Scottish Tourism Index - October 2024

In 2024, over three quarters of Scots have taken holidays – the largest proportion post-pandemic. However, domestic breaks have continued to decline, largely at the expense of overseas trips. There are encouraging signs however that 2025 may see some domestic tourism recovery

56° Degree Insight Scottish Tourism Index

What is 2024 looking like in terms of Scots' holiday behaviours? Scottish and European destinations 'neck and neck' with Spain, the Highlands & Edinburgh key beneficiaries

By late October, almost 7 in 10 Scots had taken a holiday of some description away from home (69%) and by the end of the year, up to 76% expect to have done so. A further 2% had not yet done so but had holidays booked, whilst 3% were definite that they would take a holiday(s) before the end of the year. Some 2% 'probably' would - though this is always going to be the softest segment based on previous years' data as it is unlikely they will all convert to take holidays. Just under a quarter (24%) are saying that a holiday is at best unlikely to be taken this year.

By late October, 35% of Scots had taken a domestic home holiday this year and with a further 8% claiming they are likely to do so, we predict that up to 43% of Scots residents will take a staycation of some description. Four destinations are especially popular: the Highlands (up to 13% are likely to visit), Edinburgh (12%), Glasgow (10%), and the Islands (10%). Just under a third intend visiting other parts of the UK this year (31%) with the North West, London and the North East remaining the most popular options.

We predict that some 41% of Scots are likely to take a holiday in other parts of Europe this year with Spain (18%), France (7%), Italy (6%) and Germany (6%) the main beneficiaries. The large numbers of Scots who visited Germany for the Euros in June has boosted this particular destination in 2024. One in 8 Scots are travelling long haul in 2024 (12%) with the USA remaining the most popular option.

76% of Scots intending to take holidays in 2024

Already taken holiday	69%
Holiday(s) booked	2%
Definitely will	3%
Probably will	2%
Probably won't	6%
Definitely won't	18%

	Taken by end Oct	To take	Potential total
2024 holidays in Scotland	35%	8%	43%
2024 holidays elsewhere in the UK	25%	6%	31%
2024 holidays to Europe	35%	6%	41%
2024 holidays - long haul	10%	2%	12%

Destination	Taken	To take	2024 potential
Highlands	10%	3%	13%
Edinburgh	9%	3%	12%
Islands	6%	4%	10%
Glasgow	8%	2%	10%
L Lomond, Argyll	6%	2%	8%
Angus & Dundee	5%	2%	7%
Perthshire	5%	1%	6%
Ayrshire	4%	1%	5%
Dumfries & Gall	3%	1%	4%
Aberdeenshire	3%	1%	4%
Fife	2%	1%	3%
Borders	2%	1%	3%
NW England	6%	3%	9%
London	6%	3%	9%
NE England	4%	3%	7%
Midlands	4%	2%	6%
Yorkshire	3%	2%	5%
SW England	3%	2%	5%
Wales	2%	2%	4%
Other SE England	2%	1%	3%
N Ireland	2%	1%	3%
Spain & its islands	15%	3%	18%
France	5%	2%	7%
Italy	4%	2%	6%
Germany	5%	1%	6%
Portugal	3%	2%	5%
Greece / islands	4%	1%	5%
Turkey	3%	1%	4%
Cyprus	2%	1%	3%
Belgium	2%	1%	3%
USA	4%	1%	5%
South East Asia	2%	<1%	2%
South America	2%	<1%	2%
Australia	1%	1%	2%
Canada	2%	<1%	2%
New Zealand	1%	<1%	1%
Japan	1%	<1%	1%
South Africa	1%	<1%	1%
India	1%	<1%	1%

Holiday taking has peaked as we reach the end of 2024

Although in the first wave of the Scottish Tourism Index this year (late January), three quarters of Scots expected to take holidays this year, there was always going to be some uncertainty at this early stage - only 39% had taken any or had booked holidays by then. In late April and late July, likelihood to holiday held up with three quarters of us still planning to do so (75%), and this has increased very slightly to 76% in late October. However, 69% of us have now either already taken a break somewhere or have booked one. The seasonal spread of Scots holidays varies by destination and predicted breaks to most destinations peaks in August & September. The exceptions are Scotland itself and Europe with June the main month of travel – in Europe inflated this year by the Euros in Germany.

Holidays Anticipated

	January	April	August	October
Total	75%	75%	75%	76%
Already taken a holiday(s)	7%			
Holiday(s) booked	32%	40%	62%	69%

Anticipated Annual Totals

	In January	In April	In August	In October
Scotland	45%	40%	48%	43%

Seasonal Spread of Scots' Holidays & Breaks 2024

Scotland: J 3%, F 4%, M 5%, A 8%, M 8%, J 10%, J 9%, A 7%, S 8%, O 6%, N 5%, D 8%

And despite overall increases, fewer domestic holidays than in 2023 remains likely

It is also possible to compare tourism prospects amongst Scots with this time in the last 2 years - we ran identical questions in the same week in late October each year. Overall, the proportion of Scots expecting to take holidays this year is likely to increase slightly by 3 or 4 percentage points to 76%. We are some 4 percentage points ahead of where we were this time last year in terms of holidays already taken (69% compared to 65% last year). The main reason for this increase is that more of us have holidays taken to Europe and further afield this year (+3% and +2% respectively) – however this has partly been at the expense of holidays in Scotland (-1%) and to other UK destinations (-1%).

Holidays Planned

October 22	October 23	October 24
73%	72%	76%

	Holidays taken to end October 2022	2023	2024	Change	Annual predicted holiday totals 2022	2023	2024	Change
Scotland	38%	36%	35%	-1%	46%	44%	43%	-1%
Other parts of the UK				-1%				-1%

Scottish home holiday characteristics in 2023 - shorter, lower spend and fewer in number with a continued trend towards self-catering accommodation

43% Took fewer Scottish breaks than in 2023

38% Shorter in duration than in previous years

54% Kept costs as low as possible by reduced spending

Accommodation used on 2024 home holidays

Self catering 32%; Large hotel 23%; Friends & relatives 21%; Small hotel 19%; B&B/Guest house 15%; Own caravan 10%; Own tent 7%; Hostel/Bunkhouse 5%

Activities undertaken on 2024 home holidays

Rest & relaxation 59%; Visits to the outdoors 50%; Eating/drinking out 47%; Active outdoor pursuits 36%; Bought takeaway food 34%; Cooked your own meals 32%; Visits to historic properties 30%; Shopped for gifts, souvenirs 29%; Visited purpose built attractions 25%; Meeting/mixing with locals 24%; Cultural activities 20%

Spending on Scottish holidays in 2024 compared to previous years

A lot less	A bit less	Much the same	A bit more	A lot more
11%	13%	53%	18%	6%

Why spent less? / Why spent more?

High prices are still having an impact - especially on the demand for domestic holidays - while increasing fuel bills are back in the picture

The nature of holidays taken in 2024 has continued to evolve

54% were more careful on spending when on holiday; 39% protected their holiday by making cut backs elsewhere; 39% booked their holiday at the last possible moment; 32% were more able to take holidays than feared at the start of 2024; 29% were more likely to use a tour operator because of so many uncertainties; 21% are uncomfortable going abroad because of continuing Covid concerns

Looking forward to 2025, some possible optimism ahead for domestic tourism?

Scots holidays in 2025 vs 2024

Scotland (main holidays) 18% / 15%; Scotland (short breaks) 21% / 15%; Other parts of the UK 16% / 14%; Europe 20% / 17%; Long haul 13% / 15%

Winter breaks and holidays: What do Scots have planned and what could make a difference?

Over half of Scots are considering a break over the winter months (November '24 to March '25)

The winter season has always been a challenging time for tourism businesses in Scotland. For this edition of the Scottish Tourism Index we included a series of questions to better understand attitudes and behaviours as well as what's important to them when choosing destinations and accommodation. This has highlighted a number of positives and considerable potential if businesses can embrace some of these requirements

Already booked	Very likely	Quite likely	Don't know	Not very likely	Not at all likely
17%	18%	19%	5%	15%	25%

54%

Winter break destinations under consideration - and the appeal

Scotland 24%

Highlands 6%; Edinburgh 3%; Islands 1%; Perthshire 1%; Argyll, Loch Lomond 1%; Glasgow 1%; Aberdeenshire 1%

Other UK 15%

London 3%; Lake District 1%; Other NW England 1%; NE England 1%; SW England 1%; Wales 1%

Europe 18%

Spain & Balearics 3%; Canary Islands 2%; France 2%; Italy 2%; Germany 1%; Netherlands 1%; Turkey 1%

Appeal:

- Warmer Weather and Sunshine: especially Spain, Italy, and the Canary Islands.
- Festive and Cultural Experiences: Europe's winter charm is enhanced by Christmas markets and festive events
- Visiting Family and Friends who live in Europe
- Affordability: The appeal of cheap flights, affordable accommodation, and better value for money
- Historical and Scenic Attractions: Europe offers a rich array of historical sites, scenic landscapes, and cultural diversity - different from home
- Sports and Winter Activities: Some are drawn to Europe for skiing, snowboarding, and other winter sports,
- Quick Getaways and Shorter Travel Times: Europe's proximity allows for quick getaways, which are manageable in terms of travel time and logistics

Further afield 6%

Florida 1%; California 1%; Other USA 1%; Australia 1%; SE Asia 1%

Appeal:

- Warmer Climates and Sunshine: Popular destinations include Florida and California, the Caribbean, and other tropical or warm places like Thailand and Dubai.
- Family Visits: Visiting family abroad and reconnecting with loved ones over the holiday season.
- Unique Cultural Experiences: Long-haul destinations offer rich cultural experiences and traditions that differ significantly from the UK, appealing to those looking for something beyond Europe
- Special Events and Celebrations: Specific cultural or religious festivals are a draw, adding to the seasonal appeal of these destinations.
- Escape from High Energy Costs: Travelling to warmer places is a way to reduce heating costs at home during winter.
- Adventure and Novelty: Long-haul trips often offer unique landscapes, wildlife, and activities

What are the important considerations for a winter break in Scotland - and what words come to mind?

	Extremely important	Quite important
Local food and drink	26%	40%
Staying cosy in front of the fire	20%	40%
Activities for families	18%	26%
Visiting villages and towns	16%	45%
Indoor attractions	14%	37%
Visiting pubs	14%	33%
Forest walks	13%	34%
Night-sky activities	13%	26%
Beach walks	13%	34%
Wellbeing experiences	12%	29%
Wildlife spotting	12%	31%
Live traditional music sessions	12%	24%
Local winter events/festivals	11%	30%
Hiking	9%	24%
Snowboarding and skiing	6%	14%
Cycling	6%	12%

When it comes to winter breaks in Scotland, a whole range of factors become important, however two stand out: the appeal of local food and drink is extremely important to 26% on such holidays and quite important to a further 40%. Whilst accommodation where you can be cosy in front of the fire is also very appealing: extremely important to 20% and very important to 40%.These factors, coupled with other features listed below illustrate the types of messaging and products which could be particularly appealing if tourism businesses want to attract that local audience this winter.

When asked to spontaneously write down one word which captured their ideal Scottish holiday, 'cosy' was the main unprompted response (15% of Scots) but with other mentions of snow, scenery, relaxation and peace and quiet. When provided with a prompted list of words and asked to choose their 'top three' considerations, three stand out: peaceful (46%), cosy (41%) and affordable (41%). A need for exploration and discover and to recharge were also popular choices.

Words that captures your ideal Scottish break

Peaceful	46%
Cosy	41%
Affordable	41%
Explore	29%
Quiet	23%
Recharge	22%
Discover	18%
Local	13%
Tasty	13%
Accessible	12%
Reconnect	11%
Energise	9%
Disconnect	7%
Exhilirate	7%
Awaken	5%
Challenge	4%

Accommodation types for a Scottish winter break, willingness to pay, what are the main requirements and how they differ from other times of the year

Small hotel	23%
Large hotel	16%
AirBnB	13%
Homes of friends/ relatives	11%
Bed and Breakfast	11%
Other self catering	10%
Guesthouse	6%
Own caravan	4%
Other - please specify	2%
Own tent	2%
Hostel/bunkhouse	2%

When it comes to the type of accommodation most likely to be considered for a Scottish winter break, the slightly greater appeal of serviced accommodation at this time of the year: 23% would choose a small hotel and 16% would choose a larger hotel. That said, AirBnB (13%) and other self-catering options (10%) are also popular. On average, Scots would be willing to pay an average of around £125 per room per night on a Scottish winter break – though the pre-family and empty nester markets would both pay more than those in other age groups. As would be expected, willingness to pay also reflects availability of disposable income across the different socio-economic groups. The box below highlights the key requirements amongst Scots from their winter holiday accommodation – warmth, cleanliness and affordability all being key.

Maximum spend per room per night on a Scottish winter break

Up to £50	£50 - £99	£100 - £149	£150 - £199	£200 - £249	£250 or more
8%	31%	32%	17%	5%	6%

Overall mean	£125
Age: 18-24	£123
25-34	£136
35-54	£120
55+	£128
Seg: ABs	£142
C1s	£125
C2s	£116
DEs	£112

Main requirements from winter accommodation:

- **Warmth and Cosiness**: a warm, cozy atmosphere, often mentioning features like a fireplace, log burner, or good heating to keep out the winter chill.
- **Cleanliness**, comfortable furnishings, and cozy, inviting accommodations are essential
- **Affordability**: A large portion of respondents seek affordable options, emphasising value for money and a balance between quality and cost.
- **Scenic and Peaceful Locations**: There is a desire for scenic, quiet locations with views of natural landscapes, often with easy access to outdoor walks and attractions.
- **Self-Catering and Practical Amenities**: there is a desire for practical amenities, such as self-catering facilities (kitchens, cooking appliances) to allow for more independent stays, as well as basics like WiFi, TV, and good bathrooms.
- **Family and Pet-Friendly Options**: Accommodations that are family-friendly and pet-friendly are important for many.
- **Unique and Traditional Charm**: Some respondents look for accommodations with unique, rustic touches - often a cottage or cabin atmosphere.
- **Extra Features for Relaxation**: Additional features like hot tubs, open fires, and spa facilities are appreciated as they enhance the winter getaway experience, providing a cozy, luxurious feel.

In summary, a desire for warmth, comfort, affordability, and scenic tranquility, with a preference for cozy, self-sufficient spaces that feel like a home away from home.

Scotland's Viewpoint is a regular survey of 1,000+ Scots - statistically representative of the Scottish population and undertaken by 56 Degree Insight. It is conducted online over a two-day period on a quarterly basis.

The results displayed here are taken from the 4th wave of 2024, with fieldwork taking place from the 28th-30th October. Some 1,001 Scots were interviewed. For further information visit:

www.56DegreeInsight.com