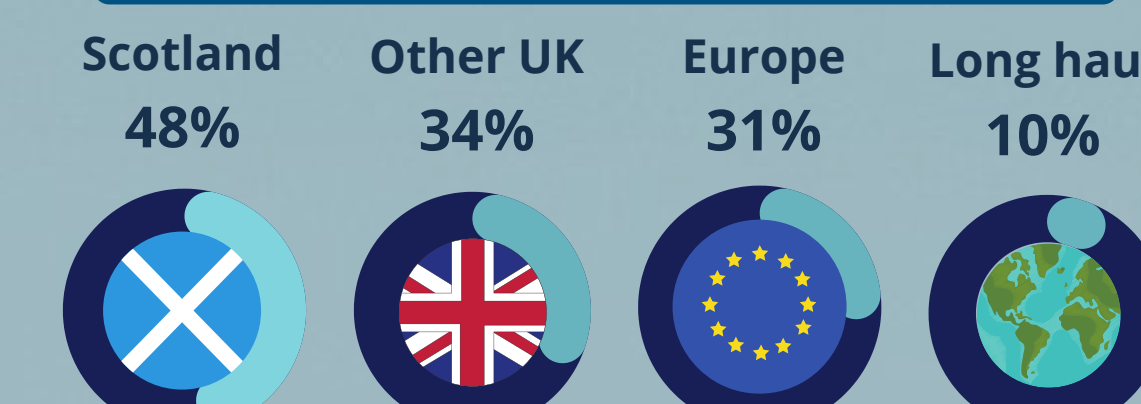
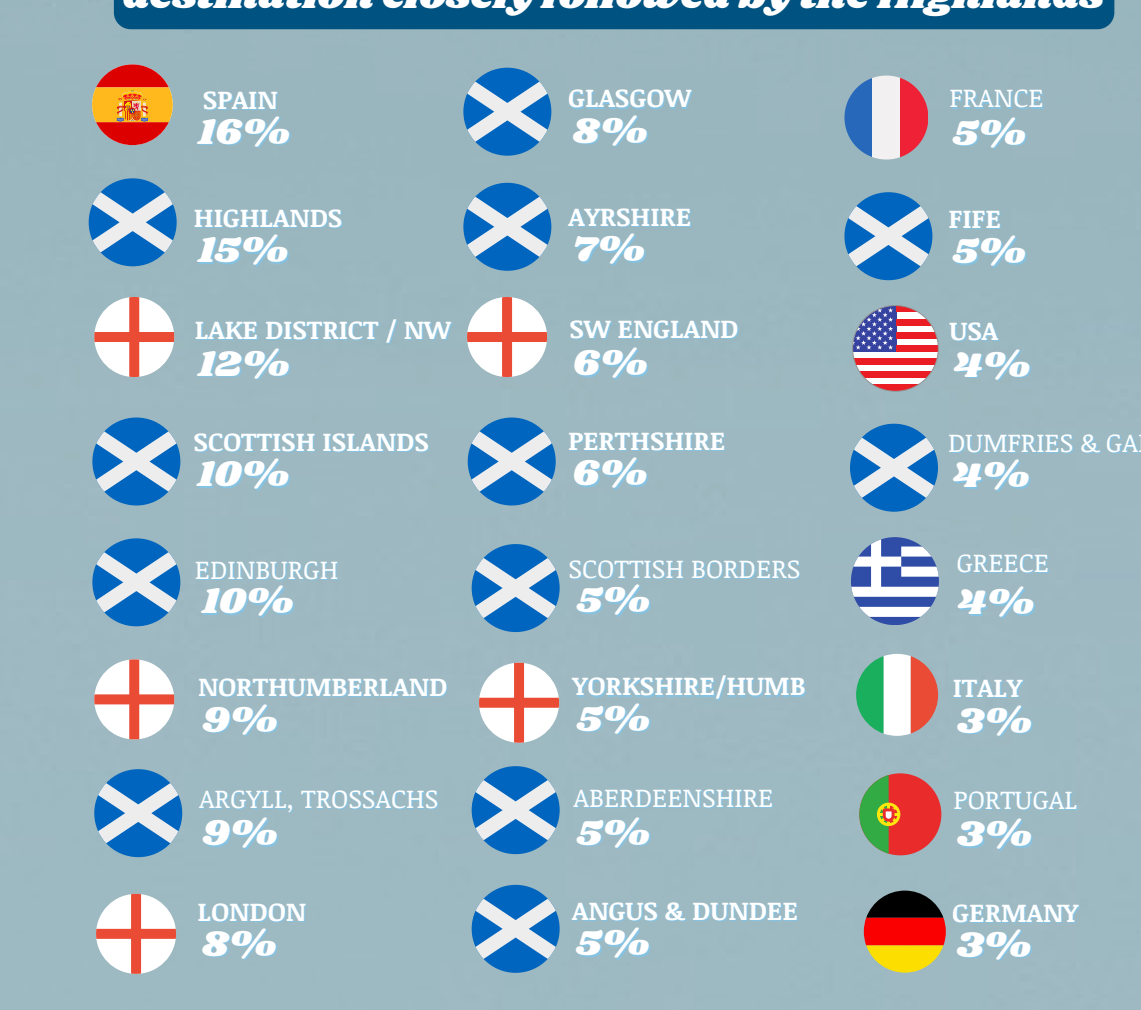


By the start of August, 48% of Scots had either taken or were planning a holiday in Scotland this year

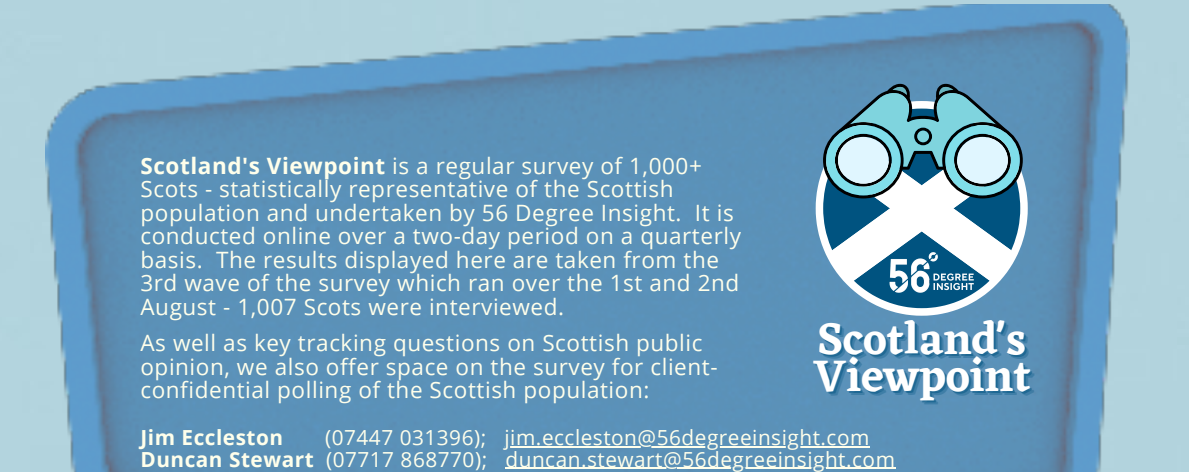
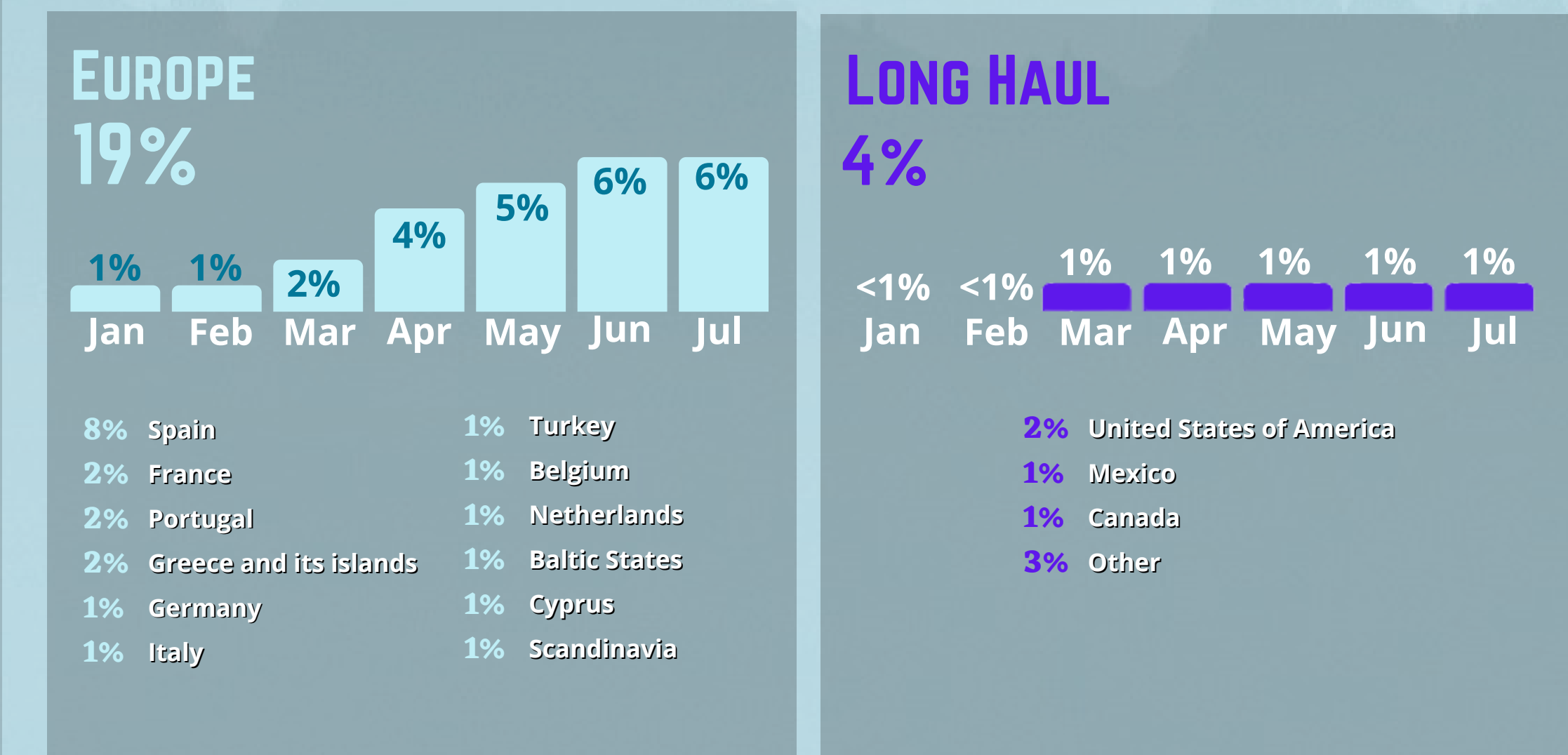
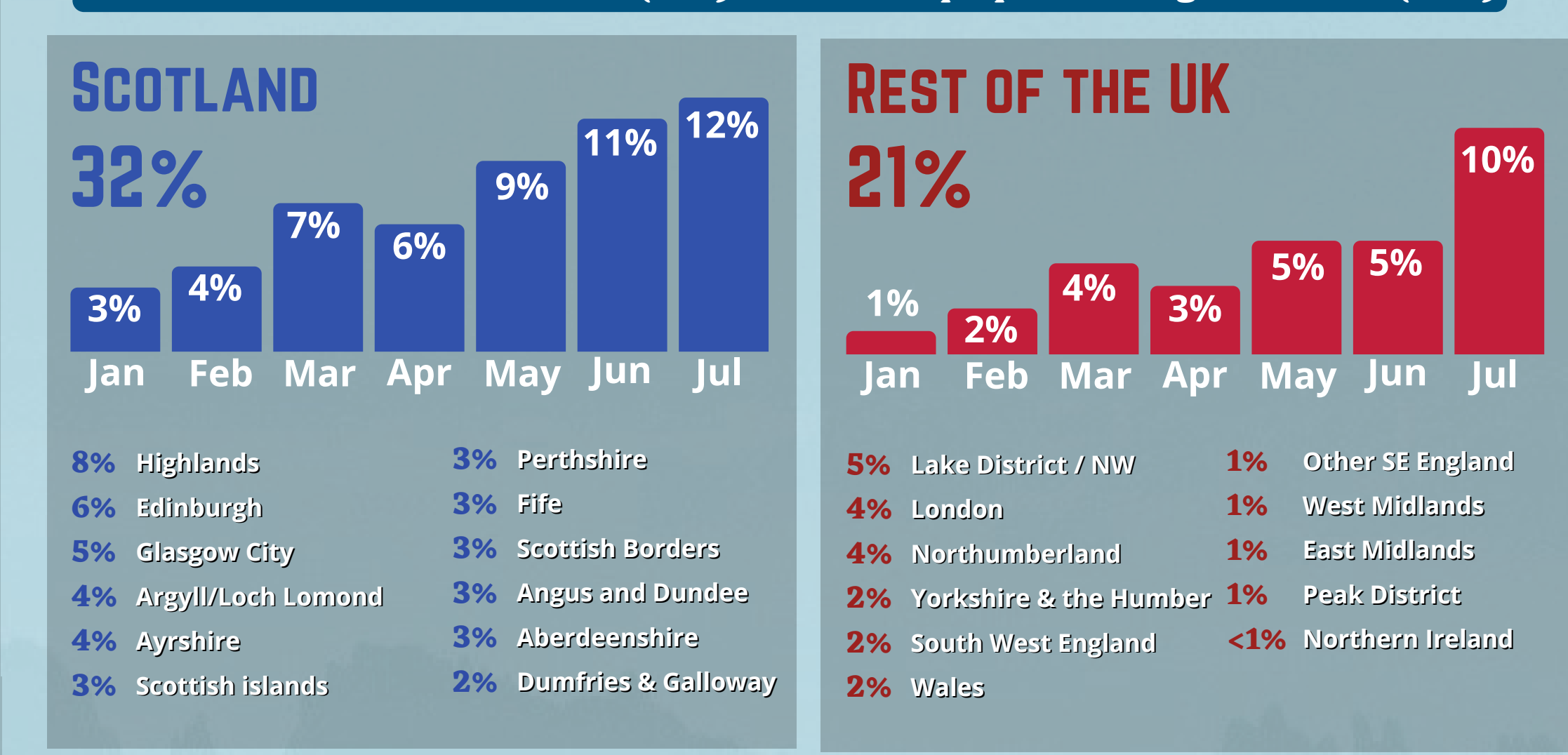


Proportions of Scots taking holidays in 2022: Spain will be Scotland's favourite holiday destination closely followed by the Highlands



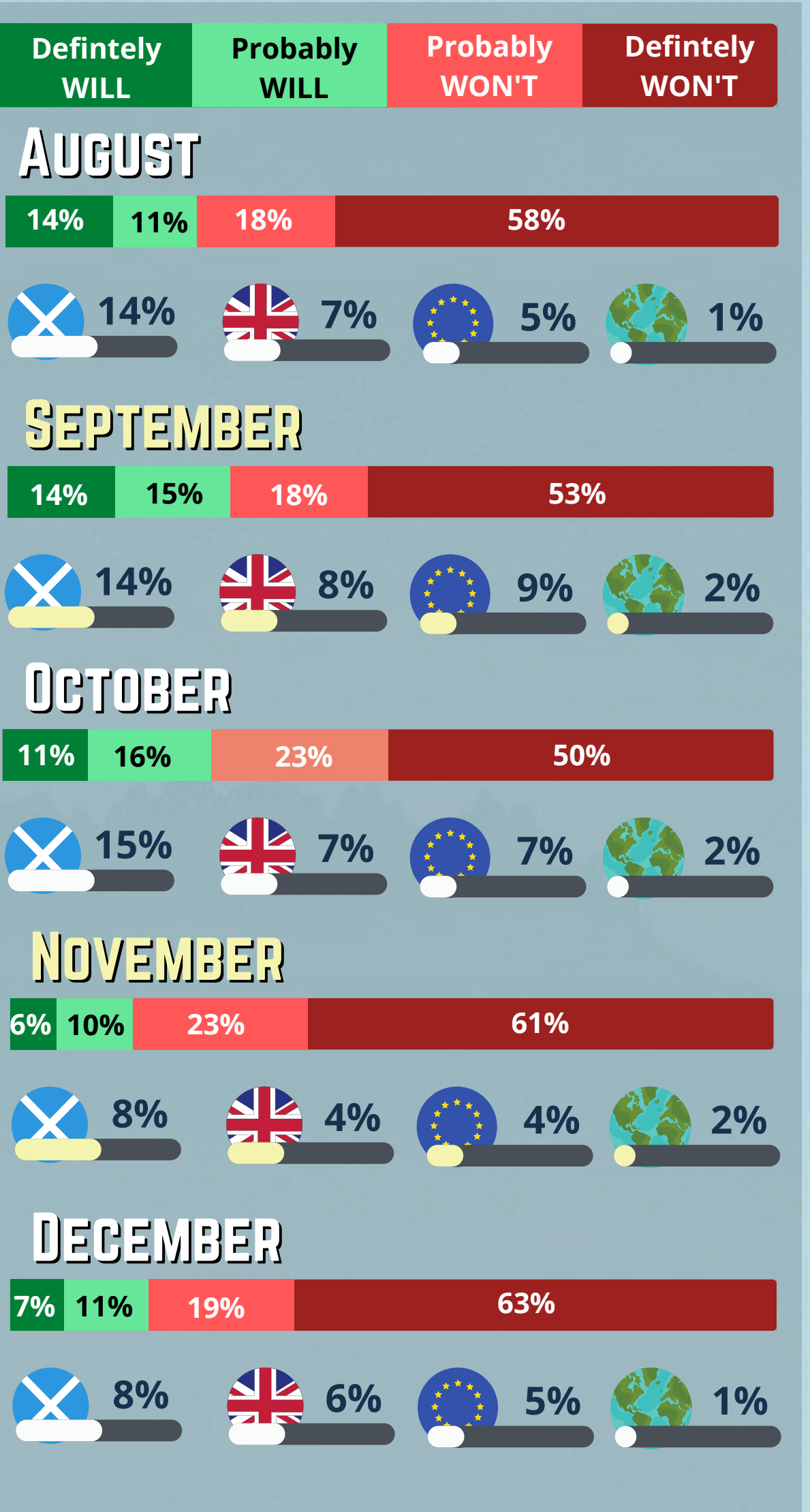
2 HOLIDAYS ALREADY TAKEN - JANUARY TO JULY 2022

Just under a third of Scots had taken a home holiday in the first seven months of 2022 (32%), one in five had visited elsewhere in the UK (21%) and a similar proportion had gone overseas (22%)



3 REST OF 2022
PREDICTED HOLIDAY VOLUMES

For the rest of 2022, September & October are most likely to result in visits - with over a quarter of Scots planning breaks in either or both months



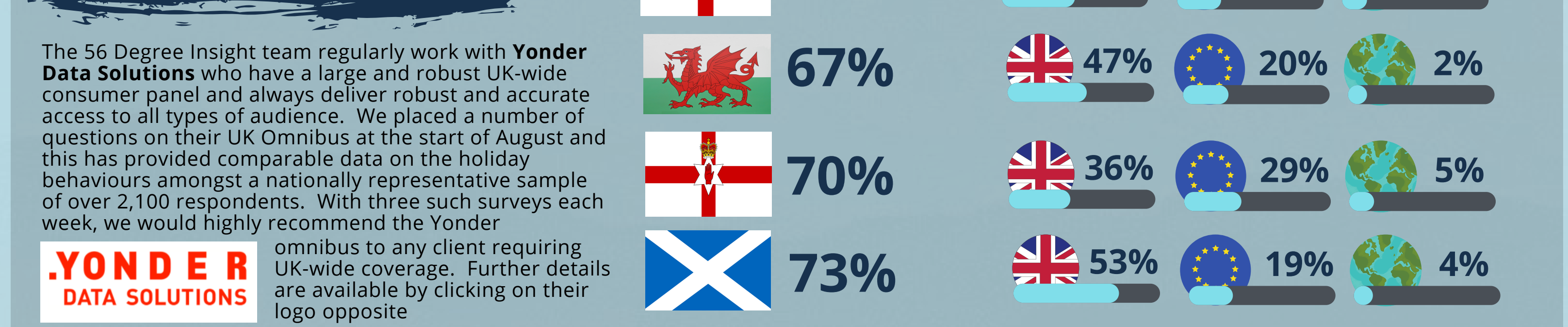
FROM COVID TO COST OF LIVING
FALTERING STEPS TO TOURISM RECOVERY?



Each quarter, the 56 Degree Insight team interview around 1,000 Scottish residents to understand how they are feeling about holidays and breaks - the Scottish Tourism Index. Between the 1st and 2nd of August 2022, we interviewed 1,007 Scots residents and some key findings have emerged:

- Across 2022 as a whole, recovery in tourism trip taking amongst Scots is continuing in 2022 - with increasing numbers taking domestic trips in Scotland and elsewhere in the UK, but also in short haul travel to Europe. Only longer haul travel continues to be somewhat depressed. 73% of Scots are intending to take at least one holiday or break (58% had already done so) and almost half of them were taking a domestic holiday in Scotland itself (48%) making this the main destination for Scots holidays in 2022. The Highlands (15%) and Islands (10%) and Edinburgh (10%) were the main Scottish destinations, however other parts of the UK are also popular - 12% going to the Lake District / North West and 9% to Northumberland and North East England. Spain is the most popular overseas destination with 16% of Scots visiting this year - split fairly evenly between the mainland, the Balearics and the Canary Islands.
- Looking at the year to date - January to July, almost a third of Scots had already holidayed in Scotland (32%), whilst around one in five had taken a break elsewhere in the UK (21%) or in Europe (19%).
- For the rest of 2022, September & October are most likely to result in visits - with over a quarter of Scots planning breaks in either or both months (29% in September and 27% in October). Scotland is a likely destination for around 14-15% of Scots in each of these months. Not surprisingly, the proportions expecting to take holidays in November and December decreases significantly - in each case, over four in five will be staying at home.
- Yonder Data Solutions provided space on their regular UK-wide omnibus to allow us to run some comparable questions on holiday behaviours across the wider UK population - this has meant we can put Scottish behaviours into a wider UK context. Interestingly, Scots are rather more likely to be taking any form of holidays in 2022 than their English (65%), Welsh (67%) or Northern Irish counterparts (70%) suggesting greater buoyancy in terms of holiday activity within the Scottish marketplace. In particular, Scots are taking a greater proportion of domestic holidays across the UK than is the case elsewhere.
- In terms of the characteristics of holidays taken in Scotland so far this year, around three quarters made the decision to travel at least a month beforehand, and almost nine in ten booked some elements in advance - especially their accommodation (69%). Self-catering was the most popular individual type of holiday accommodation amongst Scots (28%), a higher proportion than amongst residents from elsewhere in the UK visiting Scotland (21%). Conversely, small hotels are much more popular choices amongst those from the rest of the UK (33%) than amongst Scots (16%).
- Finally, what is impacting on our holiday choices in 2022? The cost of living crisis is having the biggest impact with 84% of Scots claiming their holiday choices have been impacted by this factor. Rising petrol and diesel costs are also having an impact amongst 70% (especially important for the domestic markets), and we see that Coronavirus continues to play a role in our decision-making - especially for overseas holidays (61% impacted). Travel disruption has been significant over the summer - and this has also been an important consideration for many: just over half claim that potential disruption at airports has impacted their holiday choices, whilst smaller but still significant numbers have been impacted by rail and cross-channel ferry delays and disruptions. Once again, in each case, UK-wide comparisons are available and demonstrate that with the exception of airport and ferry disruptions, these factors are slightly more likely to have been a consideration and have an impact for Scots than amongst other UK residents.

4 COMPARING SCOTS
HOLIDAY CHOICES WITH
OTHER PARTS OF THE UK



5 CHARACTERISTICS OF SCOTTISH
HOLIDAYS TAKEN IN 2022

