

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

WILL

Scotland Other UK 48%



34%

DEFINITELY

WILL



Europe

31%



Long haul

10%

DEFINITELY

WON'T

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



Scottish Tourism Index - August 2022 ALMOST THREE QUARTERS OF SCOTS ARE TAKING **HOLIDAYS THIS YEAR - MORE THAN PEOPLE ELSEWHERE** IN THE UK - ALMOST HALF OF SCOTS ARE TAKING TRIPS Tourism Index IN SCOTLAND

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% Perthshire

3% Scottish Borders

3% Aberdeenshire

3% Angus and Dundee

2% Dumfries & Galloway

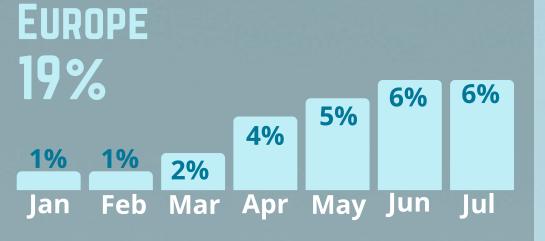
3% Fife

8% Highlands 6% Edinburgh 5% Glasgow City 4% Argyll/Loch Lomond 4% Ayrshire

3% Scottish islands

10% 21% Apr May Jun Jul Feb Mar **1%** Other SE England 5% Lake District / NW 1% West Midlands 4% London East Midlands 4% Northumberland 2% Yorkshire & the Humber 1% Peak District

REST OF THE UK



8% Spain 2% France 2% Portugal 2% Greece and its islands 1% Germany 1% Italy

1% Turkey 1% Belgium 1% Netherlands 1% Baltic States 1% Cyprus 1% Scandinavia

LONG HAUL 4%

2% South West England

2% Wales

1% 1% 1% 1% Mar Apr May Jun Jul Jan

<1% Northern Ireland

2% United States of America 1% Mexico

1% Canada 3% Other

Scotland's Viewpoint

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

Defintely WILL	Probably WILL	Probably WON'T	Defintely WON'T
AUGUST			
14% 11%	18%	58%	
14%	7%	5%	1%
SEPTEMBER			
14% 15%	18%	53%	
14%	8%	9%	2%
OCTOBER			
11% 16%	23%	50	%
15%	7%	7%	2%
November			
6% 10%	23%	61%	
8%	4%	4%	2%
		170	
DECEM			
		63%	

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



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 n 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

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

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.

COMPARING SCOTS HOLIDAY CHOICES WITH OTHER PARTS OF THE UK

The 56 Degree Insight team regularly work with **Yonder Data Solutions** who have a large and robust UK-wide consumer panel and always deliver robust and accurate access to all types of audience. We placed a number of questions on their UK Omnibus at the start of August and this has provided comparable data on the holiday behaviours amongst a nationally representative sample of over 2,100 respondents. With three such surveys each week, we would highly recommend the Yonder

DATA SOLUTIONS

omnibus to any client requiring UK-wide coverage. Further details are available by clicking on their logo opposite



70%



WHERE TAKING 2022 HOLIDAYS





HOLIDAYS TAKEN IN 2022

"When I decided to take a Scottish holiday:"

CHARACTERISTICS OF SCOTTISH

Several months beforehand 41%

A month or so beforehand 34%

A few *l*ithin a week weeks before of going 10%

"I booked the following in advance...."

ACCOMMODATION

12% Nothing ACTIVITIES

"Accommodation used on my recent Scottish holiday...."

SELF Friends & 868 / LARGE SMALL RELATIVES GUESTHOUSE CARAVAN HOTEL CATERING 28% sects 19% sects 16% sects 12% sects 11% sects 17% other 33% other 23% other

Net change in consideration of accommodation types since Covid

SELF-CATERING +29% SMALL HOTELS +6% FRIENDS & RELATIVES +4% B6Bs & GUESTHOUSES CARAVANS -6% TENTS/CANVAS -9% LARGE HOTELS AIR BNB -16% Hostels & Bunkhouses -29%





% Impacted Major Some impact impact

"Money is better saved than spending on an "Everything is more expensive including holidays. We have less than spending on an overseas holiday" money to spend on a holiday" "It is just impossible to now be able to even have "Having to find a cheap holiday and not buy as many clothes to take with me" a short break away"

Rising Petrol & Diesel Costs % Impacted Major Some impact impact 85% 30% 35%

"Taking the car on road trips is now more expensive"

"With high fuel prices I'm not traveling as far and I'm now probably going to visit places close by"

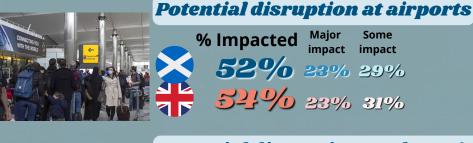


Coronavirus Pandemic % Impacted Major Some impact impact 61%

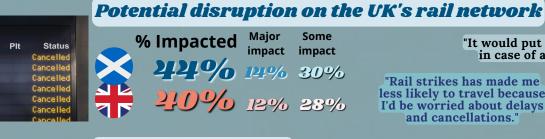
I like to take short holiday breaks back home to see my parents but it uses a lot of fuel, if the prices keep increasing I might not make it home as much as I'd like.""

"With all the different rules in different "Still a bit worried places it gets to be confusing in knowing what you have to do" about different variants in different countries"

"We have decided to not go any holidays by plane or mixing with strangers" by plane or mixing with strangers"



There was a worry about flights being cancelled and luggage being lost" "I don't want to book a holiday and spend days in an airport queueing and unsure if you will actually get away. Holidays are to de stress. This sounds incredibly stressful." "Too chaotic with everything being cancelled"



"It would put me off booking in advance in case of any future strike action" "Its unreliable. We need to know "Rail strikes has made me less likely to travel because I'd be worried about delays



and cancellations. "It has made me think more about what

were getting to and from home safely - especially with the price of train journeys." "Choosing to stay away from surrounding areas in case of any



disruption to travel arrangements" country I visit" "I wouldnt be comfortable flying anywhere near the disputed airspace. It is also partly fueling the cost of living crisis."



"Wouldn't want to be stuck "Normally I take the car to France but not this year - I am going somewhere else instead"