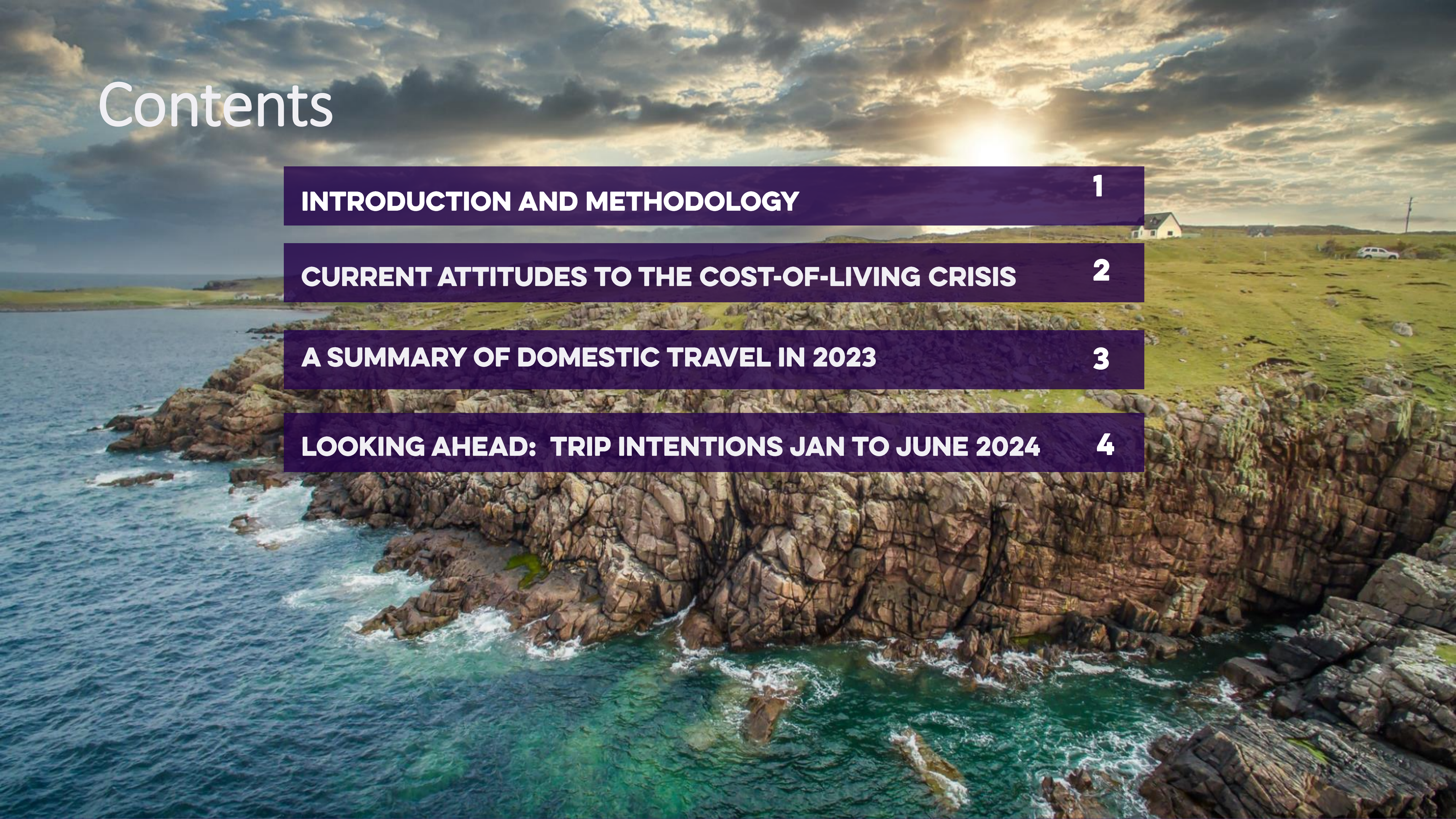
VisitScotland | Alba™

DOMESTIC SENTIMENT TRACKER SCOTLAND SUMMARY

Based on November 2023 to January 2024 fieldwork



Contents

INTRODUCTION AND METHODOLOGY 1

CURRENT ATTITUDES TO THE COST-OF-LIVING CRISIS 2

A SUMMARY OF DOMESTIC TRAVEL IN 2023 3

LOOKING AHEAD: TRIP INTENTIONS JAN TO JUNE 2024 4

Methodology and background

Background

The findings in this report are based on a monthly online survey amongst a nationally representative sample of the UK population with a survey boost for Scotland residents. Each wave 1,750 surveys are completed within which 250 are Scotland residents

Frequency

The research is currently on its 66th wave – the first wave having been conducted in May 2020, with a weekly, fortnightly and now monthly cadence thereafter

This report

This presentation is based on research conducted in Waves 64-66 (November to January) with references to previous waves where applicable.

There is a more detailed report available, which you can access through Jacqui and the insights team

Key findings

Key findings (1)

The cost-of-living crisis and general leisure behaviour

1. As of January 2024, the cost-of-living crisis remains at the forefront of the public's minds. Around 7 in 10 have either been 'hit hard' or 'are being cautious and careful' – a percentage that has barely shifted since first measured in June 2022. Furthermore, whilst people thinking 'the worst is still to come' continues to drop, this is driven by increasing proportions believing 'things are going to stay the same' as opposed to any sense that 'the worst has passed'.

2. Unsurprisingly, pessimism around personal finances has a direct impact on travel intentions. 'Rising cost of living' is the leading obstacle to taking a domestic trip, within which 'accommodation' is the main individual cost barrier. As a result of these barriers, 1 in 3 anticipate reducing the extent of their domestic trip taking, with a further third planning to take the same number of trips but to cut back on spending instead. Accommodation, eating out and things to do are the main ways they anticipate cutting back.

3. Intentions to cut-back appear to be conveyed in trip intentions. Domestic trips (in Scotland and across the UK) between January and June 2024 are set to be significantly shorter than in the same period in 2023, amongst all life stages and in all destination types.

4. In addition to the threat of the cost-of-living crisis, the lure of overseas travel is also increasing, in particular amongst retirees who had taken the longest to return to overseas travel following the pandemic (cont)

Key Findings (1 continued)

The cost-of-living crisis and general leisure behaviour

4. Notably, the public book overseas travel earlier than domestic travel, making domestic trips more vulnerable to circumstance that may drive people to sacrifice one of their planned trips. That said, overseas travel is more likely to challenge trips to the UK's 'bucket and spade destinations' – plans to visit the South West of England dropping on 2023.

5. However, despite a continued pessimistic outlook there are some causes for optimism. With the proportion stating 'the worst is still to come' at its lowest point to date, the public are less likely to hold back than earlier in the crisis. Furthermore, although 'rising cost of living' is the leading barrier, it is now at its lowest point and only just ahead of UK weather. A further positive indicator is the continued drop in 'the cost of fuel' as a barrier to trip-taking, a reassuring finding given that the vast majority of Scotland trip-takers travel to their destination by car. Notably, although they may be cutting back on trip length, the public's appetite to take a trip remains strong – over half anticipating a trip between January and June, higher than the same period in 2023. Scotland is set to benefit from this, it being the 3rd most popular destination in the UK, marginally behind London and the South West of England.

6. Furthermore, attitudes and behaviours are not consistent across the population. Retirees and those from higher income groups are broadly unaffected by the crisis – 3 in 5 of those with a household income of £100k+ better off and/or confident they won't be impacted. With Scotland tending to attract a relatively more affluent visitor, it may be that it is more cushioned than other regions of the UK.

Key findings (2)

Scotland intender profiles and behaviour

1. The profile of Scotland January to June 2024 intenders is notably different to 2023. They are less likely to be retirees, with a higher incidence of older independents and families - and are more likely to come from London and the South East of England. Previous research has demonstrated that intenders from further afield are less likely to convert to visits, so it may be that the actual trip-taker is slightly different.

2. 'Countryside or village' and 'large city' are the leading destination types for Scotland January to June 2024 intenders, the latter having increased in preference since 2023. The increase in large city preference is evident across other UK destinations and amongst all life stages – particularly retirees – suggesting that attitudes to these types of destination are returning to normal, following the post-pandemic caution. Echoing the increased intention to visit large cities, interest in the Edinburgh area and Glasgow area have both increased since 2023.

3. Scotland January to June trips are likely to be shorter than in 2023, a trend occurring across the UK, and amongst a range of sub-groups.

4. 'Family time or time with my partner' and 'to get away from it all and have a rest' are the leading motivations for a short break or holiday in Scotland, the latter particularly high for Scottish residents. Motivations are broadly consistent with 2023, although the desire 'to travel somewhere new' and 'to learn something new' have both increased in prevalence. These increases have not occurred across the UK, suggesting they are driven by the change in the profile of Scotland intenders – in particular by older independents.

Key Findings (2 continued)

Scotland intender profiles and behaviour

5. Walking, hiking or rambling', 'trying local food and drink' and 'visiting heritage sites' are the leading three activities planned on January to June Scotland trips although a range of other activities are also planned. The biggest rise in activities is in 'visiting cultural attractions' – an activity that has risen across the UK, and across all destination types. This may also suggest an increasing comfort with indoor venues following post-pandemic concerns.

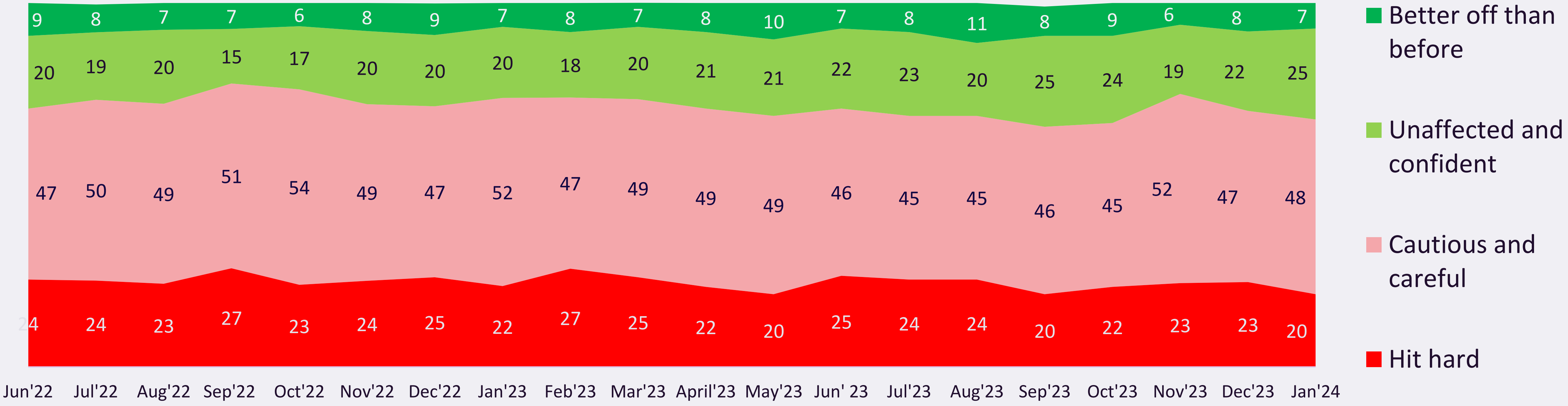
6. 'Own car' is the leading mode of transport intended to be used on a January to June trip in Scotland, followed by 'train'. Unsurprisingly, mode of transport varies considerably by destination within Scotland – Glasgow and Edinburgh visitors most likely to travel by train with more remote destinations dominated by travel by car. As mentioned earlier, falling fuel prices are likely to help ensure trips by car are more likely to happen.

7. 'Hotel/motel/inn', is the number one accommodation type for intended trips in January to June, although it is less popular than in the equivalent period in 2023. 'Rented house' is the second leading accommodation type, followed by 'friends or relative's home' – both having increased on last year. Notably, intentions to stay in a 'guest house/B&B' have also dropped on 2023.

Attitudes to the cost-of-living crisis and travel

There are no clear changes in the personal impact of the cost-of-living crisis – around 7 in 10 ‘cautious and careful’ or ‘hit hard’.

Impact of the cost-of-living crisis (%)



Visit Scotland | Alba

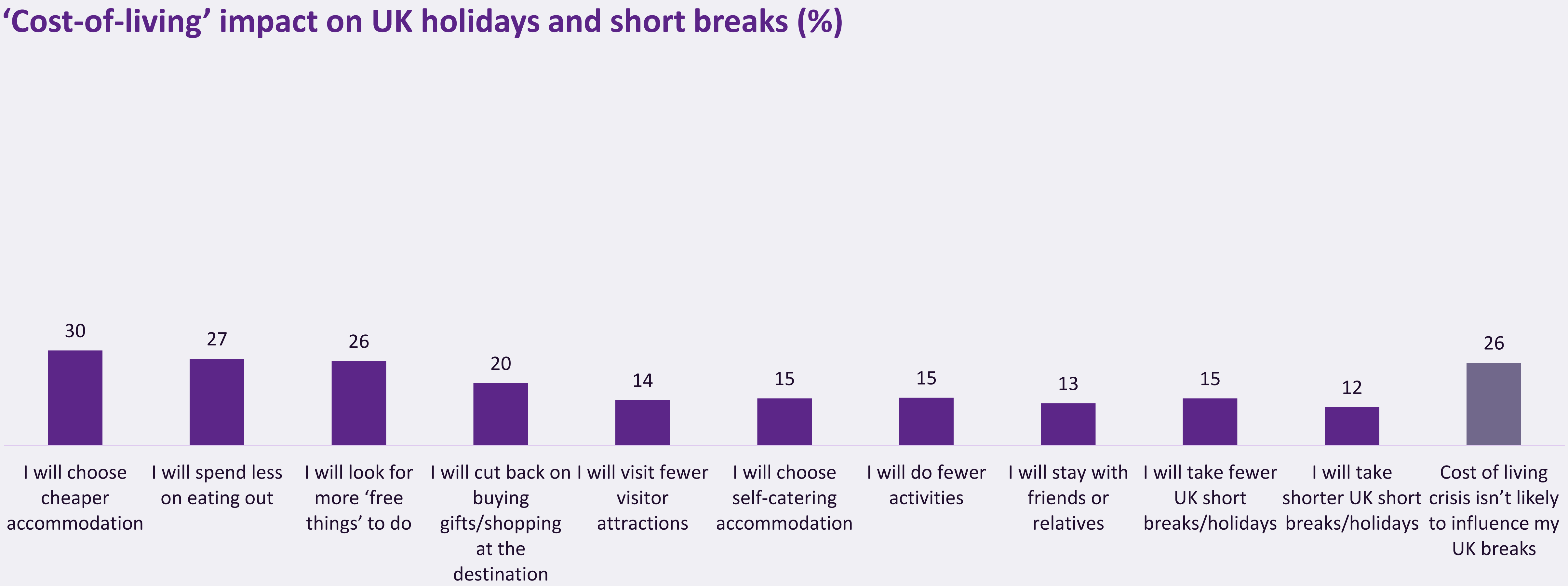
Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.270

An overriding spirit of caution means that the majority anticipate moderating their domestic trip behaviour at some level in the coming months

'Cost-of-living' impact on UK holidays and short breaks (%)

VB7iii. How, if at all, would you say the 'cost-of-living crisis' is likely to influence your UK short breaks or holidays in the next six months?
Base: All UK respondents. n=5,217; All Scotland respondents n=766.

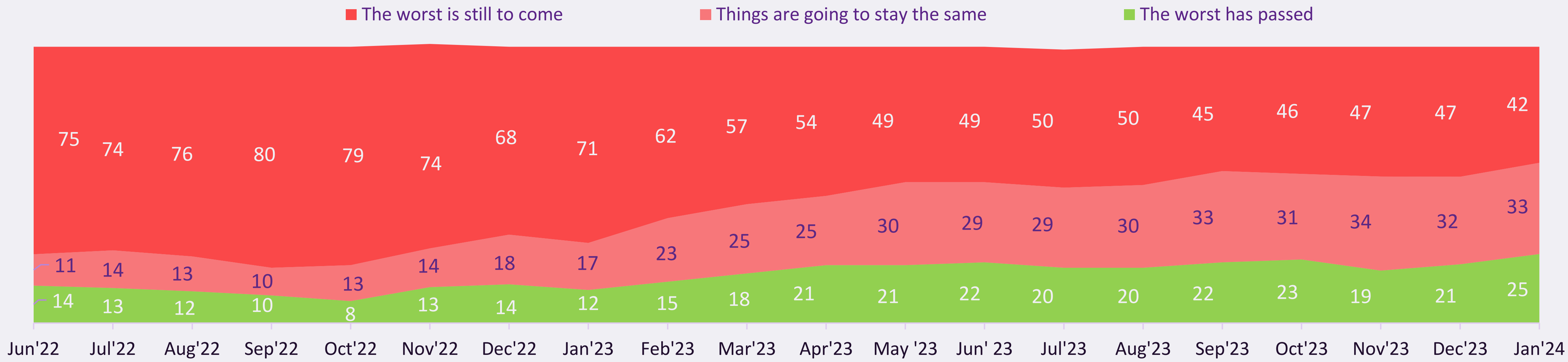
Choosing cheaper accommodation, spending less on eating out and ‘looking for more free things to do’ are the key ways the public anticipate cutting back



VB7iii. How, if at all, would you say the ‘cost-of-living crisis’ is likely to influence your UK short breaks or holidays in the next six months?
Base: All UK respondents. n=5,217; All Scotland respondents n=766.

There are some signs of improvement – the public less pessimistic about the future than at any point since June 2022

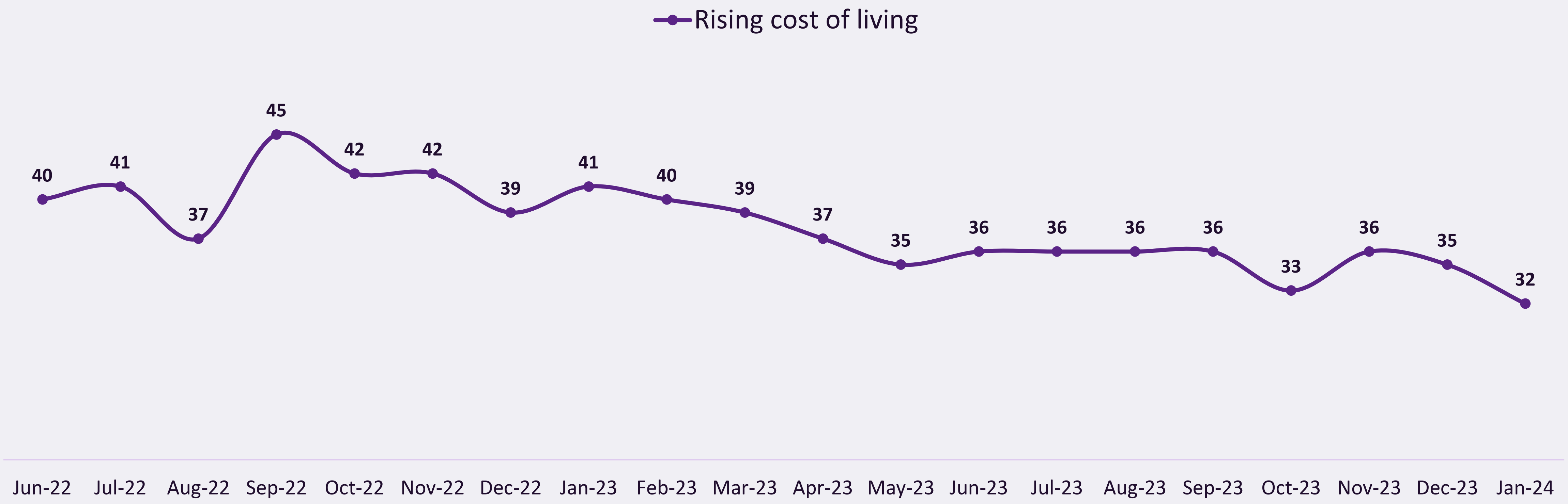
Perceptions of the cost-of-living crisis over time (%)



Q7b: And now regarding the 'cost-of-living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.270

‘Rising cost of living’ as a barrier to domestic travel is also at its lowest point since this metric was first measured in June 2022

Rising cost of living as a barrier to an overnight trip in the UK in next 6 months (%)



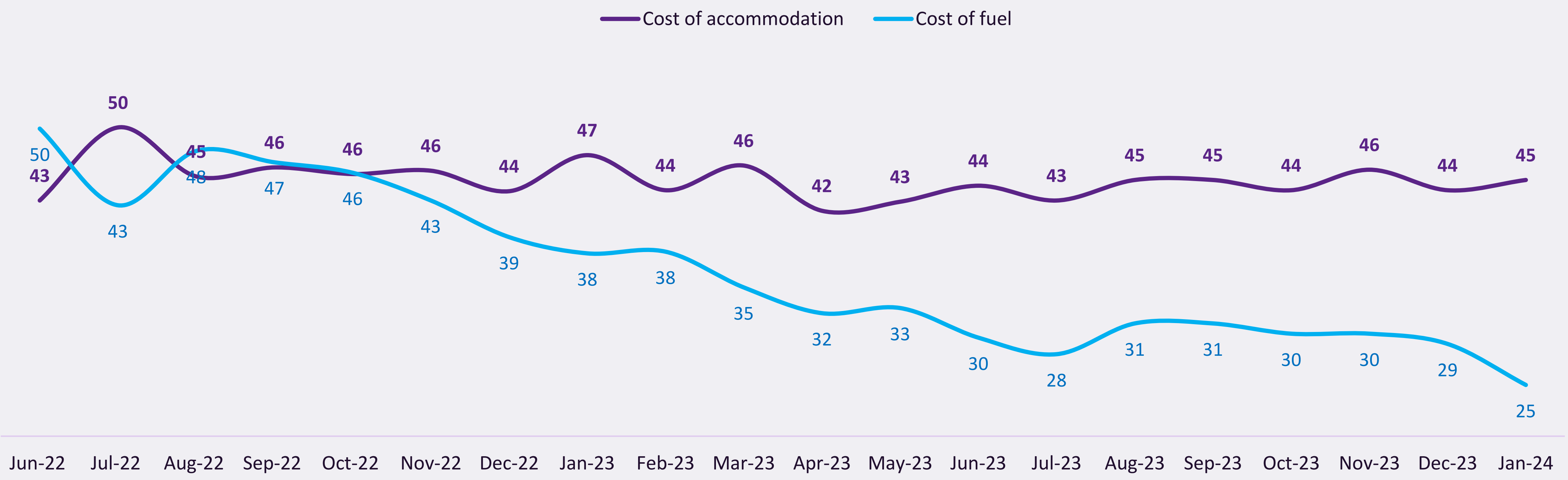
VisitScotland | Alba

VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=1,760

bva Bdrc

‘Cost of fuel’ as a barrier is also at its lowest point – a positive for the majority of Scotland intenders who travel by car. Accommodation costs is a stubbornly high barrier however.

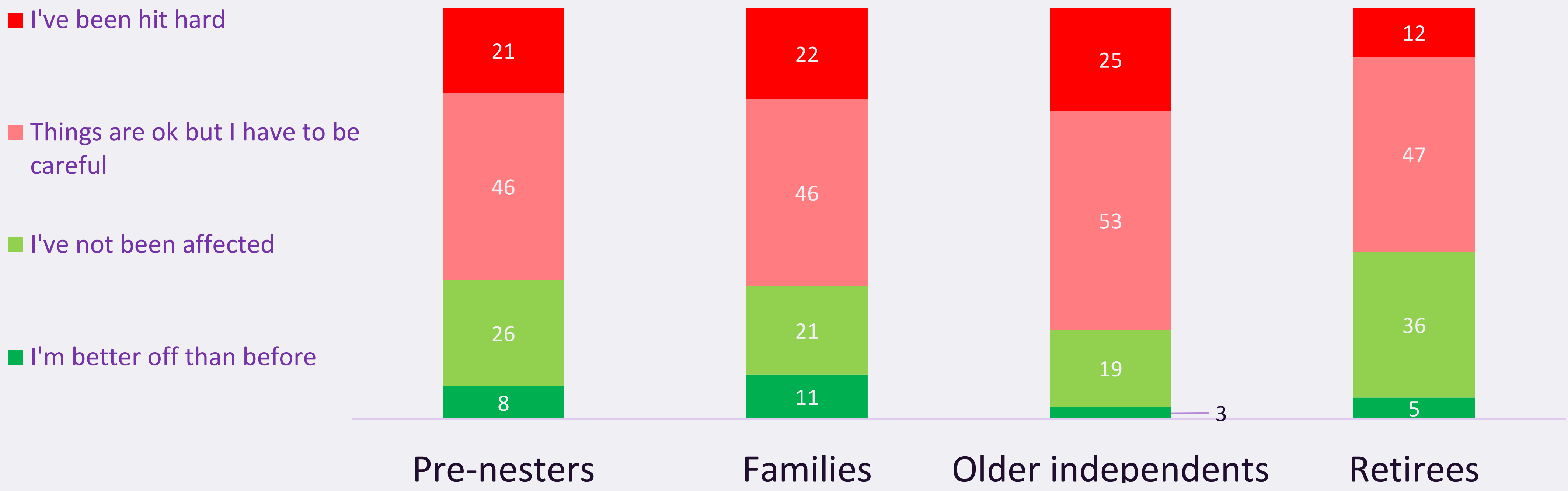
Selected individual costs barriers to taking UK holidays and short breaks in next 6 months (%)



VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=1,760

The impact across life stages differs considerably – retirees the least negatively impacted and older independents the most. Families boast the highest 'better off' and high 'hit hard'.

Financial segments by life stage (%)

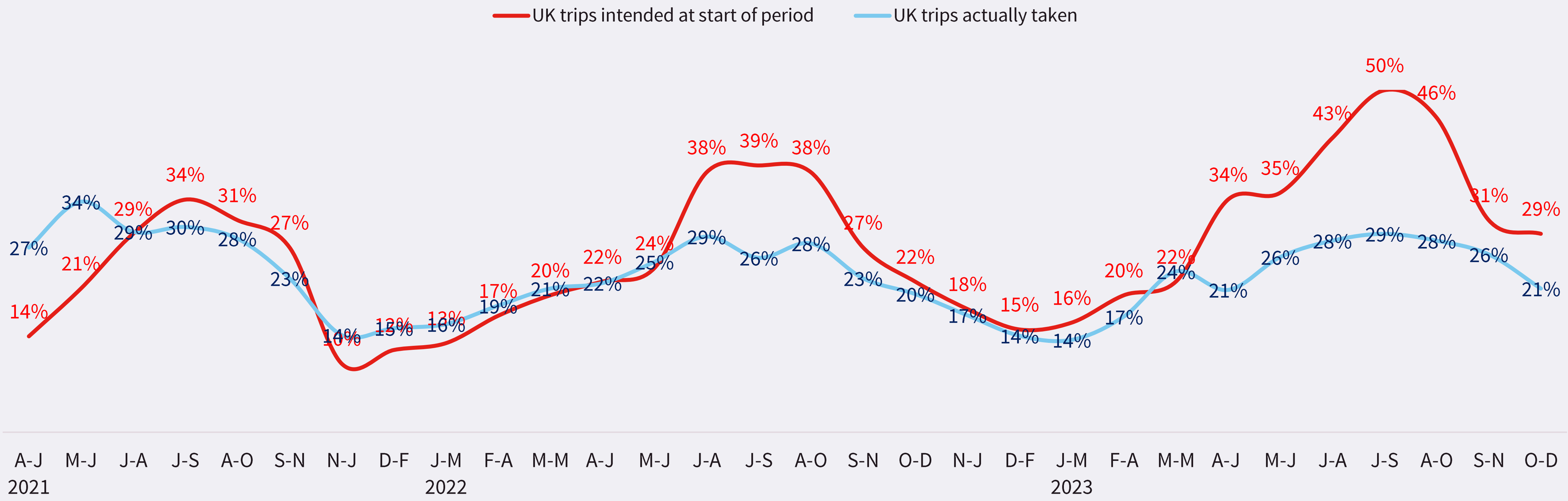


Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: All UK respondents. n=1,760; All Scotland respondents n=270. Pre-nesters n=308; Families n=628; Older Independents n=460; Retirees n=364;

A summary of domestic travel in 2023

The stable trip-taking is despite trip intentions that suggested demand that far outweighed 2022

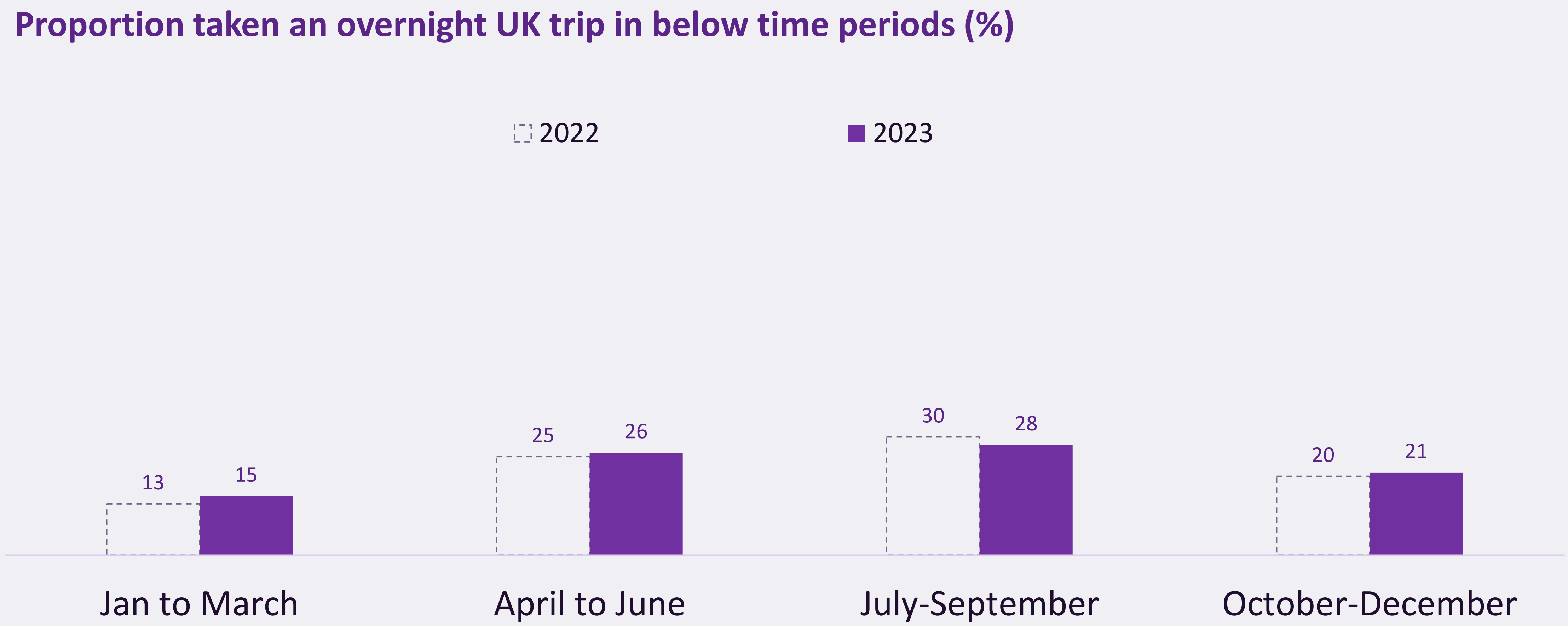
Overnight UK trips planned and taken in 3 month periods (%)



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2enew: Which of the following best describe how close you are to booking your next overnight UK trip in [pipe: hVB3]? Base: All UK respondents. n=1750 each wave

*Actual trips taken is only available from April 2021 up to December 2022. Please note questionnaire was updated in April 2023 so there may be some artificial uplift

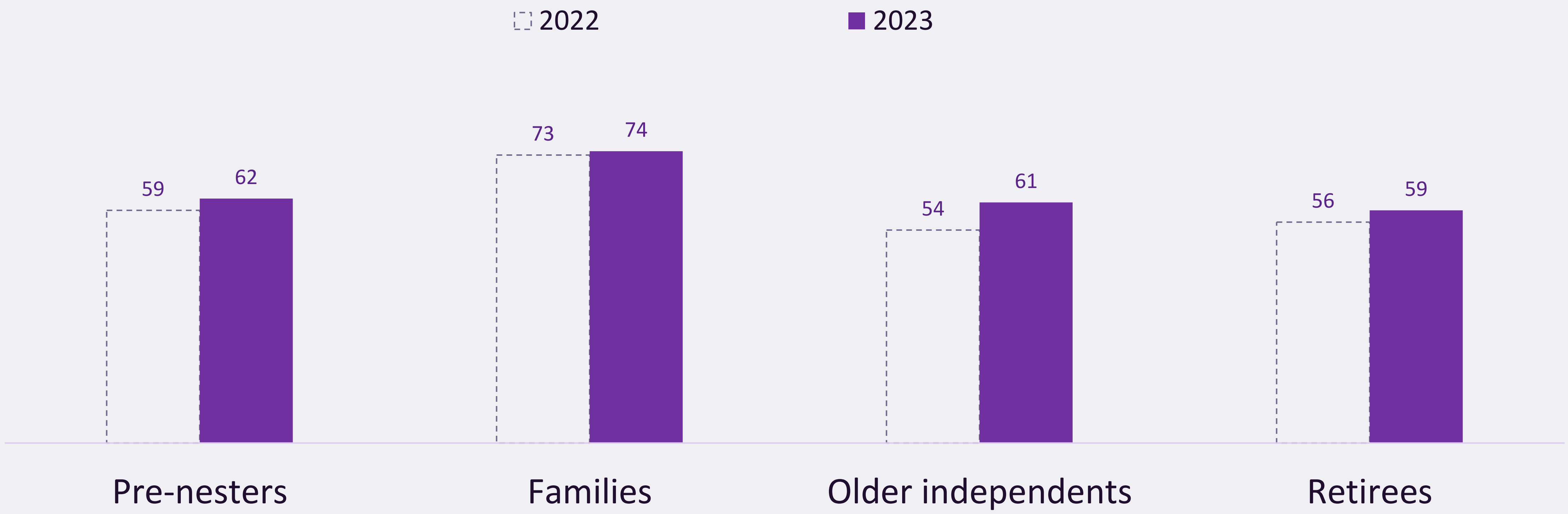
Domestic trip taking in 2023 was broadly on a par with 2022 – although shortened trip lengths may have eroded the number of nights



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: All respondents. 1,750

Across the year families remained relatively consistent as the most active life stage, with slight increases across other audiences

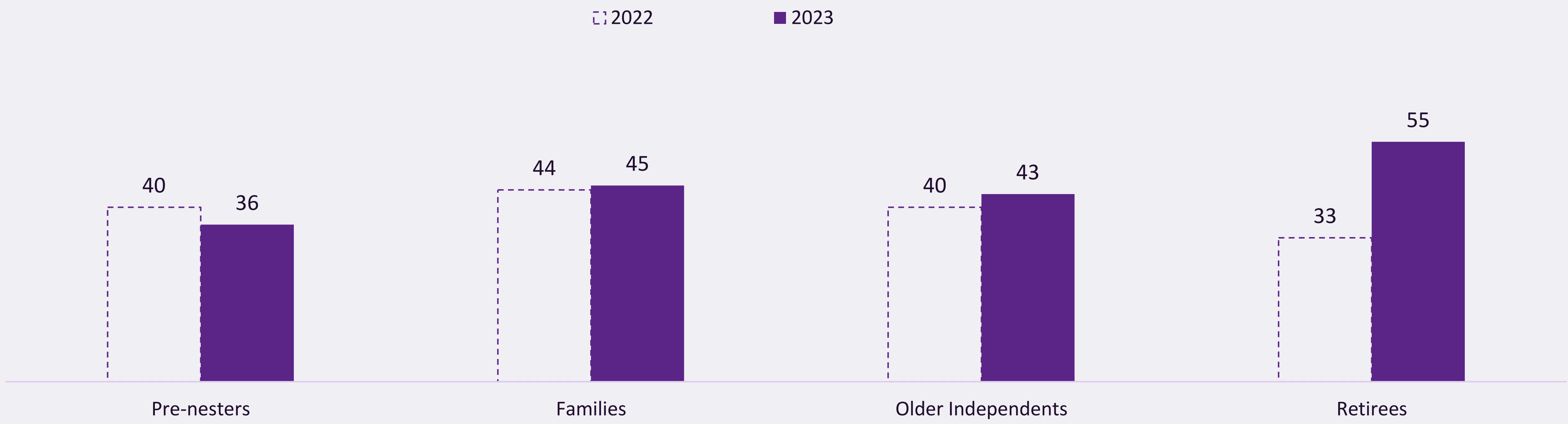
Proportion taken an overnight UK trip in below time periods (%)



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: Pre-nesters n=287; Families n=658; Older Independents n=474; Retirees n=336

The fall-out of peak trip-taking however suggests that people are shifting **when** they are taking trips to off-peak months

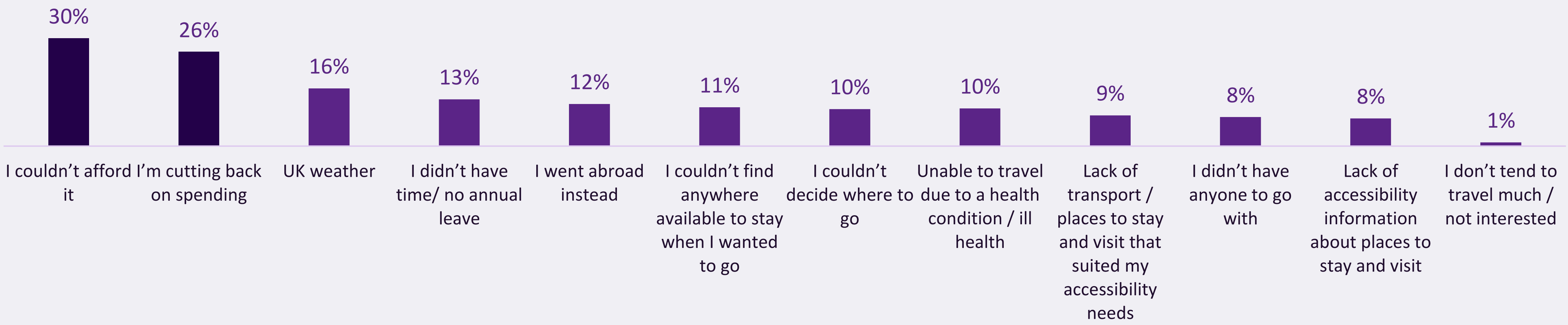
Overnight UK trips taken between April and September by life stage (%)



Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: All respondents. October 2023 Pre-nesters n=287; Families n=658; Older Independents n=474; Retirees n=336 October 2022 Pre-nesters n=460; Families n=690; Older Independents n=370; Retirees n=236; November 2022 Pre-nesters n=351; Families n=666; Older Independents n=522; Retirees n=219

The main reasons for not following through on (summer) trips were financial – although weather, overseas travel and accommodation availability were also factors.

Reasons for not taking a UK overnight trip despite originally intending to do so (%)



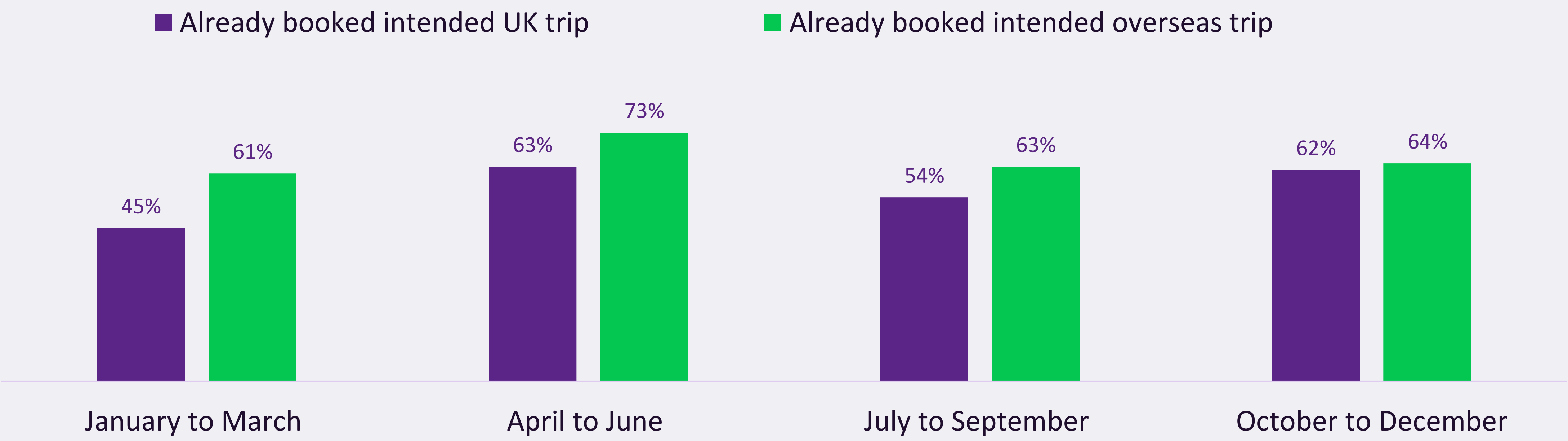
Source: VisitEngland Domestic Sentiment Tracker
Question: VB13hW53: VB13h2W53. Why did you not take an overnight short break or holiday in the UK during the summer months (June-September) this year?
Base: All summer non-trip-takers considering taking a summer trip n=488

Overseas travel is a continued 'threat' to domestic, with trip-taking increasing at a higher rate than domestic travel

Source: VisitEngland Domestic Sentiment Tracker
Question: QVB13a2. In which of these months have you taken an overnight short break or holiday in the UK/overseas in the last 12 months?
Base: Pre-nesters n=287; Families n=658; Older Independents n=474; Retirees n=336

The public are more likely to book overseas trips in advance, making domestic travel more susceptible to circumstance

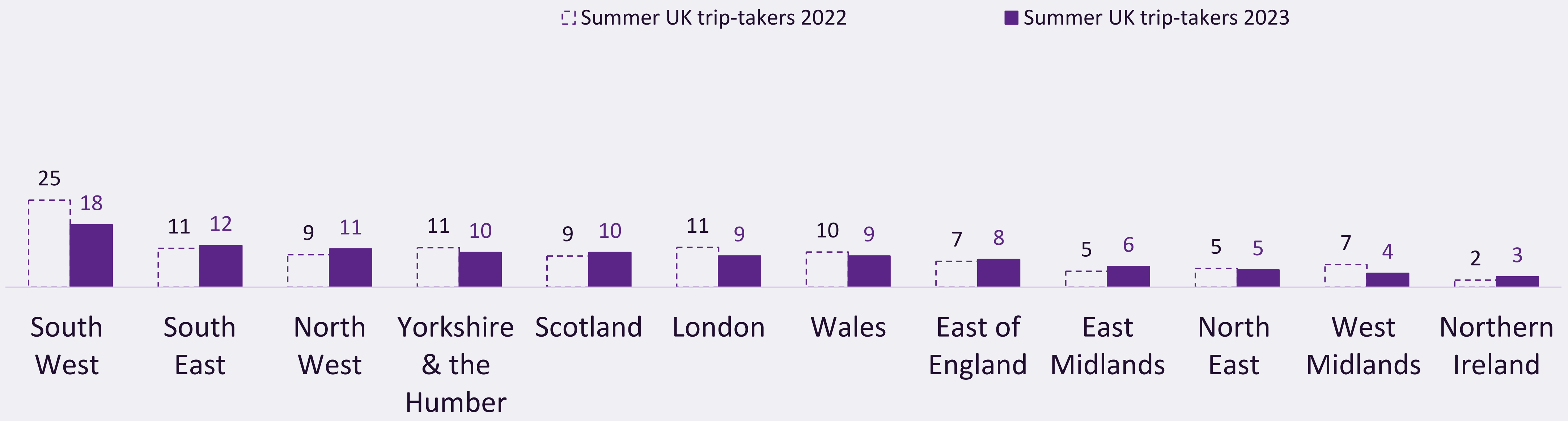
Booking status of overnight UK and overseas trips (%)



VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>?
Base: c. 500 each quarter

The impact appears to have been biggest on the South West of England, *suggesting* ‘seaside’ destinations are hit the hardest and Scotland may not be hit so hard

Where stayed on most recent UK overnight summer trip (%)



VisitScotland | Alba

Source: VisitEngland Domestic Sentiment Tracker
Question: VB13hW53: VB13h2W53. Why did you not take an overnight short break or holiday in the UK during the summer months (June-September) this year?
Base: All summer non-trip-takers considering taking a summer trip Pre-nesters n=100; Families n=228; Older Independents n=100; Retirees n=60

bva Bdrc

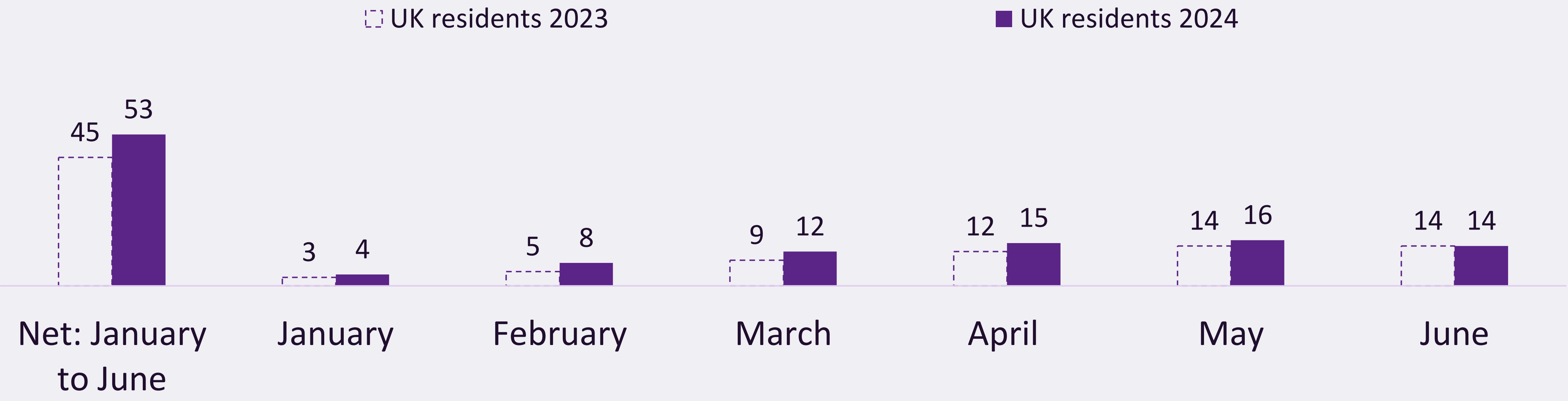
Looking ahead: Trip intentions January to June 2024

Key finding 1: Demand remains high overall and for Scotland

Trip intentions are higher than in 2023 and Scotland is the 3rd most popular destination

Domestic trip intentions for the first half of 2024 look relatively healthy – demand higher than 2023 in each month

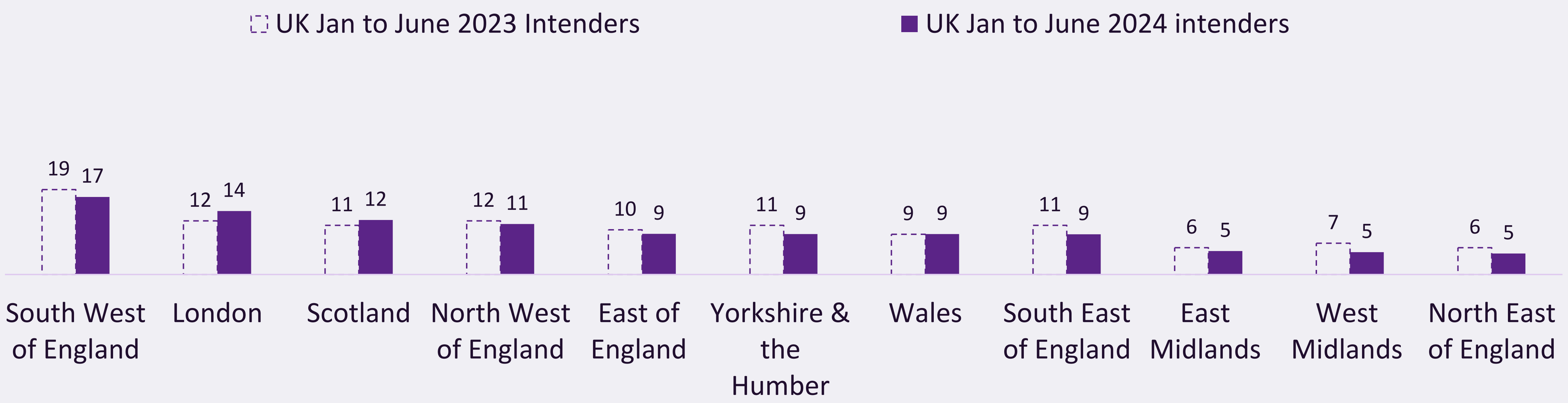
Proportion anticipating going on any overnight UK trips (%)



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,760; All Scotland respondents n=270

Scotland intentions are stable – along with London the only destination experiencing a rise in intention (albeit a small one)

Where planning on staying on next UK overnight trip in January to June (%)



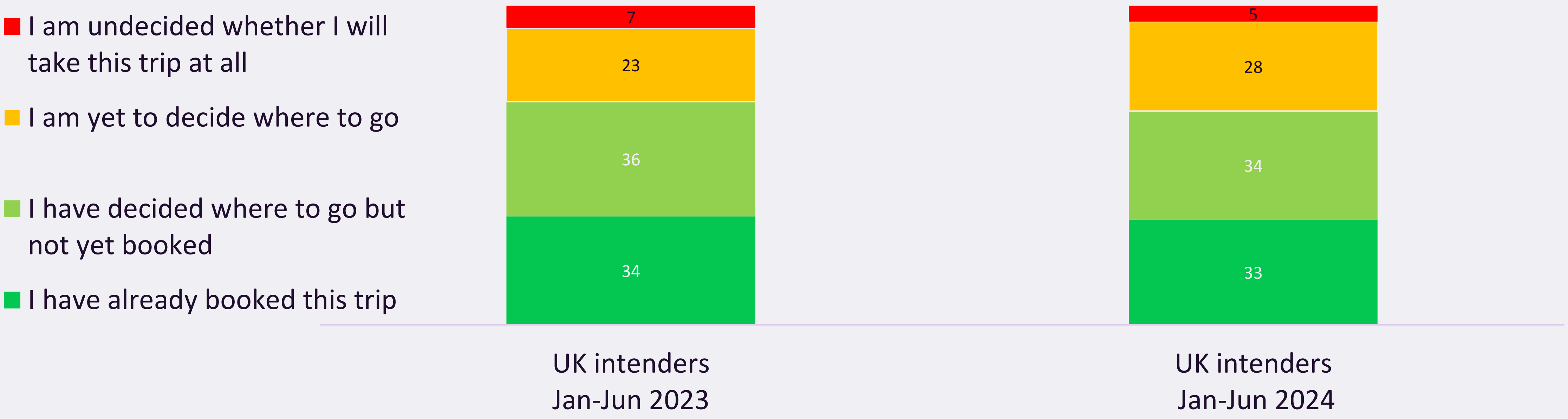
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: UK January to June 2023 intenders n=2,052; UK January to June 2024 intenders n=2,385; Scotland resident January to June 2024 intenders n=333

Key finding 2: Trip intentions are an aspiration rather than a reality – particularly for Scotland

Only a third have already booked their trip, falling to just a quarter of Scotland intenders

However, strong intentions are tempered by only a minority having booked their trip. Bookings and destination certainty are lower than in 2023, suggesting the intention gap will continue

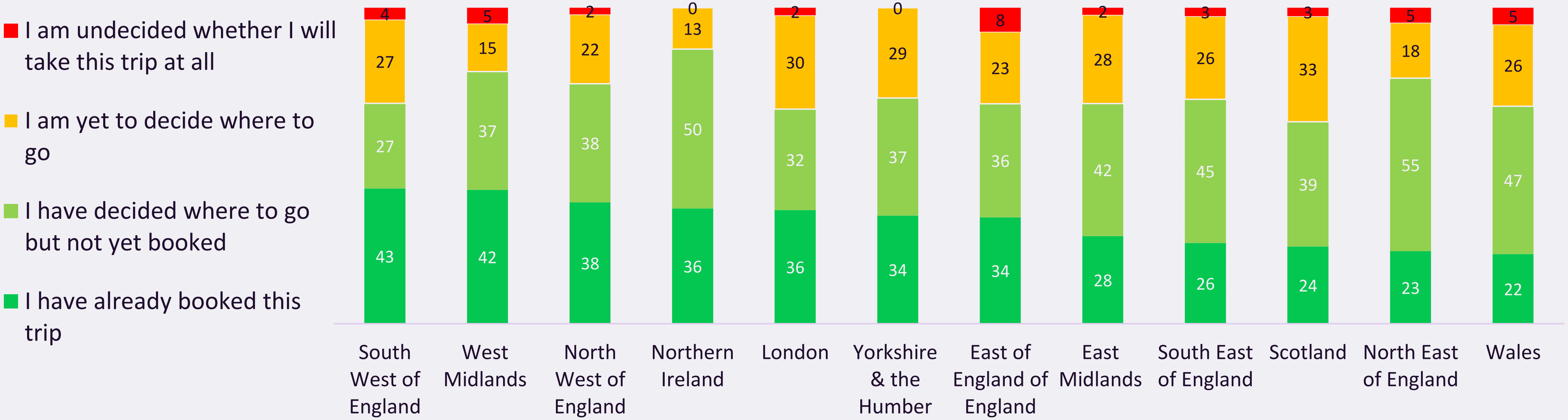
Overnight UK trip booking status (%)



VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>? Base: UK intenders Jan-June 2023 n=772; UK intenders Jan-Jun 2024 n=925; Overseas intenders Jan-June 2023 n=450; Overseas intenders Jan-Jun 2024 n=552;

Scotland is the part of the UK with the 3rd lowest incidence of trips ‘already booked’ – only the North East of England and Wales with lower booking status

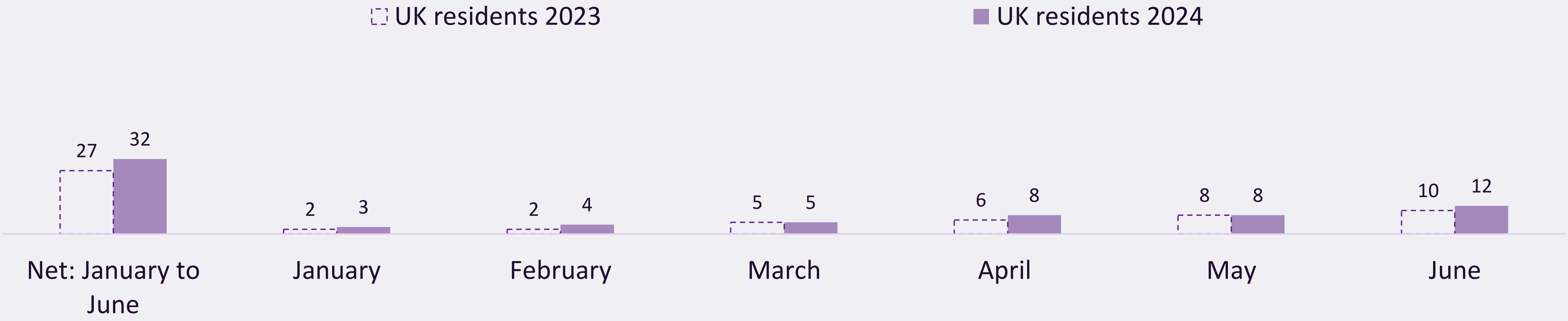
UK trip booking status by intended destination (%)



VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>?
Base: UK intenders to each destination

Overseas travel is also set to increase on 2023, with a notable increase amongst retirees – an audience previously limited to domestic travel

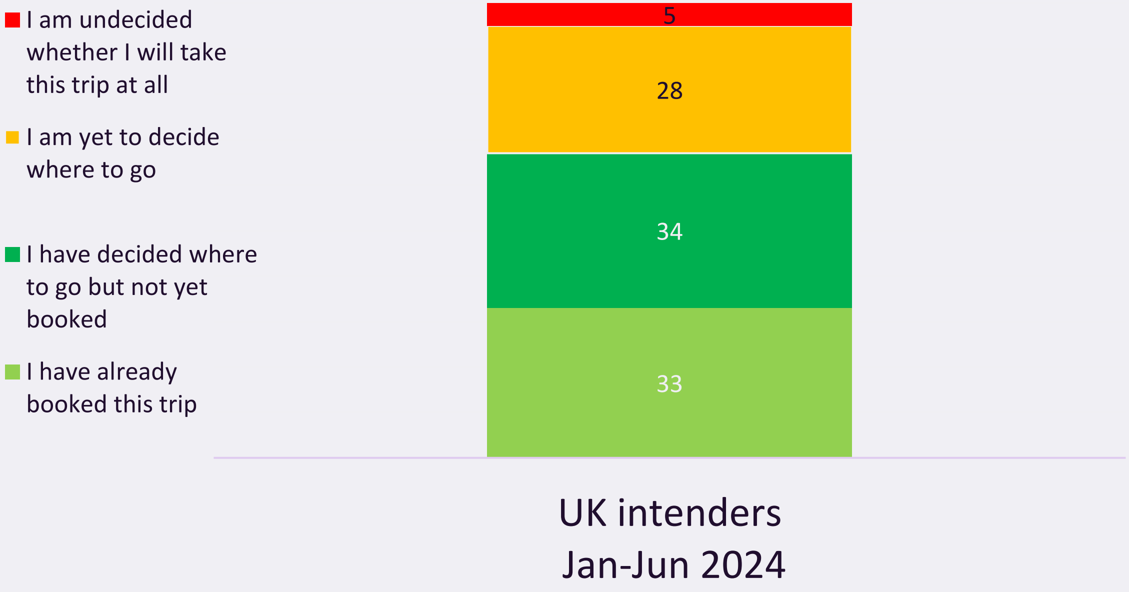
Proportion anticipating going on any overnight OVERSEAS trips (%)



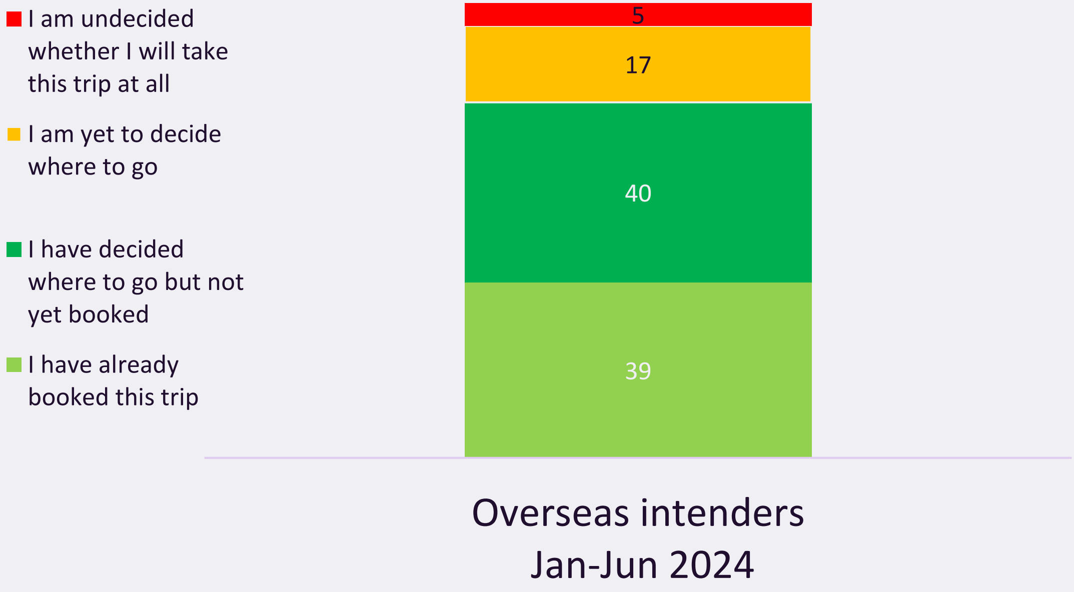
VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,760; All Scotland respondents n=270

The rise in overseas intention is particularly pertinent with planned overseas trips far more certain to go ahead than domestic trips

Overnight UK trip booking status (%)



Overnight OVERSEAS trip booking status (%)



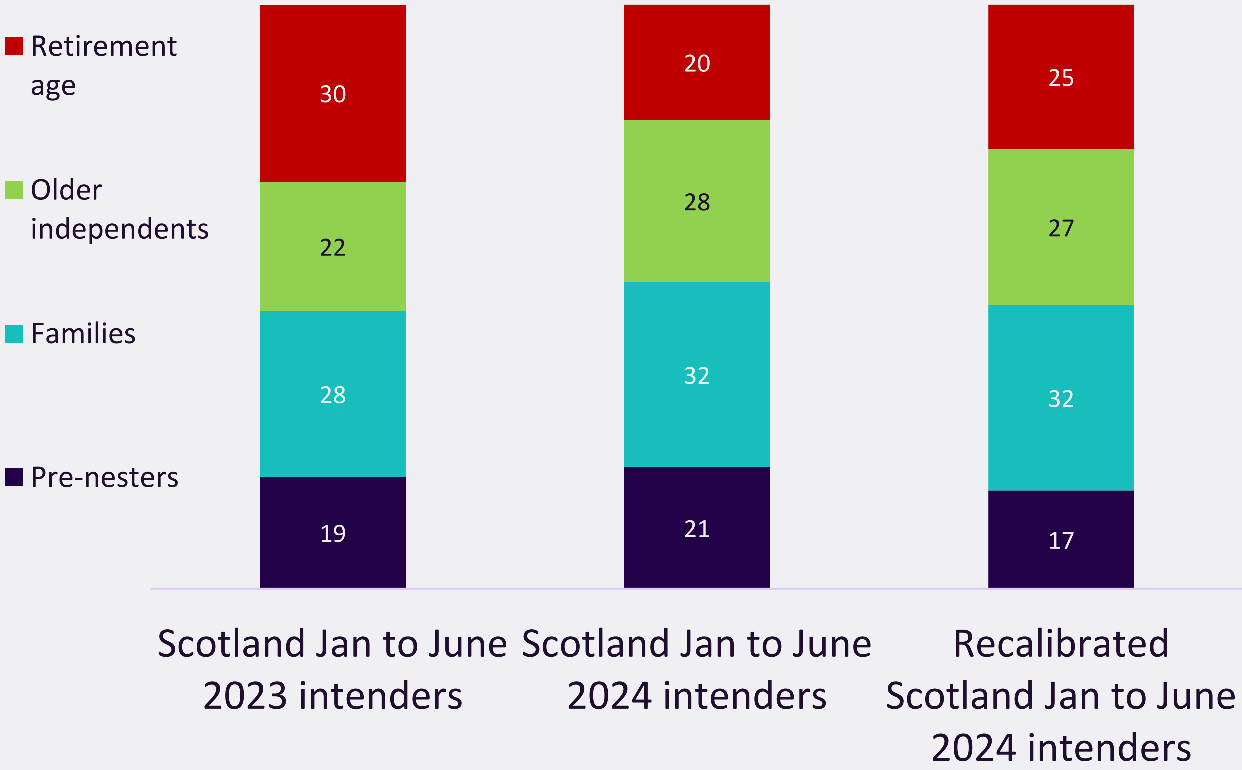
VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>? Base: UK intenders Jan-June 2023 n=772; UK intenders Jan-Jun 2024 n=925; Overseas intenders Jan-June 2023 n=450; Overseas intenders Jan-Jun 2024 n=552;

Key finding 3: Families and older independents are the main life stages for Scotland trips

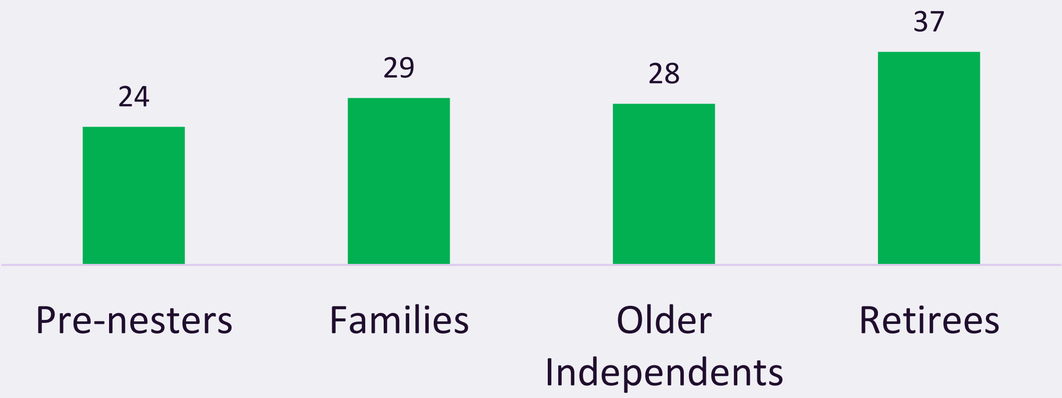
1 in 3 Scotland intenders fall into the family life stage.
Retirees over-index on trips 'already booked'

Families and older independents make up the highest proportion of Scotland intenders, although when ‘recalibrated’ by *trip-bookers*, retirees grow in number

Scotland intenders by life stage (%)



Already booked my next planned domestic trip (%)



Source: Demographics.
Base: All respondents. All Scotland January to June 2023 intenders n=307; All Scotland January to June 2024 intenders n=367; All Scotland resident January to June 2024 intenders n=169

The high incidence of families should also be tempered by the fact that not all families travel with their children – partner is the most common party type with other family members increasing

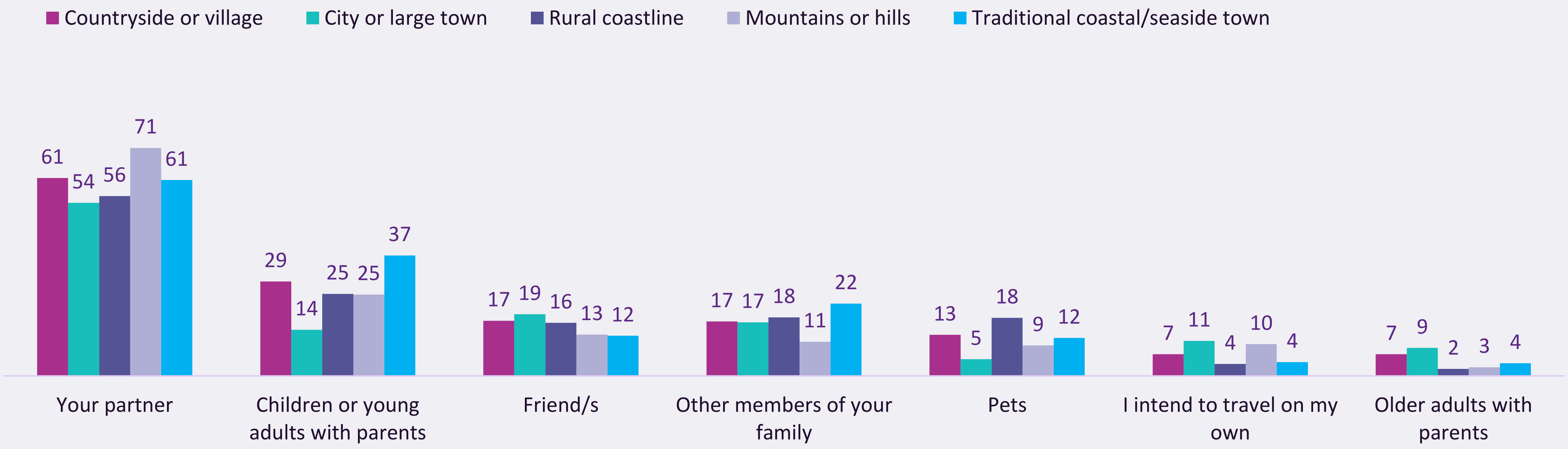
Visitor party make-up for Scotland January to June intenders (%)

QVB4d. With whom are you likely to be spending your holiday?

Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

Visitor party composition varies considerably by destination type

Visitor party make-up for Scotland January to June intenders (%)



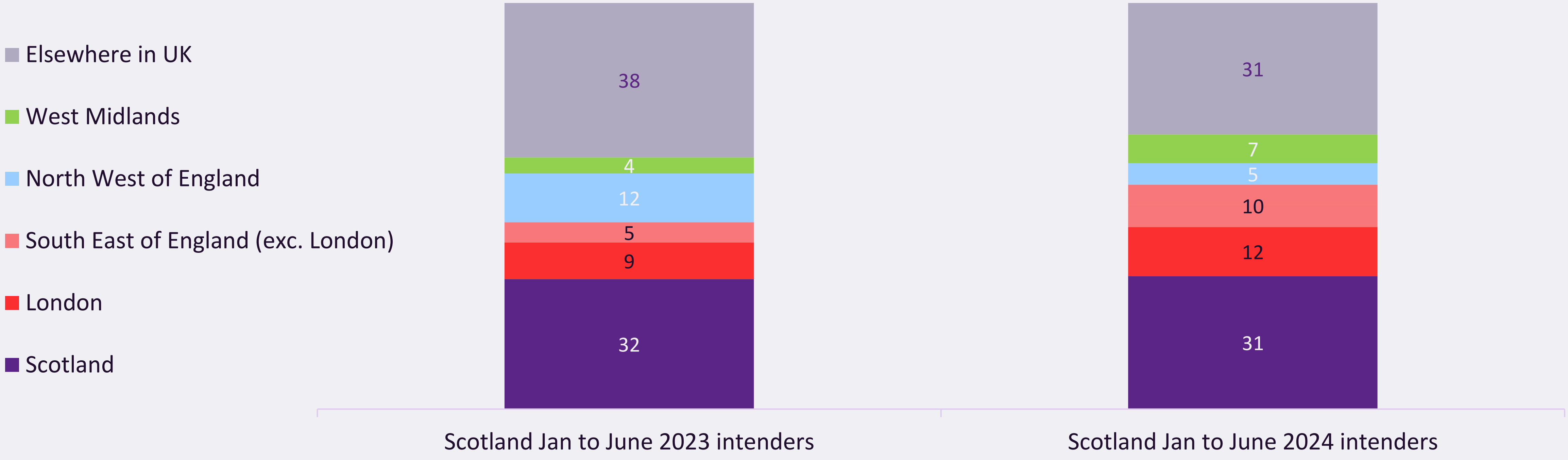
QVB4d. With whom are you likely to be spending your holiday?
Base: All intenders planning to take a trip exclusively in Scotland. City or large town n=105; countryside or village n=110; Traditional coastal/seaside town n=54; rural coastline n=67; mountains or hills n=76

Key finding 4: There has been a rise in Scotland intenders from London and the South East, who are less impacted by cost-of-living

22% of Scotland intenders are from London/South East compared to 14% in 2023. 1 in 3 are better off/unaffected by cost-of-living

Interest in Scotland has risen amongst residents of London and the South East

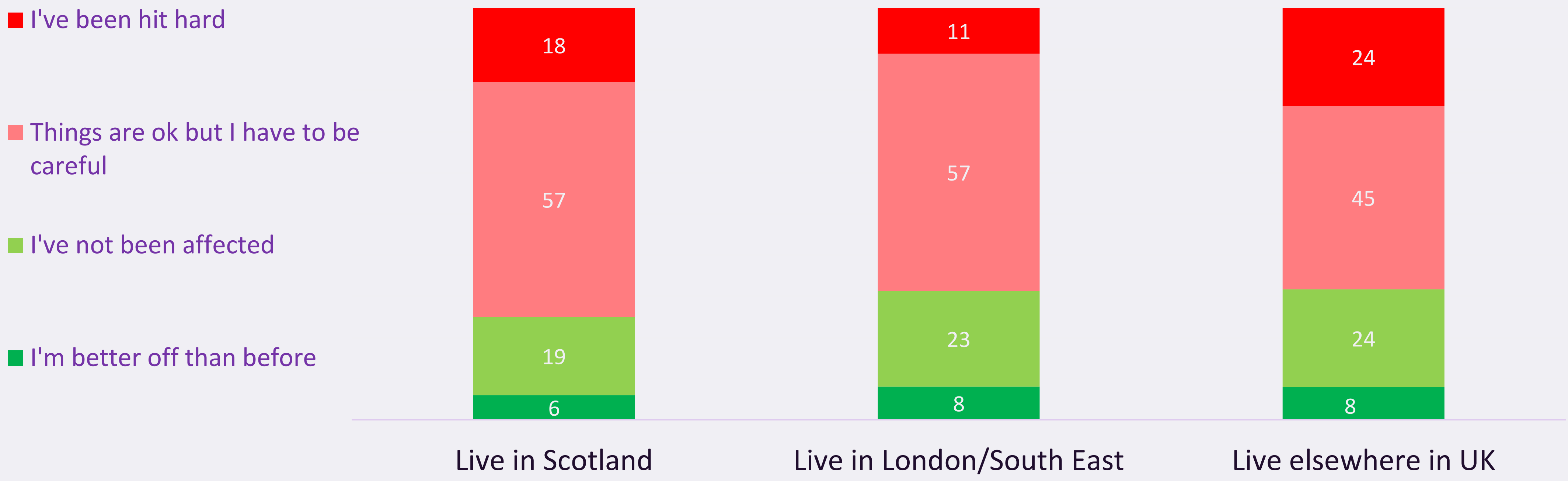
Origin of Scotland intenders (%)



Source: Demographics.
Base: All respondents. All Scotland January to June 2023 intenders n=307; All Scotland January to June 2024 intenders n=367; All Scotland resident January to June 2024 intenders n=169

The London and South East audience tend to be less impacted by cost-of-living than elsewhere in the UK

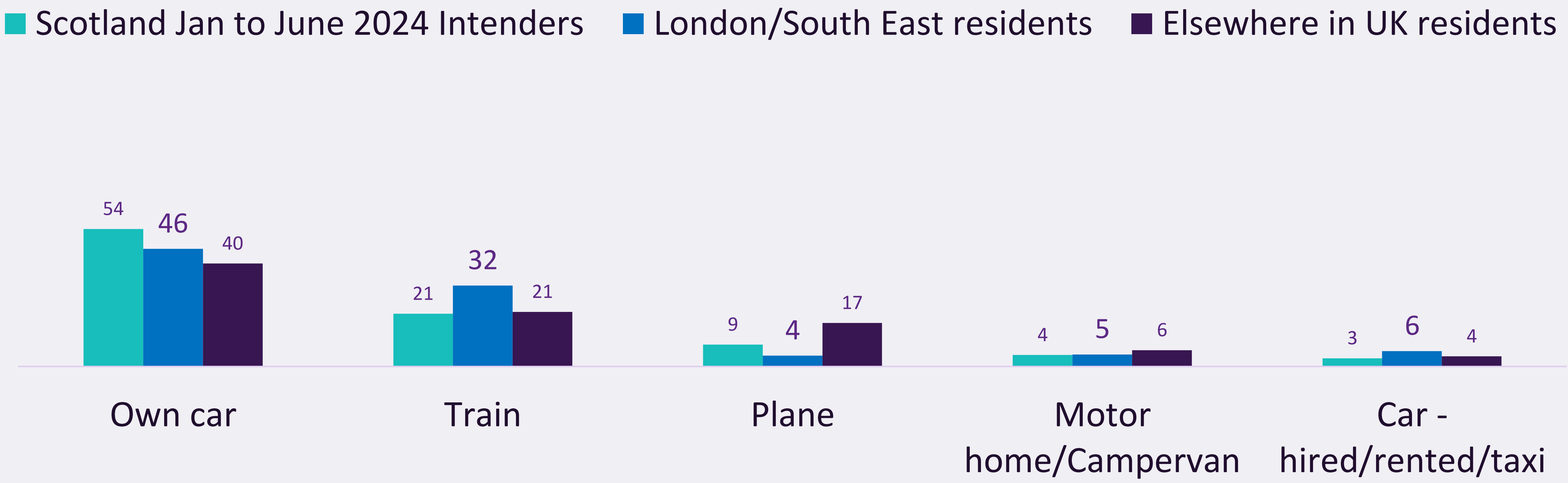
Financial segments by life stage (%)



Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: All UK respondents. n=1,760; All Scotland respondents n=270. Pre-nesters n=308; Families n=628; Older Independents n=460; Retirees n=364; Under £40k n=708; £40k to £74.9k n=444; £75k to £99.9k n=128; £100k+ n=83

They are also more likely to travel by train – although ‘own car’ remains the most common mode of travel. Encouraging early bookings should prevent ‘train’ prices putting intenders off

Top 5 main modes of travel of destination for trip (%)



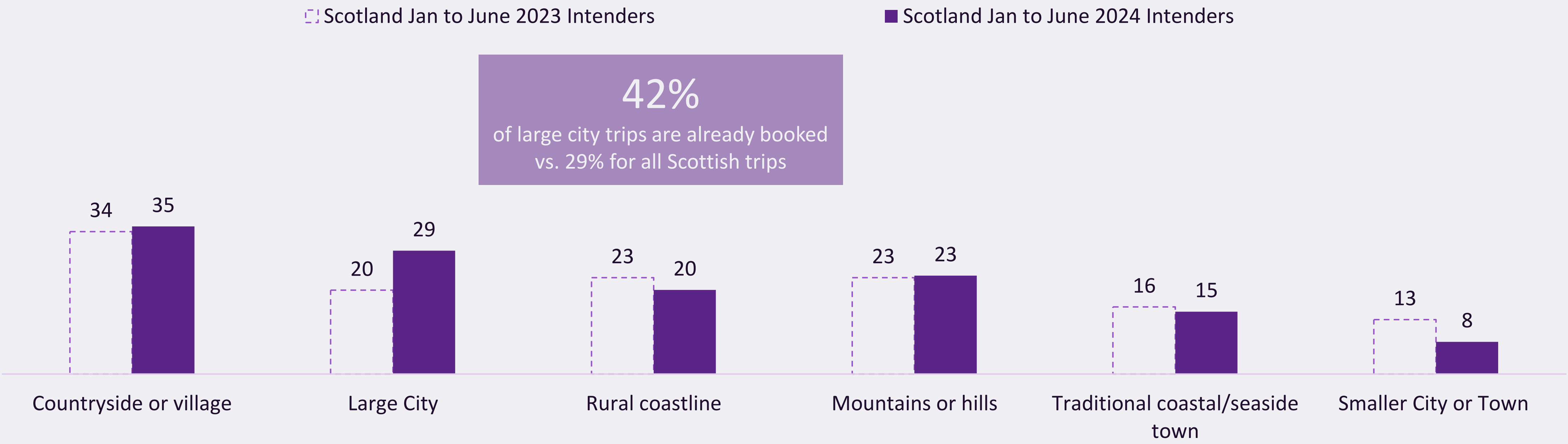
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

Key finding 5: Large cities such as Edinburgh are set to benefit the most

29% of Scotland intenders plan on visiting a large city compared to 20% in 2023. Intention to visit Edinburgh has increase from 28% to 37%

Large cities are set to experience the biggest increase in Scotland trips compared to 2023

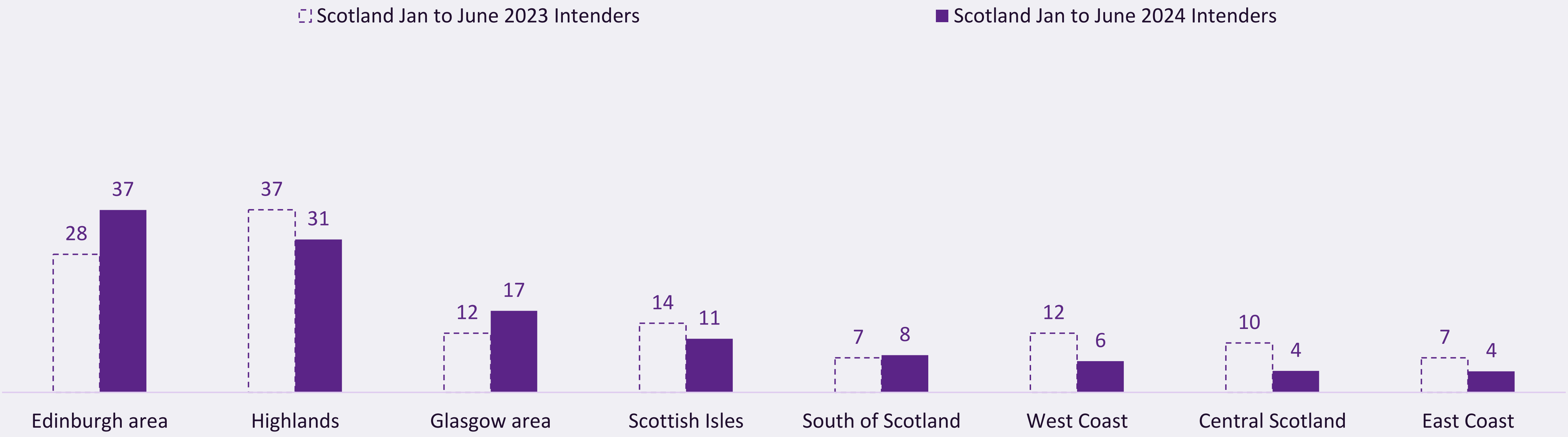
Main type of destination for Scotland January to June overnight trip (%)



QVB5a. Which of the following best describes the main types of destination you are likely to stay in during your UK trip?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

Unsurprisingly this increase is driven by intention to visit Edinburgh, although Glasgow intention is also up

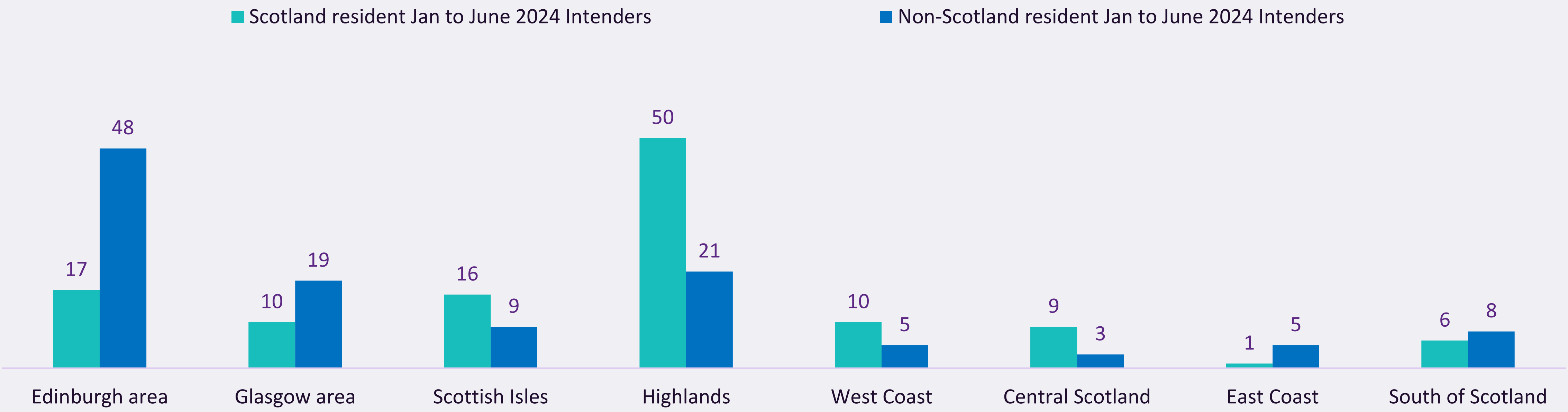
Planned destination for Scotland January to June overnight trip (%)



QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All intenders planning to take a trip in Scotland. All Scotland January to June 2023 intenders n=307; All Scotland January to June 2024 intenders n=367

As in previous reporting, the desire to visit Edinburgh is driven by intenders outside of Scotland – the Highlands has the opposite effect

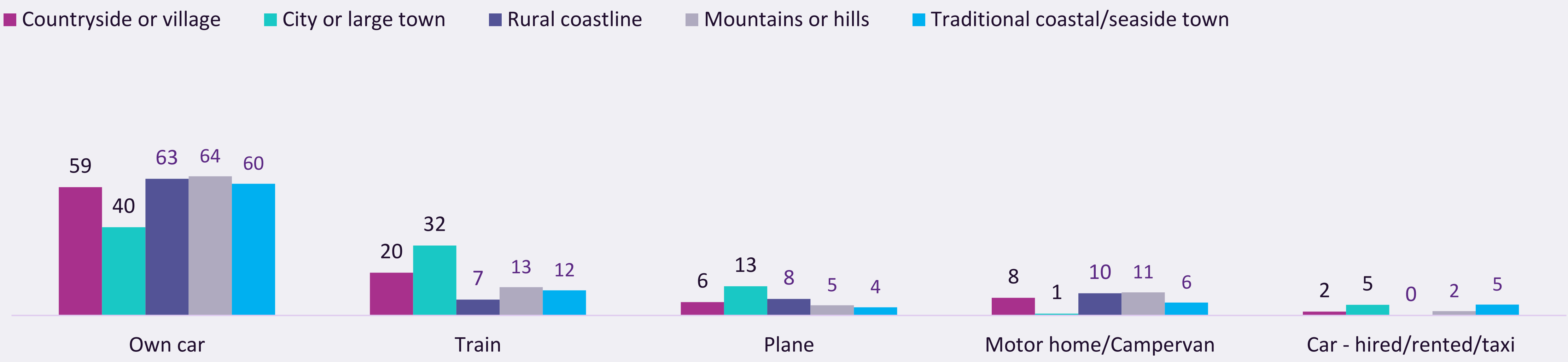
Planned destination for Scotland January to June overnight trip (%)



QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All Scotland resident January to June 2024 intenders n=161; ; All Scotland resident January to June 2024 intenders n=161

Mode of transport is often dictated by destination type. ‘Train’ is almost as likely to be the main mode of travel as car is for trips to a city or large town

Top 5 main modes of travel of destination for trip in January to June (%)



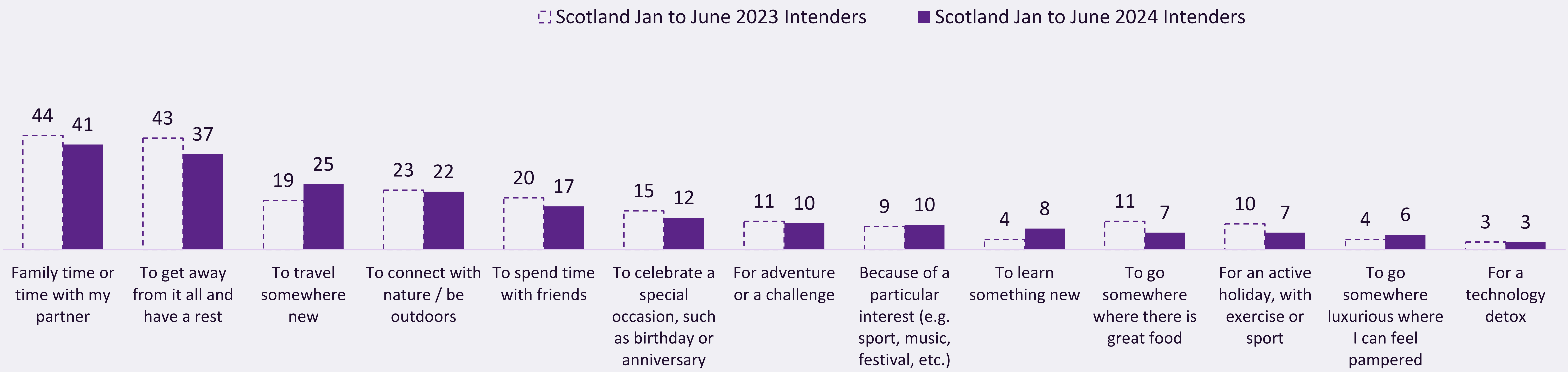
QVB4c. What do you anticipate being the main mode of travel to your holiday or short break destination?
Base: All intenders planning to take a trip exclusively in Scotland. City or large town n=105; countryside or village n=110; Traditional coastal/seaside town n=54; rural coastline n=67; mountains or hills n=76

Key finding 6: Intenders come with a desire for culture and something new

Most ‘learning-based’ activities are set to increase on Scotland trips in 2024. Visiting cultural attractions the biggest increase.

A desire to ‘travel somewhere new’ is the only notable jump since 2023 – driven by trips to ‘cities or large towns’ and ‘mountains or hills’

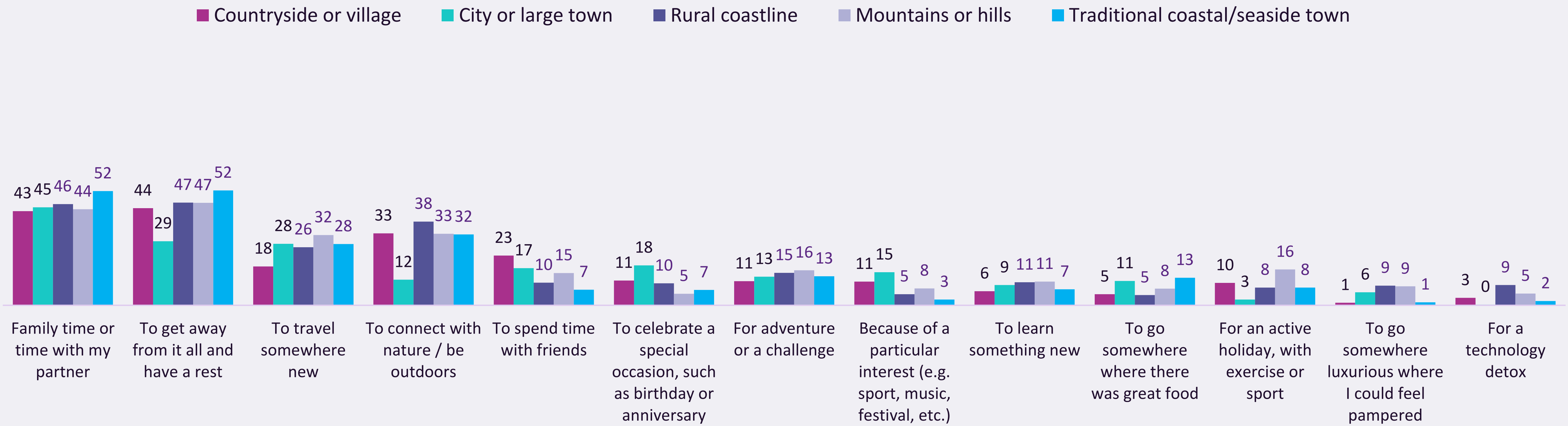
Motivations for Scotland January to June overnight trip (%)



VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

‘Family time or time with my partner’ is the leading reason for all destination types, in particular for those planning on visiting a ‘traditional coastal town’.

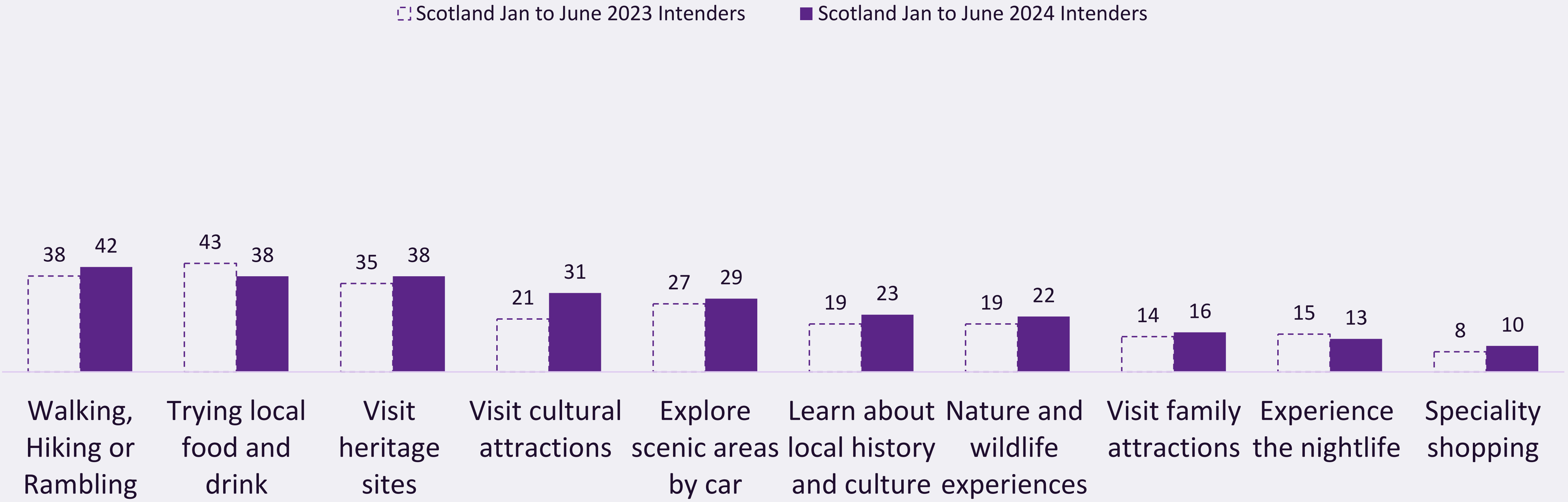
Motivations for Scotland January to June overnight trip (%)



VB6fii. Which of the following best describe your motivation/s for this trip?
Base: All intenders planning to take a trip exclusively in Scotland. City or large town n=105; countryside or village n=110; Traditional coastal/seaside town n=54; rural coastline n=67; mountains or hills n=76

Activities that relate to learning and exploration have all risen compared to 2023, typified by a large increase in plans to 'visit cultural attractions'

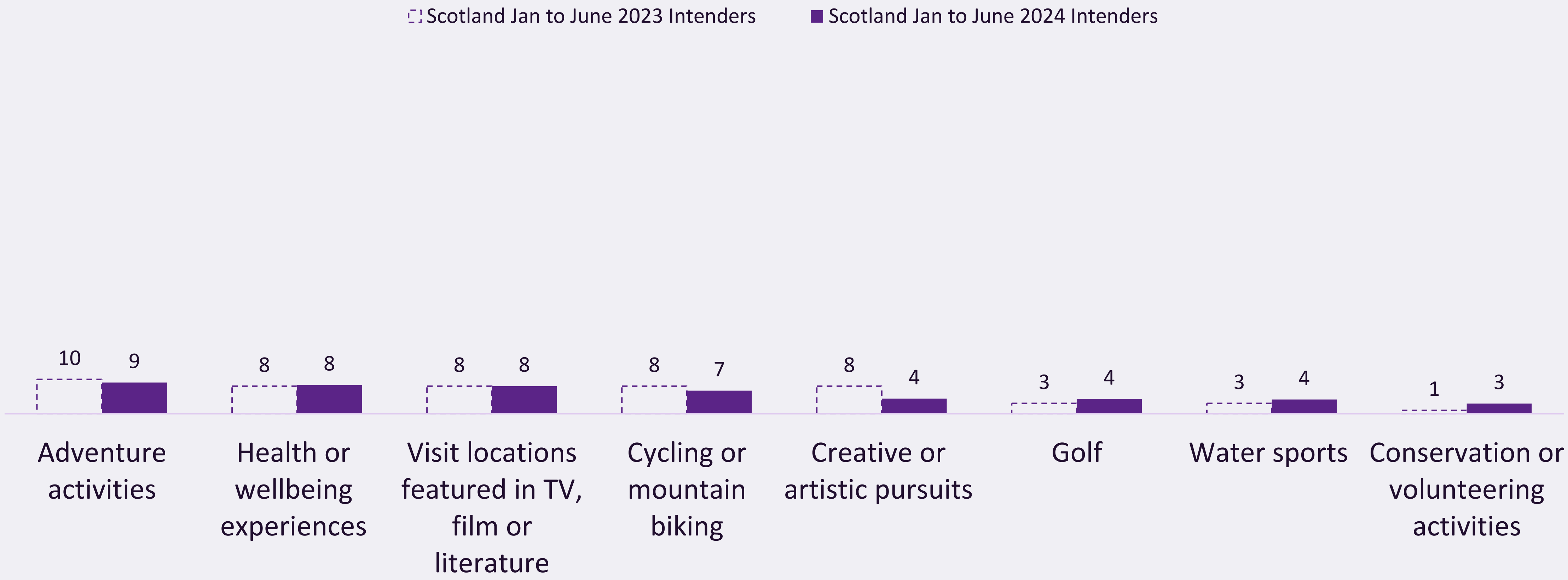
Activities for Scotland holidays and short breaks in January to June (%)



VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

A range of other, more niche activities are also planned on Scotland trips – broadly in line with 2023 levels

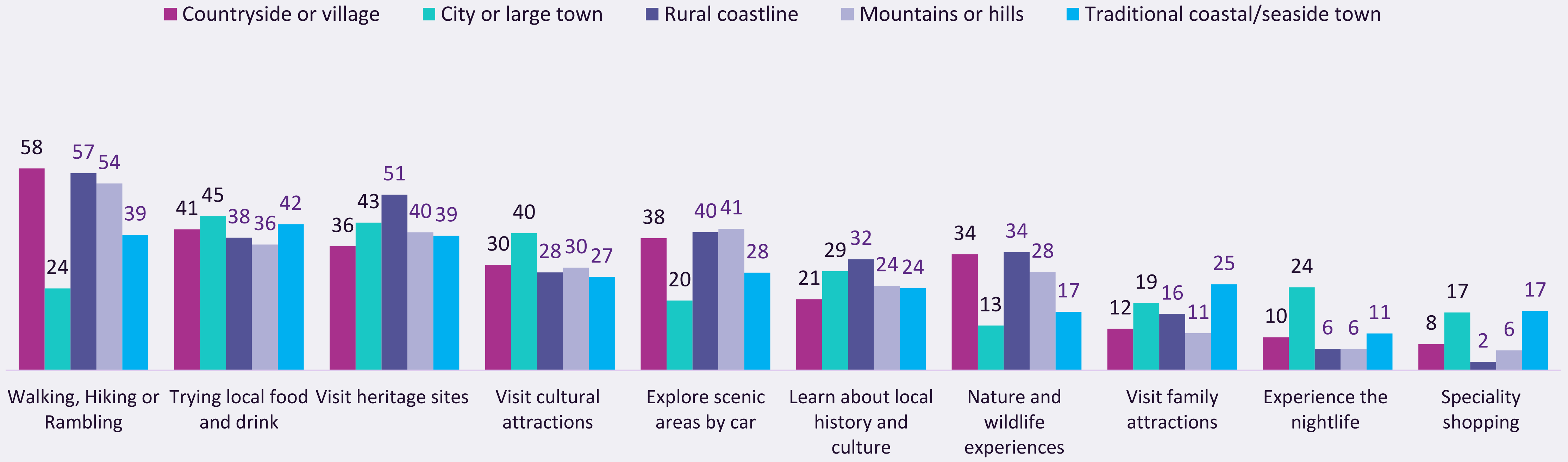
Activities for Scotland holidays and short breaks in January to June (%)



VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

The type of activity planned varies depending on the type of destination, Scottish intenders plan on visiting

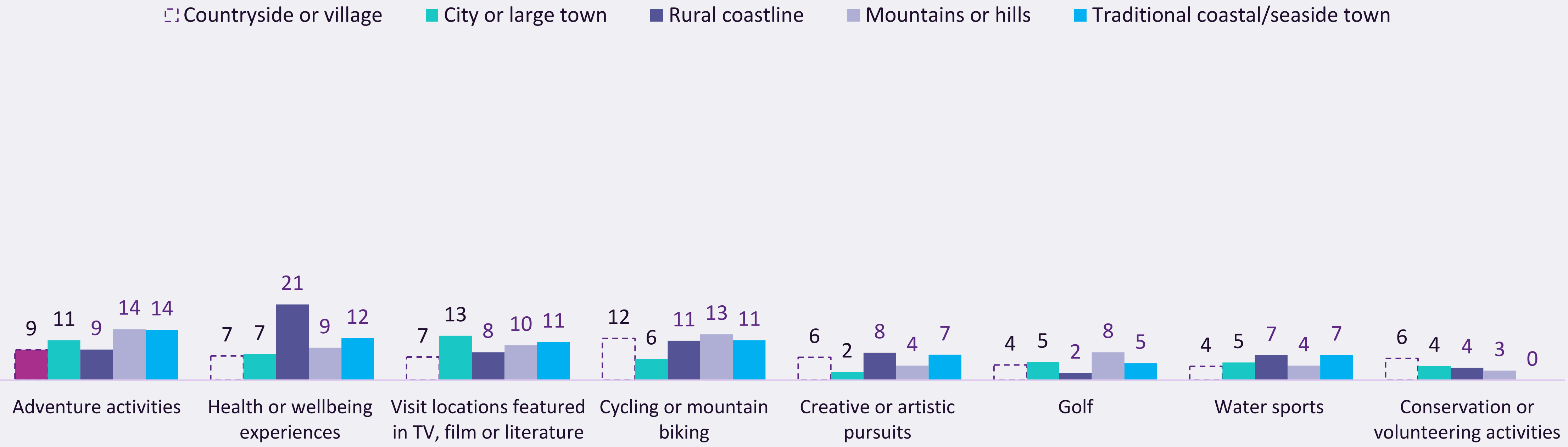
Activities for Scotland holidays and short breaks in January to June by destination type (%)



VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Base: All intenders planning to take a trip exclusively in Scotland. City or large town n=105; countryside or village n=110; Traditional coastal/seaside town n=54; rural coastline n=67; mountains or hills n=76

Notably, some niche activities gain more prominence in specific destinations.

Activities for Scotland holidays and short breaks in January to June by destination type (%)



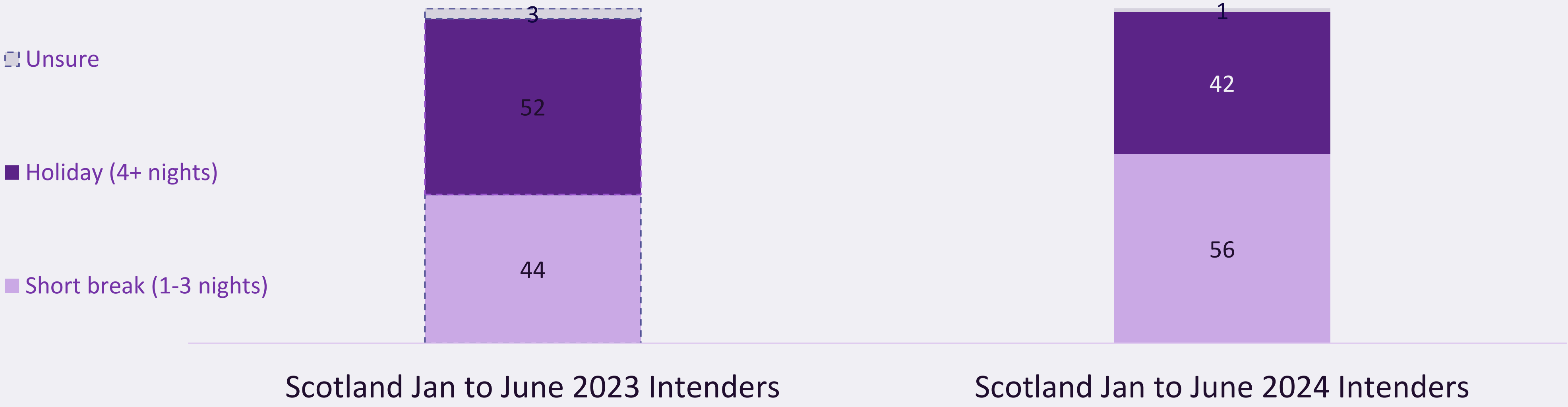
VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Base: All intenders planning to take a trip exclusively in Scotland. City or large town n=105; countryside or village n=110; Traditional coastal/seaside town n=54; rural coastline n=67; mountains or hills n=76

Key finding 7: However, trips are likely to be shorter to all destination types

The majority of Scotland intenders are planning a short break in 2024, a reversal of 2023

Over half of 2024 intenders are planning a short break in Scotland - a rise on 2023. This trend is consistent across the UK and a range of destination types

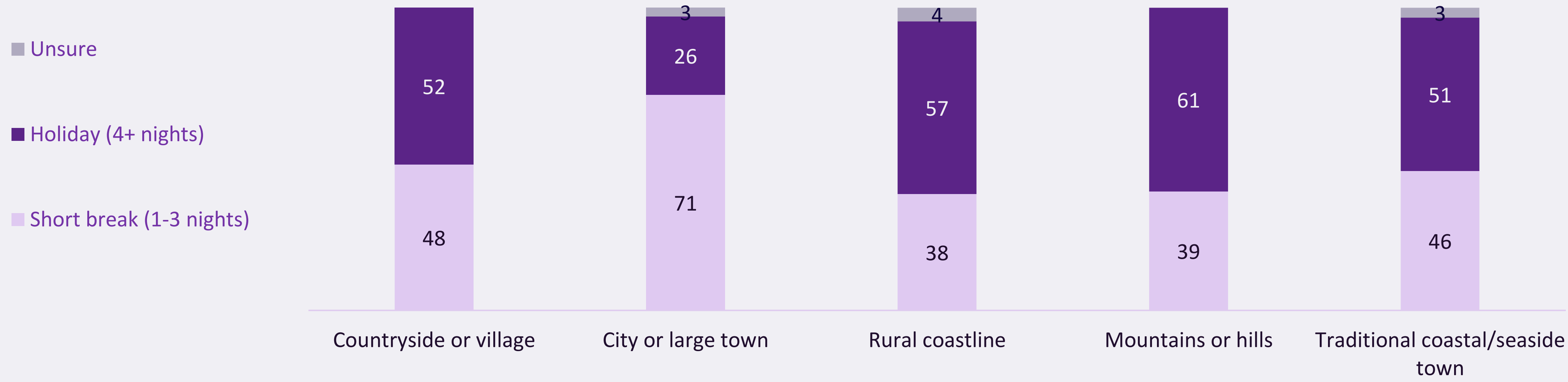
Length of next <u>January to June</u> holiday or short break in Scotland (%)



QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

However, it's important to note that for all but 'city or large town' trips, longer breaks make up the majority

Length of next January to June holiday or short break in Scotland by destination type (%)



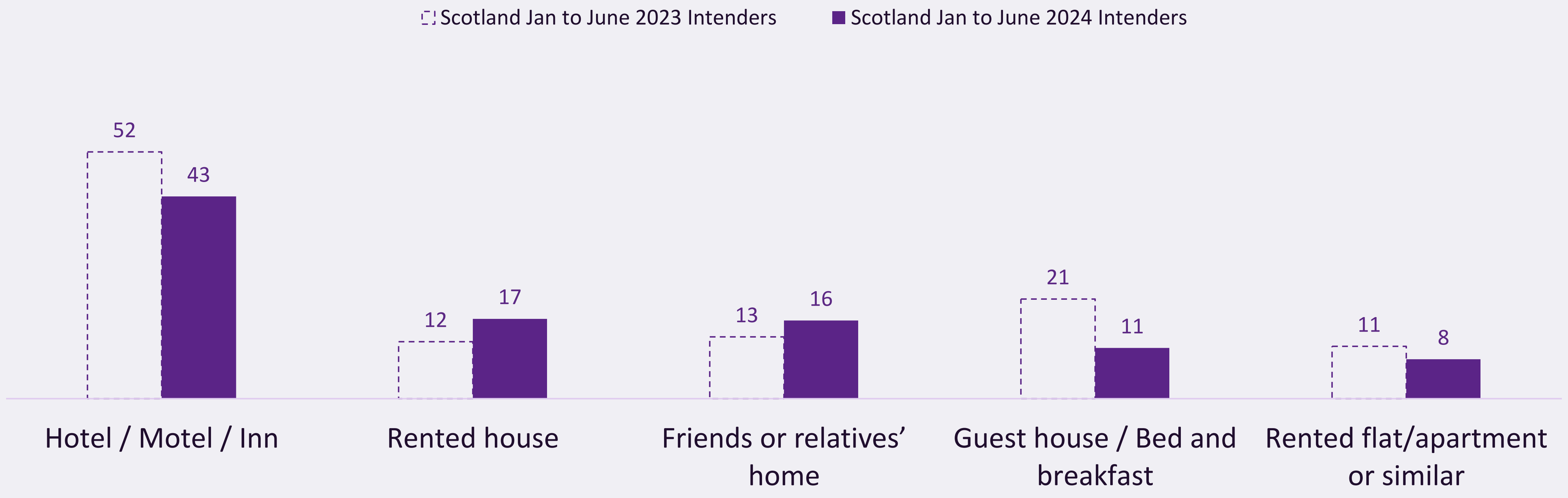
QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: All intenders planning to take a trip exclusively in Scotland. City or large town n=105; countryside or village n=110; Traditional coastal/seaside town n=54; rural coastline n=67; mountains or hills n=76

Key finding 8: Serviced accommodation looks set to decline

2 in 5 plan on staying in a hotel or similar, compared to half in 2023. This represents the second wave of reporting where this drop has occurred

Intention to stay in serviced accommodation has dropped since 2023, with ‘rented house’ and ‘friends or relatives homes’ increasing. Are cost considerations driving choice?

Top 5 accommodation for Scotland January to June trip (%)



QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland January to June 2023 intenders n=226; All Scotland January to June 2024 intenders n=311

SUMMARY OF FINDINGS

Summary of key findings

Key finding 1:
Demand remains high and Scotland set to benefit

Key finding 2:
Trip intentions are an aspiration rather than a reality – particularly for Scotland

Key finding 3:
Families and older independents are the main life stages for Scotland trips

Key finding 4:
There has been a rise in Scotland intenders from London and the South East, who are less impacted by cost-of-living

Key finding 6:
Large cities such as Edinburgh are set to benefit the most

Key finding 5:
Intenders come with a desire for culture and something new

Key finding 7:
However, trips are likely to be shorter to all destination types

Key finding 8:
Serviced accommodation looks set to decline

Appendix: Methodology and other information

VisitScotland | Alba

Methodology

- The findings in this report are based on a fortnightly online survey conducted amongst a nationally representative sample of the UK population.
- The sample is representative of UK adults aged 16+ by gender, age, government region and household income.
- In the first stage a nationally representative core sample of 1,500 is recruited and interviewed. This sample is then ‘boosted’ in Scotland and Scotland to ensure sufficient base sizes for separate nation analysis. The data are then weighted to make the sample representative of the UK overall and within each nation.
- This report aggregates the results taken from Waves 57-59 of the domestic sentiment tracker

Quality and accreditation

BVA BDRC is certified to ISO 20252 and 27001, the recognised international quality standards for market research and information security.

- Adherence to the standard is independently audited once per year
- Where subcontractors are used by BVA BDRC, they are assessed to ensure any outsourced parts of the research are conducted in adherence to ISO 20252 and 27001

All work will be carried out in conformity to these standards, the MRS Code of Conduct, and all relevant legal requirements