BREAKS TAKEN AND PLANNED:

SCOTLAND WAS THE MOST POPULAR DESTINATION UP UNTIL EASTER, BUT AN INCREASING DESIRE TO GO ABROAD IN THE SUMMER - ESPECIALLY TO SPAIN

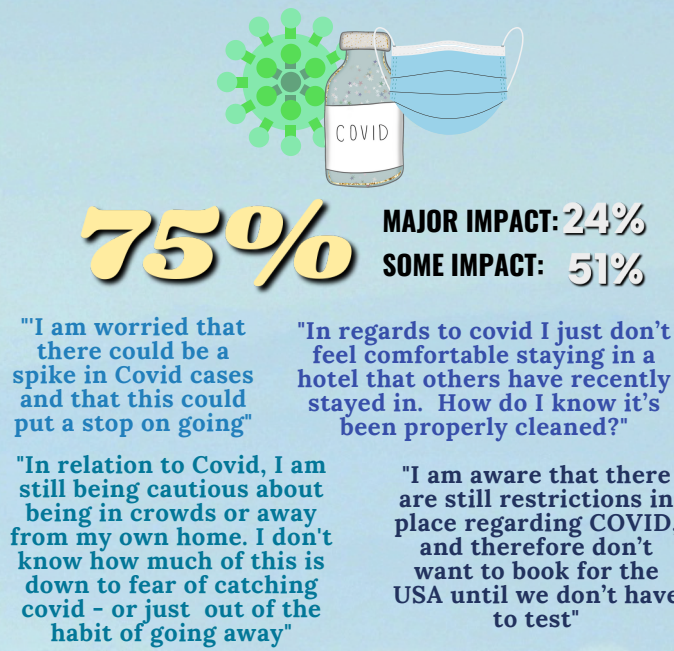


Outside Factors are impacting on holiday choices

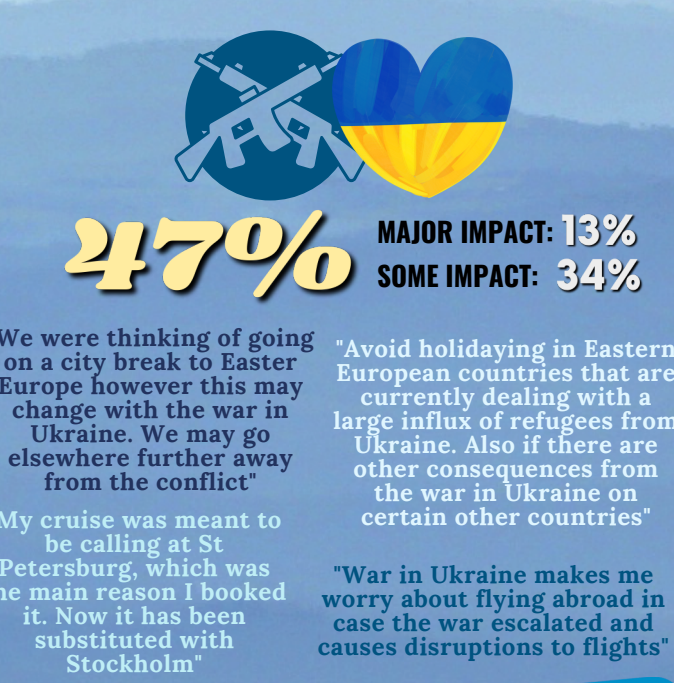
Increased cost of living



Coronavirus Pandemic



War in Ukraine



In the second Scottish Tourism Index of 2022, there are some encouraging signs of a recovery in holiday taking amongst Scots this year. When the survey was undertaken in mid April, around 72% of Scottish adults expected to take a holiday(s) at some point in 2022 - and a third had already done so between the start of the year and the Easter weekend (33%). This is a thirteen percentage point uplift on predicted holiday taking in mid January when only 59% expected to take a holiday or break this year.

Just over four in ten Scots expected to take a 'staycation' - a holiday in Scotland itself (41%), whilst three in ten expected to visit other parts of the UK (30%) and over a quarter intended taking a holiday in Europe (27%) with Spain the main beneficiary (14%).

Looking back at the first three months, the vast majority of holidays had been taken in the UK - 21% of Scots holidayed in Scotland and 13% holidayed elsewhere in the UK. Edinburgh, the Highlands and London were the main destinations visited, whilst Spain was the only destination mentioned by a significant number (3% holidayed there)

Looking forward to the rest of the year, 38% are planning a holiday in the early Summer, but it's in the main Summer period (July-September) that most holidays are expected - over half of Scots expect to holiday then (52%). The further forward we look however, there is increasing uncertainty about where these holidays will be taken. Over a quarter of Scots who are planning a holiday in the main summer period are unsure exactly where (26%).

What is clear is that holiday choices and decisions are being impacted by three key 'external factors' this year. The cost of living crisis in particular is impacting on the holiday choices of 84% of Scots - 50% describing it as a major impact. And clearly, in the minds of many, Coronavirus is still playing a role in decision-making - three quarters are taking account of the uncertainty it continues to bring in their choices. And of course, the war in Ukraine is also impacting decision-making and choices for almost half of Scots (47%).

Generally however, the prospects for holiday taking by the Scottish population are looking decidedly brighter than they did at this point in 2021.

Scotland's Viewpoint is a quarterly survey of a statistically representative sample of the Scottish population, undertaken by 56 Degree Insight. The most recent wave of the survey ran over 18th and 19th April 2022 - 1,007 Scots were interviewed. We can also accommodate client confidential questions - please just get in touch:

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