

of Scots expect to take holidays this year

Main Overseas Destinations

Spain (

Italy

France

USA

Portugal

Germany

14%

5%

5%)

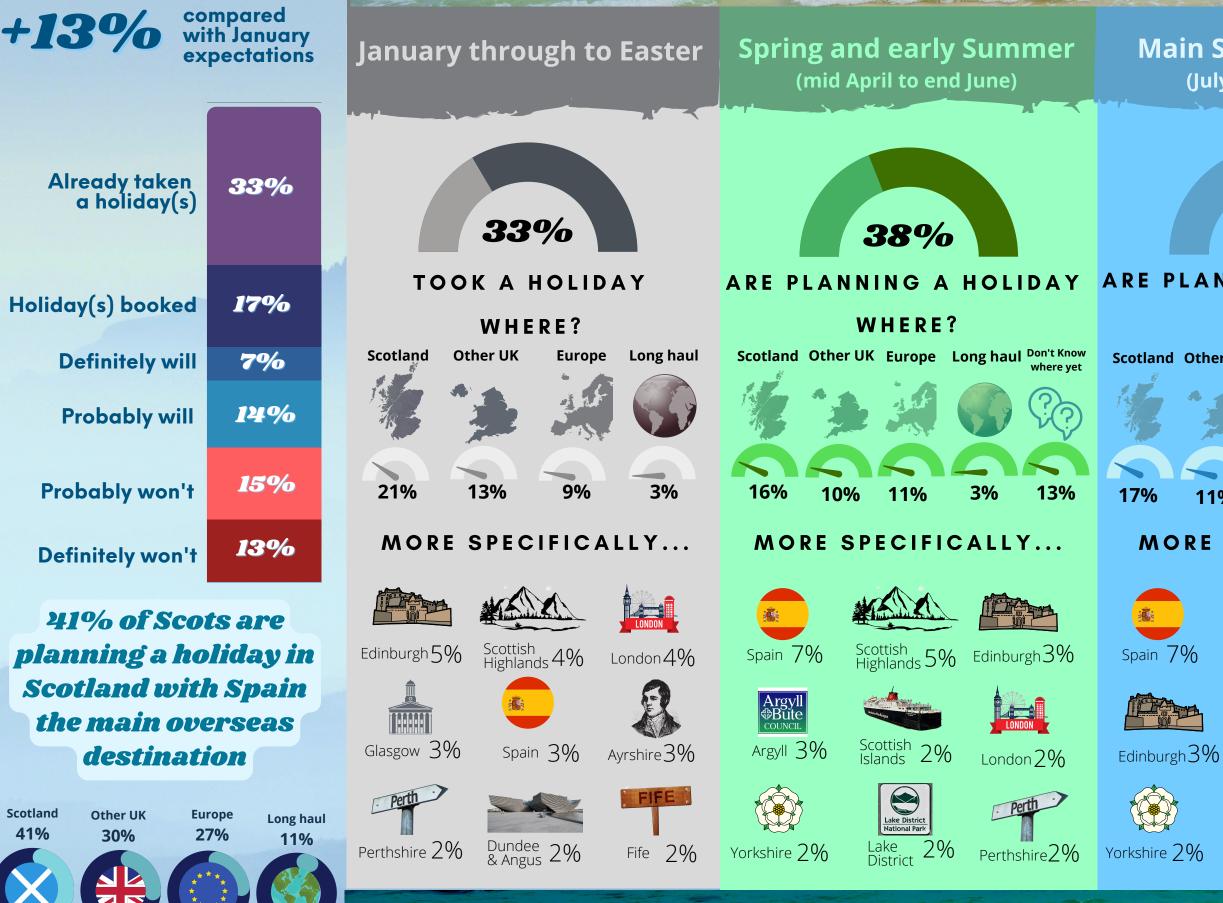
4%

4%

4%

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**



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)



Outside Factors are impacting on holiday choices

Increased cost of living

Main Summer period (July to September)



ARE PLANNING A HOLIDAY

WHERE? Scotland Other UK Europe Long haul Don't Know



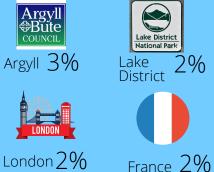
MORE SPECIFICALLY...

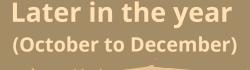
















WHERE? Don't Know Scotland Other UK Europe Long haul where vet 28% **MORE SPECIFICALLY...**





Edinburgh 2% Germany 2% London 2%

Lake District

District 2%

All other potential destinations 1% or less

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.



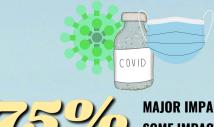
"Money is being used to cover day to day life. Bills have increased but no pay rises. I have also dropped days as childcare is expensive'

"Barely enough money for basic necessities such as fuel and food and clothes for myself and family so holidays are not an option this year"

"I have less disposable income due to the rise in cost of living and therefore less to spend on holidays'

"Spiralling cost of living and energy bills are leaving me with nothin each month, no chance of affording a break"

Coronavirus Pandemic



MAJOR IMPACT: 24% SOME IMPACT: 51%

"I am worried that there could be a spike in Covid cases and that this could put a stop on going"

"In relation to Covid, I am still being cautious about being in crowds or away from my own home. I don' know how much of this is down to fear of catching covid - or just out of the habit of going away"

"In regards to covid I just don't feel comfortable staying in a hotel that others have recently stayed in. How do I know it's been properly cleaned?"

> "I am aware that there are still restrictions in place regarding COVID and therefore don't want to book for the USA until we don't have to test





be calling at St Petersburg, which was he main reason I booked it. Now it has been substituted with Stockholm"

"We were thinking of going on a city break to Easter Europe however this may change with the war in Ukraine. We may go elsewhere further away from the conflict"
"My cruise was meant to
"Avoid holidaying in Eastern European countries that are currently dealing with a large influx of refugees from Ukraine. Also if there are other consequences from the war in Ukraine on certain other countries"

"War in Ukraine makes me worry about flying abroad in case the war escalated and causes disruptions to flights"

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 2002 - 1,007 Scots were interviewed. We can also accommodate client confidential questions - please just get in touch:

