

A Decade of Consumer Trends

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 Visit Scotland | Alba™



Welcome

It's ten years since our first trends report in 2013. We set out to inform and inspire Scottish tourism businesses on consumer interests and drivers which influence our industry. We have used horizon scanning methods to study the consumer environment and to identify trends of interest to Scottish tourism businesses. We have stimulated discussion and invited readers to reflect on who their customers are, what motivates their actions and how their interests are changing.

A decade on, we have decided to look back at our trend discussions. The world has followed a turbulent path, with the residual effects of the coronavirus (COVID-19) pandemic, economic and political uncertainty and the climate crisis at the forefront of our minds today. Being informed about the latest trends, experiences and news has never been more accessible.

Looking back over our past Trends papers, we will highlight the trends we feel continue to offer opportunities for Scottish tourism businesses.

“Change they say, is the only true constant” (Trends for 2020 paper).

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1. Transformational Tourism

In our 2020 Trends paper, we reflected on the road to transformational tourism. We explored how there has been a shift in traveller focus from consumption to purposefulness. There has also been a change in destination focus from growth to sustainable destinations.

What is Transformational Tourism?

A movement amongst consumers to travel with purpose and cause. Maximise their time, giving something back to the destination they visit and consciously off-setting the impact of their travel.

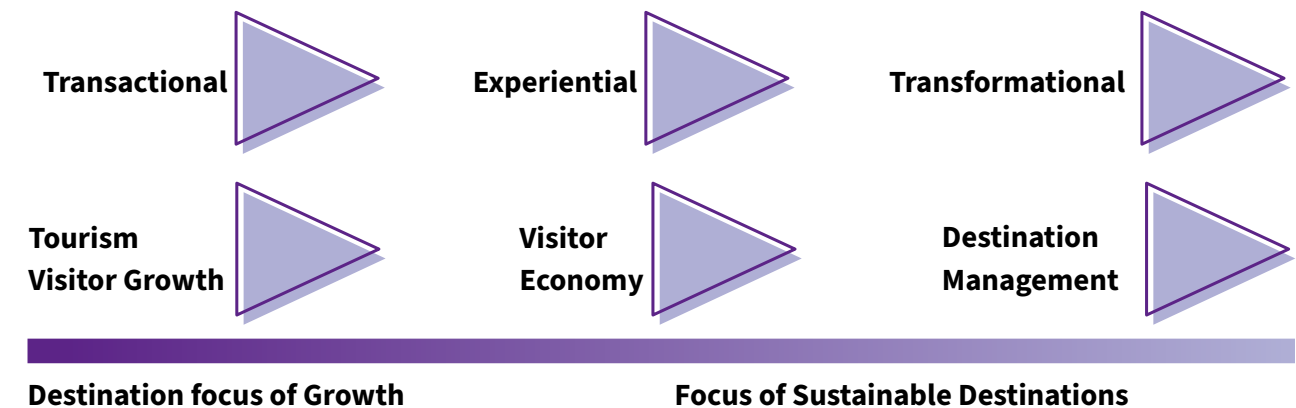


Looking back, the period from 2010-2019 has produced influential behavioural shifts which we continue to see.

- Before 2010 many destinations, providers and tourism bodies were focused on growth and increasing visitor numbers. Travellers had a transactional approach to tourism. Travellers were keen to take advantage of low-cost airlines as well as competitive pricing for accommodation, activities and attractions.
- Following the economic slowdown in the early 2010s, attitudes to travel began to change through the values of younger generations and a government focus on tourism as an economic lever for employment and social cohesion.
- By the middle of the next decade, visitors were now seeking experiential travel. Travel had become more immersive with visitors seeking meaningful engagement with a destination’s history, people, culture and environment. At the same time, governments, public agencies and industry bodies saw tourism in terms of the “visitor economy”, an appreciation of the wider impact tourism made throughout a nation.

- Moving into the new decade (2020’s) we highlighted that travellers were now seeking transformational tourism. Many have a desire to give something back to the destination they visit and consciously try to off-set the impact of their travel. Driven by the trends of wellness, betterment and mindfulness, visitors want their trips to have meaning and challenge. Younger generations are compelled by a desire to seek powerful change in their life and are aware of the environmental cost of their travel.
- This decade we are also witnessing the development of destination management. Pursuing more visitors in an age of over-tourism is unsustainable. Industry and policy makers are focusing on seasonality and regionality to deliver the benefits of tourism through a balanced economy, society, culture and environment.

Shifting consumer travel focus from consumption to purposefulness



Transformational Tourism: Opportunity and Ideas

During the Covid-19 pandemic there was an enhanced spotlight on opportunities for self improvement and personal growth. More and more people may look to holidays and short breaks to fulfil this role.

The Covid-19 pandemic also fostered a sense of community and responsibility for those around us. This may translate to a lasting impact on visitors' desire to give back to the communities they visit. There are diverse ways the tourism industry can incorporate these trends:

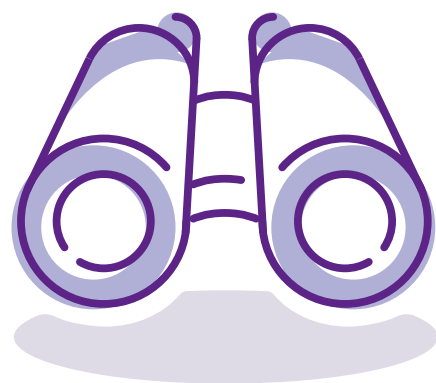
1.1 Trips to have meaning and challenge

Self-improvement: Incorporate personal fulfilment and lifestyle choices into marketing messages and tourism product development. Highlight how tourism can enhance personal development.

New skills and skill-sharing: Identify opportunities for visitors to share and learn new skills within a business or local community. This can range from formalised courses (such as writing workshops or experiences in restoration, conservation, bushcraft, art or cooking) to informal opportunities for guests to lend a hand. Offer retreats where consumers can take time away to learn a new hobby or skill.

Think about skills which have a unique twist connected to Scotland or your local area.

Hunt for achievement: Focus on achievements to be gained from visitor experiences such as climbing a mountain, bagging a Munro or ticking off bucket list experiences. Promote specific challenges in walking, running or cycling such as completing a certain distance or a specific graded route which are unique to the local area.



1.2 Desire to give back to the destination

Cleaning Up: Provide opportunities to enjoy the local landscape blended with voluntary work such as beach litter picking, waterway cleans or paddle boarding litter picks. Promote wider voluntourism opportunities in a local area or partner with organisations that offer these. This can help to demonstrate how visitors and destinations can work in harmony and enjoy Scotland responsibly.

Charitable communities: Highlight social enterprises in the area visitors can support during their stay (e.g. local social enterprise cafés).

Develop a connection or partnership with a local social enterprise.

Promote local charitable events that visitors could take part in during their stay. For example, Kiltwalk 2024 will be held in 5 locations across Scotland.

This can offer visitors a unique view into the destination and provide informal interactions with local people.

Learning from the locals: Consider products involving local people such as chatting to an older resident about the local history, events and heritage.. Sharing your local culture with consumers can also help build an inspiring relationship and may lead to referrals to family and friends.

Craftsmanship: Via tours, classes or retail, promote local artisans work from artwork, crafts to local food and drink. Tell their unique story connected to the local area. Visitors will feel that they have supported small, local businesses and learnt about authentic people and their crafts.

Read how Mercat Tours have supported the Grassmarket Community project [Our Stories Your City \(mercattours.com\)](#)

Invisible Cities is a social enterprise that trains people who have experienced homelessness to become walking tour guides in six cities across the UK [Invisible Cities - Tour Guides with a difference! \(invisible-cities.org\)](#)

2. WELLNESS

Wellness has been a consistent theme throughout our annual trends papers, recognising the growing importance that people are placing upon physical and mental wellbeing. We have explored how the Scottish tourism industry can incorporate wellness into the visitor experience and discussed the interface between travel and wellbeing.

What is wellness tourism?

Travel associated with the pursuit of maintaining and enhancing one's physical and inner wellbeing.

Tourism has a huge potential to create a mental space where people can relax, can focus inward and can process their personal journeys and uncertainties.



2.1 Escape and recharge

We first mentioned the potential for growth in wellness tourism in our Trends for 2014 paper, referring to a **Soul Recharge: Boot Camp for the Soul**. Even back then, we were discussing that stress was a bi-product of the global economic woes of the time. The fast-paced change of technology was also putting pressure on people to feel constantly connected.

Consumers were seeking escapism from technology and the mental strains of the day job. Whilst this was not a sign of consumers abandoning technology, we identified that consumers were looking to engage in the physical world again and take a break from the digital world at times. We continued this theme in 2018, exploring how the new fast paced technology was raising concerns about the impact on people's mental health and we looked at how consumers were **Seeking Sanctity in a Chaotic World**.

Moving forward the global COVID-19 pandemic has put the spotlight on poor mental health and we have seen a shift since 2020 in the number of people now working from home. Today's turbulent geo-political landscape and the outbreak of conflict in various locations across the globe continues to add to a feeling of mental strain for many people. These drivers mean that the need for a soul recharge has not gone away!

VisitScotland research on the perceptions of Scotland has uncovered several consistent and strong features and emotional benefits associated with a holiday in Scotland. Needing a place to escape is a common priority for tourists.

There is an expectation of experiencing real space on a Scottish holiday - this may come from the openness and vastness of the landscape as well as simply being away from everyday life - and de-stressing is also seen as one of the key benefits of taking a holiday in Scotland.

The top motivation for intended Autumn and Winter 2023 trips in Scotland by UK residents was 'to get away from it all and have a rest' (42%). 10% wanted a 'technology detox'.

Source: Domestic Sentiment Tracker Scotland
Summer July to October 2023 field work
[UK residents Holiday Sentiment Tracker | VisitScotland.org](#)

In 2016, we also highlighted the opportunity for **Escapism that isn't a world away**. Whilst Scotland offers a host of rural or remote locations where the crowds aren't present, we highlighted that consumers do not need to travel to distant or remote locations to gain a feeling of being 'off the grid'.

Many urban areas are littered with opportunities for escapism which could simply be public parks, botanical gardens, roof terraces, quiet spaces or running waters. During the global Covid-19 pandemic as restrictions were placed on travel and people's movement, many people started to explore their local areas in a way that they had not before. More people may now see the benefit of exploring our urban areas and finding personal space even in built up areas.

In 2017, we discussed how Scotland was one of the quietest destinations in Europe, **Silence is Tartan - The Deafening Silence of Wellbeing**. We highlighted that a serene place away from all the noise is appealing to many people and Scotland has a vast array of landscapes for people to enjoy tranquillity.

65% of UK adults feel that 'finding a quiet, peaceful place to disconnect from everyday life' is important to them when visiting a UK location for a holiday or short break

Source: YouGov plc UK Consumer Omnibus for VisitScotland, Mar 2021 Total sample size was 2103 adults. Fieldwork was undertaken between 19 and 20 May 2021. The survey was conducted online. The figures have been weighted and are representative of all UK adults (aged 18+)

Fast forward to the COVID-19 pandemic, lockdown brought natural quiet to a heightened focus. It was the longest period of quiet in recorded history. The lack of air and road traffic meant that people had an opportunity to 'hear the natural quiet' like never before. Our return to normality post Covid has led to a return to noise pollution, but we now have that experience of natural quiet to reflect on.

The idea of silent retreats are on the rise, urban quiet parks are being tested across the world. Stockholm has identified 65 calm spaces within its city and surroundings and 11 walking paths with a quiet trails icon.

The appeal of silence and tranquillity remains an opportunity for Scotland to capitalise on. Tourism businesses can benefit from this trend by promoting the peacefulness of their location or promoting tranquil spaces even within a busy environment.



Quiet Parks International identify the benefits of quiet including relaxation, improved focus, better sleep, reduced anxiety, increased creativity, inner peace.

They have awards for Wilderness Quiet Parks, Urban Quiet Parks and Quiet Trails. In 2021 they awarded Europe's' first Urban Park Quiet status to Hampstead Heath, London.

[Quiet Parks International](#)

The Hush City App was launched in 2017. It used Berlin as a pilot city and is now used internationally to empower people to identify and assess quiet areas in cities.

[Hush City Lab opensourcesoundscapes.org](#)

Finland introduces the world's first phone free tourist island where visitors are encouraged to stay off-line.

[Visit Kotka-Hamina \(visitkotkahamina.fi\)](#)

Benmore Botanic Garden in Argyll was the first garden in Scotland to join Silent Space in 2017

[Silent Space | Peaceful time in green places](#)

Looking ahead, a growing trend focuses on the potential of sleep tourism. People are travelling the world in search of unique sleep experiences and focusing on good quality sleep as part of the rest and recharge movement. Where better to focus on sleep than in Scotland – away from noise pollution and a quieter pace of life?

We now see more and more brands bringing in sleep technology as part of their product development; weighted blankets, pillow mists, podcast recommendations, white noise experiences, sleep concierges are now more commonplace in the 2020s as people place an emphasis on good quality sleep.



2.2 Connection to nature

Back in 2019 we looked at **Restorative Recreation** and explored the potential to connect Scotland's urban and rural green spaces to the growing interest in physical and health improvements associated with time spent in green spaces. The Japanese concept of 'Shinrin Yoku' or forest bathing has been linked to reduced rates of cardiovascular illness and type two diabetes.

Close behind the interest in green spaces, there is also a growing body of evidence around the benefits of people being near water. We explored the benefits in our 2021 paper which focused on the health benefits of blue space. And a growing interest has emerged in cold water therapy and the health benefits of cold-water immersion.

Research is now moving towards looking at specific features within green and blue spaces which can have an impact, such as seeing or hearing birds.

Scotland's landscapes, scenery, green and blue spaces continue to offer opportunities to appeal to a growing interest in the benefits of time in nature. But a connection to nature is not found solely in a connection to the wilderness or to the great outdoors. More and more businesses are seeking ways to align outdoor experiences with their business. Cold water plunges, hot tubs, fire pits are all ways to offer outdoor experiences.

47% of people wanted to connect with nature and the outdoors this was a top reason for UK visitors who took a trip in Scotland in 2022 .

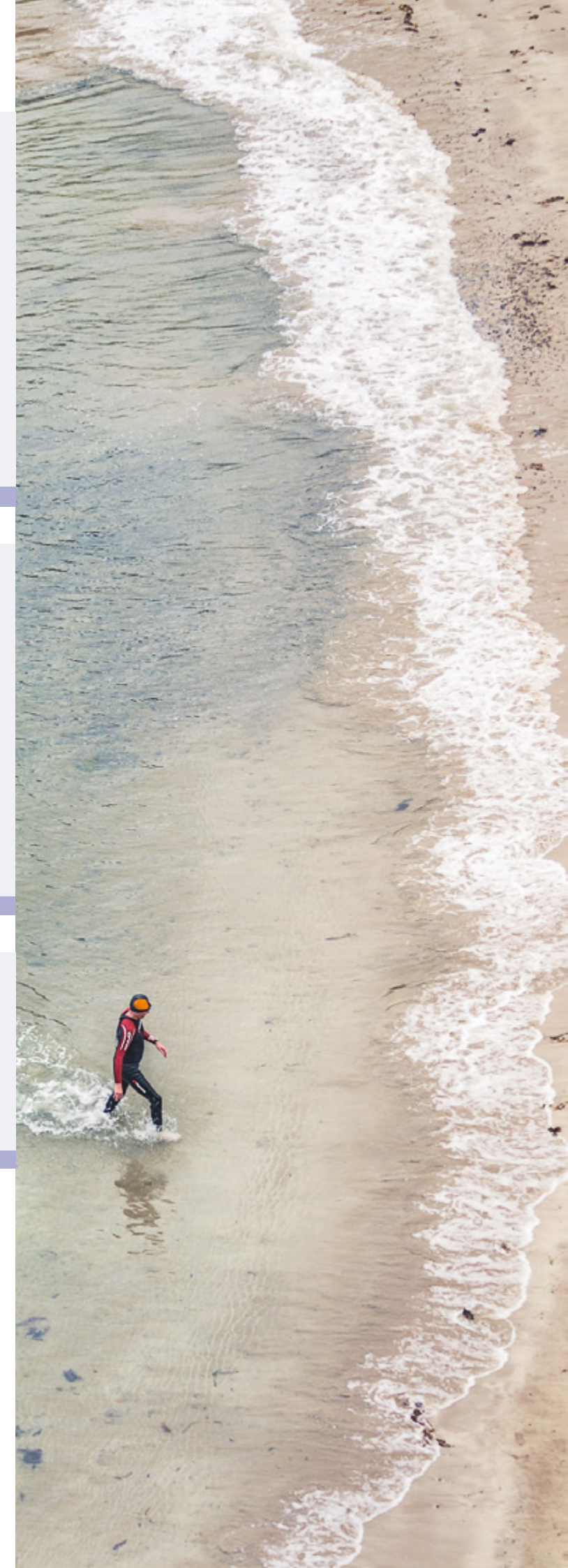
(sample from VisitScotland database)

Source: Scotland Visitor Experience 2022, Online research with VisitScotland UK and Ireland customers
[Scotland's Visitor Experience - Survey Research | VisitScotland.org](#)

80% of UK Adults felt being near water had a general calming effect

Source: YouGov plc UK Consumer Omnibus for VisitScotland, May 2021 Total sample size was 2103 adults. Fieldwork was undertaken between 19 and 20 May 2021. The survey was conducted online. The figures have been weighted and are representative of all UK adults (aged 18+)

In summer 2023, [IHG Hotels and Resorts brand voco hotels](#) launched a 'Find Your Flock' package with a focus on the benefits of birdwatching.



2.3 All year-round wellness potential

In 2016 we talked about a boom in the trend of Hygge; a Danish word with no direct English translation but one which could be described as a cosiness and comfort that engages a feeling of contentment or well-being. In our 2018 paper we coined **Scotland's answer to Hygge: Còsagach**, a word of Scottish origin which is dedicated to that feeling of being snug, sheltered or cosy. A feeling of warmth and cosiness also aligns well with Scotland's reputation for being welcoming and friendly.

Scotland is a country where Còsagach can be achieved in all seasons. While Scotland has a vast array of outdoor activities and visitor attractions, it also has plenty of breathtaking views to enjoy from the comfort of accommodation or a local pub or restaurant all year round.

But winter is where it really comes into its own. In winter when the storms rage and the waves crash against the rocks, there is nothing more satisfying than being curled up in front of the fire listening to the weather outside. Promotion of wellbeing and the benefits of taking a holiday or short break in Scotland can therefore incorporate the theme of wellness throughout the year, taking advantage of our changing seasons and the benefits that come with these.



2.4 Spiritual connection

In 2019, we considered Spiritual Inspiration as an opportunity for Scotland. At the time, seeking a spiritual meaning to travel was on the rise. Traditionally spiritual travel focused on travel for religious or spiritual purposes but with a growing interest in spirituality, mindfulness and meditation, travellers may be interested in a spiritual connection as part of their means to escape and recharge. Some pilgrimage trails have evolved to become long distance routes for those seeking to overcome an endurance challenge rather than pursuing enlightenment – Camino to Santiago de Compostela being an example. But Spiritualism can take many forms and seeking enlightenment from nature or marvelling at religious architecture can be enjoyed by a broader range of visitors.

Offering spiritual workshops or highlighting opportunities for people to connect more with themselves and people around them can have appeal to visitors. Champing is now an opportunity to camp overnight in historic churches, developed by the Churches Conservation Trust in England.

In 2022, there were 1.9 million visits to places of worship/spiritual attractions in Scotland, the fifth largest reported attraction category.

Source: Moffat Centre
Visitor Attraction Barometer 2022

Wellness: Opportunities and Ideas

Wellness is a trend that isn't going away any time soon. What makes the concept of wellness tourism interesting is that it has different connotations for different people. For some it will be a direct definition and maybe the sole purpose of trip (encompassing yoga retreats, spa breaks,). Others may take part in outdoor or creative activities to improve their wellbeing as part of a trip or just seek out moments of uplift or peace during their breaks.

But more and more we see health and wellness becoming an integral part of all travel as consumers seek to get away from stressful lives, to re-connect with nature and with family and friends, and possibly even take opportunities to disconnect from the digital world. As wellness tourism can be seen as the primary or secondary element of a trip, it offers the potential to be relevant to all consumers, of all ages and life stages as wellbeing can be important to all.

Tourism businesses can consider wellness as a holistic and central part of their brand and product, rather than just a wellness add on.

Soft wellness to a full detox: Create experiences that appeal to consumers desire for escapism and recharge. Find and share unique moments where you can uplift your customers.

Offer visitors flexibility to personalise breaks to include a broad range of wellness activities, either as primary elements of the visitor experience or secondary elements.

Incorporate soft wellness approaches with the addition of Tai Chi, yoga, meditation, nature walks, healthy cooking classes or holistic activities into the visitor experience. Or offer full wellness retreats or dedicated detox breaks which make it easy to take a break from social media habits and connect with like-minded people on a personal level.

Happiness travel: Highlight the emotional and physical benefits of a holiday or short break. Travel can alleviate stress, foster resilience, increase creativity, boost confidence and encourage empathy.

Leisure travel can offer a break from over stimulation and multi-tasking. Holidays can also offer opportunities for people to boost their Vitamin D levels by being more active and outdoors, especially since the growth of working from home.

Read more in our paper on The Emotional Benefits of Tourism

[Why People Choose Scotland - Research & Insights | VisitScotland.org](#)

Silence is tartan: finding quiet in a hectic world: Share messages around tranquillity and peacefulness of locations.

Promote special areas of quiet within your business (this can be a quiet indoor space or outdoor location) or within your local area.

Consider quiet trails or mindfulness moments. Remember silence does not need to mean the absence of sound – but the ability to hear individual sounds that's possible in a natural environment – rain drops, whistling wind, Scotland's' seasons in one day offer the ultimate soundscape experience.

Close by escapism: It's not just remote places in Scotland that can offer silence and escapism. We can promote quiet areas, tranquillity and peace in every corner of Scotland, in our urban areas as well as our rural and coastal destinations.

Encourage visitors to slow down and savour every moment of what there is to see, do and learn.

A good night's sleep: Appeal to consumer desire for a good night's sleep and how to use sounds and space for the perfect rest and relaxation.

Restorative recreation: Promote opportunities to engage with Scotland's scenery and landscape, as diverse as green spaces, nature walks, forest bathing, tranquil locations, cold water or outdoor activities.

Talk about the restorative impacts of being in green spaces and being near water.

Read our paper on the Health Benefits of Being Near Water

[Coastal Tourism - Research & statistics | VisitScotland.org](#)

Sensory tourism: Connected closely to Silence is Tartan, draw attention to the sensory aspects of outdoor activities and experiences in the area such as the spectacular views, smell of the forest, warmth of the sun, sound of the waves.

Healthy choices: Include local, sustainable food whenever possible as key parts of wellbeing strategies. Tell the local provenance and the story of local suppliers behind the food.

Còsagach: Highlight opportunities for cosiness and comfort as well as warmth and snugness, which can enhance a sense of wellbeing and fits perfectly with our Autumn and Winter seasons. The summer months aren't the only time to experience Scotland's wellness potential.

Dark skies: Take advantage of Scotland's dark skies. Promote night tours, taking consumers on stargazing journeys to dark sky locations, track the Northern Lights. This could be beneficial during quieter times of the year when the nights are longer. Some consumers may be seeking betterment, empowerment and enlightenment on their trips.

Spiritual inspiration: Consider ways to incorporate spirituality into the visitor experience.

3.

THE CONSCIOUS TRAVELLER

Another key theme throughout our trends discussions has focused on the rise of the conscious traveller. There has been a growing concern over climate change and there is more awareness around what can be done to protect our environment. Consumers more than ever before are being switched off by excessive consumption, are living more responsibly and embracing localism.

More important than ever, it is our chance to make sustainable choices as easy as possible for the visitor and actively draw the attention to ways visitors can adopt sustainable practices when here and how a collective effort can make a difference.



3.1 Green is important to me

In 2017, we explored the rise in consumer interest in green living, **Green is important to me**. Customers were becoming more interested in the origins and practices of the brands and products they used, as well as a growing sense of the broader business social responsibility.

But we emphasized the need for brands and businesses to be authentic and transparent in their messages to consumers.

We highlighted that tourism businesses should showcase their green credentials (be it through waste disposal, stocking of local goods and produce) to differentiate themselves.

Fast forward to this new decade, sustainability is now so engrained in the consumer psyche that sustainable practices cannot not be viewed as a competitive edge or a unique selling point for a business. Consumers expect businesses to be putting in place sustainable practices as an operational requirement, not as a marketing tactic or a point of differentiation. Consumers are looking to organisations to take ownership of their carbon footprint.

But we know that people may still be reluctant to think about sustainability whilst on their holidays and short breaks. In 2023, [Phocuswright](#) highlighted a sustainability gap amongst consumers with a difference in claimed belief versus actual behaviour.

We also need to be aware that there are other barriers to sustainable behaviour, including affordability and distrust which may impact future actions by consumers. According to [IBM](#), consumer scepticism is skyrocketing, especially around sustainability. It is therefore important to show the impact of sustainable efforts in practice and afford simply relying on marketing messages.

Read our industry guidance to help tourism businesses become more sustainable and how to promote this to our visitors.

[Responsible Tourism - Industry Guidance | VisitScotland.org](#)

73% of Scottish residents agree that climate change is an immediate and urgent problem.

45% had become more concerned about tackling climate change since the COVID-19 pandemic, rising to 71% for 18 to 24 year olds.

Source: Scotland Residents View on Tourism, 2021

73% of Scottish residents agree that they try to have a positive impact on the environment through their everyday actions.

But 49% agree that 'when I'm on holiday I don't want to think about sustainability, I want to relax and enjoy myself'

Source: Scotland Residents View on Tourism, 2021

Behavioural Change: Opportunities (amongst Scottish residents)

69%

are willing to go off the beaten track in Scotland

68%

would be willing to travel more in the off-peak season in Scotland

76%

would choose independent local shops, cafés, restaurants in Scotland

53%

would be willing to pay more for locally sourced and produced food and drink

59%

would consider car free days when on holiday in Scotland

59%

would consider public transport one in destination

60%

would search out places to eat that source local food and drink

22%

would choose vegan or vegetarian option more often when eating out on holiday

Source Scotland Residents View on Tourism, 2021

The top five areas where Scotland residents believe that tourism businesses could do more:

sourcing local products
(72%)

providing information to tourists on a local natural and cultural attractions
(71%)

employing staff local to the area
(70%)

committing to reduce carbon energy consumption
(62%)

committing to reduce carbon emissions
(61%)

Source: Scotland Residents' View on Tourism, 2021



3.2 Loco-motional travel and the eco-drive

In 2019 and 2020, we highlighted that individuals were increasingly aware of the personal impact of their own behaviours on the environment. Travellers were becoming more aware of the impact of their own travel and people were increasingly looking to looking for smart ways to reduce their carbon footprint. **We talked about Loco-motional travel and the eco-drive, a rise in popularity of train travel as an alternative to short haul flights.** The activity of Tågskryt (a Swedish term translated loosely to “train brag”) involves people encouraging others to travel by train by posting their trips online.

A flight-free movement continues to gather pace inspired by the Swedish climate activist Greta Thunberg’s eco-conscious travelling. There are new rail routes and old ones being resurrected across Europe, including an expansion of Europe’s night train network.

And there has been a growth in social media communities focused on reducing carbon footprints through train travel (e.g. Facebook page TrainVacation). We see the emergence of a new term, ‘flexi-air-ians’, to describe people looking to intersperse air travel with carbon lighter train journeys.

Train journeys appeal to a growing appetite for slow travel and meaningful experiences where the journey is part of the experience in a fast-paced world.

41% of Scottish residents agree they will fly less for future holidays and breaks

Source: Scotland Residents View on Tourism, 2021



The Conscious Travel: Opportunities and ideas

As responsible tourism grows, it will not just be the younger generations that are aware of the environmental cost of travel. More and more consumers may wish to seek opportunities to offset the carbon footprint of their travel.

Transparent history and credentials:

A commitment to sustainability and the climate crisis is to be expected, so it is important for businesses to take a proactive approach. Ensure visitors know the active changes and commitments you are making towards sustainability.

Share evidence of your responsible business practices and make your green credentials and brand history accessible and clear. Validate your progress and demonstrate sustainable impact. Be factual and back up your sustainable claims with tangible proof. Show to your visitors how individuals' choices can make a difference.

Discover information and resources to help make your business more sustainable and responsible.

[Advice Factsheets – Sustainable Tourism | VisitScotland.org](#)

Sustainable opportunities: Help to engage our visitors and share content that will bring responsible choices to the forefront. Use the following themes in your messaging:

- Go off the beaten track but leave no trace.
- Beat the crowds and travel out of season.
- Use low carbon transport options.
- Stay longer and really explore our landscapes, nature and culture.
- Shop local, eat local and meet the locals.
- Respect, protect and enjoy your Scottish experience

Net Zero by 2045: Ensure you are familiar with Scotland's plans to be Net Zero by 2045 and are highlighting what actions your business is taking to support this.

[Find out how to create a climate action plan.](#)

Train Travel: Train travel within Scotland may have added appeal for overseas visitors looking to reduce their air miles by exploring the destination by rail.



4. DISTINCTIVE SCOTLAND

Across our past Trends papers, we have reflected on a number of different trends which continue to offer opportunities to portray a unique and distinctive visitor experience in Scotland.

4.1 Cultural Noir – celebrating our dark side

In 2017 we covered how visitors are attracted by our history William Wallace's battles at Stirling and Falkirk, Robert the Bruce and the Battle of Bannockburn or even Culloden, Scotland's tourism product is in part based on dark events. With shows like *Outlander*, *Downton Abbey*, *Game of Thrones* more and more people are becoming interested in the past. And this attraction to the past has led to a growing interest in dark tourism.

Traditionally referred to as travel to specific places associated with death and tragedy, dark tourism now has broader appeal and is not confined to one type of traveller. It is now more broadly associated with places associated with distress or sadness, ranging from an interest in witchcraft, stories of crime and punishment, prisons, the paranormal, battlefields and graveyards.

We also discussed the rise in Scottish film and TV. With the popularity of shows such as *Outlander*, areas such as Glencoe have seen extra visitors. The release of *Trainspotting 2* and films like *Filth* have associated the Scottish persona with pessimism, dour and dark humour. Although this may be seen by some as a negative, it is clearly a positive in terms of storytelling. Works by authors such as Irvine Welsh, Ian Rankin and Iain Banks highlight Scottish personalities and personas through the medium of literature which can be opportunity for businesses to capitalize on. Scottish humour may in part be based on a dark past and sense of pessimism which may be unique to our destination.

The darker and more gruesome parts of history are just one part of our storytelling we can utilise. And our dark Scottish humour is another distinctive part of Scotland to draw upon.



30% of UK adults would be interested in hearing about ghost tales as story theme when exploring Scotland as a destination

Source: YouGov plc UK Consumer Omnibus for VisitScotland, May 2021 Total sample size was 2103 adults. Fieldwork was undertaken between 19 and 20 May 2021. The survey was conducted online. The figures have been weighted and are representative of all UK adults (aged 18+).

In 2022, there were 2.8 million visits to Scottish attractions connected to graveyards, burial grounds, prisons/courthouses and battlefield heritage sites.

Source: Visitor Attraction Monitor Moffat Centre

4.2 Reading tourism's potential

Scotland has a rich heritage of literary works, with many highlighting the landscape, culture and history, dating back to Sir Walter Scott's 1810 publication 'Lady of the Lake'. In 2017, we highlighted the opportunity for 'novolesiure' (set jetting for readers). We highlighted the existing associations with film tourism and the opportunities to showcase our rich heritage of producing world-renowned works of fiction.

More recently Scotland's themed year, Year of Stories 2022, shone a light on the wealth of stories inspired by, written or created in Scotland. From icons of literature to local tales, the year encouraged visitors to explore the places connected to all forms of stories, past and present.

Styles of writing associated with Scotland

45%

Historical actions

37%

Poetry

36%

Crime or detective novels

27%

Fables

13%

Romance novels

Source: YouGov plc UK Consumer Omnibus for VisitScotland, May 2021 Total sample size was 2103 adults. Fieldwork was undertaken between 19 and 20 May 2021. The survey was conducted online. The figures have been weighted and are representative of all UK adults (aged 18+).

49% of UK adults believe Scotland is a nation known for its film and TV locations

62% of adults believe Scotland is a nation known for its well-known poets, authors and writers

Source: YouGov plc. Total sample size was 2,343 adults. Fieldwork was undertaken between 13 – 14 July 2022. The survey was carried out online. The figures have been weighted and are representative of all UK adults (aged 18+).

4.3 Capital investment - for anyone to realise their tourism potential

When visiting somewhere new, often there is an interest in learning about the traditions or local industries. In 2017, we considered how consumer curiosity has aided the increase in non-traditional tourism businesses entering the visitor attraction market. We highlighted that industrial businesses have capitalized on their operational capacity to increase revenue opportunities through guided tours and open days. Tours of whisky distilleries and breweries and even power stations for example have become popular over the years.

The Scottish tourism industry can continue to consider opportunities to partner and work with businesses that have traditionally had no connection with the tourism or hospitality industries but have assets that may attract visitor interest or showcase the destination and its people. Doors Open Days is an initiative which provides opportunities across the country for visitors to explore a variety of buildings for free.

And there has been growing interest from tourism brands to forge partnerships with exclusive art, fashion and music brands to create memorable visitor experiences and to complement the tourism product.



4.4 Mod-stalgia

In 2014, we discussed nostalgia as a driver for people to travel to previously visited destinations to reminisce and relive their experiences. Mod-stalgia develops this trend, where people now visit nostalgic destinations with modern day comforts. Contemporary attractions and new features enhance their experience whilst they get to visit old memories. We followed this trend into 2015, looking at the popularity of 'glamping', where travellers can camp, glamorously.

In 2018, we also reflected on retro-tainment, providing nostalgic experiences such as using 1980s arcade games and computer consoles. In recent years there has also been a growing interest in retro tastes – old time classic foods or childhood favourites with a new modern twist such as banana splits and pick 'n' mix sweets.

Nostalgia can also link into the earlier growing interest in escapism. Tourism businesses may be able to use themes from childhood to allow people to escape.

Nostalgia was a key trigger for parent considering a UK holiday destination, in particular

- want to revisit childhood places
- pass on the good memories to their family
- share values and experiences with the younger generation

Source: VisitScotland research, Family Holidays

[Visitors to Scotland - Demographic Research | VisitScotland.org](#)

Distinctive Scotland: Opportunities and Ideas

Tours of facilities: Explore opportunities to work with local businesses that may not traditionally be connected to tourism. Are there unique ways to tour local facilities or combine visitor experiences with non-tourism businesses?

Storytelling: Utilise our dark history and dark humour as unique ways to connect visitors to Scotland's places, history and people.

Consider the dark history of local historic areas such as castles, towns or villages and landmarks.

Literary connections: Celebrate Scotland's world-renowned works of fiction and explore how you could incorporate reading potential into your business.

Connect or promote Scotland's book festivals to enhance the visitor experience in your area.

Bringing the past alive: Consider ways you can trigger nostalgic childhood memories within the visitor experience, whether this is via music, food, entertainment or photographs.



5.

The Changing Traveller

In recent Trends papers, we have explored the trends impacting who people are travelling with and the growing trend for blurring holiday and business.

5.1 Solo travel

Solivagant Spirits (Soul-I-Vay-Gant) derived from the Latin word for a lone wanderer, was a term used in our 2020 paper to reflect the growth of single households and the **rise of the global nomad**.

We highlighted a rise in single households due to declining or rejecting attitudes to marriage and increased numbers of divorced households. Represented by both younger and older cohorts, some individuals embrace single life in positive affirmation of their individuality.

We also highlighted the silver nomad: a growing number of mature aged travellers with a keen sense of adventure. They may travel around a country staying in a campervan, caravan, or tent for a reasonably long time. This is a commonly used term in Australia and New Zealand but is seen throughout the world. Closely linked to the rise in single households (but not always fully connected) is the growing trend for solo travel. Whilst some solo travellers may live alone,

other people may find opportunities for solo travel, away from their co-habiting couple or family when family and friends don't align with their plans or cannot afford time away.

Recognising the impact of single travellers is important for businesses. They may travel with pets as companions, travel in informal groups that develop and change as the journey continues. There is a need for flexibility, provision of their own space and communal areas to meet and mingle with others. Solo travellers may wish to re-connect with themselves but also connect with others who have shared interests.

Almost a quarter (23%) of domestic visitors to Scotland by British residents were solo travellers

Source: Great Britain Tourist Survey 2022

The number of single-person households without children in the EU increased by 30.7% from 2009 to 2022

Source: European Union Labour Force Survey Household composition statistics - Statistics Explained (europa.eu)



5.2 Bleisure – working from holiday

In 2019, we mentioned that flexible working patterns were becoming more prevalent and that the line between business and pleasure was becoming increasingly blurred. Little did we know what was around the corner!

Roll forward to the COVID-19 pandemic, the start of the new decade saw a fundamental shift in working patterns with a growth of hybrid working and working from home, which has continued post-pandemic. Remote working has offered opportunities for blended travel, working in locations away from home. People are also increasingly looking to escape their home office and seek a change of scenery from their normal working set up.

Hybrid working has changed how we work and has created the opportunity for blended work and leisure escapes from home. This could also link in with trend of solo travel as some sole travellers may find the structure of a working day comforting whilst away from home. With nine to five taken care of, they can embark on solo adventures out with their working hours. And workcations may offer an individual time to get away and to experience new activities, not readily available at home without committing a large proportion of annual leave.

Accommodation providers are now designing their spaces to facilitate longer term stays or to facilitate connection to work as well as leisure. This can have implications for IT requirements, flexible room set up to aide working, flexibility in scheduling around mealtimes, cleaning and activities offered.

In 2020 we also highlighted creative isolation; workcations where visitors may immerse themselves in a specific project which requires their full attention but in new surroundings, away from home. An intense period of work may seek inspiration from a stimulating environment or landscape and may be bookended with a relaxing visitor experience such as a spa treatment or visit to an art gallery.

Winter workers can also be attracted to experience the unique Scottish feeling of ‘coorie, cosying up after a working day, sampling some Scottish hospitality or weather watching from their chosen accommodation.

Workcations offer destinations an opportunity to attract visitors all year round.



5.3 Modern clans

In 2014 we asked what was the family unit? We highlighted that the family unit should no longer be considered as 2.4 children households. Multi-generational households were rising as well as multi generational holidays.

We highlighted the opportunities of multi generational parties with grandparents, parents, uncles, aunts and children sharing holidays and short breaks together. This was as a consequence of families being geographically spread and people living longer. We discussed how empty nesters were funding holidays with their elder children (in their 20s and 30s). The current cost of living continues to see older generations helping younger generations via their holiday taking.

In 2019, we noted how family holidays are changing in line with evolving family units. People increasingly value spending time with loved ones to create shared memories. Today’s travellers don’t expect travel with their babies to be problematic. Destinations that provide experiences that were previously seen as exclusively for adults but now include infants (baby yoga retreats) or businesses that accommodate babies (gourmet baby menus in restaurants) are sought out through the parents’ social networks.

The days of the typical (and traditional) ‘nuclear’ family - comprising mum, Dad and two children are gone and modern families today come in many shapes and sizes. Market intelligence agency, Mintel, encourages us to consider this when targeting the family holiday market, ensuring that we embrace the broadest ‘family holiday’ spectrum.

Loan Wolves: For single or solo parents, or for one partner taking the children away while the other remains at home, mums are more likely than dads to travel alone with the children.

Boomerang Generation: With younger adults staying longer in the family home, or returning home after university or college, new patterns of family holidays reveal 16-24 year olds often travelling with their parents.

Sandwich Generation: Reflecting population growth at the end of the age spectrum, responsibility for both children and ageing parents is leading to a greater demand for multi-generation family holidays.

Grandparents: The increasing role of grandparents in the family dynamic is leading to a rise in grandparents taking their grandchildren away on their own, without the parents.

PRANKs and PUNKs: Professional Aunts /Uncles with no kids often spend leisure time with the siblings children and the can include taking them away on themed holiday and short breaks.

Source: Mintel, The UK Family Market www.mintel.com



The Changing Traveller: Opportunities and Ideas

Connection with others: Solo travellers may be keen to connect with others on their trip who are looking for the same experiences. Consider communal areas for visitors to meet others or signpost group tours or experiences which solo travellers can join.

Great communication: Ensure solo travellers receive all the information they require to make them feel safe and secure whilst on their trip. Reach out beforehand if visitors have expressed they are taking a solo trip to see if there is anything they require.

Workcationing: Those working away from home may be after creative isolation, so quiet working spaces with an opportunity to take relaxing breaks could be attractive.

Co-working spaces could be a great opportunity as some visitors might want a change of scenery or to meet co-workers whilst travelling.

6.

Summary

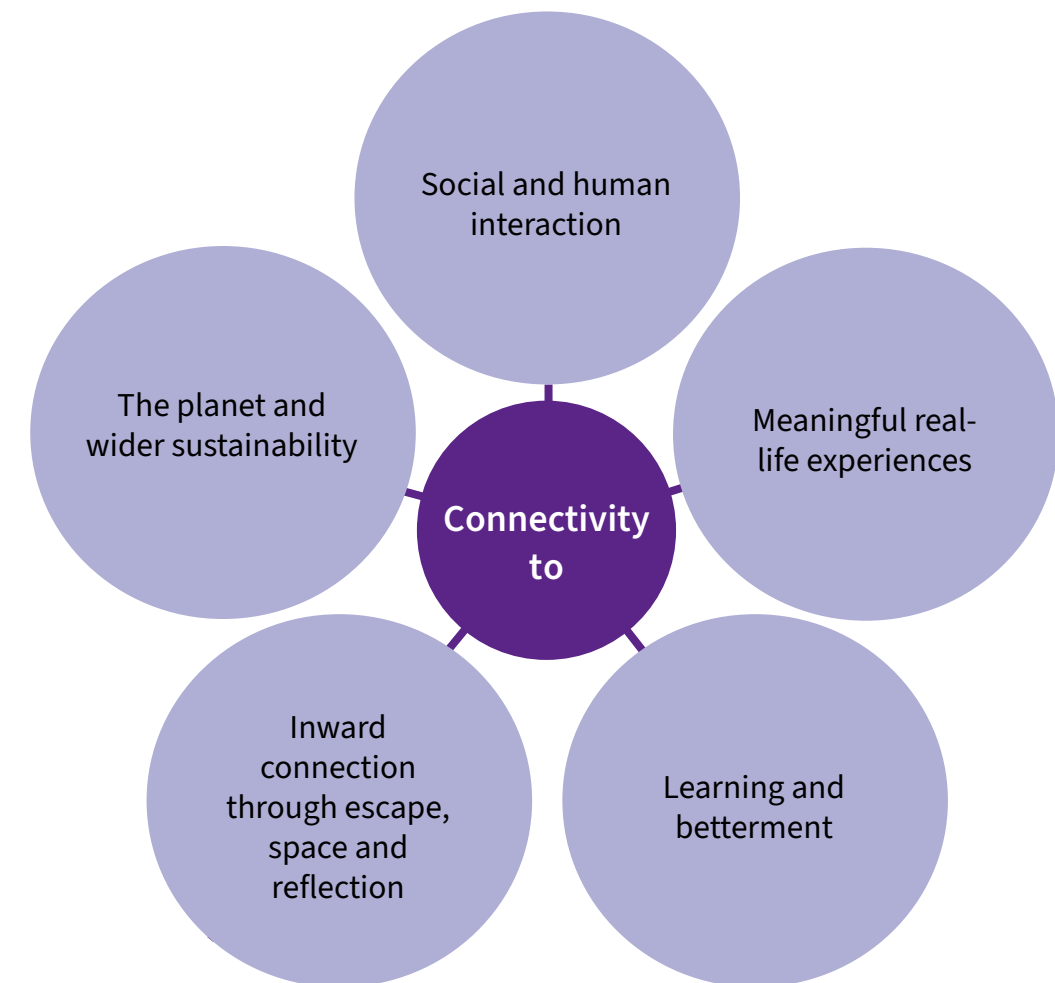
Ten years of trend discussions. The world is constantly changing, and it may feel like we have moved from one crisis and period of uncertainty to the next. Predicting the future remains a challenge but remaining informed, creative and flexible will mitigate the negative and amplify the positives of change and uncertainty.

Underpinning many of the trends we have discussed is a common thread important for the Scottish tourism industry.



Five Key Take Outs

1. Align with transformational tourism; a connection to community, meaningful travel and learning
2. Consider wellness as a central and holistic approach to brand and product development not just an add on
3. Promote the ways holidays and short breaks can boost mood, improve physical and mental health and provide engaging, meaningful in person experiences
4. Showcase your sustainable business practices and track progress and how actions can make a difference. Actively encourage visitors to make individual sustainable choices and promote our collective action
5. Spaces, products and services need to cater for all types of visitors, of all generations, family types, group set up and provide flexibility to cater for all needs





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