# DOMESTIC SENTIMENT TRACKER SCOTLAND SUMMARY

Report based on domestic tourism tracker fieldwork from May to July 2026


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# 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 97th 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 94-96 (May to July) with references to previous waves where applicable.

# KEY FINDINGS

# Key findings (1)

**The cost-of-living crisis and general leisure behaviour**

1. The cost-of-living crisis impact has worsened across May to July 2025 despite a small bounce back in June, with 32% saying they are better off or not affected in July 2026, compared to 37% in July 2025. 68% are either being cautious or have been hit hard. Perceptions that the worst is still to come have also increased compared to July 2025 (49%, compared to 45% in 2025 and 35% in July 2024), although have improved a little from their lowest point in April when this was at 62%.
2. The cost-of-living crisis impact is hitting hard across all life stages, although younger independents and families are more likely to feel they are 'better off' (albeit only 9% and 11% respectively) and older independents more likely to feel hit hard (29%)
3. Over half say the cost-of-living crisis will impact on future trips. 'Rising cost of living' continues to be the leading barrier to taking a domestic trip (31%) with personal finances and cost of holidays/leisure rising to be the joint second biggest barrier at 28%.
4. 'Accommodation' is the main individual cost barrier to travelling, and has increased a little since last July (from 41% to 43%). Cost of eating out also remains a barrier at 35% and fuel is a barrier for 28% (down from the high of 35% in May). As a result of these barriers, significantly more are looking to spend less on eating out, choose cheaper accommodation and do fewer activities while on domestic holidays or short breaks. 30% also plan to take fewer domestic trips.
5. A third had not taken a holiday in the past 12 months and financial reasons were cited by 41% of those who hadn't travelled (personal reasons making up 37%).
6. Trips taken and intention to travel are relatively stable compared to July 2025, with 35% having taken a trip so far this year and 65% planning one between July and December (compared to 68% last year). There are differences by life stage, with younger independents less likely both to have taken a trip and to be planning one.
7. The proportion of families planning a trip in the Autumn has fallen compared to last year – with the proportion of all other life stages increasing a little.

# Key findings (2)

**Scotland overnight trips**

1. Scotland is the 4th most preferred UK region for domestic overnight trip between September to December this year, making up 11% of planned trips (down from 14% in 2025). Scotland sits behind South West England, London and North West England as a destination, with higher intention among residents (41%)
2. Notably however, and consistent with July 2025, actual bookings for Scotland Autumn trips are below other destinations, around two thirds of potential visitors having decided to go there but yet to book, and half of these unsure exactly where they will go. The low bookings are particularly high amongst non-Scotland residents (who make up a majority of Scotland intenders) as well as families and those hit hard by the financial crisis, suggesting they are particularly in need of support.
3. Aligning with this, commitment to visit Scotland is also low compared to other areas, although still strong with 55% very and 38% fairly committed to visiting.
4. Following a drop in the proportion of retirement age intenders last year, this has rebounded in 2026, with a fall instead in younger independents – in line with the fall in intended trips for this group.
5. Planned use of trains for travel has increased, from 20% to 26%, and is highest among those planning to visit from London.
6. Nature focus is still a priority for 63% of visitors, with heritage also planned for 63% and an increase in interest in indulgence and retail (54%), driven by older independents.
7. Consistent with previous reporting, the Highlands and Edinburgh area are the two most preferred Scotland destinations this Autumn, followed by the Glasgow area, Scottish Isles and East coast. Also in line with previous research, non-Scotland residents are more likely than Scotland residents to plan on visiting the Edinburgh area.
8. ‘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, and particularly for Scottish residents and those of retirement age
9. ‘Hotel/motel/inn’ is the number one accommodation type for Scotland intended trips in Autumn, although this has fallen compared to previous years with an increase in ‘rented house or similar’

# THE COST-OF-LIVING CRISIS AND TRAVEL INTENTIONS

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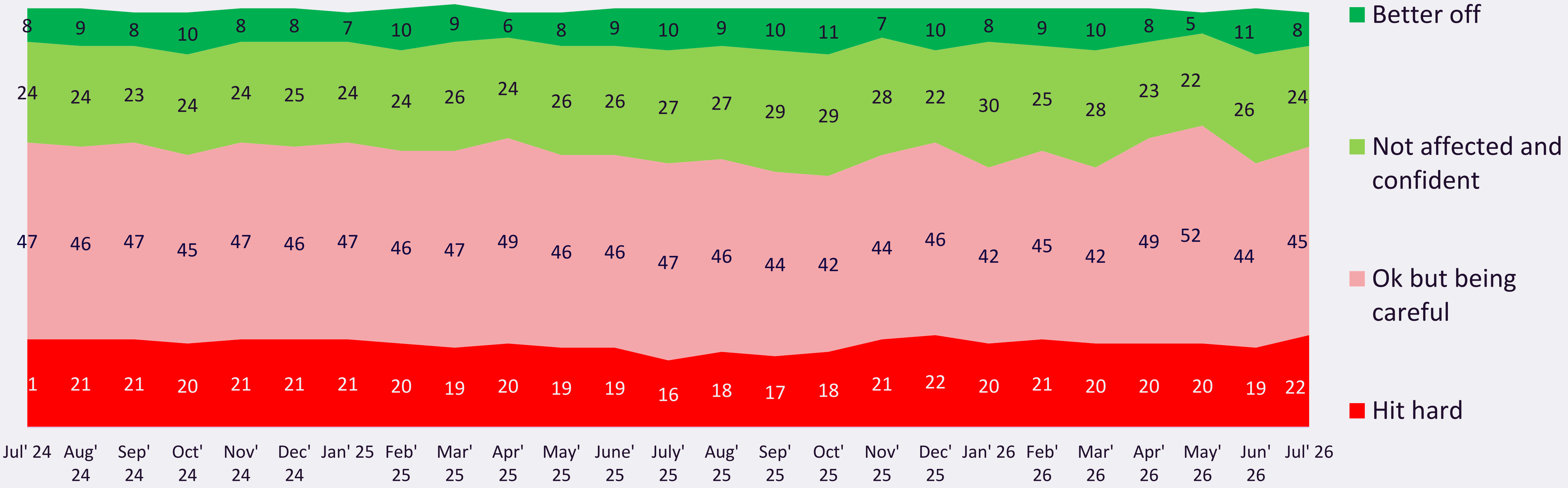
# Key finding 1: The cost-of-living crisis and travel

**The cost-of-living crisis is hitting hard and is impacting trip taking behaviour – particularly for spend on accommodation and eating out**

The *personal impact* of the cost-of-living crisis is hitting harder than at this point last year, with 22% ‘hit hard’ and a further 45% being careful. Only a third consider themselves not affected or better off.

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




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

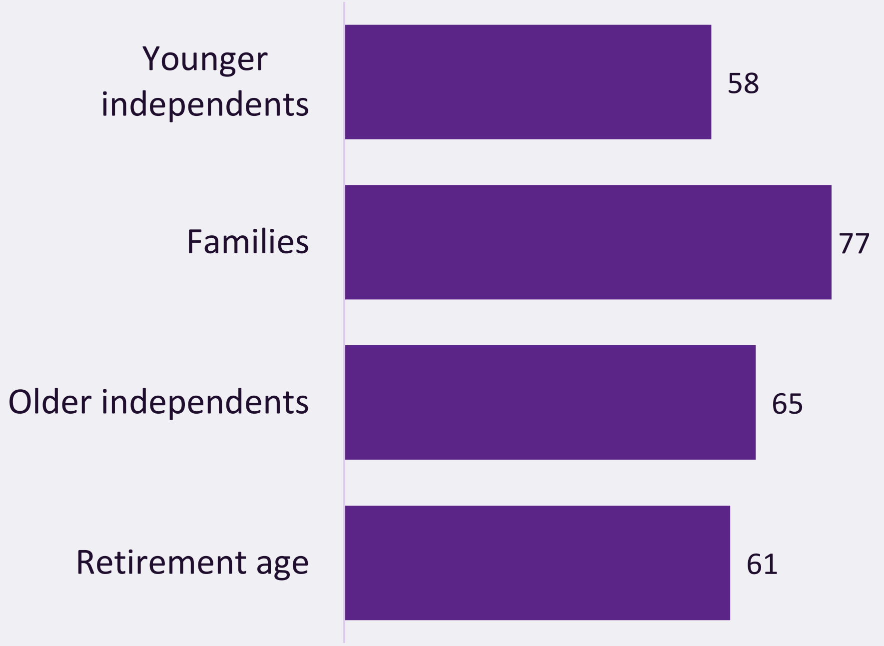
# Views on the personal impact differ by life stage, with older independents more cautious, while younger independents and families are more likely to say they are now better off. However, the majority fall into the cautious or hit hard category across all life stages.

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

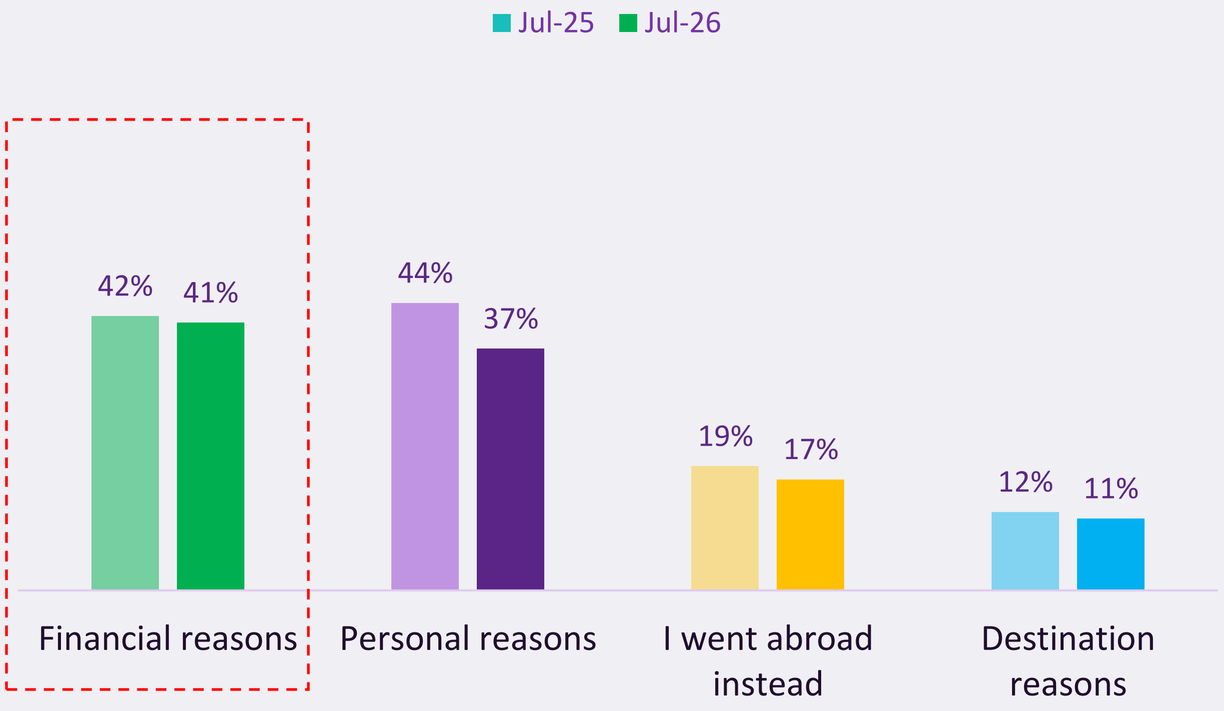

Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: Younger independents n=312; Families n=539; Older Independents n=446; Retirement age n=377

More people had taken a trip than had not in the past 12 months. Families are most likely to have travelled, while younger independents are least likely. The impact of the cost-of-living crisis on travel behaviour remains static, with 41% of those who haven't taken a trip saying this is due to financial reasons.

## % who had taken a domestic trip in the past 12 months



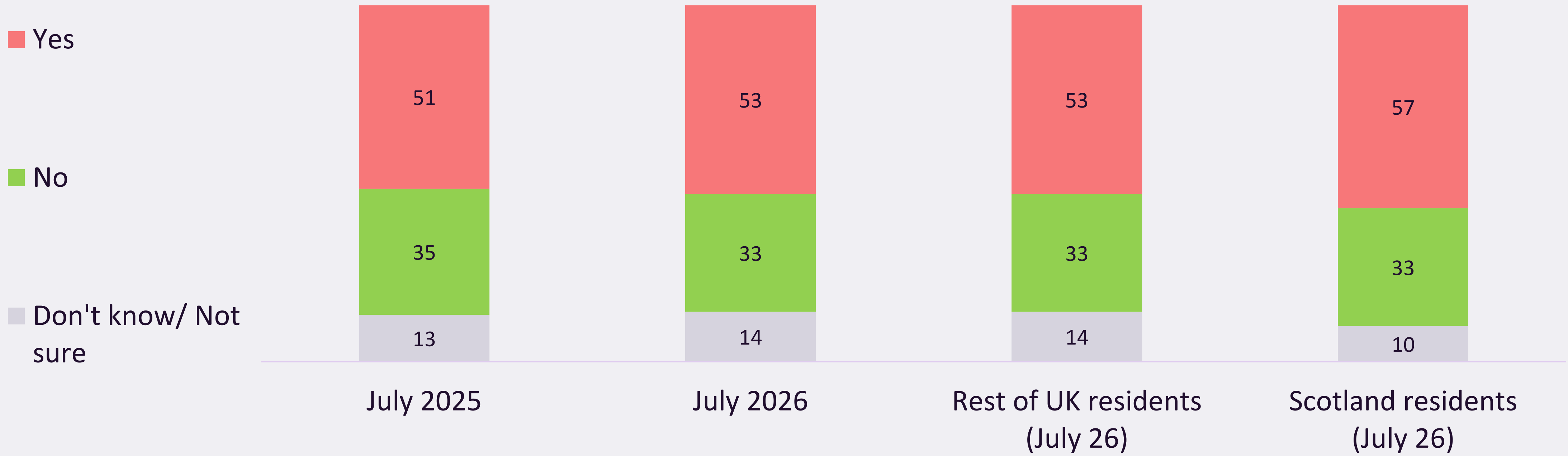

## Reasons for not taking a UK overnight trip in the last 12 months (%)




VB13A2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months? n=1,742 VB13b. Why have you not taken an overnight short break or holiday in the UK in the last 12 months? Base: Jul n=604

# The cost-of-living is also likely to impact overnight and day trips for the rest of the year, with 53% saying it will have an impact, rising to 57% among Scotland residents - in line with 2025

## Whether ‘cost-of-living’ will impact future UK overnight trips and day trips (%)






VB7iii. Just to check, is the ‘cost-of-living crisis’ likely to influence your UK short breaks or holidays/day trips in the next six months?
Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.257

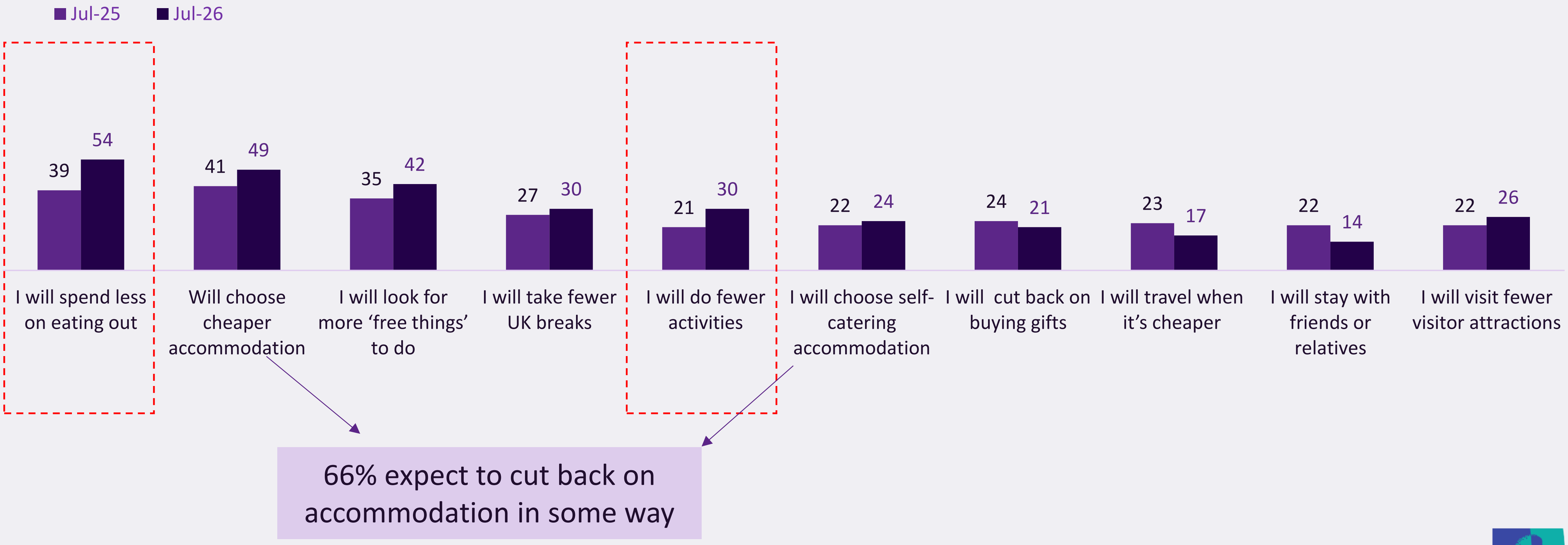
# Amongst life stages, those of a retirement age are least likely to have their future plans impacted by the cost-of-living crisis. As expected, those hit hardest are most likely to change their travel plans, but rising prices are affecting even those who rate themselves as better off.

## Whether 'cost-of-living' will impact future UK overnight trips and day trips (%)


VB7iii. Just to check, is the 'cost-of-living crisis' likely to influence your UK short breaks or holidays/day trips in the next six months?
Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.257

While the main way that people plan to cut their costs is by spending less on eating out, around two thirds are looking to reduce their accommodation costs in some way. Respondents are also more likely than last year to look at their activities, with more selecting that they will look for more free things to do or do fewer activities overall

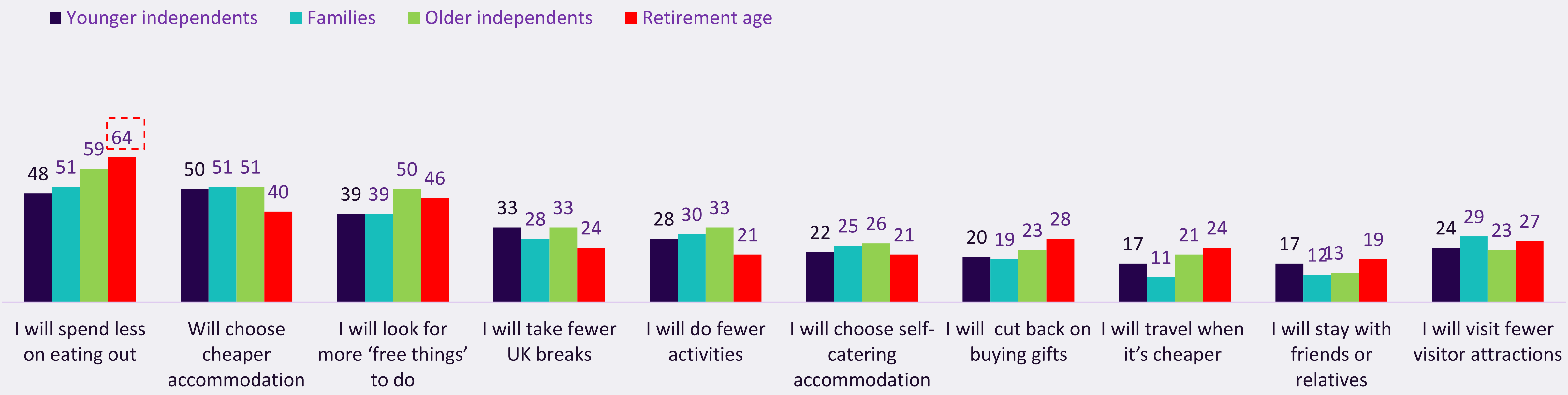
## 'Cost-of-living' impact on UK holidays and short breaks (% top 10 expecting to cut back)




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=1,760

# Likelihood to cut back on accommodation is similar for all life stages bar retirement age, who are less likely to cut back on this. Those of retirement age are more likely to cut back on eating out and buying gifts

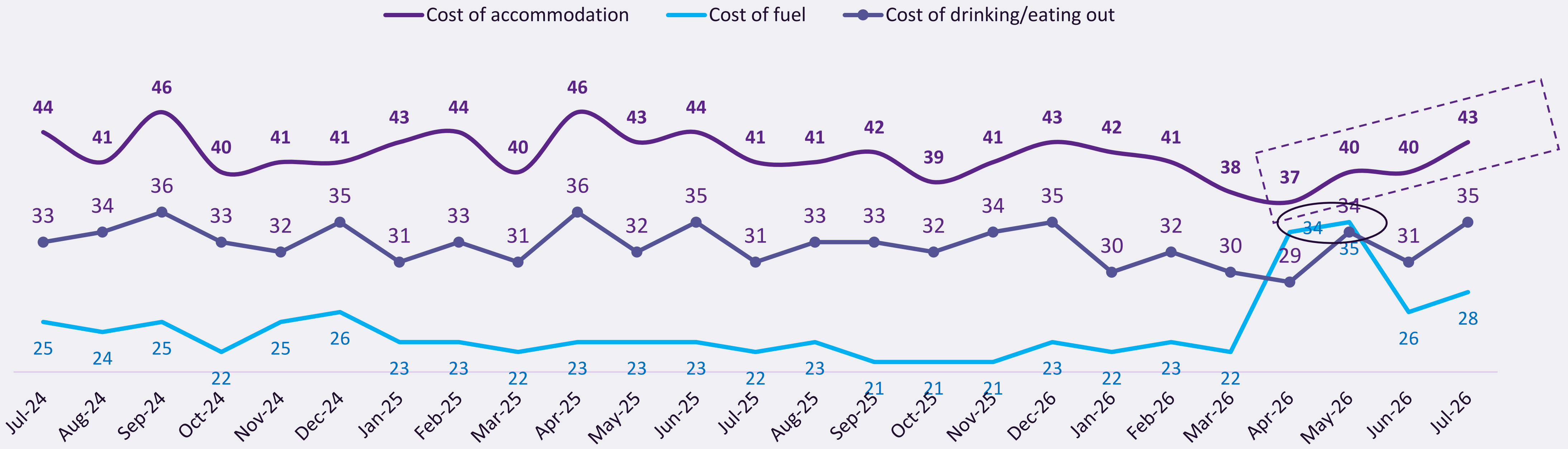
## ‘Cost-of-living’ impact on UK holidays and short breaks (% top 10 expecting to cut back)




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=1,760

# Following a peak in concern over the cost of fuel in April and May, this has fallen but is still higher than usual. Despite some decreasing concerns around accommodation and drinking / eating out at the start of the year, both are starting to increase again.

## Selected cost barriers (%)



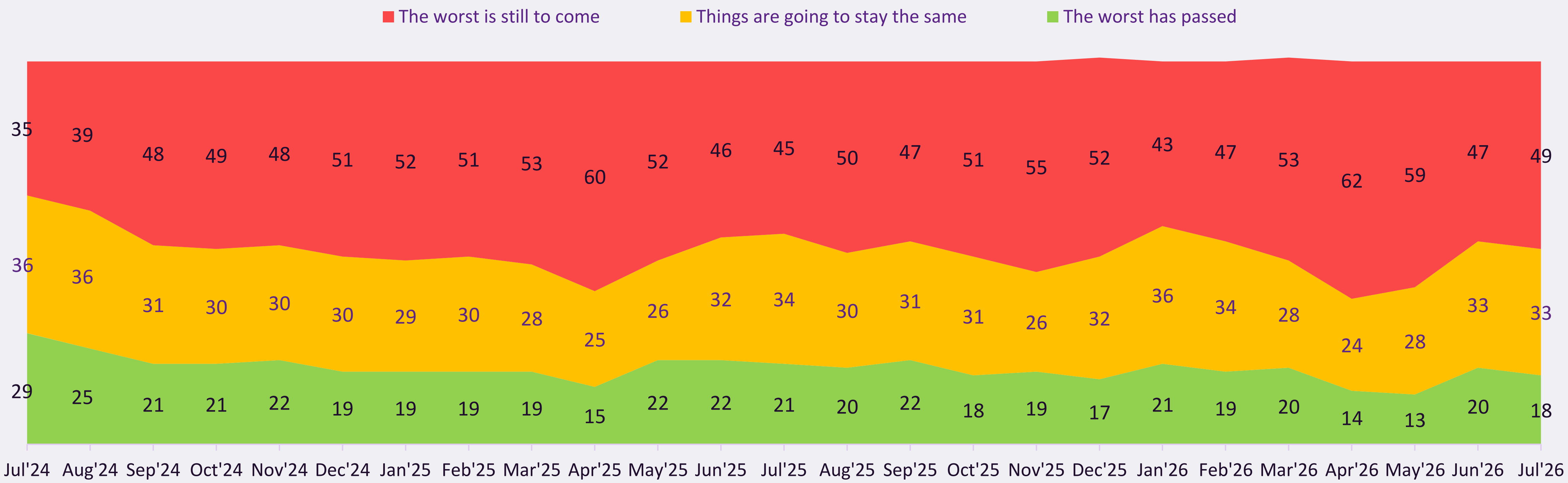

VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=c1,750

# Key finding 2: Concern over the future

The proportion feeling the worst is still to come has increased compared to last year, with concern over the rising cost of living and personal finances

# The proportion feeling the worst has still to come has fallen compared to April / May but is still higher than this time last year – with fewer feeling the worst has passed.

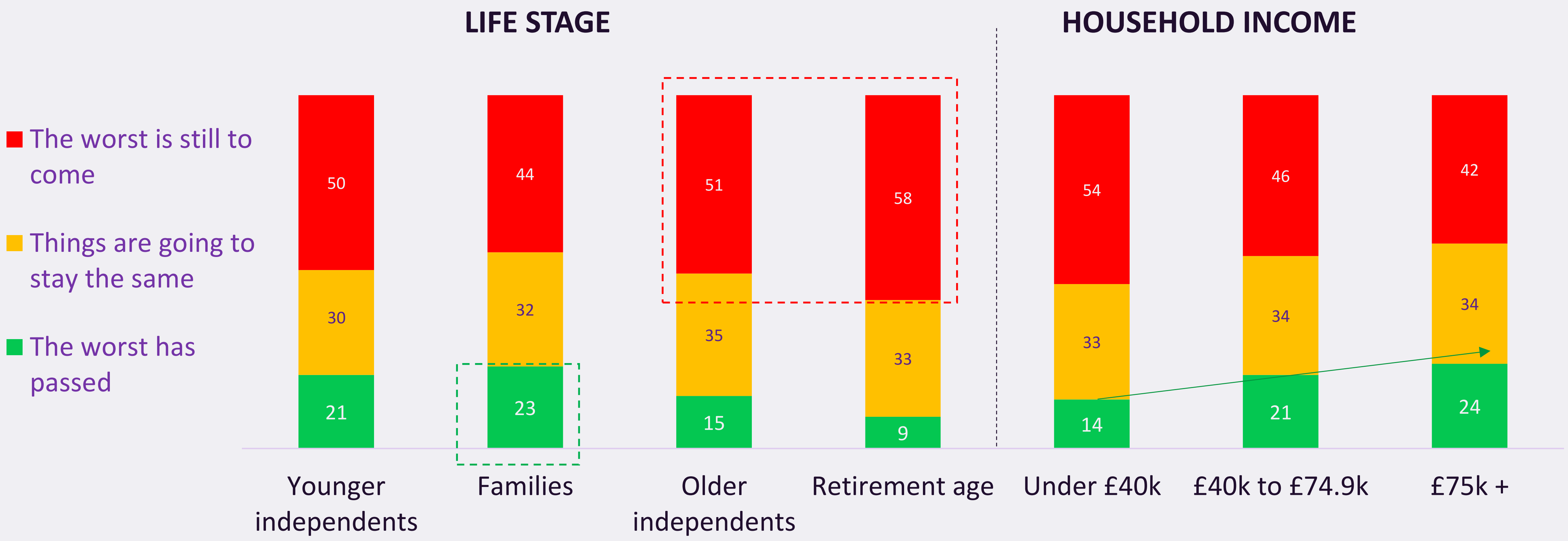
## Perceptions of the cost-of-living crisis over time (%)




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

This perception differs by life stage, with families most inclined to think the worst has passed, while older independents and retirement age feel the worst is still to come. The proportion feeling the worst has passed grows with increased household income.

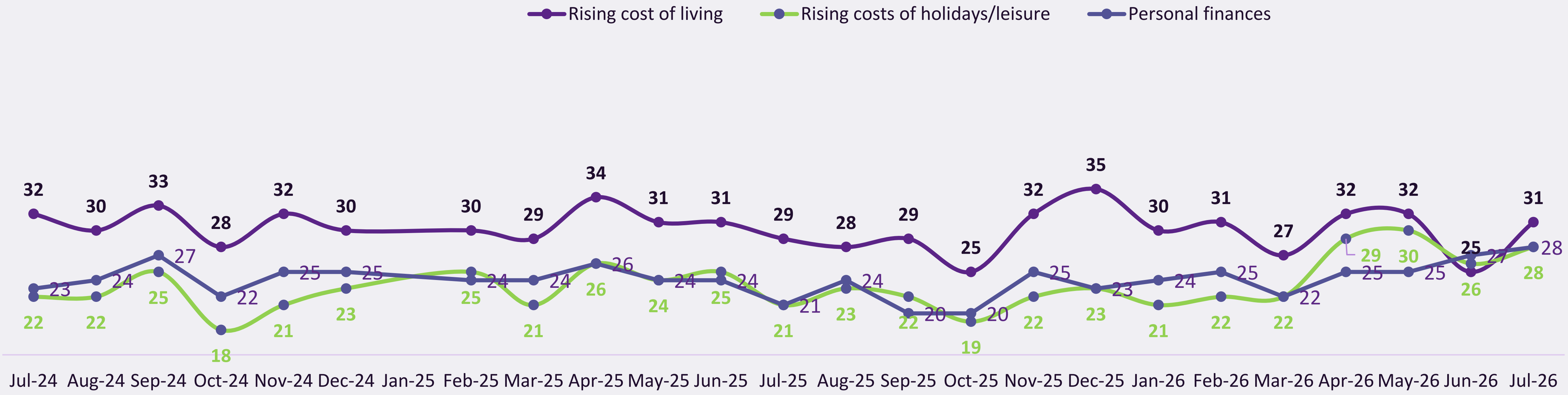
## Financial segments by individual groups (%)




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: Younger independents n=312; Families n=539; Older Independents n=446; Retirement age n=377; Under £40k n=842; £40k to £74.9k n=533; £75k+ n=274

# Personal finances has been steadily climbing as a barrier to taking a holiday. The rising cost of living and cost of holidays fell a little in June but is now increasing again. More people report all of these as barriers compared to 12 months ago.

## Selected financial barriers to taking a domestic holiday (%)



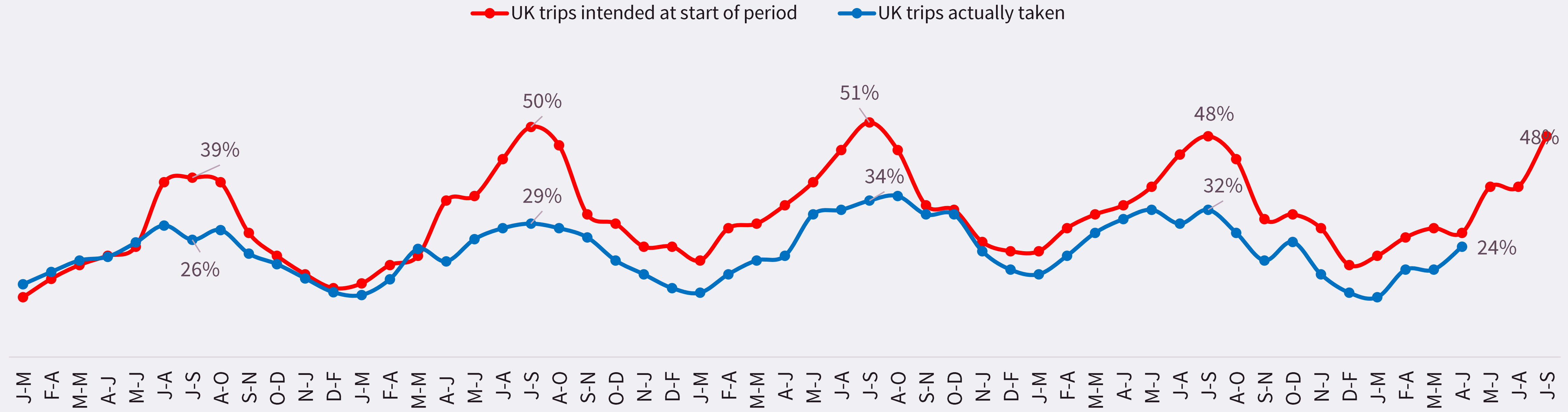

VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=1,755

# Key finding 3:  Signs of stability

Trips taken and travel intentions are similar to last year.  However, there are differences by life stage, with fewer younger independents having taken or planning a trip

Predicted trips continue to outperform actual trips taken within 3 month periods. Trips intended domestically over the next 3 months are in line with last year – with half planning a trip across July-September.

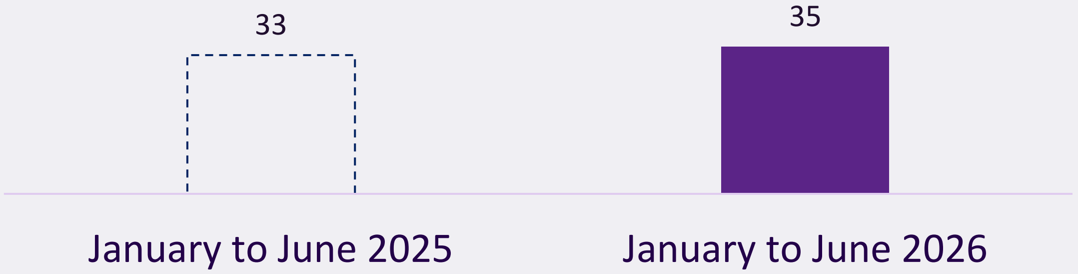
### Overnight UK trips planned/booked/taken in 3 month periods



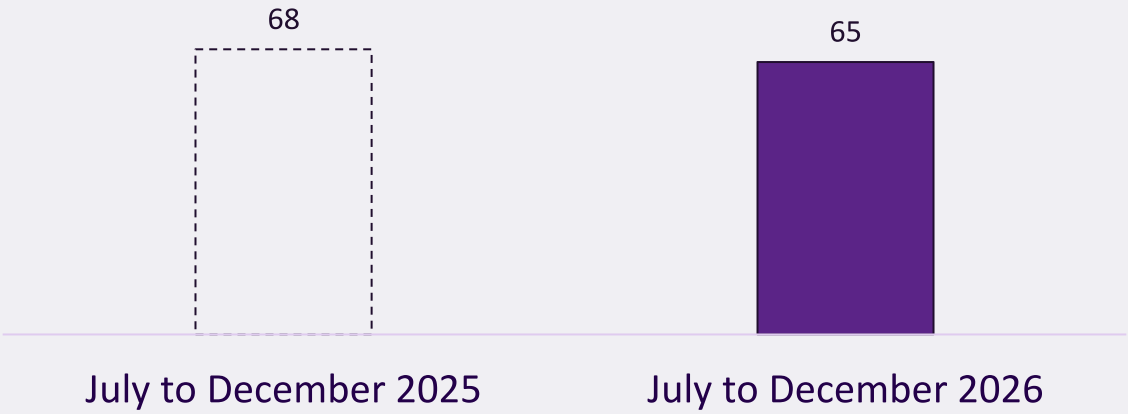

VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2enew: Which of the following best describe how close you are to booking your next overnight UK trip in [pipe: hVB3]? Base: All UK respondents. n=1750 each wave
*Actual trips taken is only available from April 2021 up to Dec 2025. Please note questionnaire was updated in April 2023 so there may be some artificial uplift

# Trips taken this year, and trips intended for the rest of the year, are very similar to last year. This suggests stability in trip behaviour (even if it is dampened by financial pressures)

## Taken a trip this year (%)



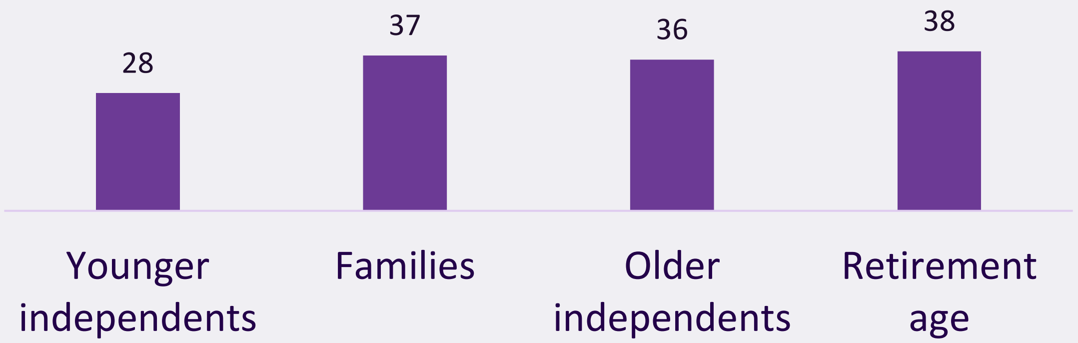

## Plan a trip the rest of the year (%)



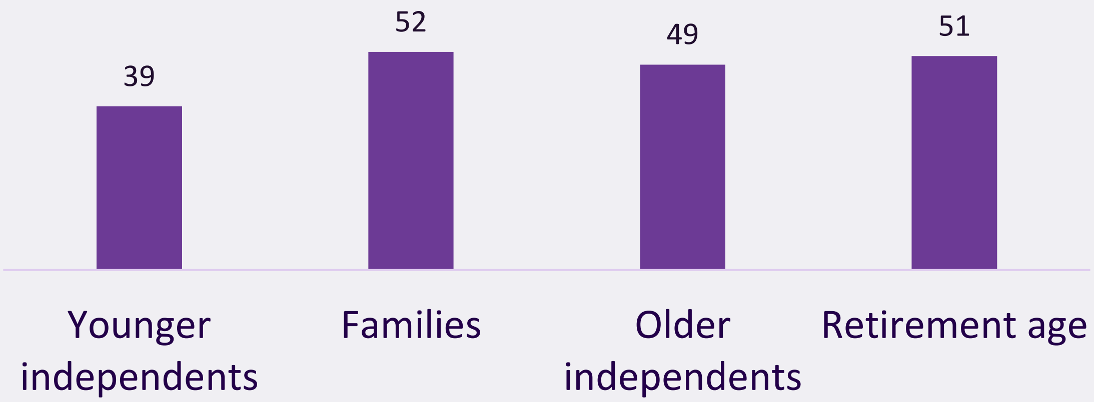

VB13A2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? n=1,755

# Looking at trip behaviour by life stage, younger independents are least likely to have either taken a trip or be planning a trip for the rest of the year

**Taken a trip this year (%) (Jan-Jun 2026)**



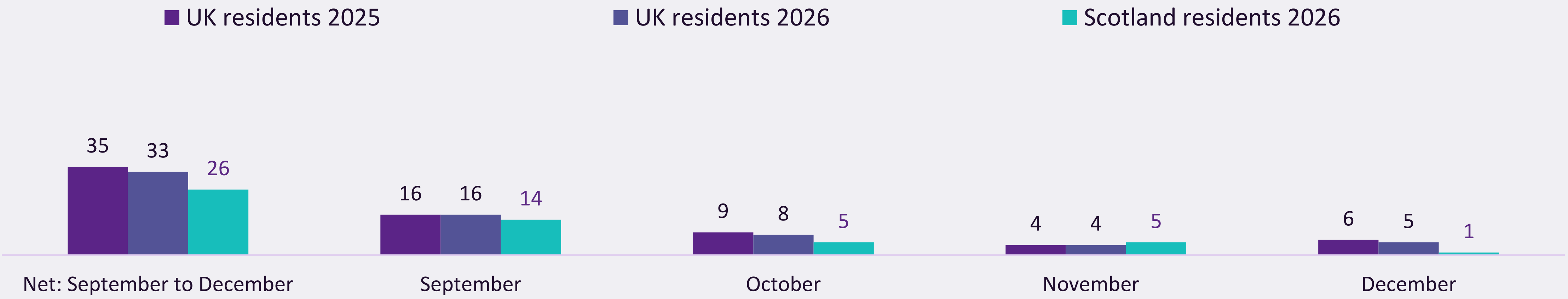

**Plan a trip the rest of the year (%) (Jul-Dec 2026)**




VB13A2. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months?
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? n=1,755

# A third are planning a holiday within the UK across September to December 2026, with intention highest in September. Scotland residents are a little less likely to have a trip planned.

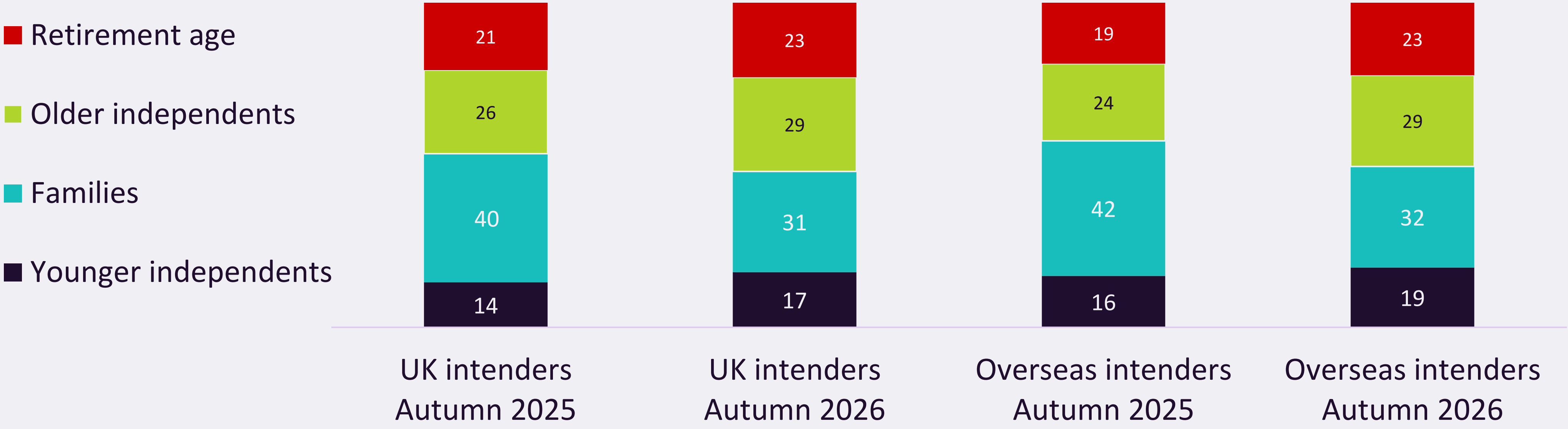
**Domestic trip intention (%)**




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?
Base: All UK respondents. n=1,755; All Scotland respondents n=251

The life stage profile of UK Autumn intenders in 2026 shows families make up a third of those planning a trip, followed by older independents, those of retirement age and younger independents.  A similar trend is seen in those planning an overseas trip.

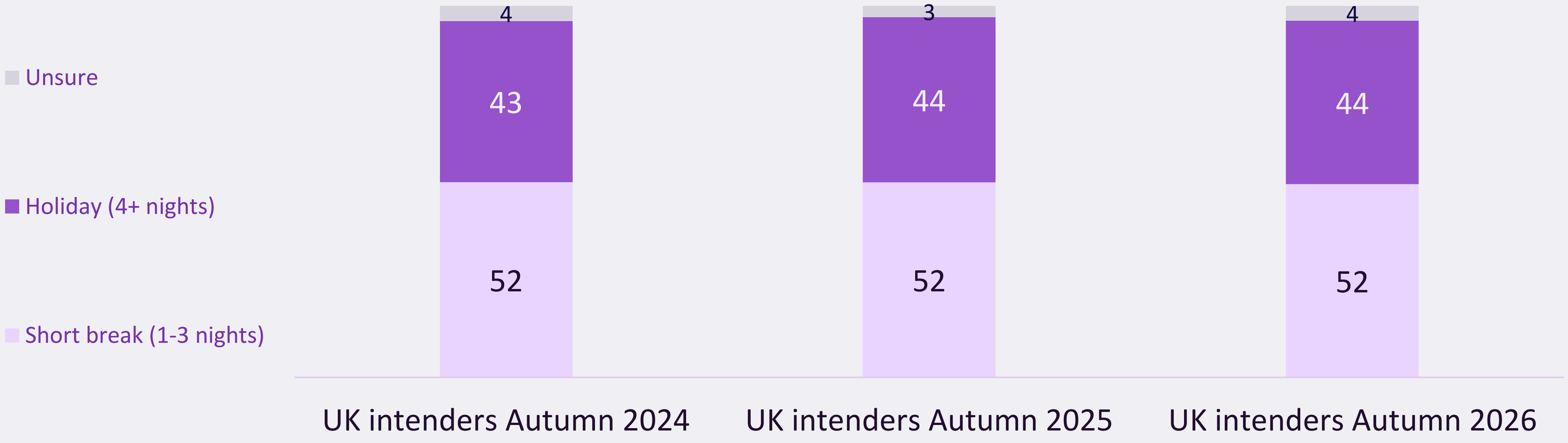
## UK autumn intenders by life stage (%)




Source: Demographic questions. Base: UK intenders Autumn 2024 n=1,602; UK intenders Autumn 2025 n=1,506 UK intenders Autumn 2026 n=1,263

# Average length of trip remains stable, with just over half planning a short domestic trip

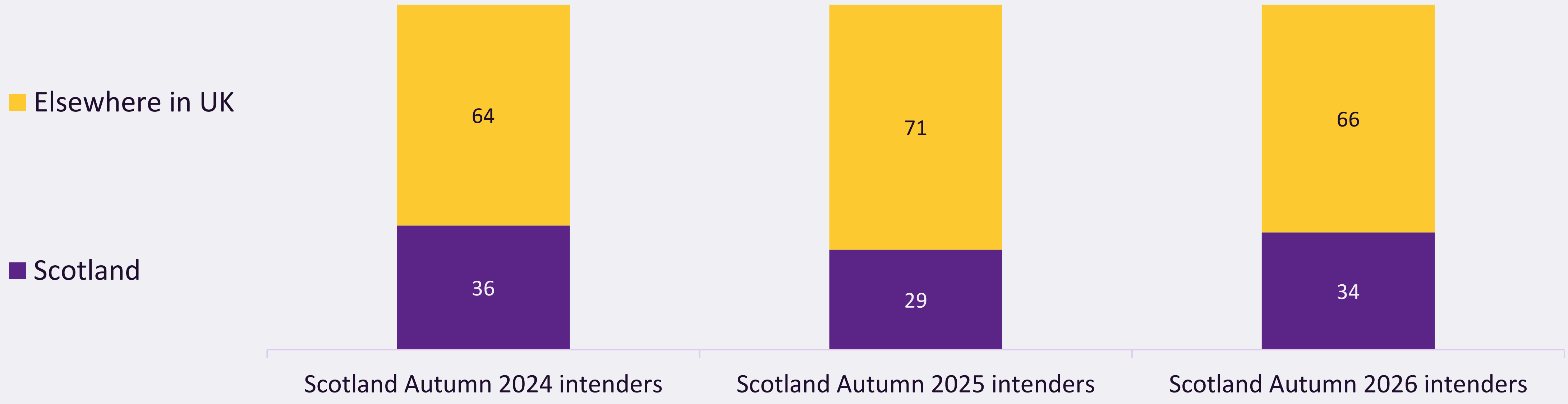
## Length of autumn domestic trip (%)




QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?
Base: UK intenders Autumn 2024 n=1,355 UK intenders Autumn 2025 1385

# Two thirds of Scotland Autumn intenders live outside of Scotland – a slight fall compared to 2025, where seven in ten lived outside Scotland

## Origin of Scotland intenders (%)



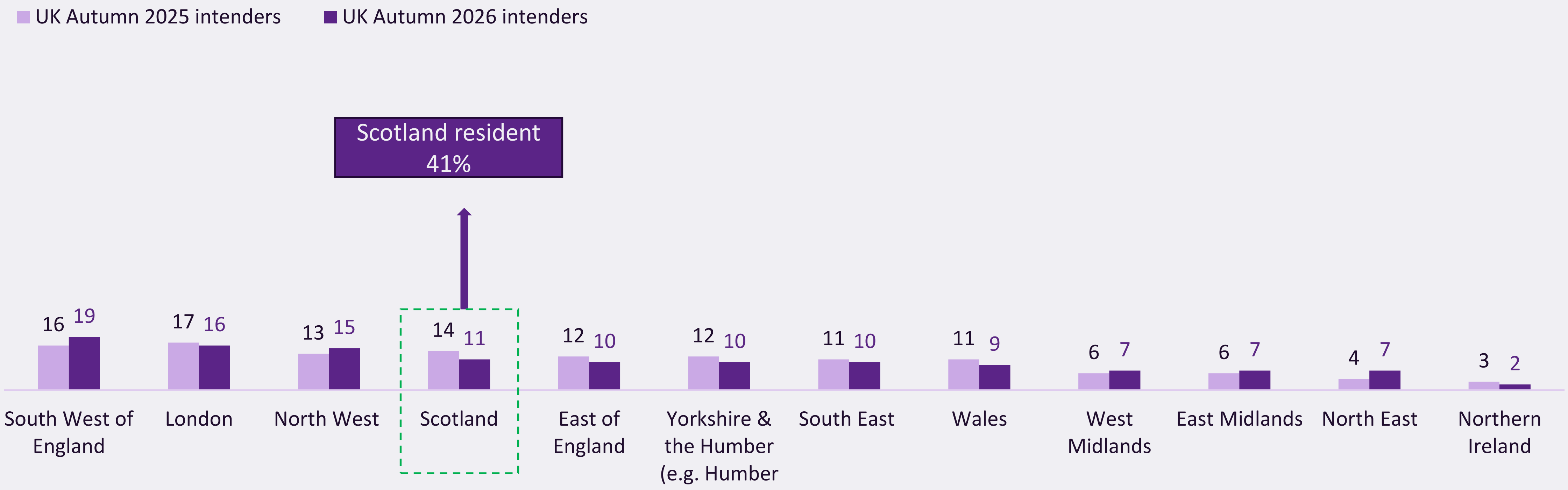

Source: Demographics.
Base: All respondents. All Scotland Autumn 2025 intenders n=235

# Key finding 4: Scotland vulnerability

Scotland intentions are strong, but booking is behind average and commitment is a little lower than average

Scotland is the 4th most preferred region for a UK holiday or short break this autumn, with higher intentions among Scotland residents

## Destination for UK autumn short break or holiday (%)




QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: All May-Jul planning a trip in Autumn: UK Autumn 2024 intenders n=1,371; UK Autumn 2025 intenders n=1,355 UK Autumn 2026 intenders n=1619

# However, consistent with previous waves, Scotland Autumn trip-intenders are ***least likely*** to have 'already booked' their trip, with a third not yet decided where to go – meaning trips may end up somewhere else or not happening

Overseas trips more likely to have been booked (47%)

## Booking status for autumn overnight trips (%)


| | Net: All destination average | North West | London | South West | Scotland | East of England | Wales | Yorkshire & the Humber |
|---|---|---|---|---|---|---|---|---|
| I am undecided whether I will take this trip at all | 4 | 6 | 2 | 2 | 4 | 2 | 3 | 0 |
| I am yet to decide where to go | 29 | 20 | 25 | 26 | 33 | 12 | 21 | 22 |
| I have decided where to go but not yet booked | 34 | 25 | 37 | 34 | 32 | 44 | 24 | 33 |
| I have already booked this trip | 33 | 48 | 35 | 38 | 31 | 42 | 52 | 45 |

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 Autumn 2026. All destination average n=549; North West n=89 London n=78 South West n=77 Scotland n=63 East of England n=54 Wales n=49 Yorkshire & The Humber n=48

# Commitment to the trip is also lower than average, with 55% very committed

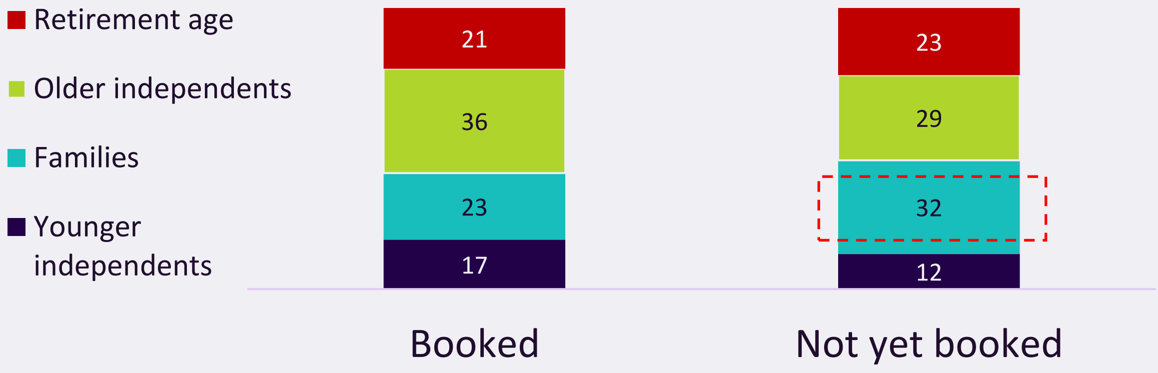
## Overnight UK commitment levels for autumn trips (%)


VB2ei. How committed are you to taking this next trip? Base: UK intenders Autumn 2026. All destination average n=549; North West n=89 London n=78 South West n=77 Scotland n=63 East of England n=54 Wales n=49 Yorkshire & The Humber n=48

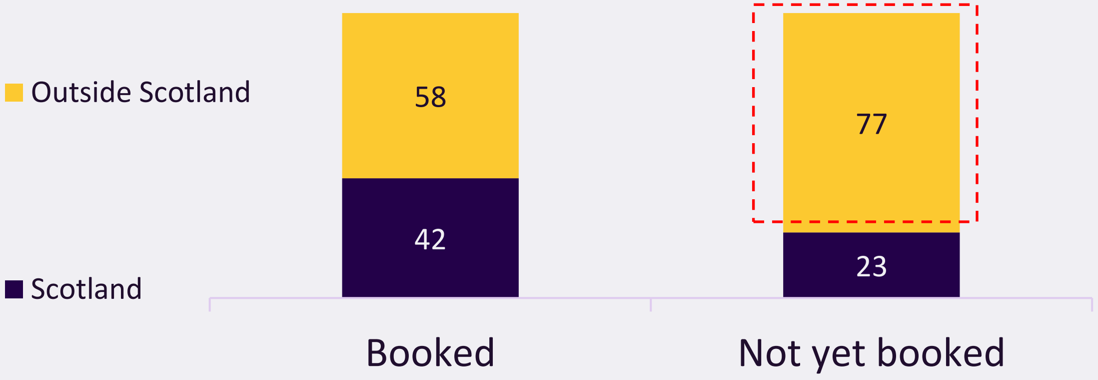
# Non-bookers are more likely to be financially stretched, families or living outside Scotland – these can be mutually exclusive

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


## Life stage (%)



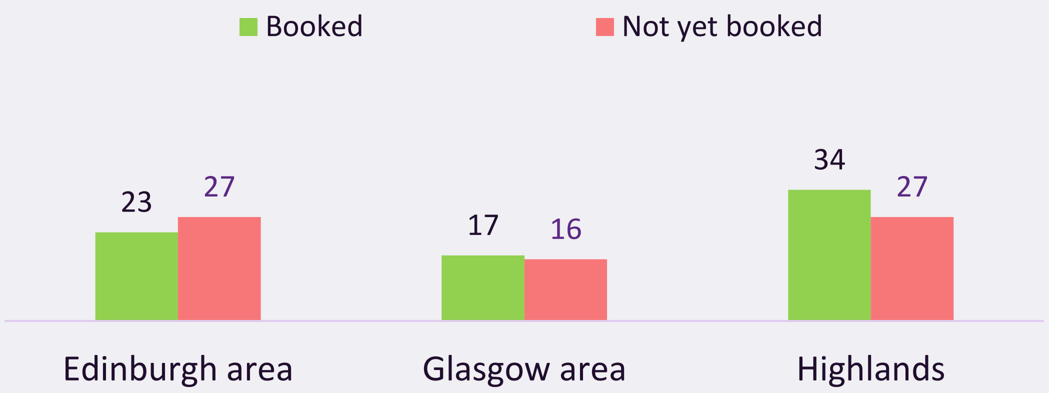

## Origin (%)



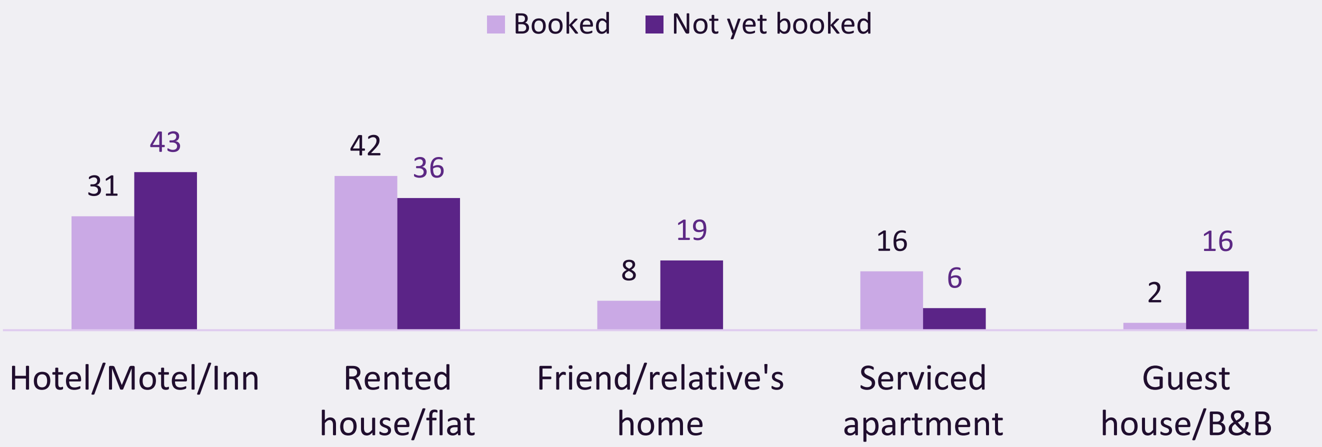

Already booked Scotland trip n=35; Not booked trip n=144
Note: Due to base sizes, these charts look at Scotland intenders across May, June and July fieldwork

# Non-bookers are more likely to take city breaks and to stay in hotels or with friends and family. They are more likely to be travelling on their own.

## Area of Scotland (%)

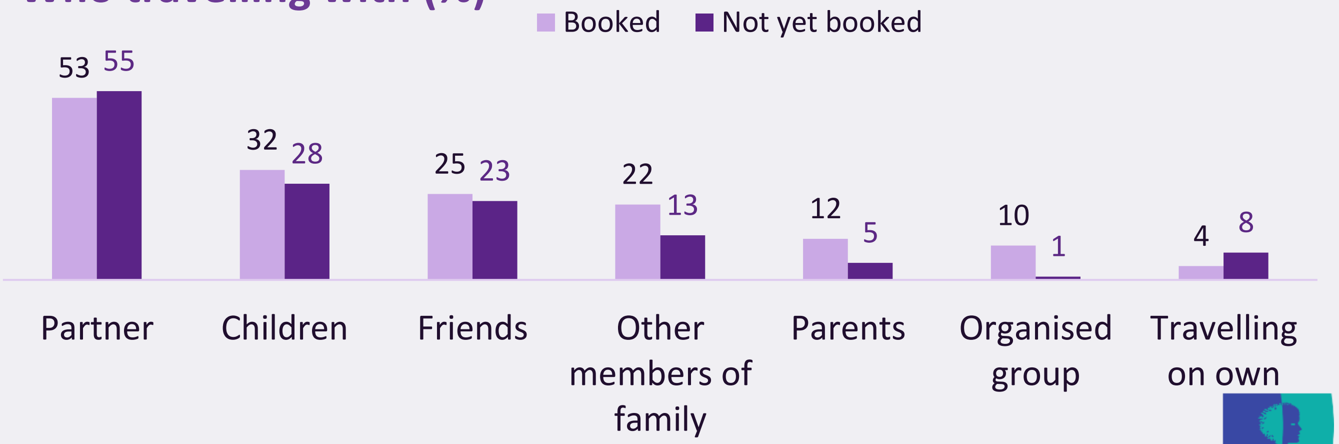



## Accommodation type (%)




## Length of autumn domestic trip (%)


## Who travelling with (%)




Already booked Scotland trip n=77; Not booked trip n=134

Note: Due to base sizes, these charts look at Scotland intenders in the next 12 months. Findings correlate with near-term findings

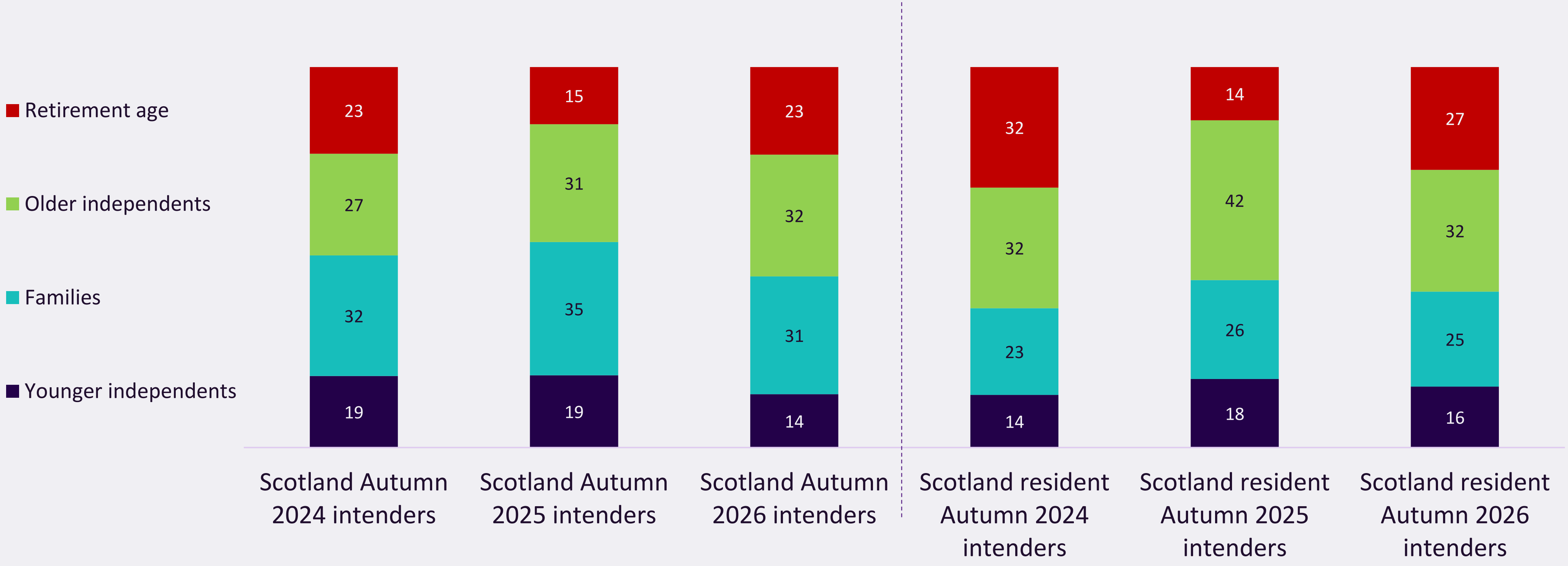
# SCOTLAND AUTUMN 2026 INTENTIONS

# Key finding 5: Shift in Scotland intenders

There has been a fall in the proportion of younger independents planning a Scotland trip this year – with a corresponding rise among those of retirement age. Older independents are being driven by indulgence while families are seeking adventure.

# The proportion of older independents planning a trip to Scotland remains high this year. Those of retirement age and families have returned to 2024 proportions, while younger independents have fallen.

## Scotland intenders by life stage (%)




Source: Demographics.
Base: All respondents. All Scotland Autumn 2026 intenders n=179; All Scotland resident Autumn 2026 intenders n=64

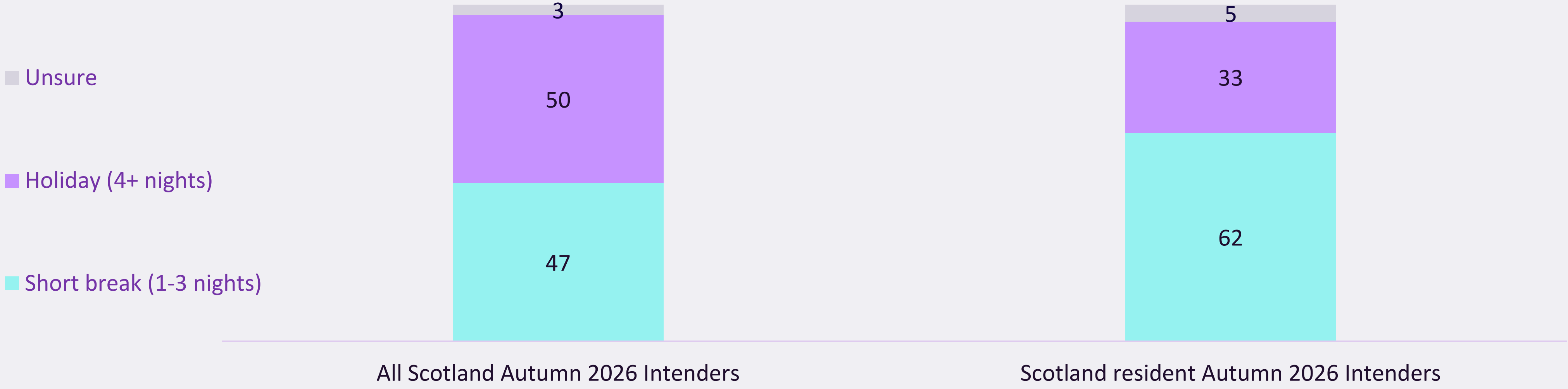
# The Highlands and Edinburgh remain the two most preferred Scotland destinations for an Autumn short break or holiday, with Scotland residents more likely to be planning a Highlands trip

## Planned destination for Scotland Autumn intenders (%)


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 Autumn 2026 intenders n=179; All Scotland resident Autumn 2026 intenders n=64

# Scotland autumn trips are more likely to be shorter breaks, particularly amongst Scotland residents. This highlights the importance of converting non-Scotland intenders to taking a trip.

## Length of next autumn 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 Autumn 2026 intenders n=179; All Scotland resident Autumn 2026 intenders n=64

# The majority of Scotland trip intenders are likely to travel by car to their destination – particularly amongst Scottish residents.  A quarter of intenders plan to travel by train (up from 2025), and this is higher among those living in London.

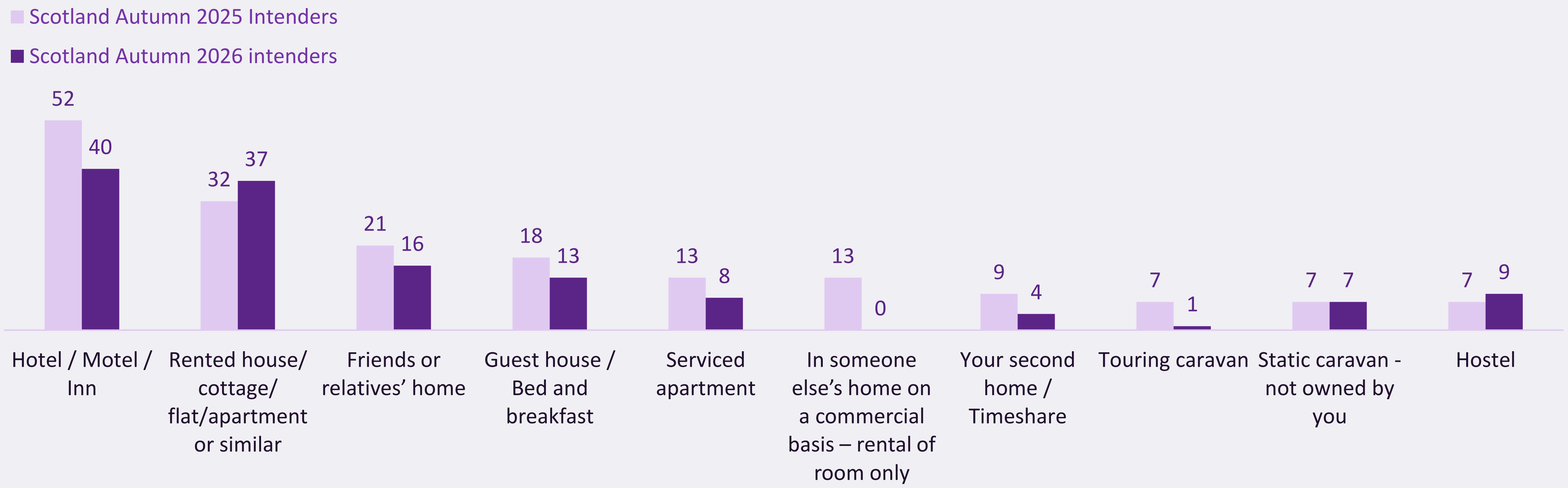
London based intenders more likely to travel by train (53%) than plane (13%)

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


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 in Scotland. All Scotland Autumn 2025 intenders n=186 All Scotland Autumn 2026 intenders n=179; All Scotland resident Autumn 2026 intenders n=64

Hotels are the most popular for a Scotland overnight trip, however planned use has fallen, with more opting for rented accommodation

## Accommodation for Scotland autumn overnight trip (% Top 10)




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 Autumn 2026 intenders n=141

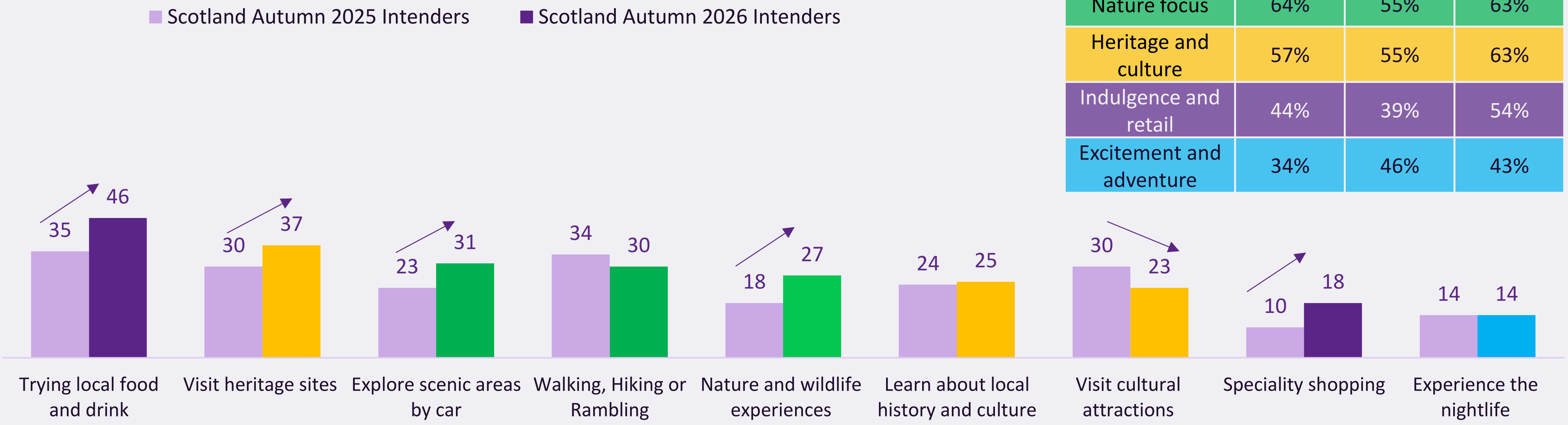
# Scotland domestic intenders visit Scotland for a range of reasons. Getting away from it all and spending time with family/partners are most popular, particularly among those living in Scotland and those of a retirement age. Younger independents are more likely to be motivated by food and for a digital detox.

## Motivations for Scotland Autumn overnight trip this autumn (%)


VB6fii. Which of the following best describe your motivation/s for this trip? Base: All intenders planning to take a trip in Scotland. All Scotland Autumn 2024 intenders n=186; All Scotland ONLY Autumn 2026 intenders n=141

# Nature and heritage focus remain the key activities planned, with a particular interest in visiting heritage sites, exploring scenic areas and nature and wildlife experiences. However, indulgence and retail experiences have increased, driven by trying local food and drink and speciality shopping

## Activities for Scotland overnight trip this autumn (% Top 10)

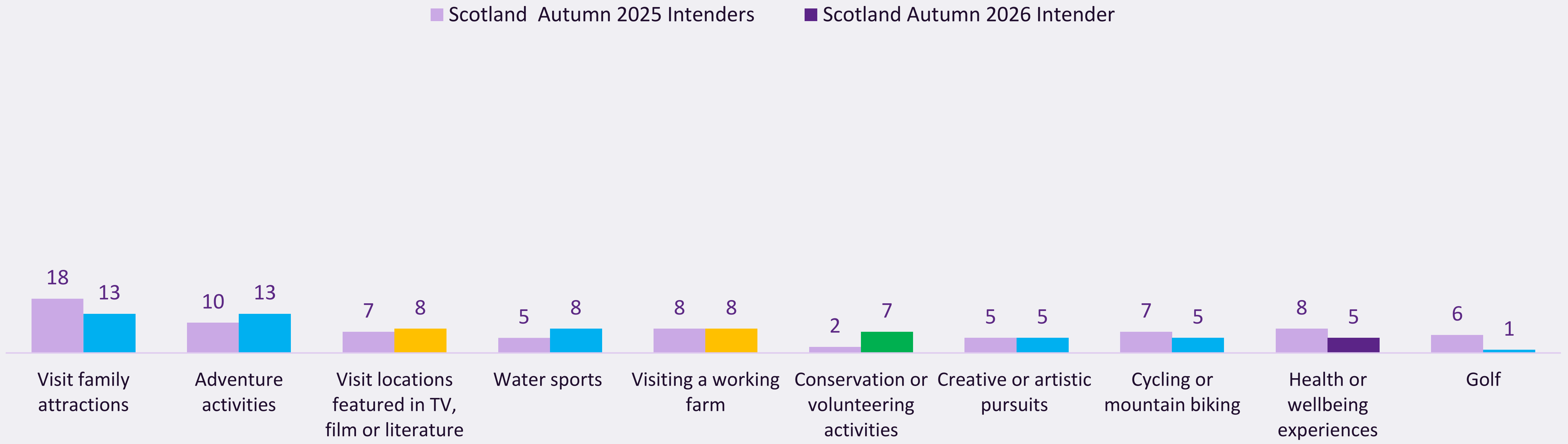



| Net categories | Jul 2024 | Jul 2025 | Jul 2026 |
|---|---|---|---|
| Nature focus | 64% | 55% | 63% |
| Heritage and culture | 57% | 55% | 63% |
| Indulgence and retail | 44% | 39% | 54% |
| Excitement and adventure | 34% | 46% | 43% |

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 in Scotland. All Scotland Autumn 2025 intenders n=186; All Scotland Autumn 2026 intenders n=141

# A range of other more niche activities are also planned by Scottish intenders – there is more interest in conservation and wildlife this year but less interest in health and wellbeing experiences.

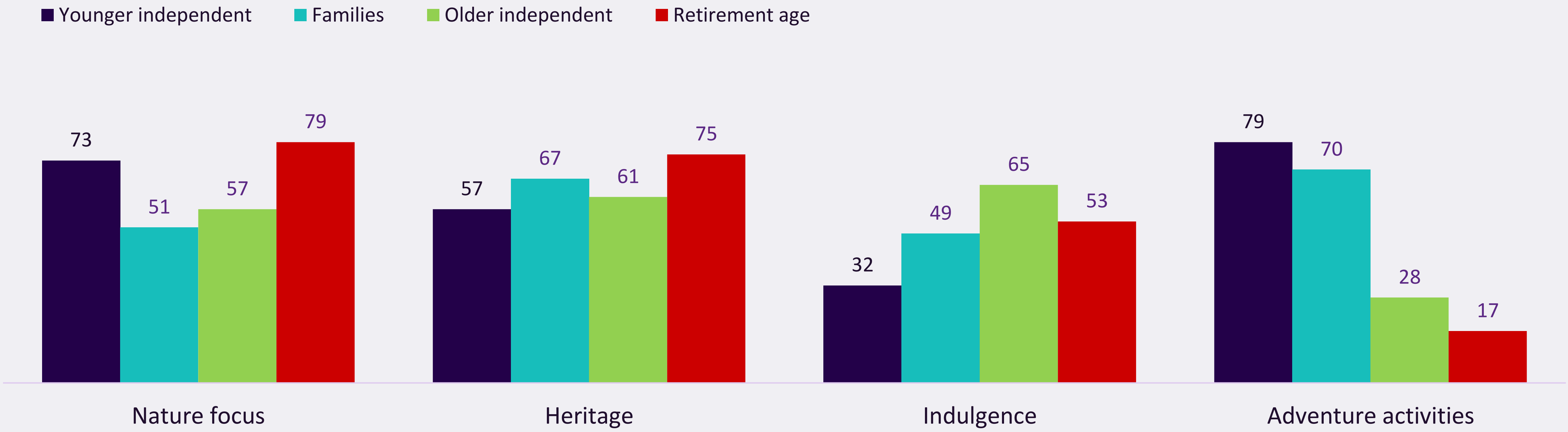
## Activities for Scotland overnight trip this autumn (% Top 10)




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 in Scotland. All Scotland Autumn 2025 intenders n=186; All Scotland Autumn 2026 intenders n=141

# Activities with a nature focus are of more interest to younger independents, alongside adventure. Families are more interested in adventure and heritage activities, while the rise in indulgence is driven by older independents.

## Activities for Scotland overnight trip this autumn (% Top 10 - families)




Scotland Intenders: n=134

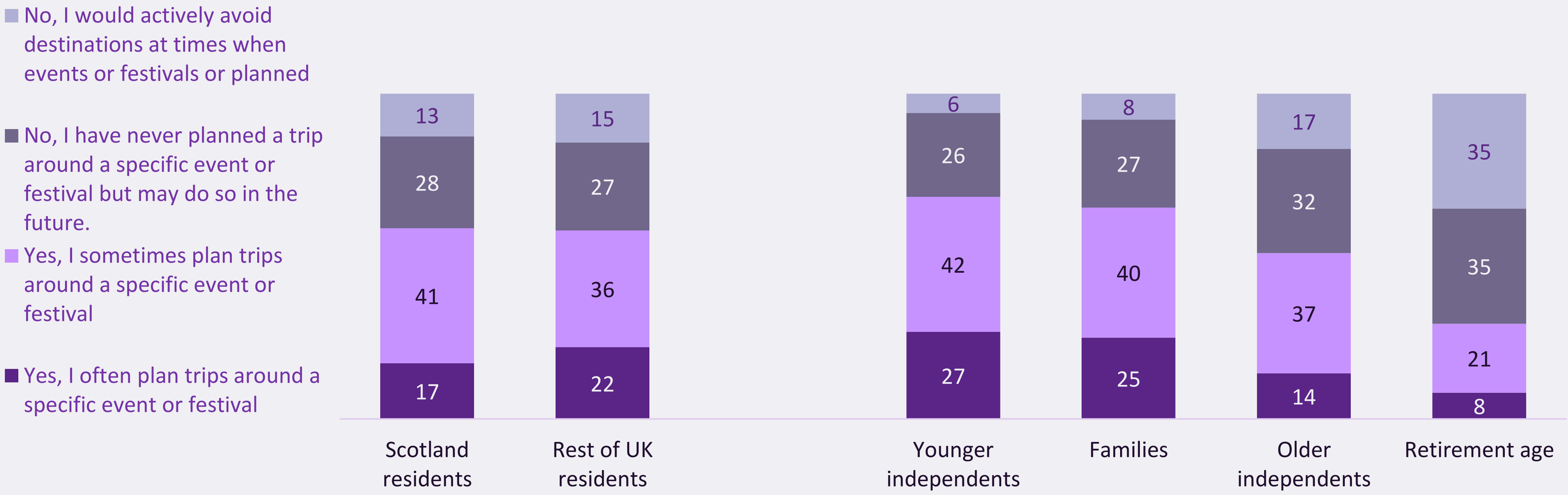
# FESTIVALS/EVENTS AND TRIP BEHAVIOUR

## Key finding 6: Travelling for events/festivals

Most respondents would happily plan trips around events / festivals or stay longer somewhere to visit an event.  Younger independents and families are particularly likely to visit Scotland for an event that interests them.

# Over half have planned trips around events or festivals, and a fifth do regularly – this rises to 69% of younger independents, and 65% of families. In addition, over a third of older age groups would be open to planning trips around these types of events in the future, suggesting a potential growth opportunity

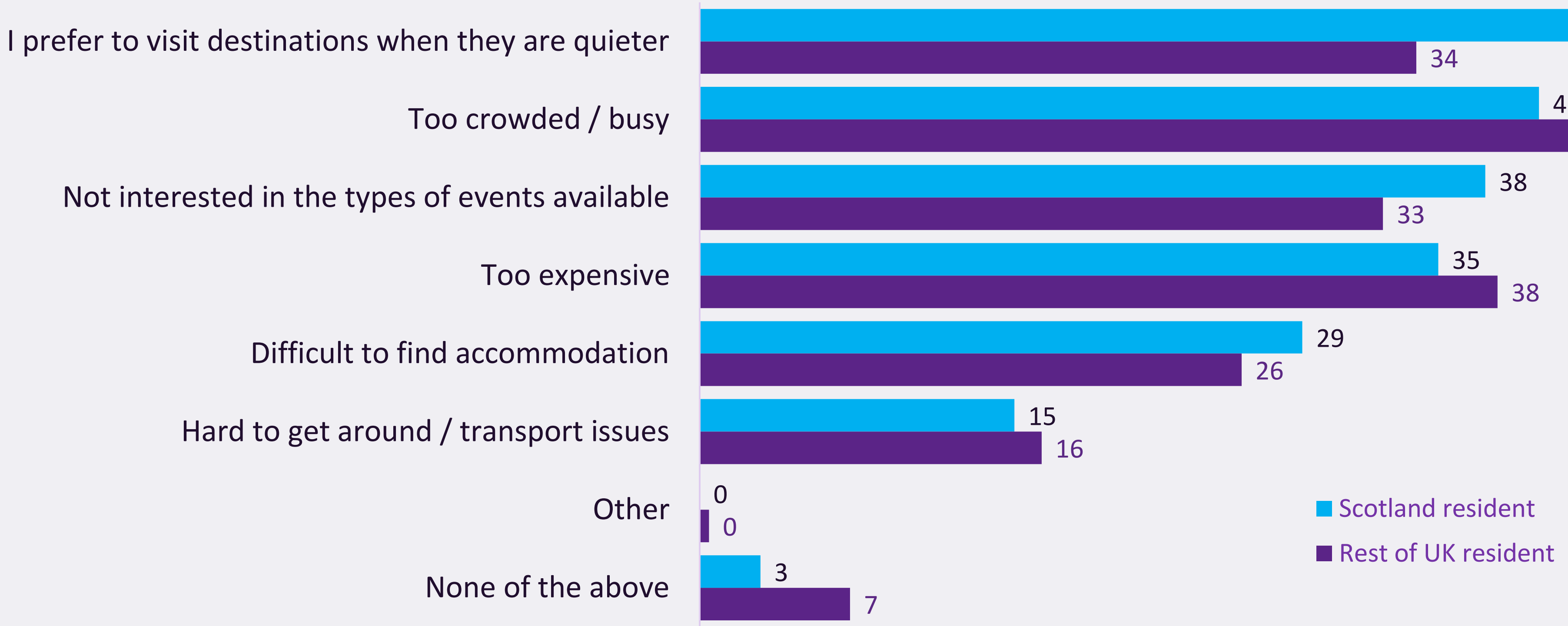
## Whether plan trips around attending specific events or festivals (%)




Q1. When choosing a UK destination, do you ever plan trips around attending a specific event or festival - for example, a major sporting event, music festival or cultural event?
Base: All Scotland residents (172) all rest of UK residents (1273)

# Amongst those who do not regularly plan their trips around events, the main reasons are a preference for quieter trips or fears it would be crowded. There is some lack of interest and concern over expense too.

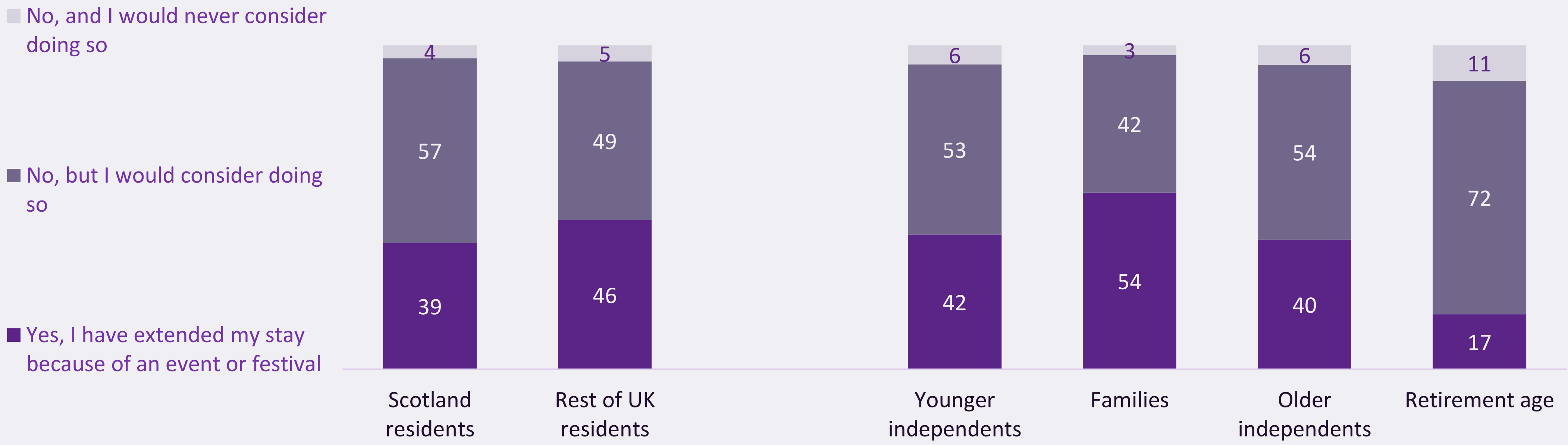
## Reason for not planning around events/festivals (%)




Q1b Why do you tend not to plan trips around events or festivals?
Base: All Scotland residents (76) all rest of UK residents (533)

# Nearly all respondents would consider extending their stay due to an event, with half of these having done so in the past – this is particularly the case for families.

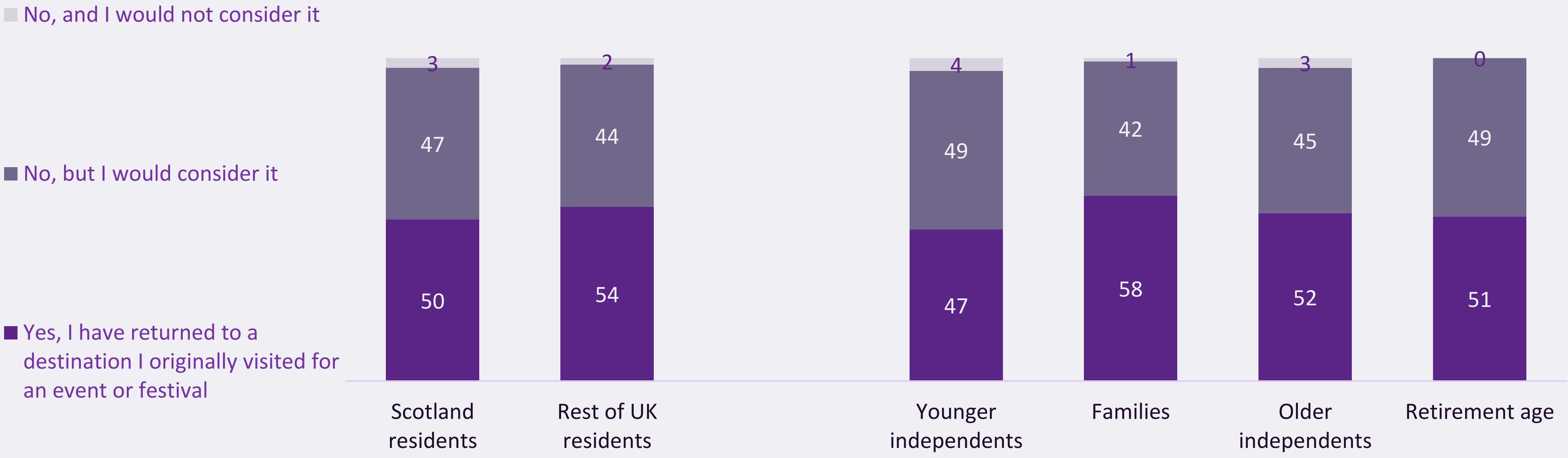
## Whether would consider extending stay because of an event (%)




Q2: Have you ever extended your stay in a destination because of a specific event or festival taking place there?
Base: All Scotland residents (96) all rest of UK residents (740) Young Independents (178) Families (311) Older independents (139) Retirement age (75)

# Over half have returned to a destination that they visited for an event or festival at a different time of year, and most would consider this in the future if they have not done so already. This is consistent across different life stages.

## Whether ever returned to a destination that was visited for an event or festival at a different time of year (%)

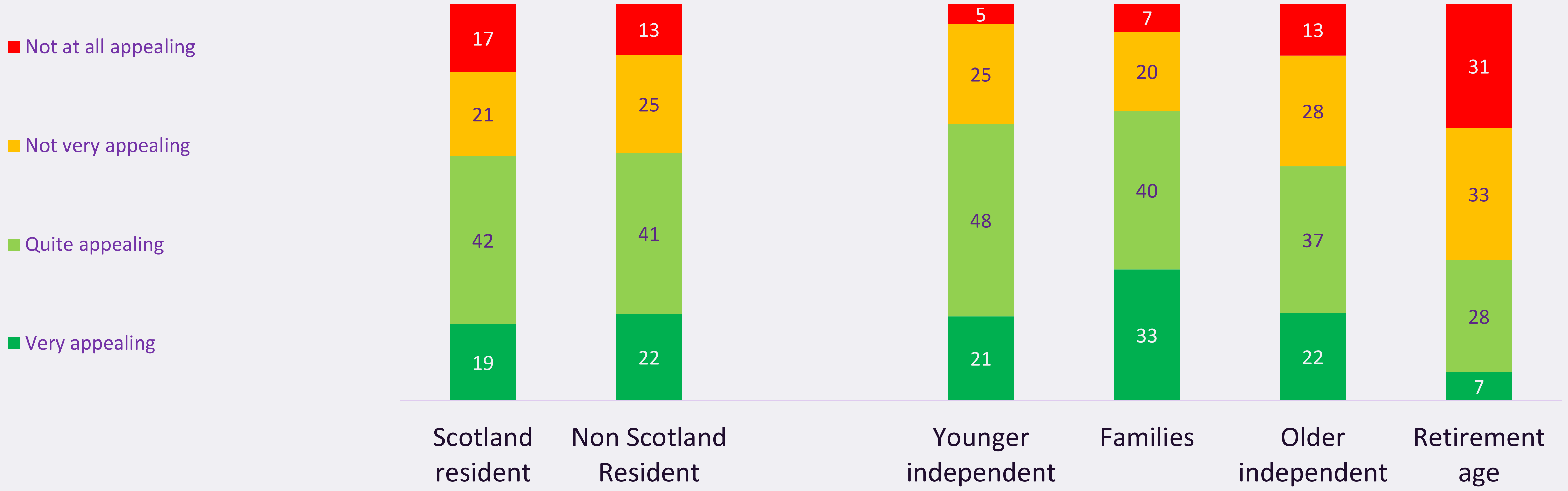



Q3: Have you ever returned to a destination - at a different time of year - that you originally visited for an event or festival? Please think about leisure trips generally, not returning for the same event

Base: All Scotland residents (96) all rest of UK residents (740) Young Independents (178) Families (311) Older independents (139) Retirement age (75)

# Just over half find the idea of travelling somewhere in the UK for an event or festival appealing, although this is lower among older independents and those of retirement age.

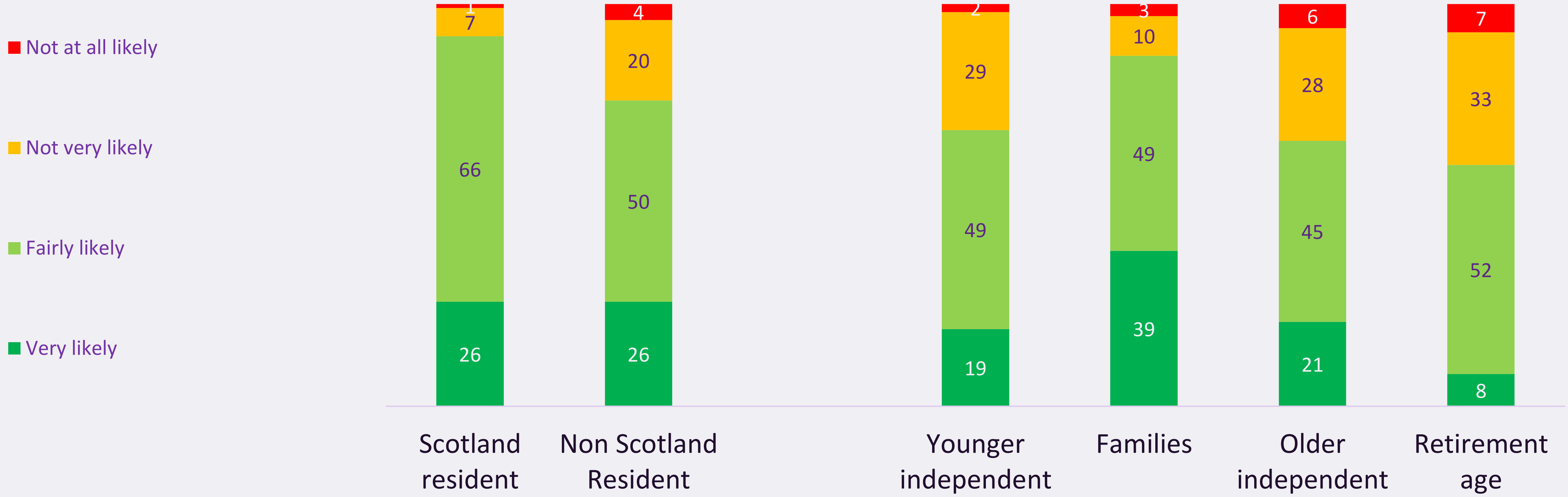
## Appeal of travelling somewhere to attend an event or festival (%)




Q4 How appealing would you find travelling somewhere in the UK to attend a major event or festival?
Base: All Scotland residents (96) all rest of UK residents (740) Young Independents (178) Families (311) Older independents (139) Retirement age (75)

# When asked specifically about events in Scotland, there was more appeal, particularly for Scotland residents and families.

## Likelihood of attending an event or festival that appealed in Scotland (%)




Q5 If an event or festival taking place in Scotland in 2026 appealed to you, how likely would you be to take a trip to attend that event?
Base: All Scotland residents (96) all rest of UK residents (740) Young Independents (178) Families (311) Older independents (139) Retirement age (75)

# Of those who wouldn’t be interested in an event in Scotland, the main concerns were things beyond control such as distance and weather – however, there were also mentions of costs as a barrier, in particular accommodation being seen as expensive.

## Reason for being unlikely to attend an event or festival in Scotland (%)

*“Scotland is further than I would like to travel for a festival”*

*“Scotland is too far and too cold and wet.”*

*“I would be unlikely to attend an event or festival in Scotland due to the cost-of-living crisis. I am not able to save money to take fun trips as it is expensive to travel far distances even with discount apps for travel. Furthermore, it is unlikely that I would attend an event in Scotland or other places due to accommodation and event ticket costs being very high.”*

*“I live in South Wales. I've been looking to go to Scotland for about 5 years, but it's unaffordable. I'd either need a £250 train to London and back to fly, take a days long train journey to Scotland that is more expensive than that or not go. In addition hotels in Scotland are very expensive”*

*“I can never time the weather right in Scotland”*

Q6 Why would you be unlikely to attend an event or festival in Scotland? Please tell us in your own words.
Base: 259

# SUMMARY OF FINDINGS

# Summary of key findings

| | | |
|---|---|---|
| The cost-of-living crisis is hitting hard and is impacting trip taking behaviour – particularly for spend on accommodation and eating out | The proportion feeling the worst is still to come has increased compared to last year, with concern over the rising cost of living and personal finances | Trips taken and travel intentions are similar to last year. However, there are differences by life stage, with fewer younger independents having taken or planning a trip |
| Scotland intentions are strong, but booking is behind average and commitment is a little lower than average | There has been a fall in the proportion of younger independents planning a Scotland trip this year – with a corresponding rise among those of retirement age. Older independents are being driven by indulgence while families are seeking adventure. | Most respondents would happily plan trips around events / festivals or stay longer somewhere to visit an event. Younger independents and families are particularly likely to visit Scotland for an event that interests them. |

# APPENDIX: METHODOLOGY AND OTHER INFORMATION

# 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 Wales 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 94-96 of the domestic sentiment tracker

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