

COMPARED WITH THE FIRST FOUR MONTHS OF 2025, ENCOURAGED BY BETTER WEATHER IN MARCH AND APRIL, MORE SCOTS HAVE TAKEN BREAKS IN SCOTLAND OVER THIS PERIOD THIS YEAR, AND LOOKING AT THE REST OF 2025, IT IS A MORE OPTIMISTIC OUTLOOK THAN AT THE START OF THE YEAR

WHAT IS 2025 LOOKING LIKE IN TERMS OF SCOTS' HOLIDAY BEHAVIOURS?

By the end of April this year, 43% of Scots adults had already taken a holiday or break of some description away from home. A further 16% had not yet done so but had holidays booked, whilst 8% were definite that they would take a holiday(s) this year. Some 13% '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 over one in five (21%) are already saying that a holiday is at best unlikely to be taken this year.

By the end of April, 24% of Scots adults have already taken a domestic break this year, and with a further 22% claiming they are likely to do so, there is the potential of 46% of Scots taking a staycation of some description during 2025. The two most popular destinations are the Highlands and the Islands (each with potentially as many as 14% visiting) - however, only 4% in each case have already visited these destinations this year. Just under two in five (39%) intend visiting other parts of the UK this year with the North West, London and the North East the most popular options.

The post-pandemic recovery in trips to Europe continues, with almost half of us likely to take a holiday there this year (48%) with Spain (20%), France (10%), Italy (9%) and Greece (7%) likely to be the main beneficiaries.

30%  
of Scots  
intending to  
take holidays  
in 2025

Already taken holiday

Holiday(s) booked

Definitely will

Probably will

Probably won't

Definitely won't

2025 holidays in Scotland

TAKEN ALREADY ANTICIPATED POTENTIAL TOTAL

24% 22% 46%

2025 holidays elsewhere in the UK

TAKEN ALREADY ANTICIPATED POTENTIAL TOTAL

14% 25% 39%

2025 holidays to Europe

TAKEN ALREADY ANTICIPATED POTENTIAL TOTAL

16% 32% 48%

2025 holidays - long haul

TAKEN ALREADY ANTICIPATED POTENTIAL TOTAL

4% 8% 12%

HIGHLANDS	TAKEN	4%	POSSIBLE	10%	2025 POTENTIAL	14%
ISLANDS	TAKEN	4%	POSSIBLE	10%	2025 POTENTIAL	14%
EDINBURGH	TAKEN	5%	POSSIBLE	8%	2025 POTENTIAL	13%
GLASGOW	TAKEN	5%	POSSIBLE	6%	2025 POTENTIAL	11%

L LOMOND, ARGYLL	TAKEN	3%	POSSIBLE	6%	2025 POTENTIAL	9%
ANGUS & DUNDEE	TAKEN	3%	POSSIBLE	3%	2025 POTENTIAL	6%
AYRSHIRE	TAKEN	2%	POSSIBLE	4%	2025 POTENTIAL	6%
PERTSHIRE	TAKEN	1%	POSSIBLE	4%	2025 POTENTIAL	6%

BORDERS	TAKEN	2%	POSSIBLE	4%	2025 POTENTIAL	6%
DUMFRIES & GALL	TAKEN	2%	POSSIBLE	3%	2025 POTENTIAL	5%
FIFE	TAKEN	3%	POSSIBLE	2%	2025 POTENTIAL	5%
ABERDEENSHIRE	TAKEN	1%	POSSIBLE	2%	2025 POTENTIAL	3%

NW ENGLAND	TAKEN	4%	POSSIBLE	9%	2025 POTENTIAL	13%
LONDON	TAKEN	4%	POSSIBLE	6%	2025 POTENTIAL	10%
NE ENGLAND	TAKEN	3%	POSSIBLE	5%	2025 POTENTIAL	8%

YORKSHIRE	TAKEN	2%	POSSIBLE	5%	2025 POTENTIAL	7%
MIDLANDS	TAKEN	2%	POSSIBLE	5%	2025 POTENTIAL	7%
SW ENGLAND	TAKEN	1%	POSSIBLE	5%	2025 POTENTIAL	6%

WALES	TAKEN	1%	POSSIBLE	3%	2025 POTENTIAL	4%
OTHER SE ENGLAND	TAKEN	1%	POSSIBLE	3%	2025 POTENTIAL	4%
N IRELAND	TAKEN	1%	POSSIBLE	3%	2025 POTENTIAL	4%

SPAIN & ITS ISLANDS	TAKEN	6%	POSSIBLE	14%	2025 POTENTIAL	20%
FRANCE	TAKEN	2%	POSSIBLE	8%	2025 POTENTIAL	10%
ITALY	TAKEN	1%	POSSIBLE	8%	2025 POTENTIAL	9%

GREECE / ISLANDS	TAKEN	1%	POSSIBLE	6%	2025 POTENTIAL	7%
PORTUGAL	TAKEN	1%	POSSIBLE	5%	2025 POTENTIAL	6%
GERMANY	TAKEN	1%	POSSIBLE	5%	2025 POTENTIAL	6%

TURKEY	TAKEN	1%	POSSIBLE	4%	2025 POTENTIAL	5%
CYPRUS	TAKEN	1%	POSSIBLE	3%	2025 POTENTIAL	4%
CROATIA	TAKEN	1%	POSSIBLE	3%	2025 POTENTIAL	4%

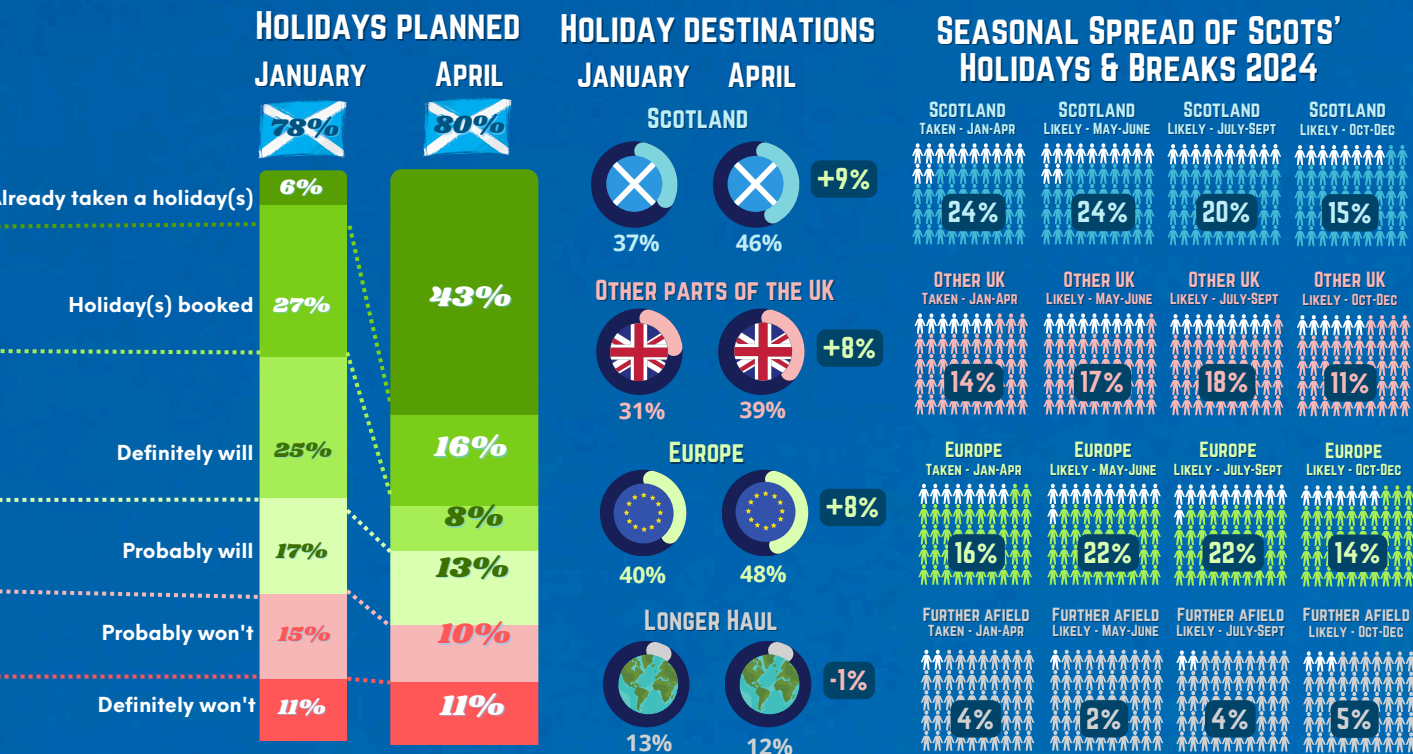
USA	TAKEN	<1%	POSSIBLE	4%	2025 POTENTIAL	4%
CANADA	TAKEN	1%	POSSIBLE	1%	2025 POTENTIAL	2%
MEXICO	TAKEN	<1%	POSSIBLE	1%	2025 POTENTIAL	1%

THAILAND	TAKEN	<1%	POSSIBLE	1%	2025 POTENTIAL	1%
AUSTRALIA	TAKEN	<1%	POSSIBLE	1%	2025 POTENTIAL	1%
JAPAN	TAKEN	<1%	POSSIBLE	1%	2025 POTENTIAL	1%

SOUTH AMERICA	TAKEN	<1%	POSSIBLE	1%	2025 POTENTIAL	1%
SOUTH AFRICA	TAKEN	<1%	POSSIBLE	1%	2025 POTENTIAL	1%
OTHER	TAKEN	1%	POSSIBLE	3%	2025 POTENTIAL	4%

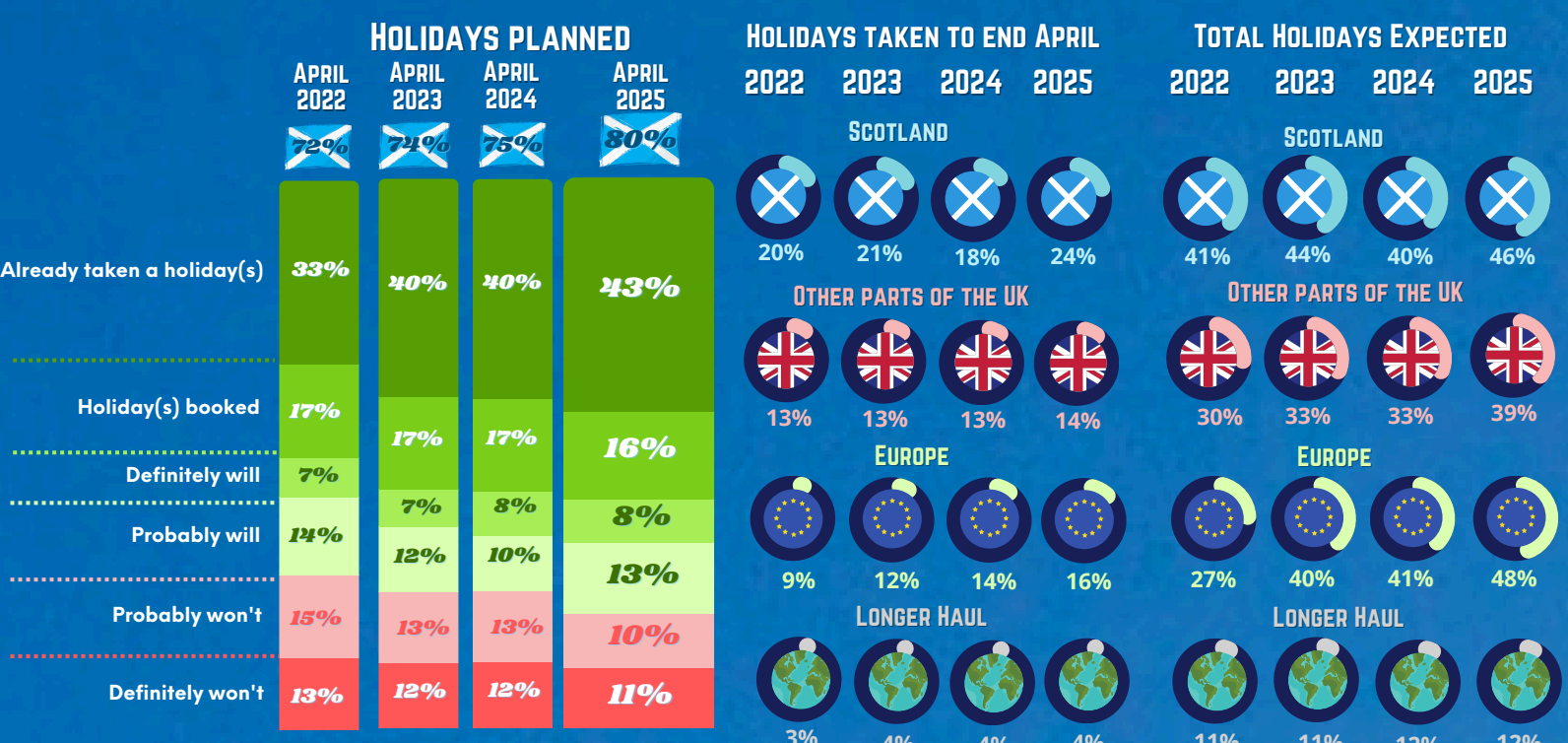
COMPARED WITH THE START OF 2025, GREATER HOLIDAY OPTIMISM AMONG SCOTS

Although in the first wave of the Scottish Tourism Index this year (late January), 78% of Scots expected to take holidays this year, there was always going to be some uncertainty at this early stage - only 33% had taken any or had booked holidays by then. Three months on in late April, likelihood to holiday has increased with four in five of us planning to do so (80%), and 59% of us have either already taken a break somewhere or have booked one. And encouragingly from a domestic holidays perspective, those of us planning holidays in Scotland this year have increased to 46% from 24% in late January - undoubtedly encouraged by the settled weather in March and April; predicted trips to other parts of the UK and to Europe have also increased compared to the levels predicted in January with 48% of us planning holiday(s) in Europe (+8% compared to January predictions) and 39% planning to visit other parts of the UK (also +8%).



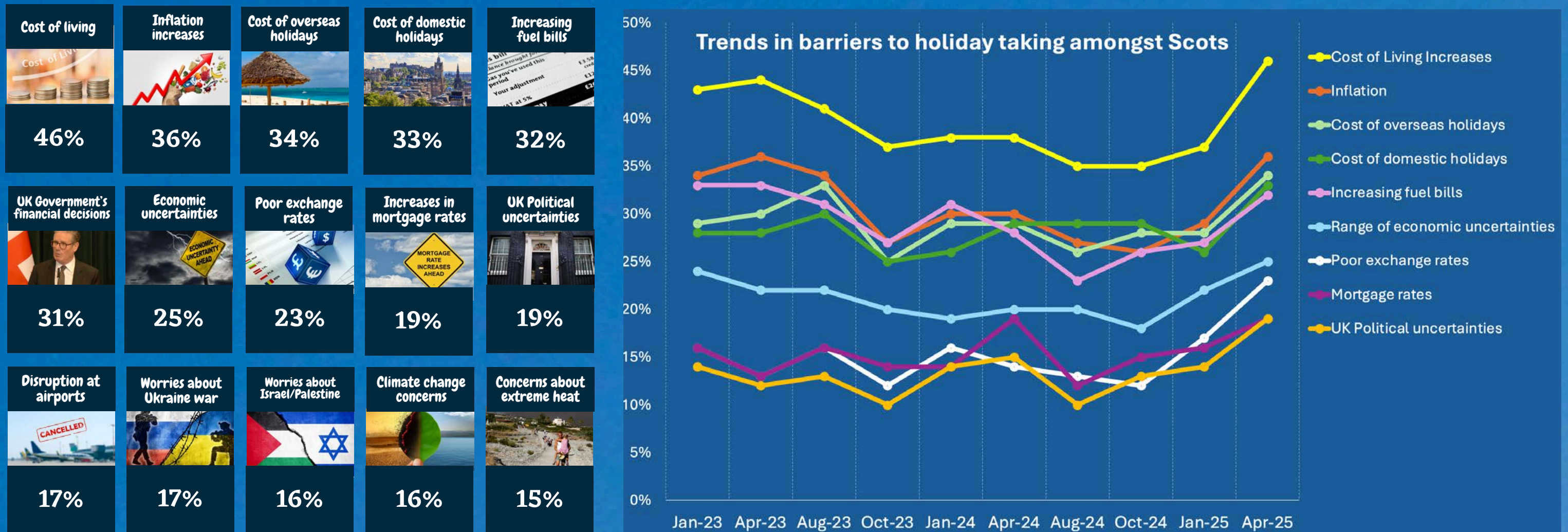
AT THIS STAGE, WE SEEM TO BE ON TRACK FOR OUR BEST DOMESTIC SEASON IN RECENT YEARS

It is also possible to compare tourism prospects amongst Scots with this time in 2022, 2023 and 2024 - we ran identical questions in the same week in late April of each year. Overall holiday taking has increased this year over the last few years - 59% have already taken holidays or have holidays booked - seven percentage points ahead of 2022 at this time (50%) and two points ahead of 2023 (57%) and 2024 (57%). And whilst 72% of Scots anticipated taking holidays during 2022 at this point of the year, this increased to 74% in 2023 and 75% last year - and a significant increase this year to 80%. This suggests a lot more buoyancy in the holiday markets, and unlike the last few years, this also extends to domestic tourism which has seen a couple of years of poor performance after the post-COVID boost. Some 24% of us have already taken a Scottish break(s) - a six point increase on this time last year (18%), but also ahead of the first four months of 2022 (20%) and 2023 (21%). Last year saw a depressed start to the holiday season with the miserable weather in the first 5 months of the year playing a big part - in stark contrast to this year where many of us have experienced one of the driest and sunniest Springs on record.



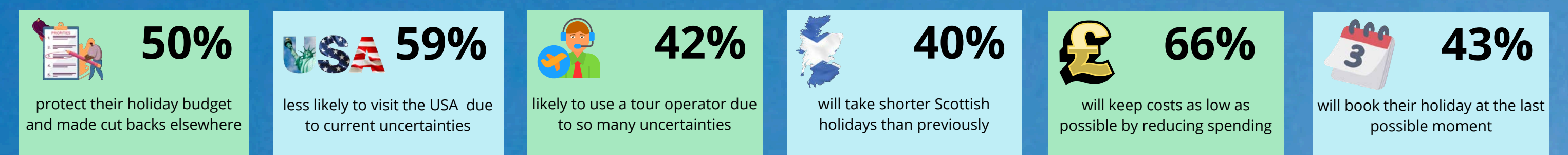
HIGH PRICES ARE STILL HAVING AN IMPACT - IF ANYTHING, PRICE BARRIERS HAVE INCREASED SINCE JANUARY

Despite the optimistic forecasts described above, it is important to introduce a note of caution as, over the last few months, we have seen increases in the potential barriers to travel - especially in terms of key financial impacts. Economic uncertainty is still playing a role when it comes to our likely holiday decisions and behaviours this year with the continued high cost of living likely to impact 46% of us and 36% are impacted by inflation. These and other economic factors have shown increases since January - indeed they are at some of the highest levels since we started recording this data in January 2023 (see line chart below). More directly, the costs of overseas and domestic holidays are negatively impacting 34% and 33% of us respectively. The other economic impacts which are playing a key role include increases to fuel bills (32%) and the financial statements and decisions made by the UK Government in April. In previous years, transport disruption - on the railways and at airports - have been major concerns, however for the moment, they are showing lower impacts, as are the continued conflicts in Ukraine and the Middle East.



THE NATURE OF FORTHCOMING TRIPS ALSO CONTINUES TO EVOLVE.....

Some 40% of us say that any Scottish holidays they take will be shorter in duration than would have been the case before now - an increase on 35% who responded this way a few months ago in January. Two thirds of us are keeping costs as low as possible by reducing spending when on holiday (66%). Reflecting the other result clearly that the overall outcome for domestic tourism will continue to be a trend towards shorter lower spend trips, albeit with the potential for a slight increase in the number of us doing so. Half of us are ring fencing and protecting a budget for holidays this year as a means of controlling spending (50%). It is notable that 59% of Scots claim to be less likely to visit the USA at the moment because of current political uncertainties there. The section below looks at these perceptions of the USA and their likely impacts in greater detail.



THE MAJORITY OF SCOTS HAVE BEEN UNIMPRESSED BY THE ACTIONS OF THE TRUMP ADMINISTRATION DURING ITS FIRST THREE MONTHS IN OFFICE. WHILST THIS LOOKS LIKE DISCOURAGING TRAVEL TO THE STATES, ENCOURAGINGLY, IT DOES NOT EXTEND TO HOW WE FEEL ABOUT AMERICAN VISITORS TO SCOTLAND THIS YEAR - IT SEEMS WE ARE LIKELY TO BE AS WELCOMING AS EVER!

We have all watched on - with varyingm degrees of fascination - at how the new administration in the United States has gone about its business over their first four months in office. We were keen to establish just how the -Scottish population feel about this - from a political and economic standpoint - but also to understand how it could impact travel to the United States from Scotland, and the degree of welcome that visiting Americans can expect on vacation here this year.....

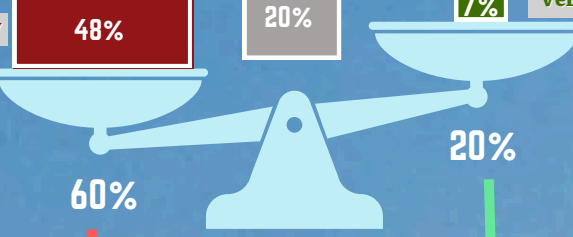
VIEWS ABOUT THE ADMINISTRATION

When asked for their overall opinion on the first four months of Donald Trump being in post as President of the United States, almost half described their opinion as being 'Very unfavourable' (48%). With a further 12% describing their opinion as 'Somewhat unfavourable', overall, 3 Scots adults in every 5 have a negative opinion of the administration. The remaining 40% are split between ambivalence/no opinion (20%) and feeling favourable (13% somewhat, 7% very favourable). Reasons provided for an unfavourable opinion range from a general dislike of Trump himself (16% of Scots), a feeling he is unfit for leadership (16%) to unpredictability and erratic behaviour (11%) and the impact of his foreign policies on the world (10%).

Thinking about Donald Trump's first four months as US President, how would you describe your overall opinion of his administration so far?

UNFAVOURABLE NEITHER FAVOURABLE

Somewhat 12% Very 48% 20% 13% Somewhat 7% Very



Why unfavourable?

- General Dislike or Distrust 16%
- Unfit for Leadership 16%
- Unpredictable and Erratic Behaviour 11%
- Foreign Policy and Global Impact 10%
- Economic and Trade Policies 9%
- Human Rights and Social Issues 6%
- Corruption and Self-Interest 6%

Why favourable?

- General Approval of Trump 6%
- Pro-Trump Economic Policies 4%
- Leadership and Determination 3%
- Fulfilling Campaign Promises 2%
- Comparison to Other Leaders 2%
- Foreign Policy and Global Impact 2%

So how does this generally negative opinion about Trump translate to how Scots feel about the USA as a country? Just over half of Scots feel more negative (51%) - 13% citing negative views about the administration as a key reason, whilst 6% mention avoiding going there and a similar proportion have safety and human rights concerns (6%). For 35% of Scots, opinions on the USA as a country have not changed, whilst 14% say that Trump's policies and administration have made them more positive about the USA: 6% because the new administration has just had a positive impact.

Have any of the actions or policies of the Trump administration made you feel differently about the United States as a country?

MORE NEGATIVE ABOUT THE USA UNCHANGED / UNSURE MORE POSITIVE ABOUT THE USA

51% 35% 14%

Why more negative?

- Negative view of Trump administration 13%
- Avoiding travel to the US 6%
- Concerns about safety and rights 6%
- Disappointing in American voters 5%
- Economic and trade concerns 5%
- Criticism of US policies 5%
- Loss of trust in the US 4%

Why more positive?

- Positive view of new administration 6%
- Focus on economic improvement 2%
- Improved global or national standing 2%
- Desire for strong leadership 1%
- Negative view of previous administration 1%
- Immigration and border policies 1%

When Sir Keir Starmer visited the States back in April, he invited President Trump to make a State Visit to Britain later this year. This has since become a bit of a political hot potato as subsequent actions and policies of the US administration have been called into question. Whilst 20% of Scots have no opinion on the State Visit, the largest proportion would prefer it was cancelled (44%) - a slightly higher proportion than those who feel it should still go ahead (36%).

Donald Trump has been invited to make an official State Visit to Britain later this year, do you think this should go ahead or should it be cancelled?

Cancelled

Don't Know

Go ahead



THE POTENTIAL IMPACTS ON TOURISM AND TRAVEL

So what are the likely impacts - if any - on these predominantly negative views of Donald Trump and his administration when it comes to travel to the United States from Scotland, and how Americans can be expected to be treated when they visit Scotland this year?

Earlier we saw that 59% of Scots would be less likely to consider the USA as a holiday destination in the near future, and indeed it would appear that amongst those who had been considering the States this year, there is likely to be a reduction in holidays and breaks taken by Scots to America this year: 5% of Scots have already cancelled or postponed a planned trip, and a further 14% who had been considering a US holiday have decided that now is not the time to go there.

Reasons provided again revolve around political concerns about Trump as well as safety concerns, moral and ethical objections.

Have Donald Trump's presidency and related events influenced any plans you had to travel to the United States in the next 1-2 years?

YES, I'VE CANCELLED OR POSTPONED TRAVEL I HAD PLANNED 5%

YES, I'VE DECIDED NOT TO MAKE PLANS I WAS CONSIDERING 14%

NO, IT HAS NOT INFLUENCED MY TRAVEL PLANS 22%

I HAD NO PLANS TO TRAVEL TO THE US REGARDLESS 25%

I HAD NO PLANS TO TRAVEL TO THE US BUT I'M NOW MORE INTERESTED IN VISITING 4%

I HAD NO PLANS TO TRAVEL TO THE US BUT I'M NOW LESS INTERESTED IN VISITING 26%

Why have travel plans changed?

- Political concerns about Trump 4%
- Safety concerns 3%
- Ethical or moral objections 2%
- Cost and financial reasons 2%
- Uncertainty and instability 2%
- Immigration and visa issues 2%

But what about the impact on US citizens who visit Scotland on vacation this year? There have been many fears expressed by Americans about the reception they might get in other parts of the world as a result of the new administration. Encouragingly, 7 in 10 Scots feel all visitors should be treated equally (71%), whilst 10% feel we should be a bit more cautious and reserved than usual, 17% feel the opposite - we should be especially welcoming and friendly. This empathetic approach is further illustrated by the 21% who feel more positive about US visitors compared to only 8% who feel more negative, and that 55% will welcome them warmly as visitors to our country. Only 8% of Scots would rather that Americans didn't visit at the moment.

This all feels very positive and reassuring - irrespective of any negative views about their political administration, American visitors can expect as warm a welcome as always from the Scottish population.

Do you think Scottish people should treat American tourists any differently because of the current US administration?

10% WE SHOULD BE MORE CAUTIOUS OR RESERVED

71% EVERYONE SHOULD BE TREATED EQUALLY

17% WE SHOULD BE ESPECIALLY WELCOMING & FRIENDLY

How do you feel about Americans visiting Scotland as tourists this year?

8% I FEEL MORE NEGATIVE ABOUT US VISITORS

70% SAME AS BEFORE / HAVEN'T THOUGHT ABOUT IT

21% I FEEL MORE POSITIVE ABOUT US VISITORS

In summary, how do you feel about American visits to Scotland at the moment

8% I WOULD RATHER THEY DIDN'T VISIT SCOTLAND AT THE MOMENT

37% I HAVE NO STRONG FEELINGS ABOUT THEM VISITING

55% I WELCOME THEM WARMLY AS VISITORS TO OUR COUNTRY