

# Scottish Tourism Index - October 2024

56 DEGREE INSIGHT  
Scottish  
Tourism Index

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

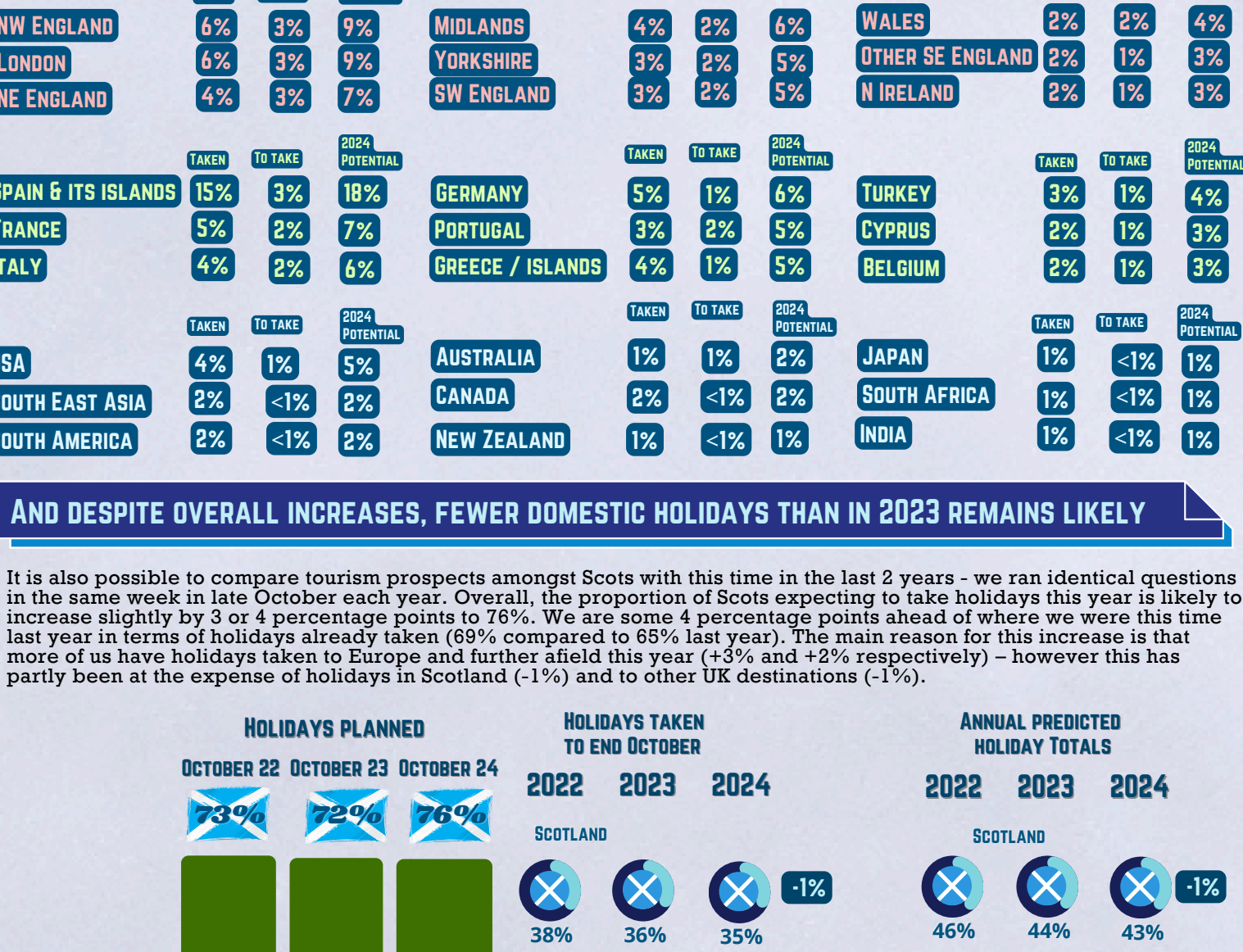
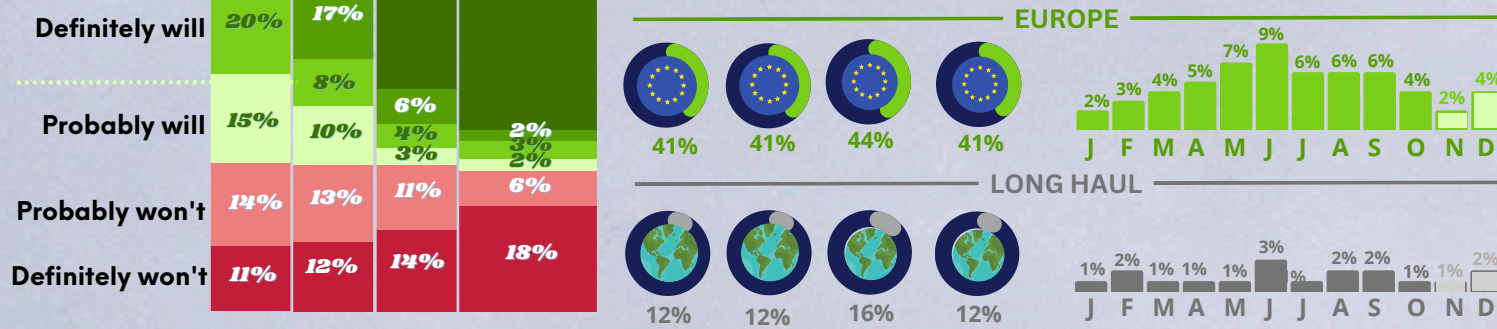
WHAT IS 2024 LOOKING LIKE IN TERMS OF SCOTS' HOLIDAY BEHAVIOURS? SCOTTISH AND EUROPEAN DESTINATIONS 'NECK AND NECK' WITH SPAIN, THE HIGHLANDS & EDINBURGH KEY BENEFICIARIES

By late October, almost 7 in 10 Scots had taken a holiday of some description away from home (89%) and by the end of the year, up to 75% expect to have done so. A further 2% had not yet booked, though this is always going to be the rest 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.

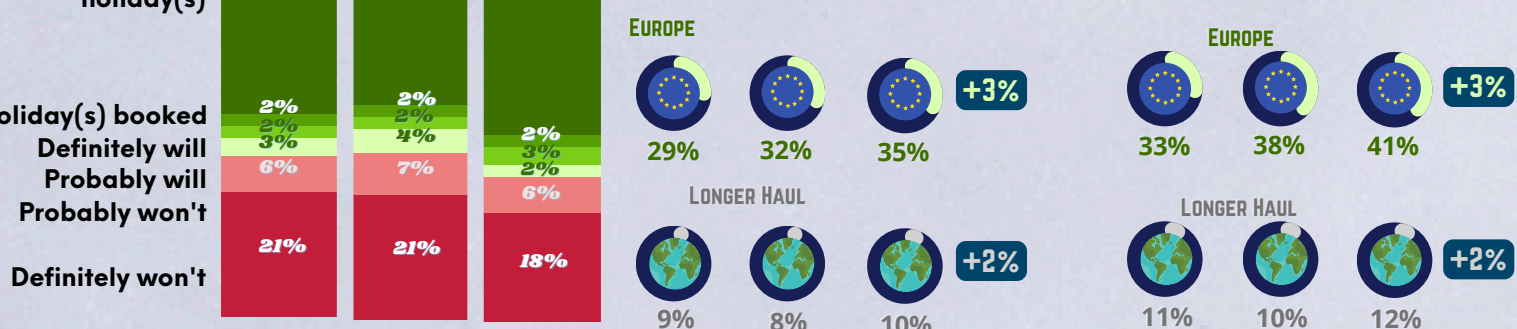
By late October, 35% of Scots had taken a domestic home holiday this year and with a further 8% claiming they are likely to do so, we predict that up to 43% of Scots residents will take a staycation of some description. Four destinations are especially popular: the Highlands (up to 15% are likely to 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 holiday in 2024. One in 8 Scots are travelling long haul in 2024 (12%) with the USA remaining the most popular option.

HOLIDAY TAKING HAS PEAKED AS WE REACH THE END OF 2024



AND DESPITE OVERALL INCREASES, FEWER DOMESTIC HOLIDAYS THAN IN 2023 REMAINS LIKELY



SCOTTISH HOME HOLIDAY CHARACTERISTICS IN 2023 - SHORTER, LOWER SPEND AND FEWER IN NUMBER WITH A CONTINUED TREND TOWARDS SELF-CATERING ACCOMMODATION

As we have seen above, the proportions of Scots taking holidays at home this year has decreased. But when we look at the detail, this is not the only story. Scots who are taking fewer holidays are also taking shorter in duration, reflecting the economic situation, over half of us have tried to keep our domestic home holiday costs as low as possible through reduced spending wherever possible (54%).

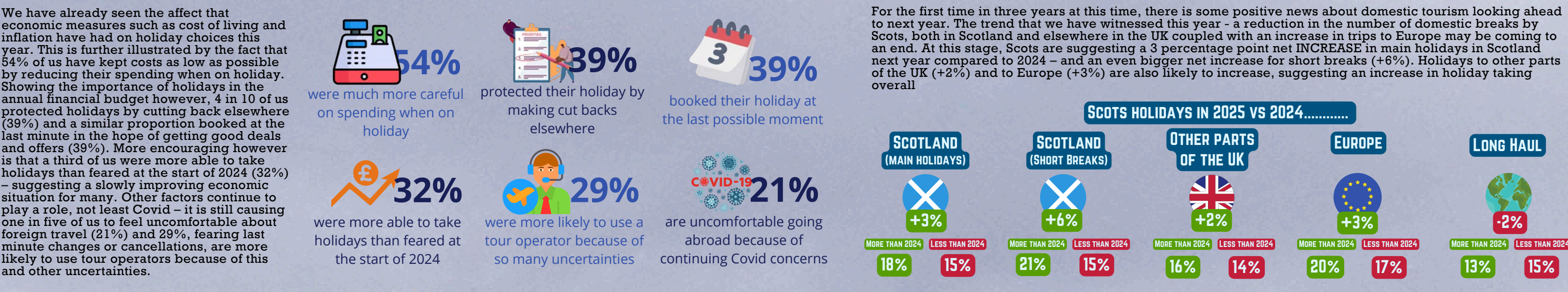
The trend towards self-catering accommodation since the pandemic has continued in 2024 with the four percentage point increase over 2023 experienced last year maintained in 2024. There has been a slight 'bounce back' however in some serviced accommodation compared to 2023: a 2% increase in the use of large hotels, and 1% increase in B&Bs and Guesthouses after larger decreases in 2023. There have also been small increases in the use of own caravans (1%) between 2022 and 2023 and a similar increase again in 2024.

All of the above is a reflection of Scots trying to reduce their holiday spend - and this is also evident when it comes to their activities. Only visits to the outdoors (+1%), active outdoor pursuits (+3%) and visits to attractions (+1%) have increased over 2023. Declines experienced in 2023 have continued in 2024 for eating/drinking out (-2%), visits to historic properties (-4%) and the purchase of gifts and souvenirs (-1%). More encouragingly however, fewer are cooking their own meals on holiday with food brought from home however (-5%) with some evidence of a shift to buying locally from takeaways.

Whilst similar proportions ended up spending more on Scottish holidays than those spending less (64%), this reflects the fact that prices have increased (resulting in more spending) whilst increased costs of living means that many have less money to spend on holiday. This picture has been consistent over the last two years.

HIGH PRICES ARE STILL HAVING AN IMPACT - ESPECIALLY ON THE DEMAND FOR DOMESTIC HOLIDAYS - WHILE INCREASING FUEL BILLS ARE BACK IN THE PICTURE

Economic uncertainty is still playing a role when it comes to holiday decisions and behaviours of many Scots this year. The continued high cost of living is impacting 33% of us and 28% are impacted by inflation - although both have decreased slightly across the year. More directly, the costs of holidays are having an increasingly negative impact - domestic holidays slightly more so than overseas holidays (28% and 28% respectively) - undoubtedly contributing to the continued decreases in home holidays over the last 12 months. A continued slow improvement in perceived exchange rates is also probably exacerbating the apparent decrease in domestic holidays as an outbound barrier is further reduced. The removal of the energy price cap has increased the increase in fuel bills is becoming significant again (a barrier to 28%). A number of non-economic barriers have shown notable decreases compared with earlier in the year - rail and airport disruptions have been less impactful this year on holidays than has been the case previously. Worries about climate change, extreme heat and the wars in Ukraine and the Middle East have had relatively low impacts compared with the economic factors mentioned earlier.



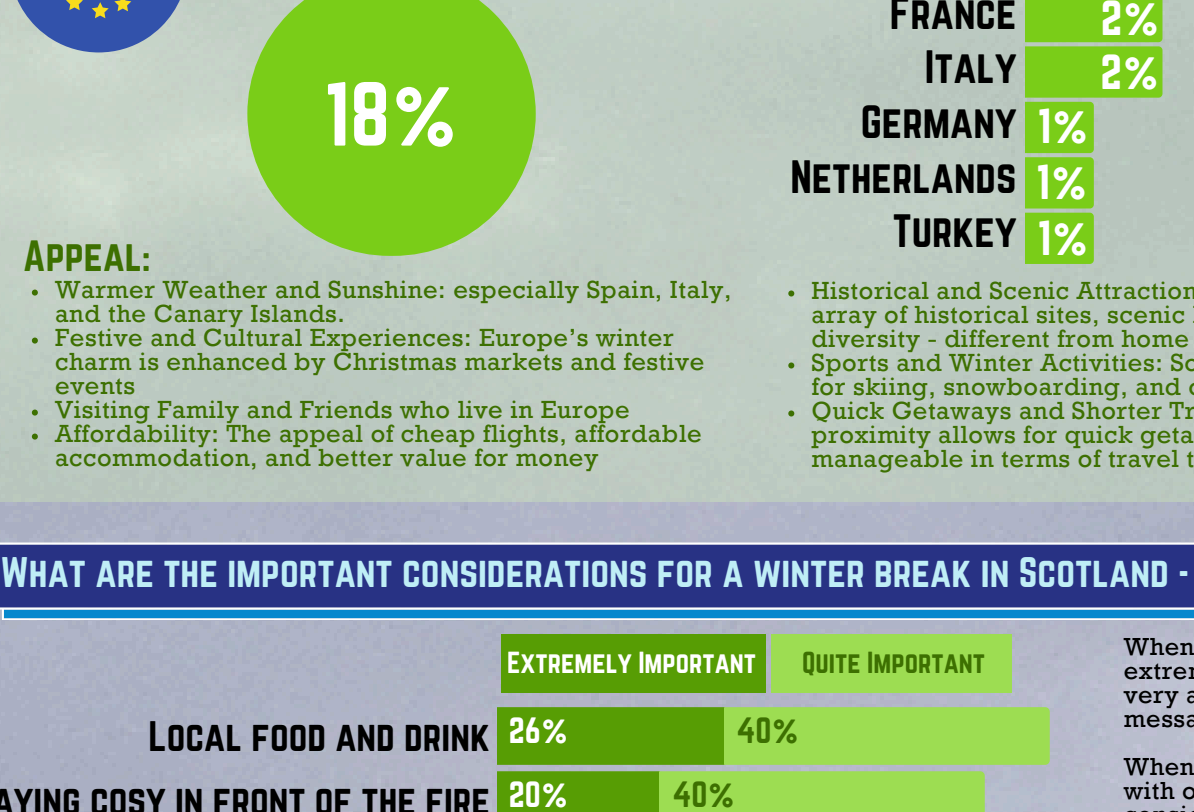
THE NATURE OF HOLIDAYS TAKEN IN 2024 HAS CONTINUED TO EVOLVE



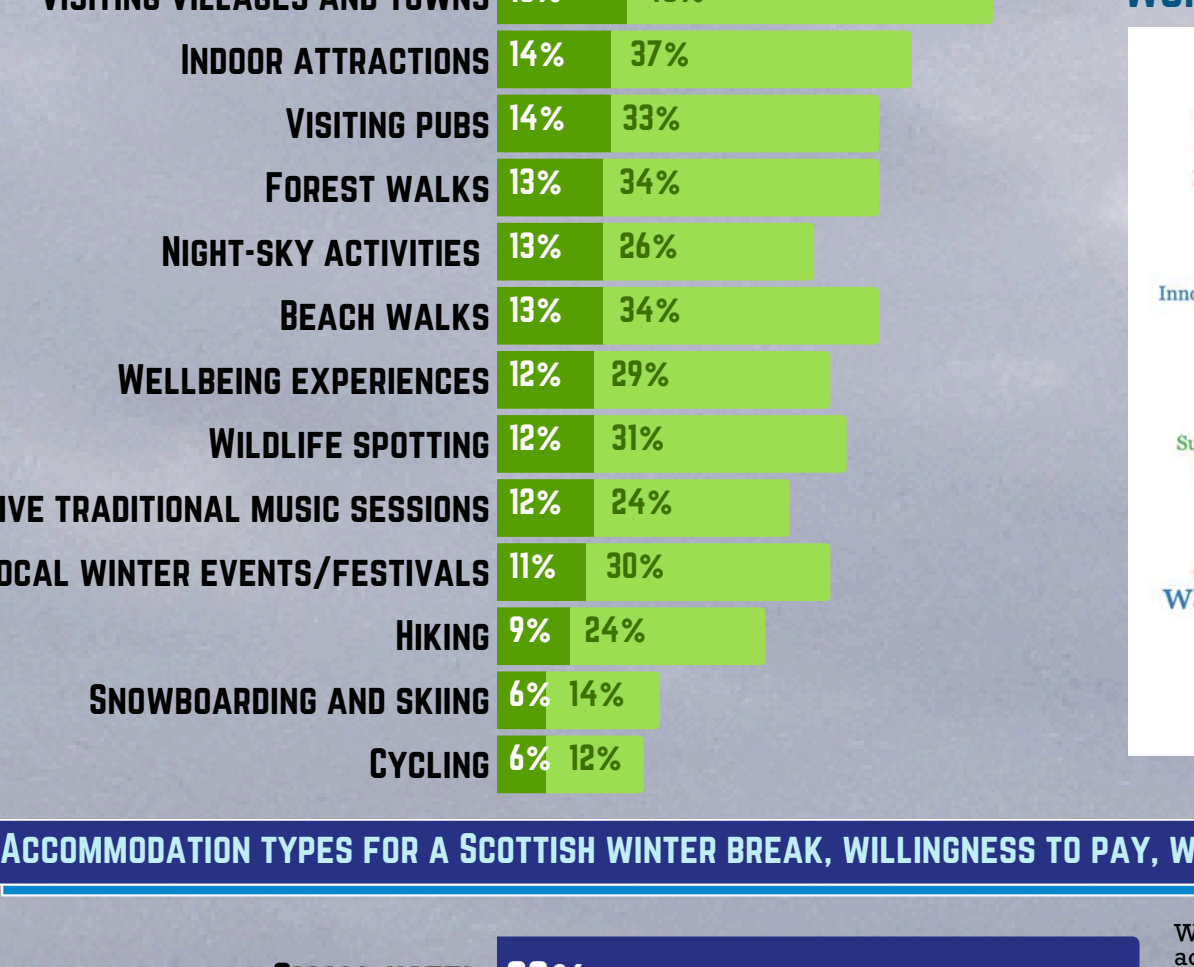
LOOKING FORWARD TO 2025, SOME POSSIBLE OPTIMISM AHEAD FOR DOMESTIC TOURISM?



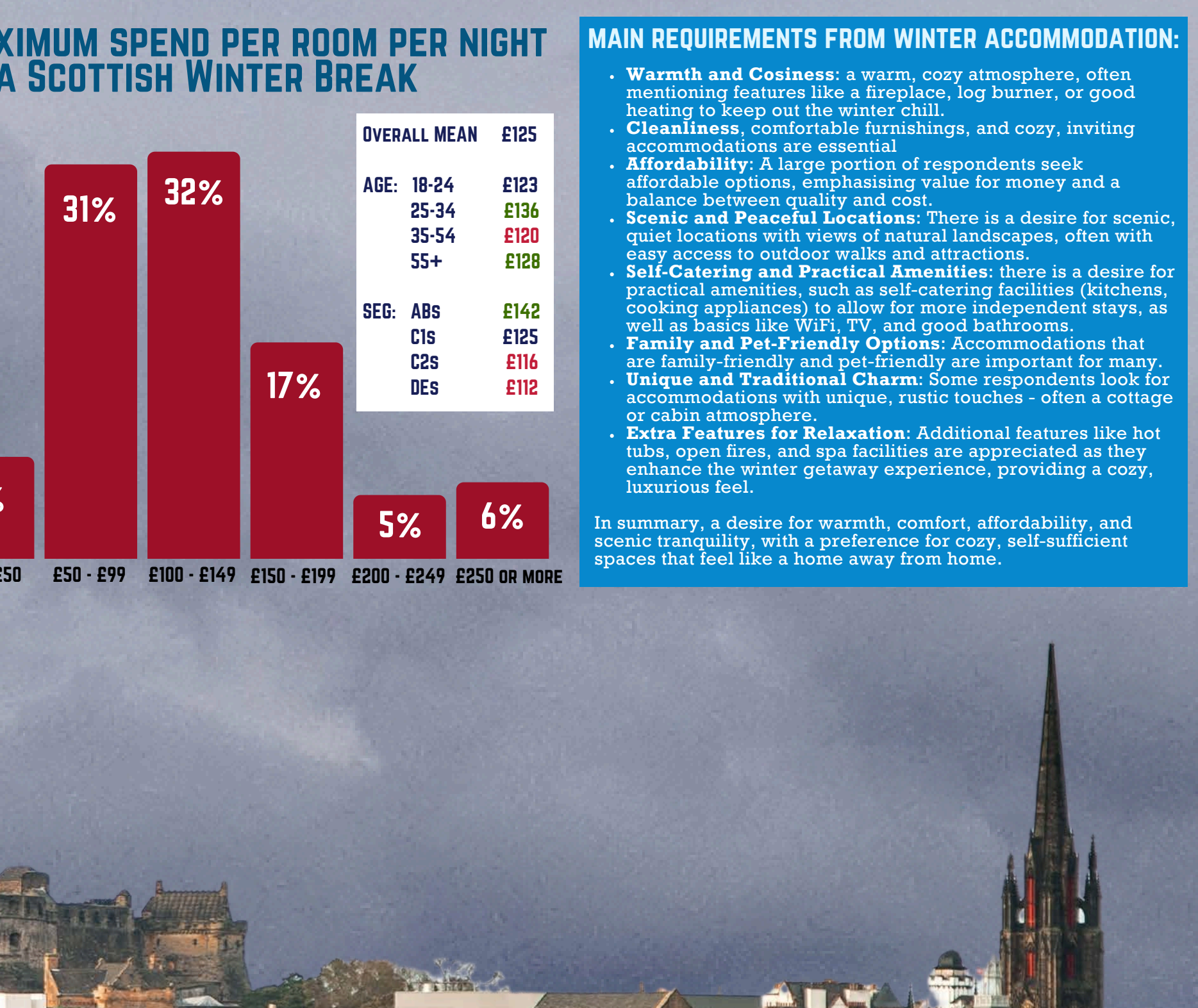
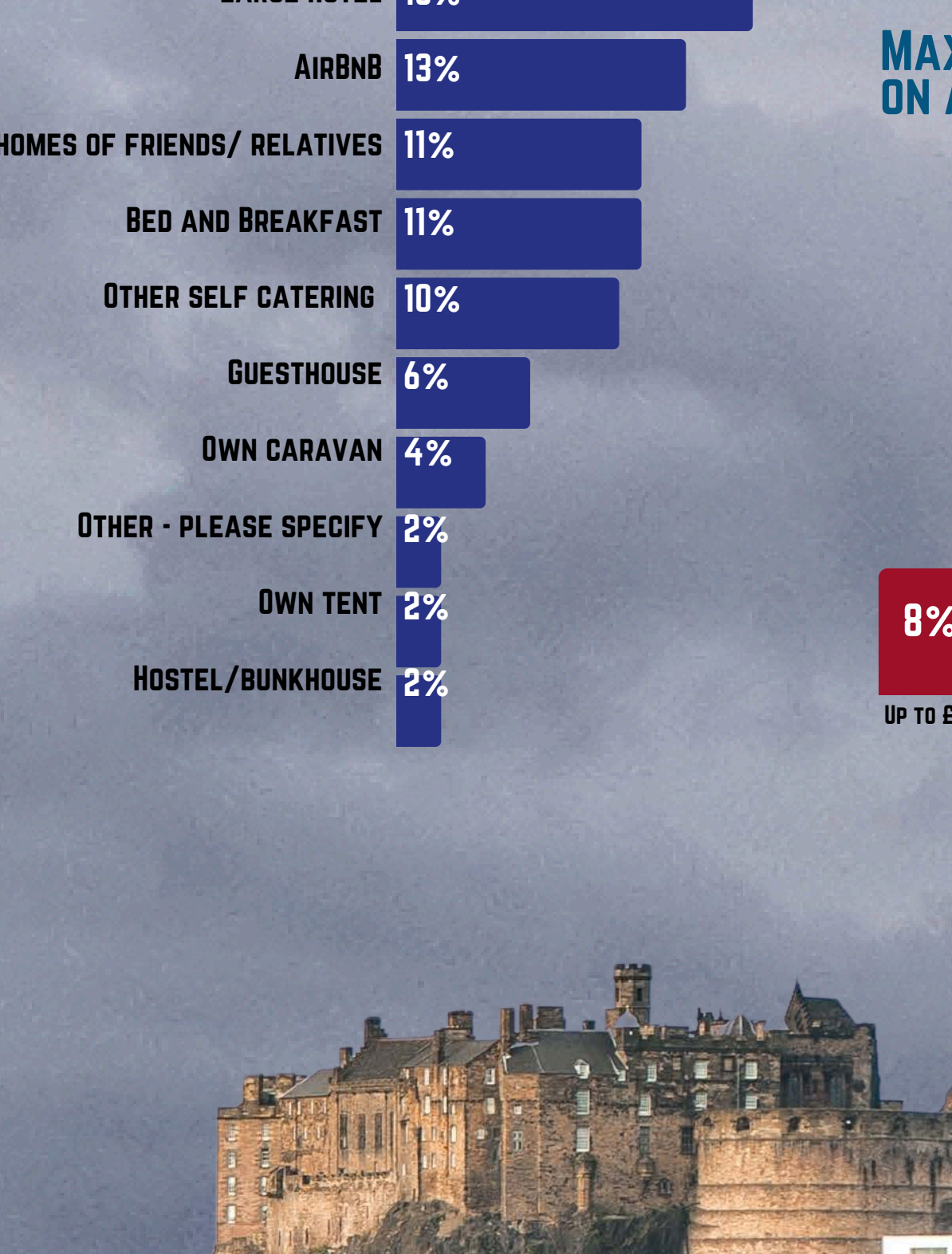
## WINTER BREAKS AND HOLIDAYS:



WHAT ARE THE IMPORTANT CONSIDERATIONS FOR A WINTER BREAK IN SCOTLAND - AND WHAT WORDS COME TO MIND?



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



DEGREE INSIGHT