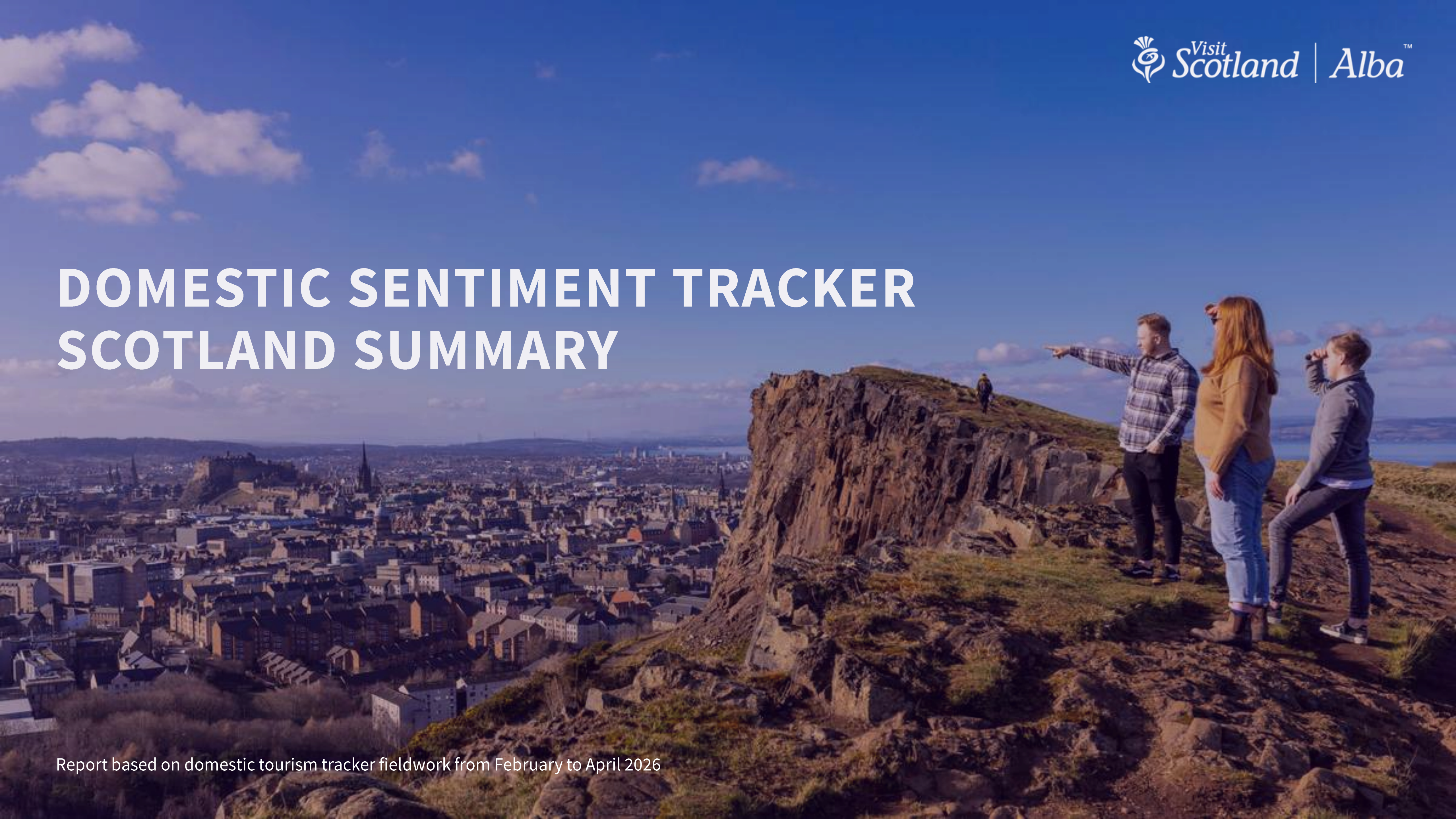
DOMESTIC SENTIMENT TRACKER SCOTLAND SUMMARY



Report based on domestic tourism tracker fieldwork from February to April 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 94th 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 91-93 (February to April 2026) with references to previous waves where applicable.

KEY FINDINGS

Key findings (1)

The cost-of-living crisis and general leisure behaviour

1. Conflict in the Middle East has had an impact on views of the cost of living crisis, with a consistent 20% saying they have been hit hard, and a growing 49% OK but being careful in April 2026. Younger independents and families are more likely to say they are better off, or not affected and confident they won't be.
2. Perceptions have also been impacted by the conflict – 62% now believe the worst is still to come, the highest this proportion has been since Feb 2023. Again, families and younger independents are the most likely to feel the worst has passed.
3. Despite this, the proportion saying the cost of living will impact on UK short breaks/holidays remains similar to last year at 54%, with the main changes planning to do/spend less or change accommodation. Those of retirement age are less likely to cut back by taking trips in the UK rather than overseas, while younger independents are more likely to take day trips rather than longer holidays.
4. Barriers to taking a trip remain financial. The rising cost of living, cost of holidays and personal finances have all increased in April as a barrier to taking a domestic holiday. Looking specifically at financial barriers, the cost of accommodation remains the main barrier, but this has been falling since December, while the cost of fuel as a barrier has jumped from 22% in March to 34% in April – unsurprising given soaring fuel costs.
5. Over a third (36%) had not taken a domestic trip in the past 12 months, and reasons for this were split between financial reasons (41%) and personal reasons (38%). Scotland residents were more likely to cite personal reasons (42%).
6. Only 14% had cancelled a trip in the past 12 months.
7. Trip intentions across Apr-September are down compared to 2025, particularly for July to September.

Key findings (2)

Scotland overnight trips

1. Scotland is the joint 4th most preferred UK region for domestic overnight trip between Apr-Sep 2026, behind London, South West and North West. Intentions to visit have dropped from 13% in 2025 to 10% in 2026
2. 39% have already booked their trip across UK destinations overall – but this is lower for visitors to Scotland, where only 31% have currently booked their trip, and 33% are yet to decide where to go or undecided whether to take the trip at all.
3. Booking and commitment is lower than last year in general, but also lower among those planning a trip to Scotland. Commitment to visiting Scotland is lower than average, with 46% very committed, compared to 56% across the UK as a whole. Commitment is evidently lower for those who have not yet booked, so it is important to try to convert these people to booking. They tend to be more financially stretched, younger and living outside Scotland – as well as those planning trips to Glasgow.
4. Intentions to visit larger cities in Scotland has grown this year, alongside growth in those planning to visit the countryside or villages. 3 in 10 plan to visit Edinburgh, and a similar proportion plan to visit Glasgow (28%, up from 17% last year) – but this is lower among Scotland residents, showing that converting those non Scotland residents to booking is important for Edinburgh and Glasgow trips.
5. As is standard, 'partner' (60%) is the most common accompanying party member for a trip to Scotland, followed by 'children or grandchildren' (23%).
6. 'To get away from it all and have a rest' and 'Family time or time with my partner' are the leading motivations for a short break or holiday in Scotland, whilst 'Walking/hiking' and 'trying local food' dominate the planned activities. However, interest in cultural attractions has grown this year, in particular visiting cultural attractions and learning about local history and culture.
7. 'Hotel/motel/inn' is the number one accommodation type for Scotland intended trips, with a similar proportion opting for this as last year – however, Scotland residents also mention planning to stay in rented houses or in caravans on their next trip.
8. Most are intending to travel in their own car (52%) and 26% will travel by train.

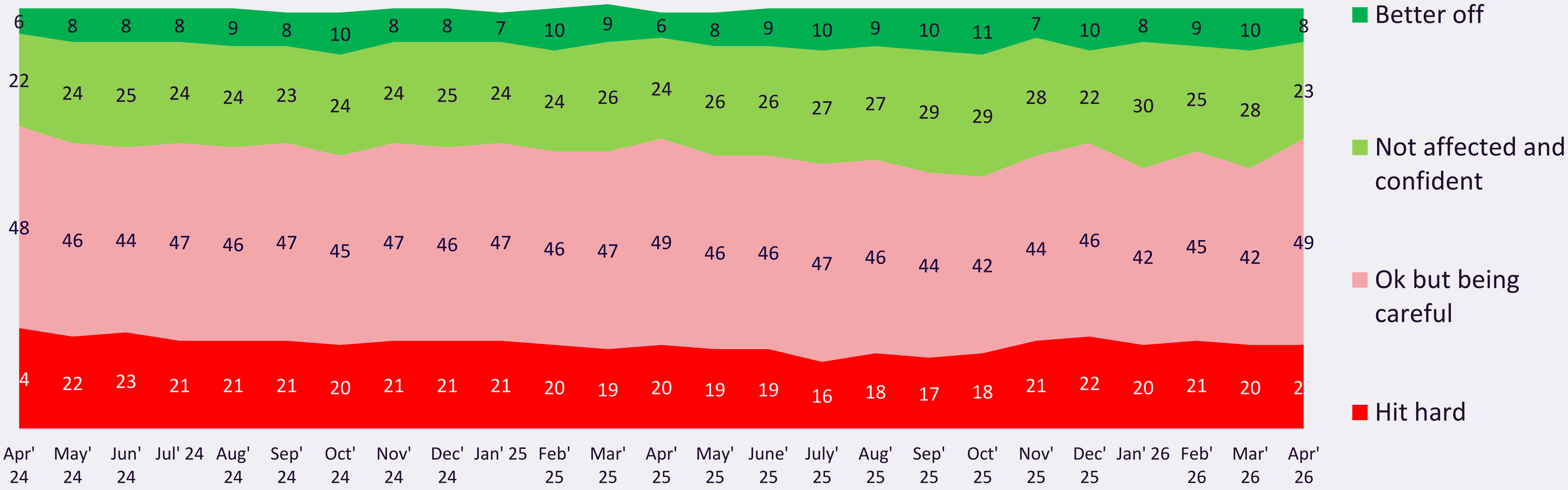
THE COST-OF-LIVING CRISIS AND TRAVEL

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

Conflict in the Middle East has led to renewed concern that the worst is still to come, and more feeling cautious – while there are indications of increased interest in domestic rather than overseas holidays, fuel costs are a rising barrier

The cost-of-living crisis impact continues to be felt, with an increase in the proportion ‘being careful’ in April, likely linked to continued uncertainty around the conflict in the Middle East

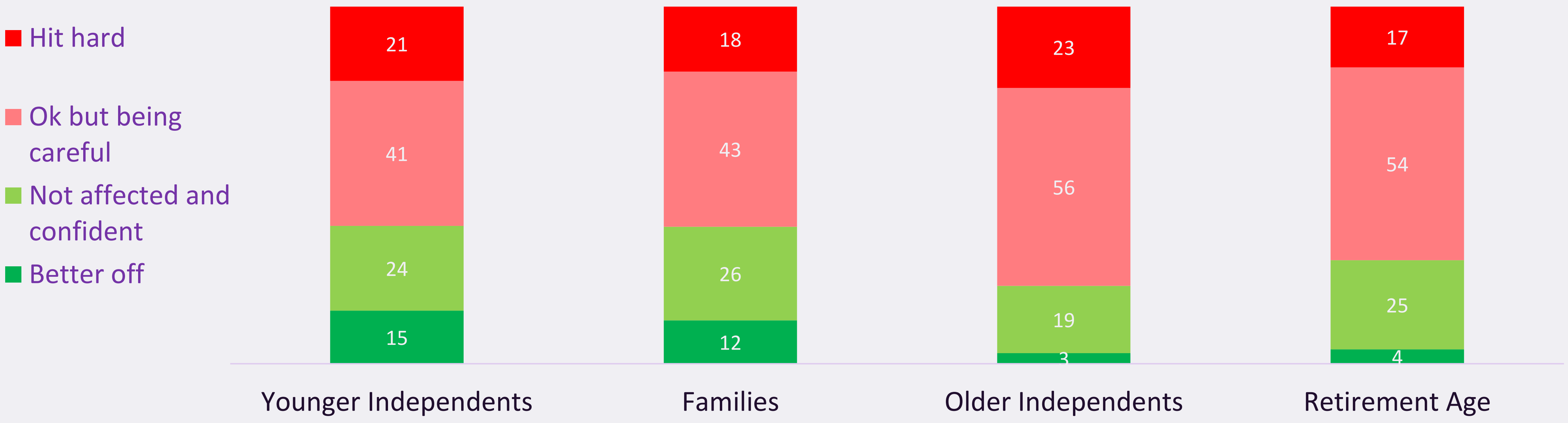
Impact of the cost-of-living crisis (%)



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. All Scotland respondents n=c.250

The impact is felt more among older independents and those of retirement age, with younger independents most likely to feel they are better off

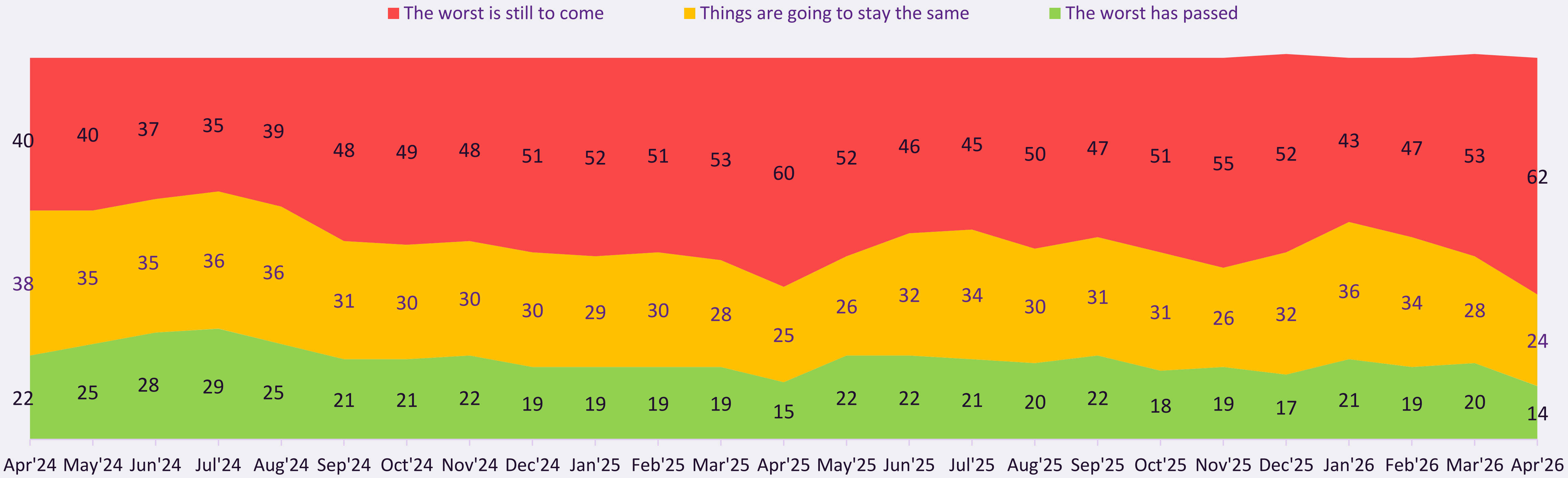
Financial segments by life stage (%)



Q17. If you had to choose, which one of the following statements would best describe your feelings right now?
Base: Young Independents n=165; Families n=622; Older Independents n=573; Retirees n=396;

Perceptions of the crisis have also worsened in April, with 62% feeling the worst is still to come

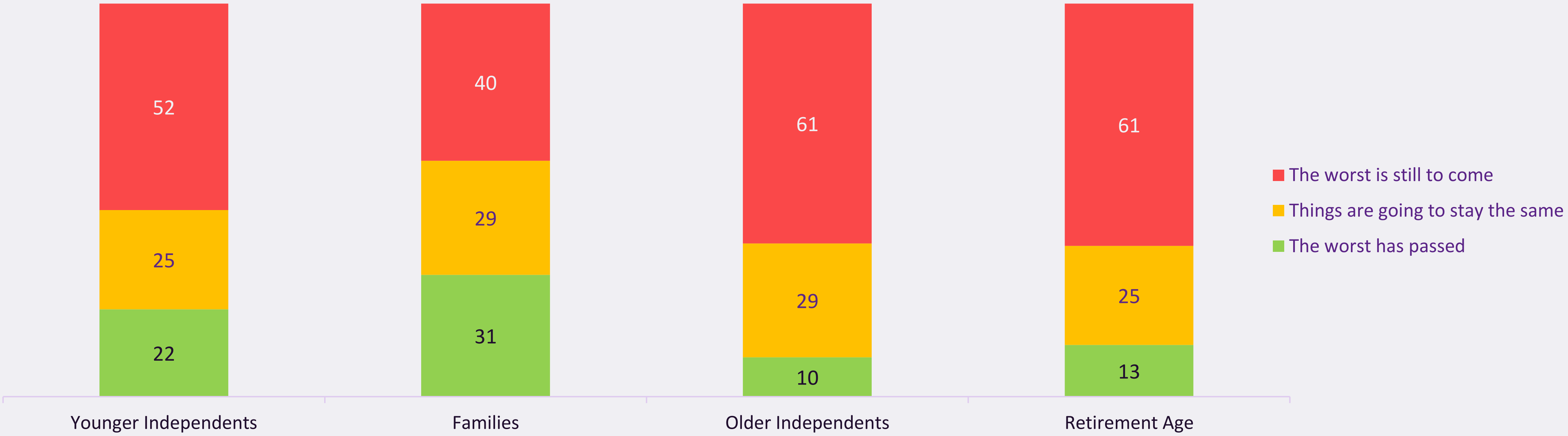
Perceptions of the cost-of-living crisis over time (%)



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

Perceptions also differ by life stage – families are the most optimistic, while older independents and those of retirement age are most pessimistic.

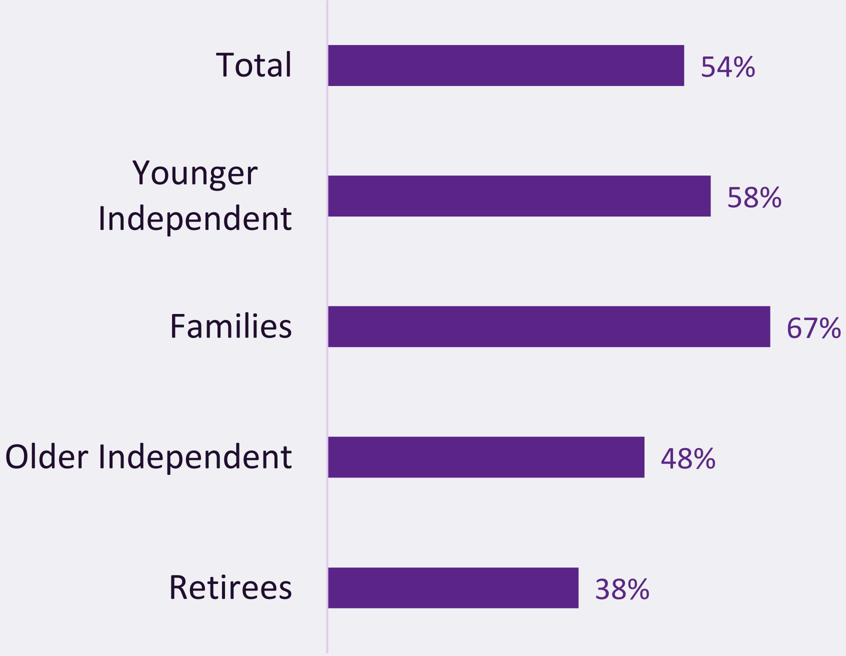
Perceptions of the cost-of-living crisis by life stage (%)



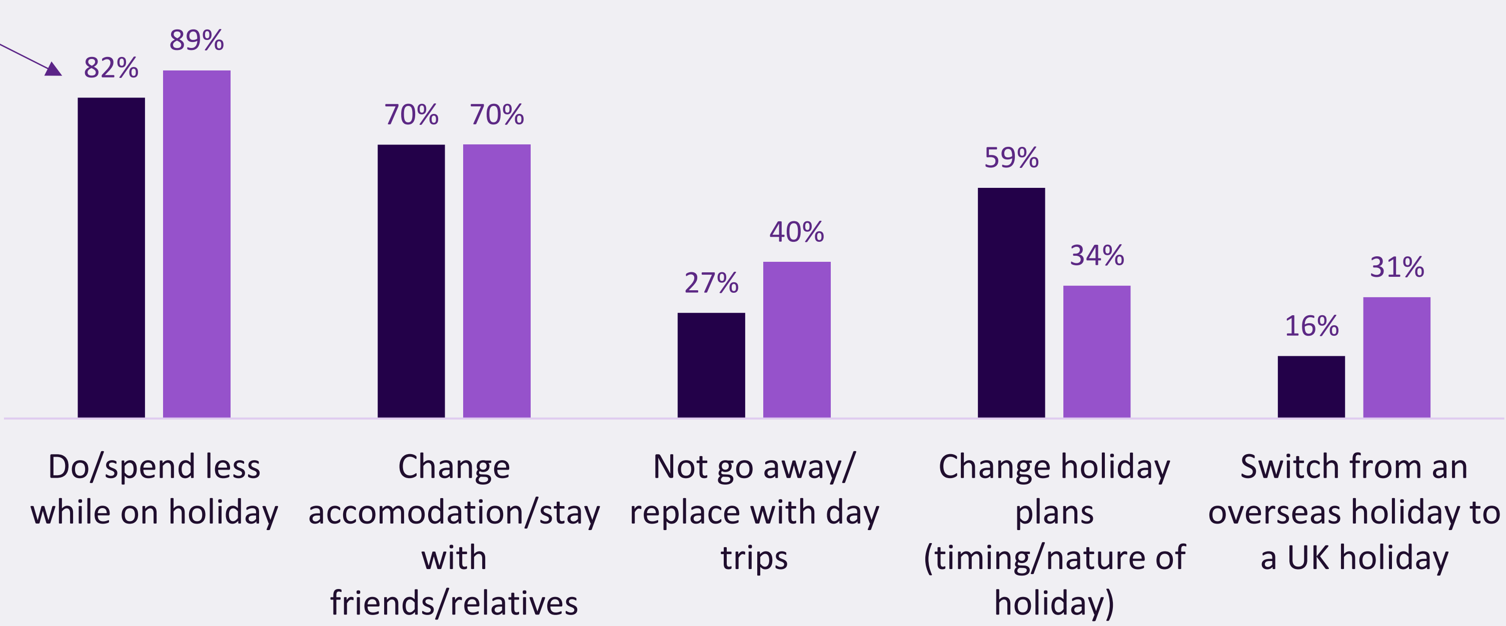
Q7b: And now regarding the 'cost-of-living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: Young Independents n=165; Families n=622; Older Independents n=573; Retirees n=396;

The cost-of-living is likely to impact holidays and short breaks for the next six months, with the majority saying they will do or spend less. However, 31% are switching to UK holidays rather than overseas (up from 16% last year). This rise will potentially be tempered by pressure of increased fuel costs

% saying cost-of-living will impact future UK short breaks and holidays



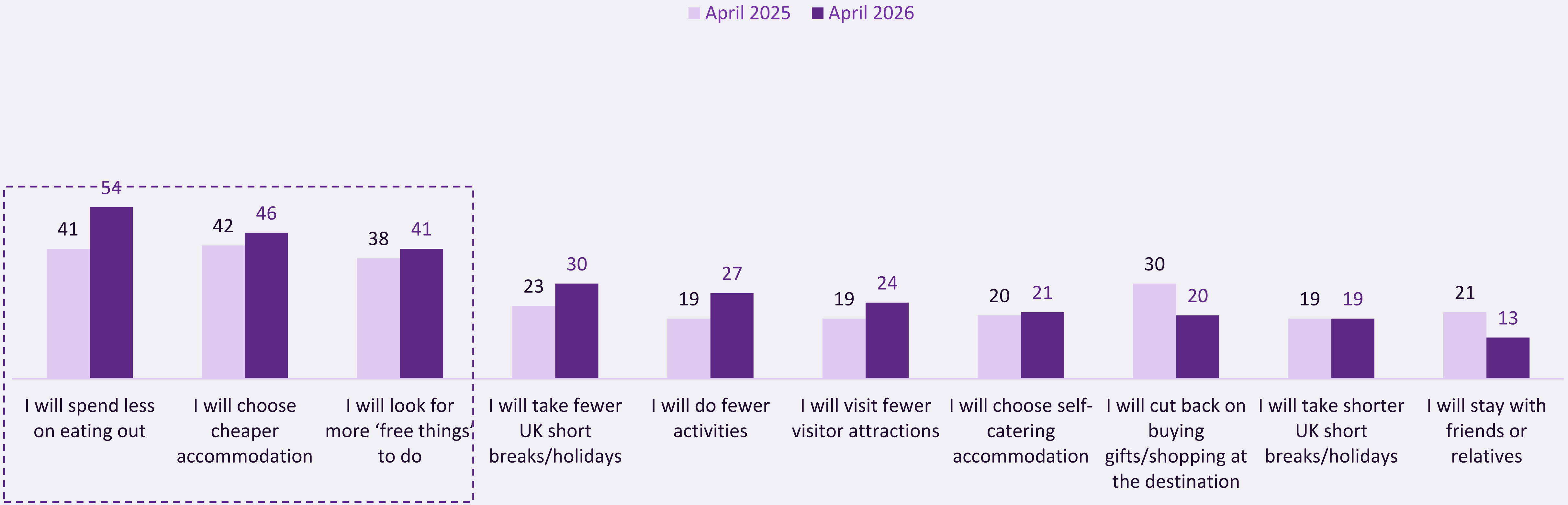
Ways in which holidays will be impacted by the cost-of-living crisis (%)



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.253

‘Spending less on eating out’, ‘choosing cheaper accommodation’ and ‘looking for more free things to do’ are the key ways that the public anticipate cutting back. This pattern is consistent with last year, however the majority of impacts are rated slightly higher.

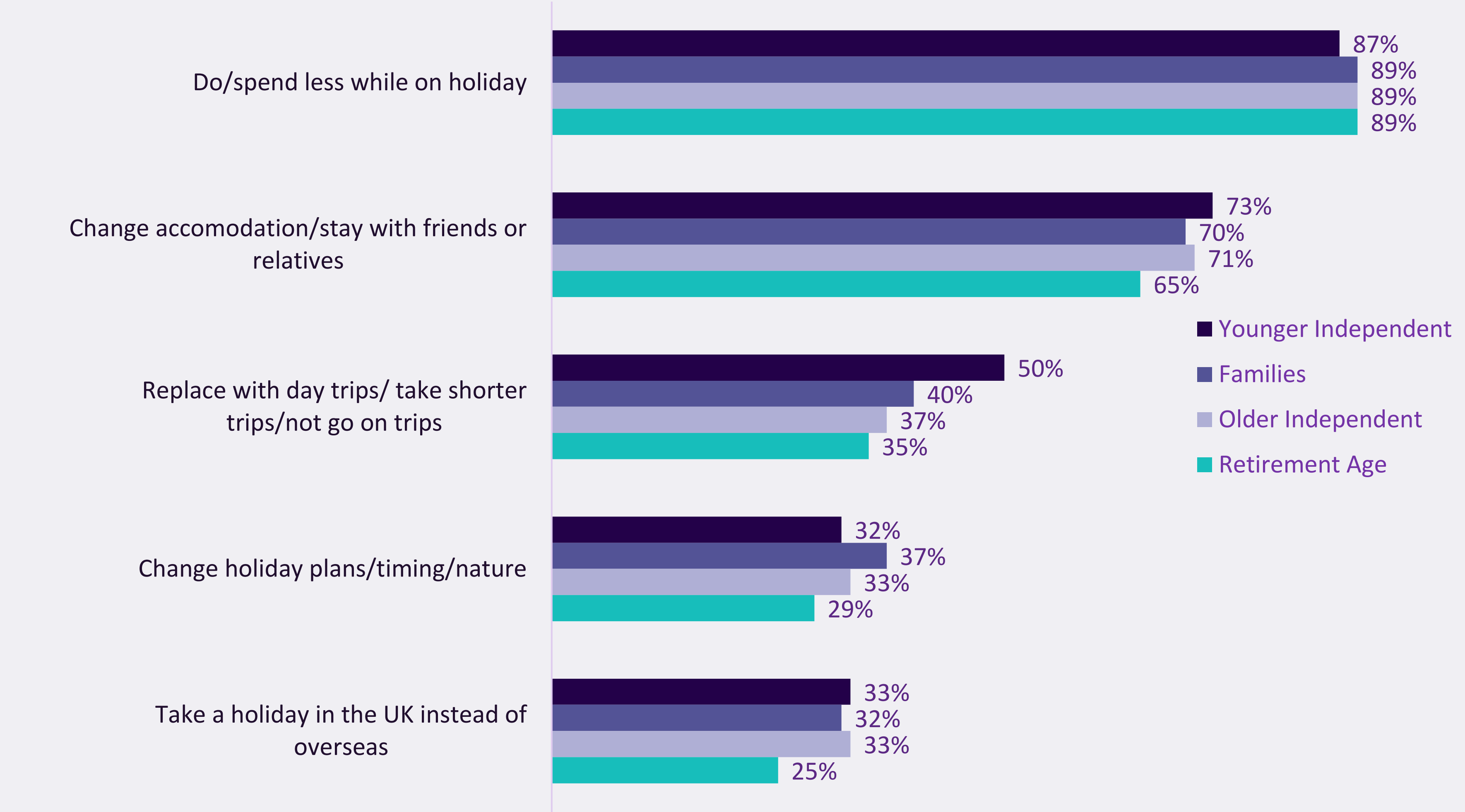
‘Cost-of-living’ impact on UK holidays and short breaks (%)



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=c.1,750. All Scotland respondents n=c.253

Those of retirement age are less likely to cut back by taking holidays in the UK or changing accommodation. Younger independents are more likely to replace holidays with day trips.

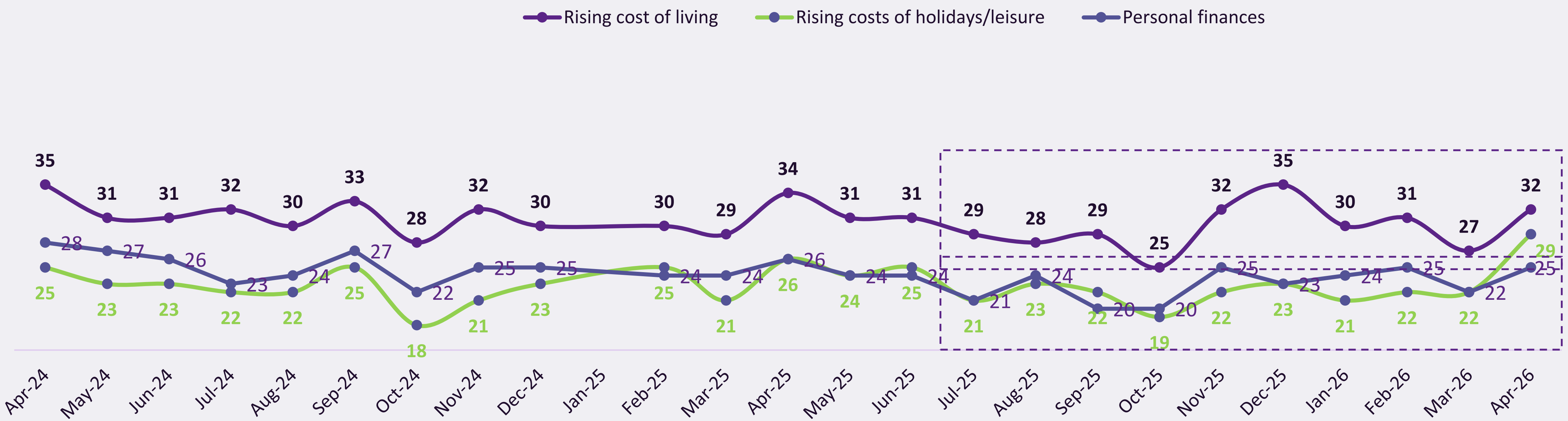
Ways in which holidays will be impacted by the cost-of-living crisis (%)



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.253

Perceived financial barriers to taking overnight domestic trips have generally increased in the last wave, with "cost of holidays/leisure" spiking to levels last recorded at the height of the cost-of-living crisis in January 2023 (29%)

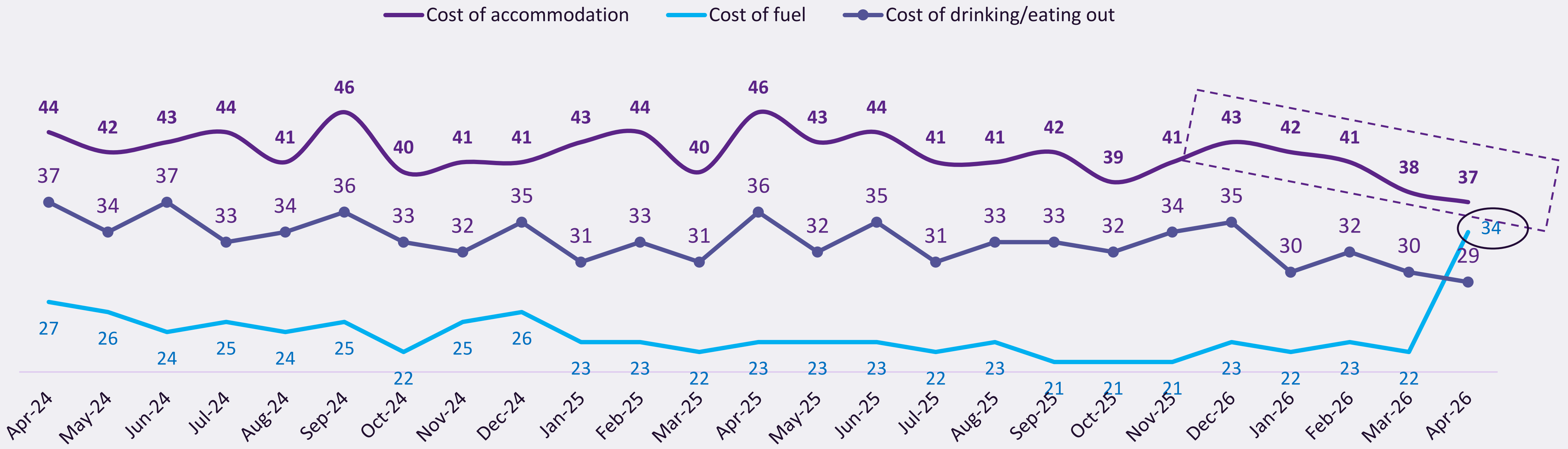
Selected financial barriers to taking a domestic holiday (%)



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

Cost of fuel has seen a large increase in concern, spiking to 34% of respondents in April. In contrast, concerns around accommodation and drinking/eating out have steadily declined since the end of last year.

Selected cost barriers (%)

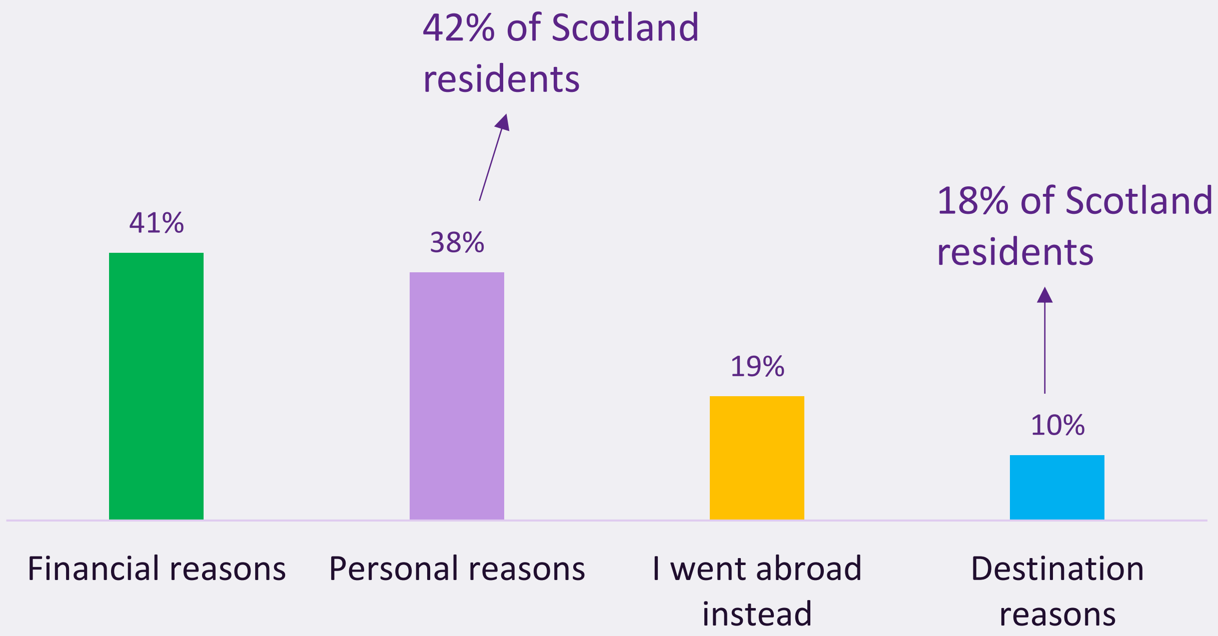


VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=c1,750

Financial reasons for not travelling are marginally higher than personal reasons, with 36% having not taken a trip in the past 12 months. This is consistent with January results where financial reasons were a barrier for 40% and personal for 38%

36% have not taken a domestic trip in the past 12 months
(35% in Apr 2025)

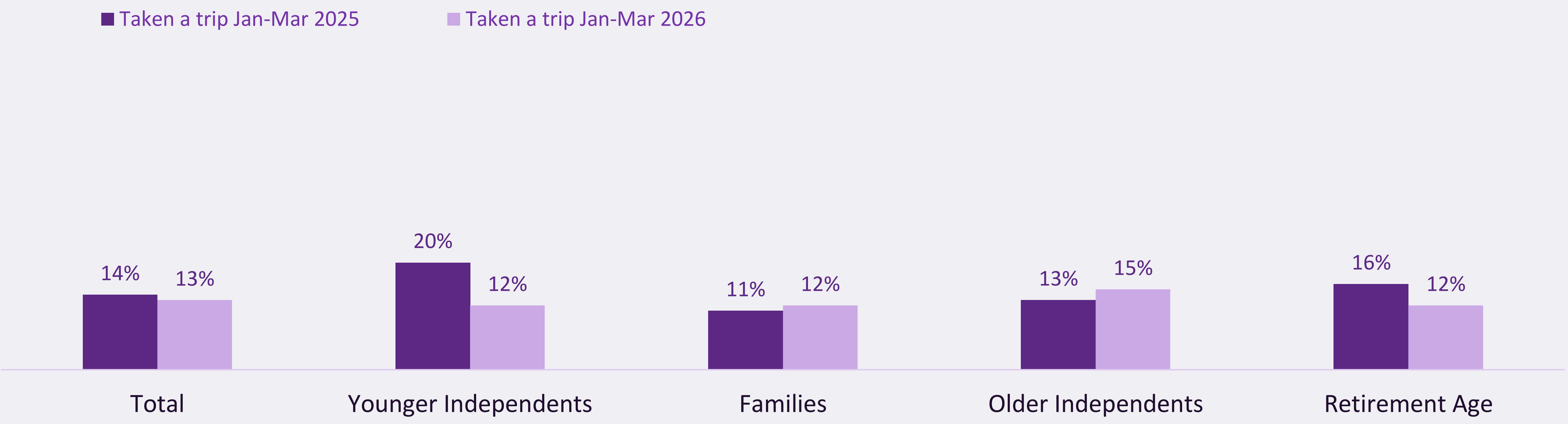
Reasons for not taking a UK overnight trip in the last 12 months (%)



VB13a. In which of these months have you taken an overnight short break or holiday in the UK in the last 12 months? n=1,750 VB13b. Why have you not taken an overnight short break or holiday in the UK in the last 12 months? Base Apr n=590 Scotland Residents n=70

At a total level, the proportion who have taken trips across Jan-Mar is in line with last year. Looking by life stage, more older independents have taken a trip, although the proportion of those of retirement age who have taken a trip has fallen.

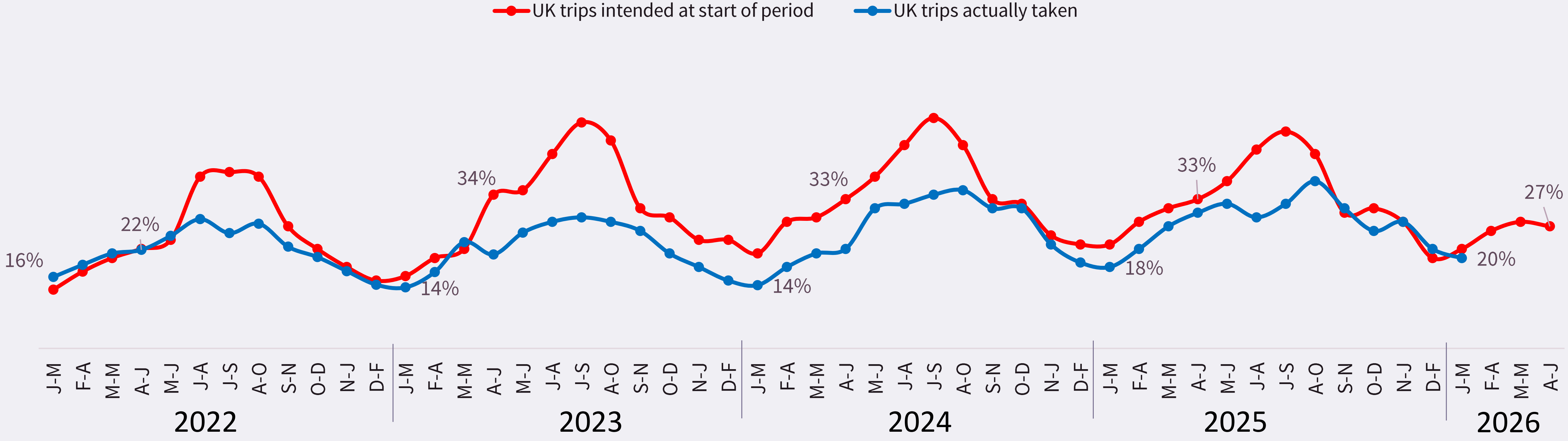
Trips taken (Jan-Mar) by life stage



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

Predicted trips taken continue to outperform actual trips taken within 3 month periods. Trips intended domestically over the next 3 months are in line with last year

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

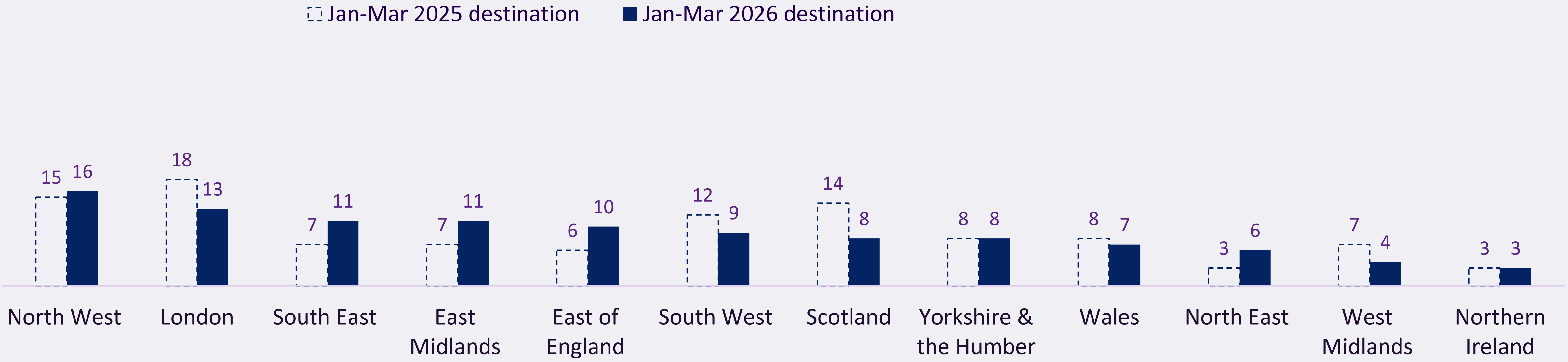


VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip? VB2enew: Which of the following best describe how close you are to booking your next overnight UK trip in [pipe: hVB3]? Base: All UK respondents. n=1750 each wave

*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

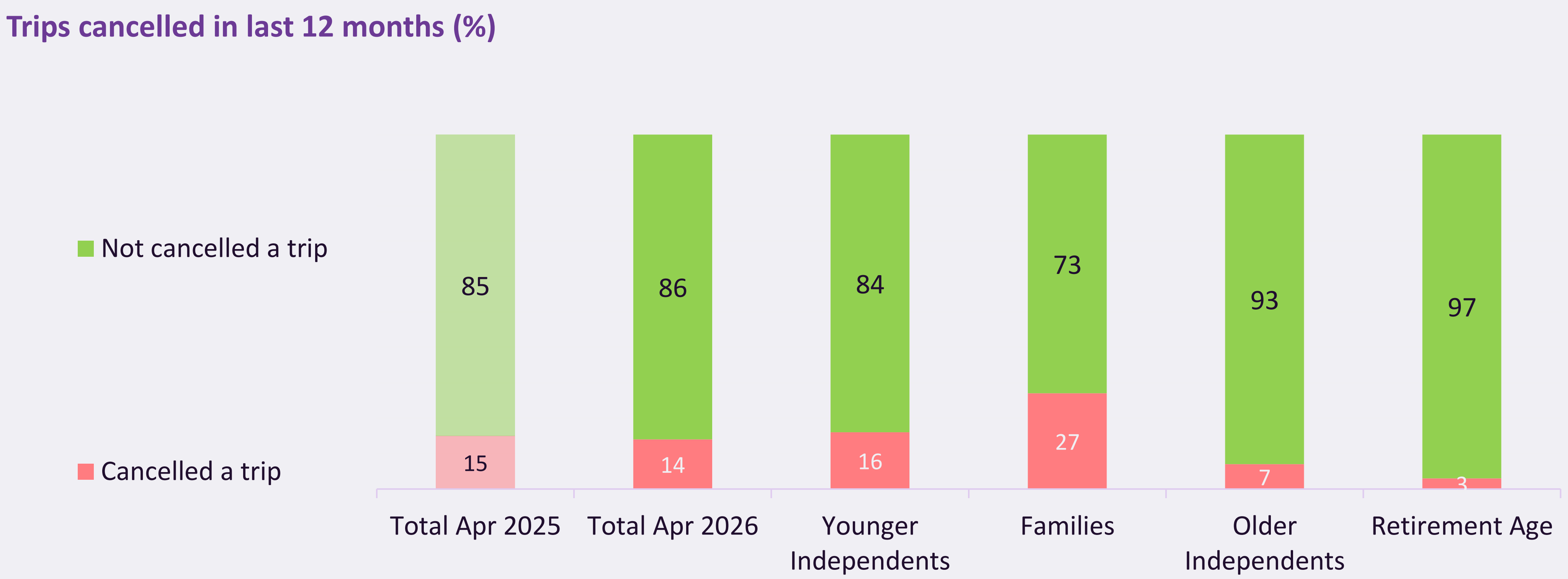
The North West and London attracted the highest proportion of overnight visitors across Jan-Mar. Scotland visitors have fallen compared to Q1 last year.

Where stayed on UK overnight trip between January to March (%)



VB13C. Where in the UK did you stay on your most recent trip in [pipe: hVB13c]?
Base: All trip-takers between Jan-Mar, April fieldwork *Note: As the question asks about the most recent trip, responses will be biased towards the latter part of the period in question

14% have cancelled a trip in the last 12 months, similar to proportions in 2025. Younger age groups, particularly families, are more likely to change plans.



VB2eiii: Out of interest, have you cancelled any of your UK short breaks or holidays in the last 12 months? VB13bii. Why did you cancel your UK short breaks or holidays in the last 12 months ?
Base: All UK respondents n=1,755; Younger Independents (256) Families (607) Older Independents (507) Retirement Age (385)

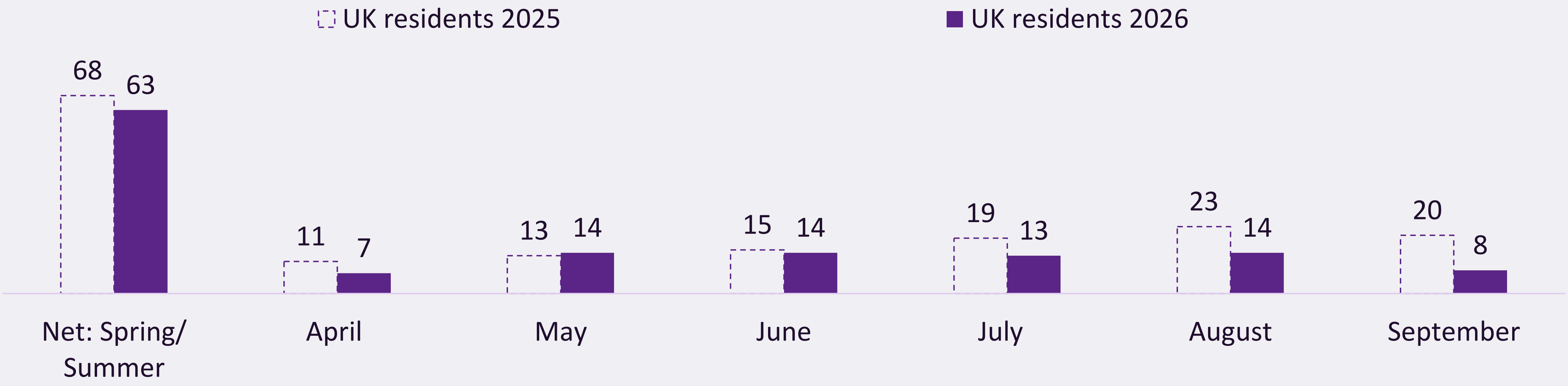
TRIP INTENTIONS FROM APRIL TO SEPTEMBER

Key finding 2: Overall trip intentions from April to September

Domestic trip *intentions* across the summer are down at a UK wide level, with commitment levels to actually taking trips also lower than last year

Domestic trip intentions are down compared to last year, particularly across the key summer months.

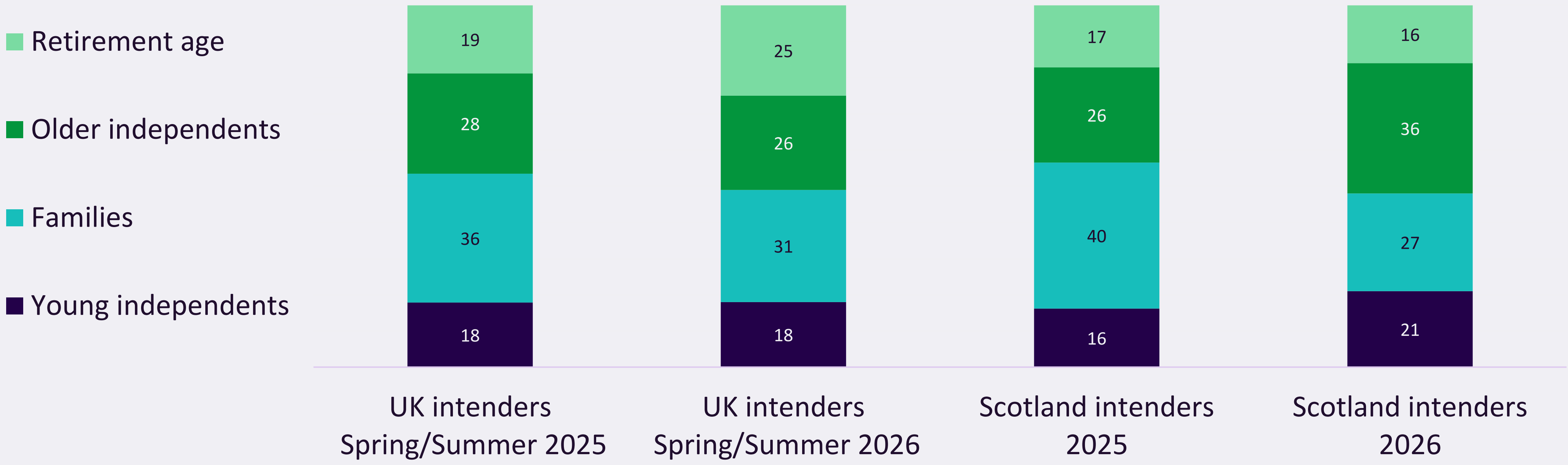
Domestic trip intention (%)



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?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,755

The retirement age group have grown in proportion for UK intention in Spring/Summer 2026. For Scotland intenders, older independents is now the most common group, with a smaller proportion of families planning a trip

UK intenders by life stage (%)



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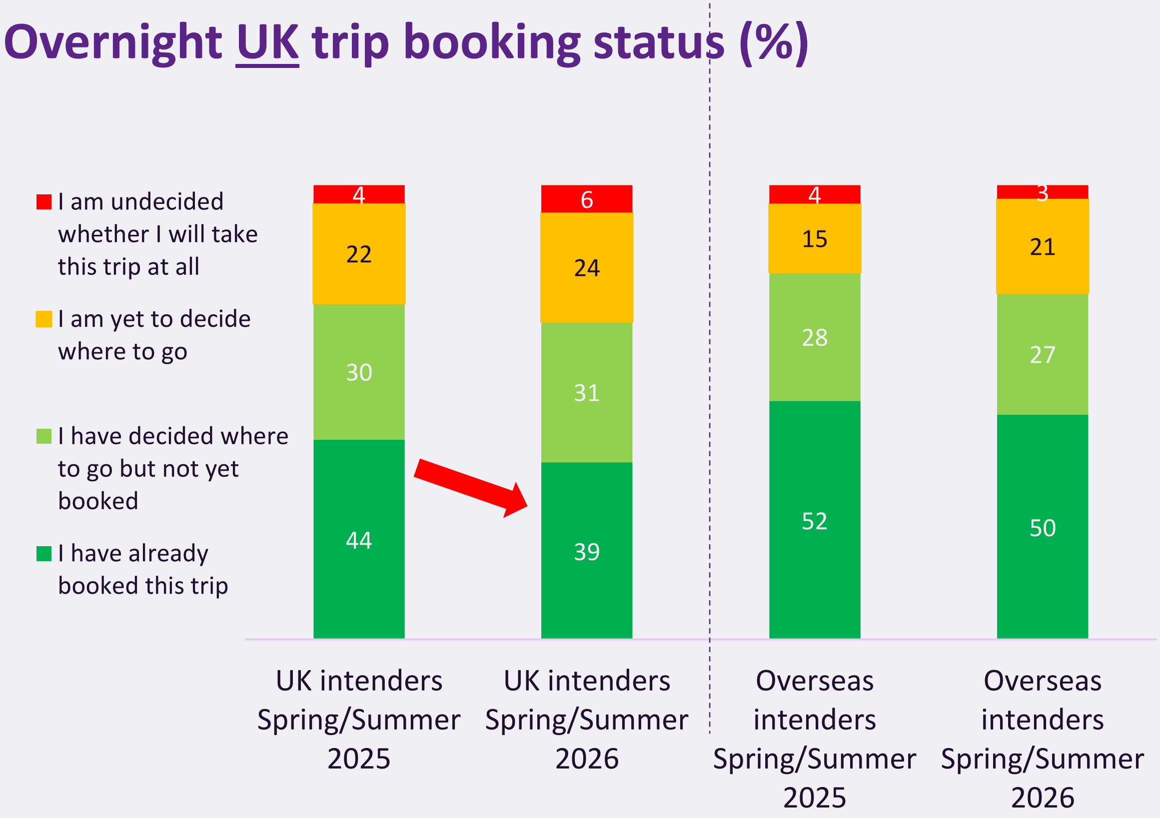
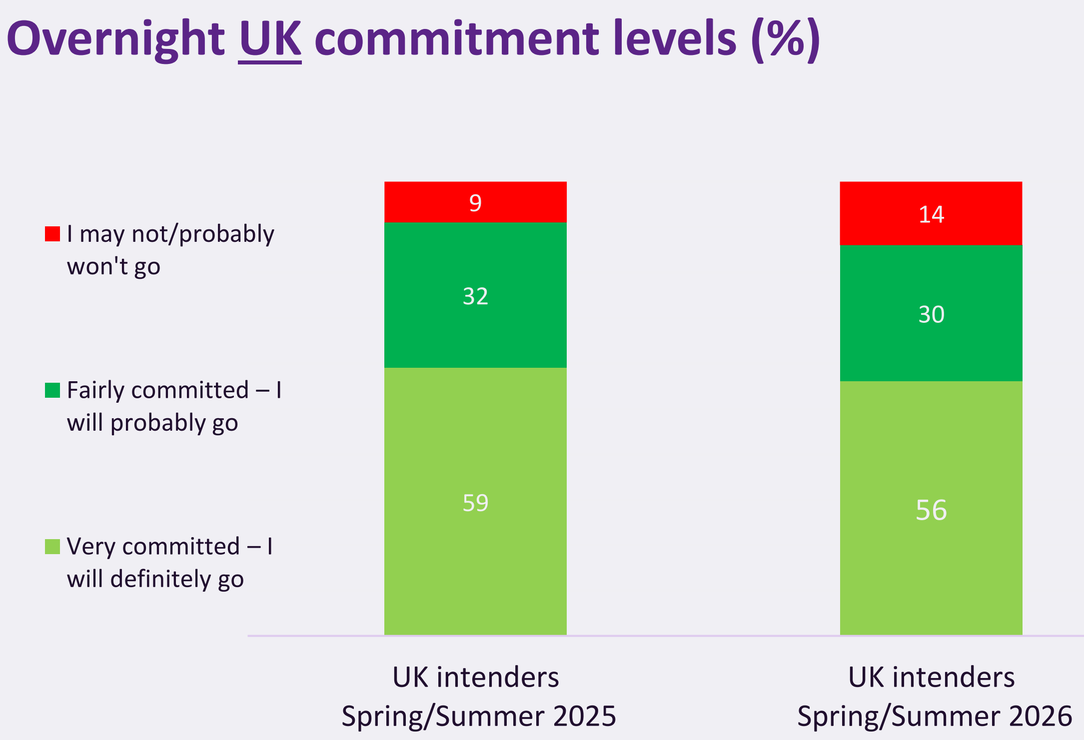
Source: Demographic questions. Base: UK population n=1,755; UK intenders Spring/Summer 2025 n=1,201; UK intenders Spring/Summer 2026 n=1,108; Scotland intenders Spring/Summer 2026 n= 124.

Booking is behind 2025, with only 39% having booked a domestic trip and three in ten still unsure where they will go or whether they will take the trip. Booking for overseas trips is just a little higher with 50% having already booked.





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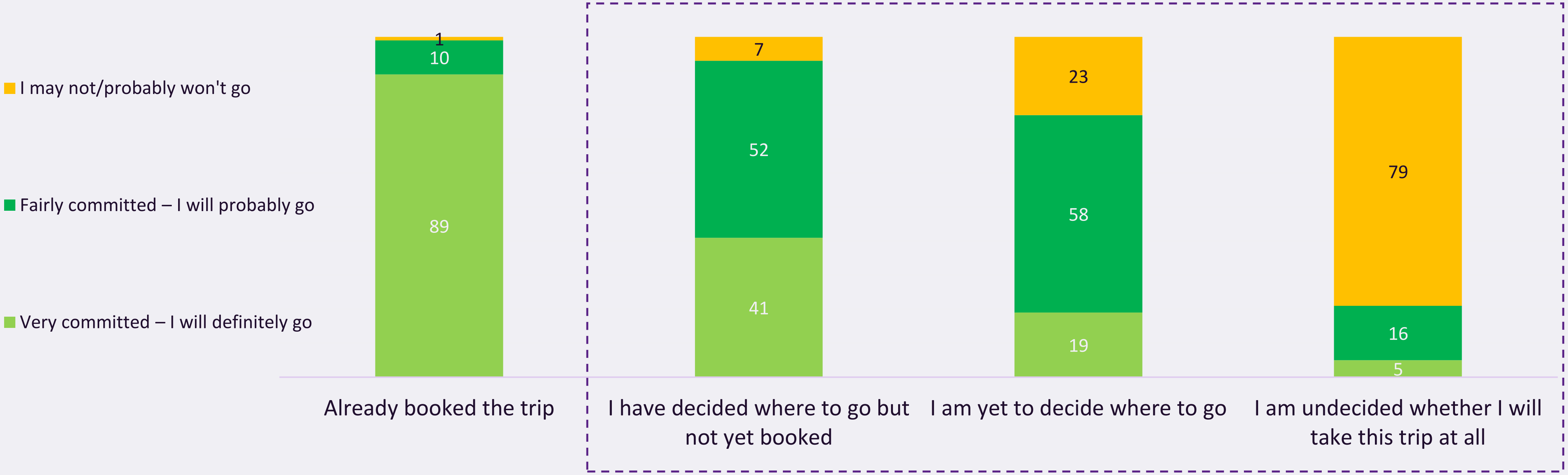
VB2e/g. Which of the following best describe how close you are to booking your next overnight UK/OVERSEAS trip in <INSERT MONTH FROM VB2a(III)>?UK intenders Spring/Summer 2024 n=1,212; UK intenders Spring/Summer 2025

Commitment levels are particularly low amongst those that have not booked the trip, suggesting that they will need some convincing and support to follow through

Overnight UK commitment levels by booking status (%)



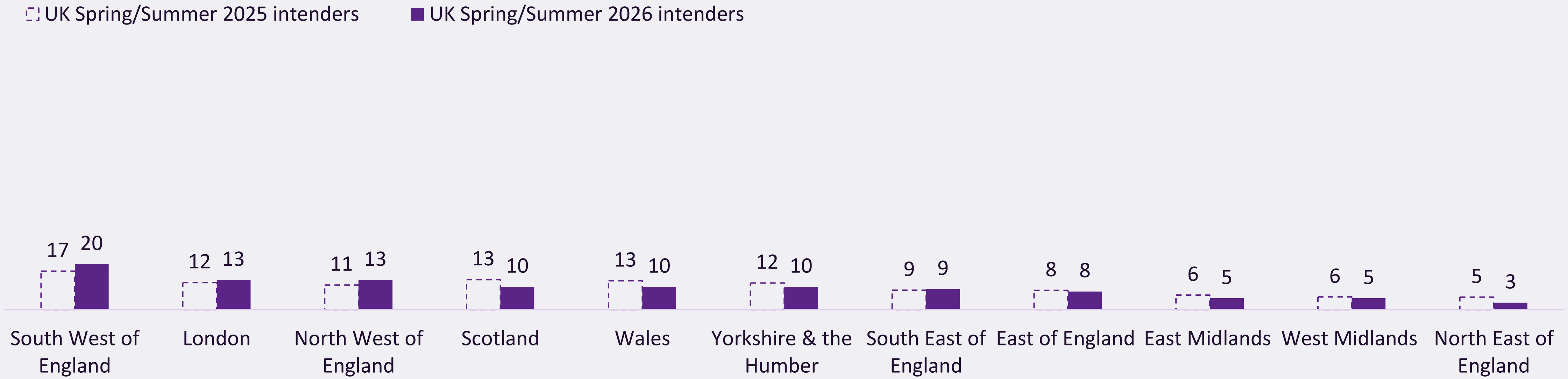
VB2ei. How committed are you to taking this next trip in <INSERT MONTH FROM VB2A>? Base: Already booked the trip n=426; Decided where but not yet booked n=351; Yet to decide where to go n=266; Undecided whether I will take the trip at all n=56* *Note low base

Key finding 3: Scotland trip composition – signs of cutting back

Scotland intenders have decreased in proportion and are more likely to visit for a short-break

Scotland intentions have decreased on this time last year. South West of England furthers its lead as most preferred domestic destinations (+3pps)

Destination for domestic spring/summer trip (%)



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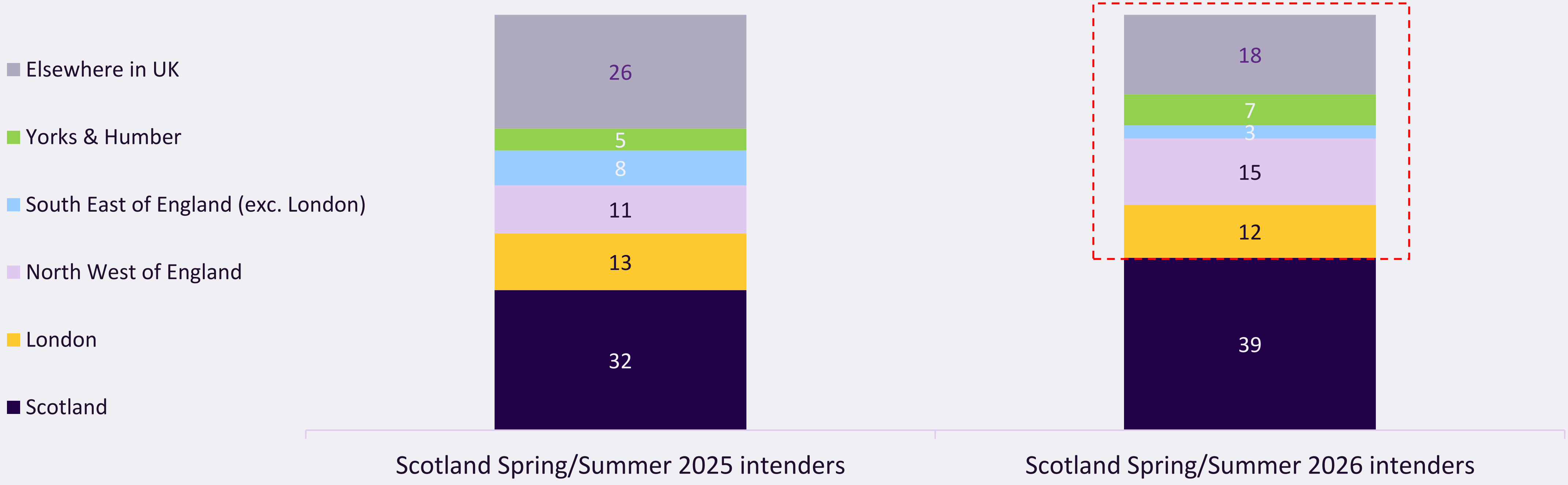
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: UK Spring/Summer 2025 intenders n= 1201; UK Spring/Summer 2026 intenders n= 1,108

The proportion of Scotland trip intenders who are Scotland residents has increased to almost two-fifths.

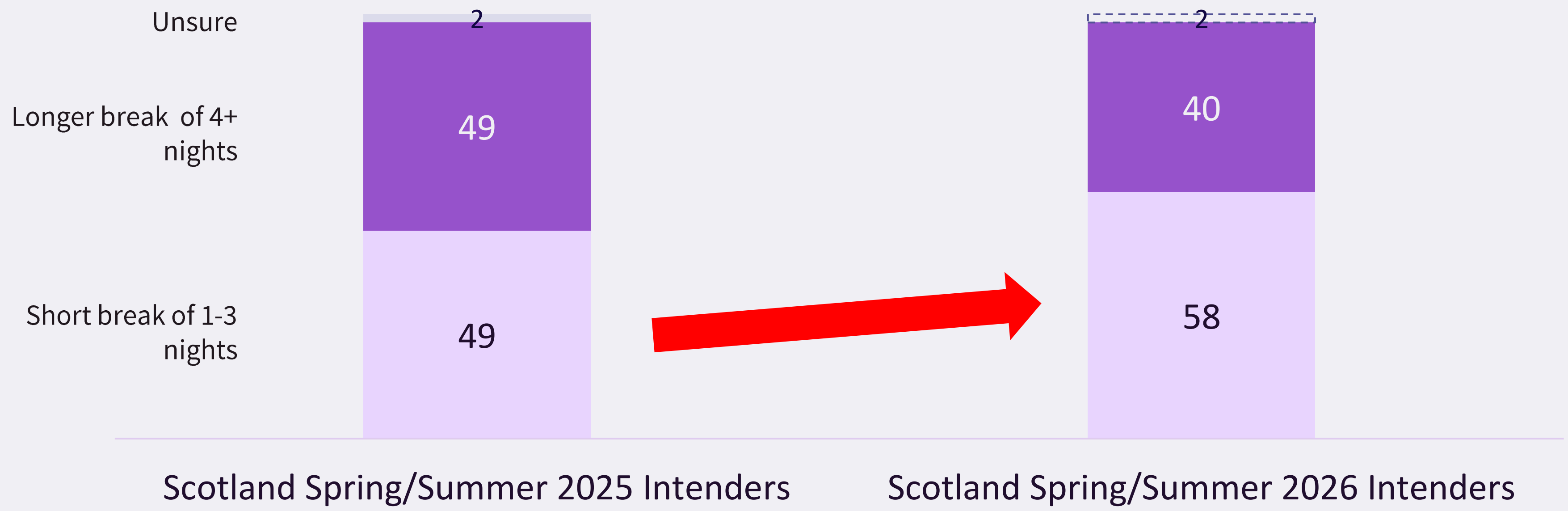
Origin of Scotland intenders (%)



Source: Q3 Demographics.
Base: All respondents. All Scotland Spring/Summer 2025 intenders n=488; All Scotland Spring/Summer 2026 intenders n=124.

Compared to last year, more are planning a short trip to Scotland – a result of the intender profile shifting towards Scottish residents. However, 59% of families are likely to take longer breaks of 4+ nights.

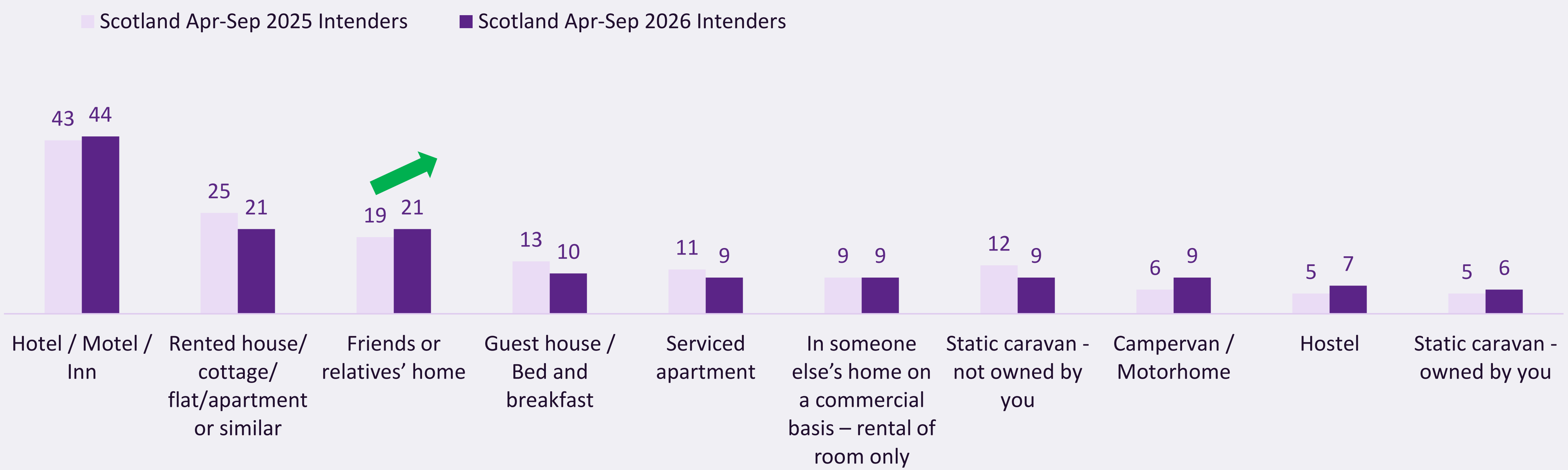
Length of next Scotland Spring/Summer domestic trip (%)



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 Spring/Summer 2026 intenders n=103

Intention to stay in a hotel remains the biggest planned accommodation choice. However, there has been an increase in plans to stay at friends' or relatives' – reflecting the concerns over cost of accommodation. Rented house/cottage/flat/apartment has dropped after last wave's increase.

Accommodation planning on staying in on next UK overnight trip for Scotland Apr-Sep intenders (%)



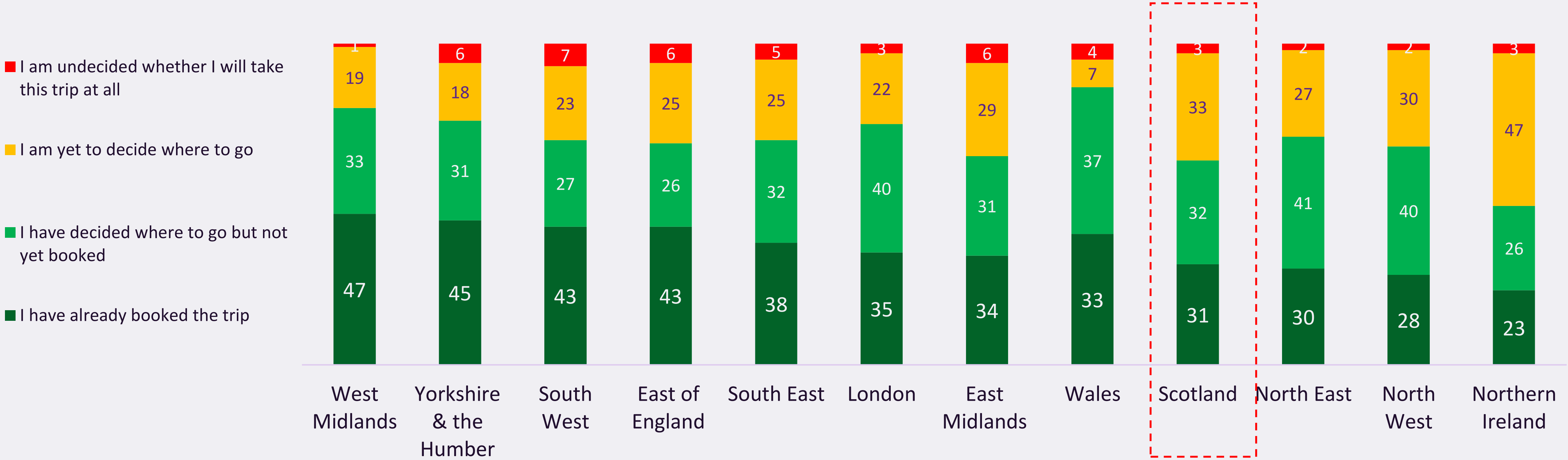
QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland resident Spring/Summer 2025 intenders n=124.

Key finding 4: Scotland trip vulnerability

Scotland summer trips are more vulnerable than the majority of other UK destinations, with less commitment and lower future bookings

Scotland is at the lower end of UK areas in terms of those who have 'already booked', with nearly three in ten 'yet to decide where to go'. This makes trips more vulnerable.

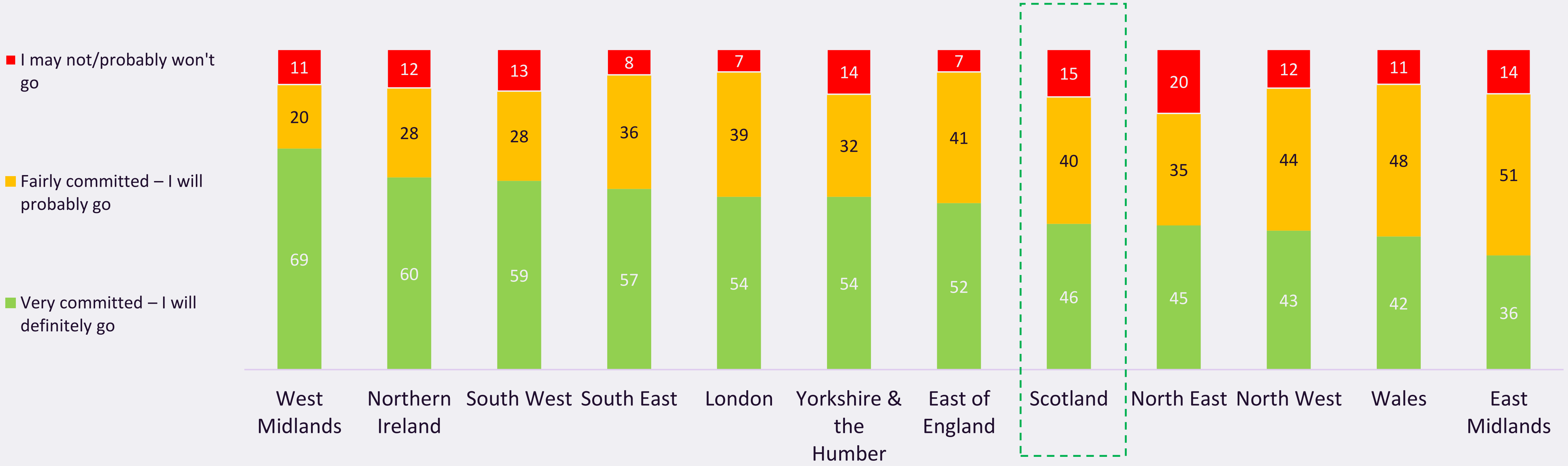
Overnight UK trip booking status by destination (%)



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 Spring/Summer 2026. London n=187; West Mids n=63; NW Eng n=188; East Mids n=66 SW Eng n=236; SE Eng n=123; Yorks & Humber n=139; NI n=30; Wales n=161; NE Eng n=58; Scotland n=162

Commitment to visit is also relatively low compared to other regions, with 46% very committed, and 15% saying they may not or probably won't go.

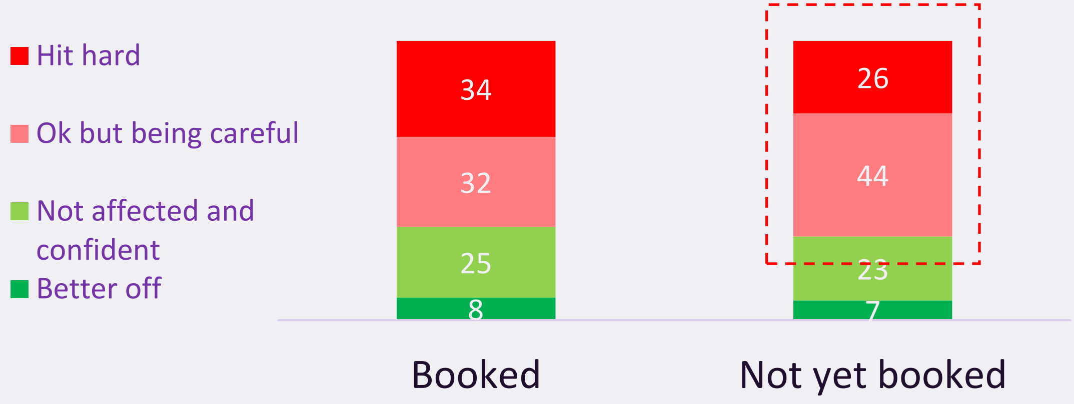
Overnight UK commitment levels by destination (%)



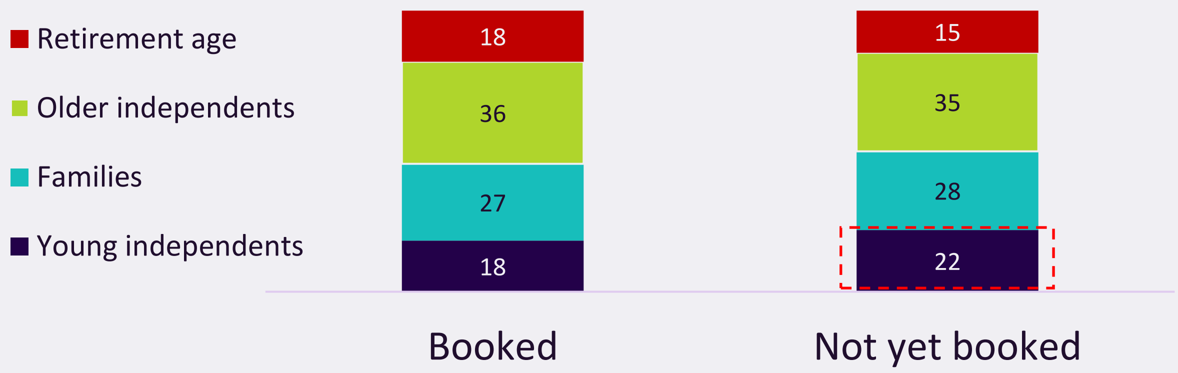
VB2ei. How committed are you to taking this next trip in <INSERT MONTH FROM VB2A>? Base: UK intenders Spring/Summer 2026. London n=187; West Mids n=63; NW Eng n=188; East Mids n=66 SW Eng n=236; SE Eng n=123; Yorks & Humber n=139; NI n=30; Wales n=161; NE Eng n=58; Scotland n=162

The non-bookers are more likely to be financially stretched, younger and living outside Scotland. Being that non-Scotland residents stay longer and spend more, it is important to convert non-bookers to booking

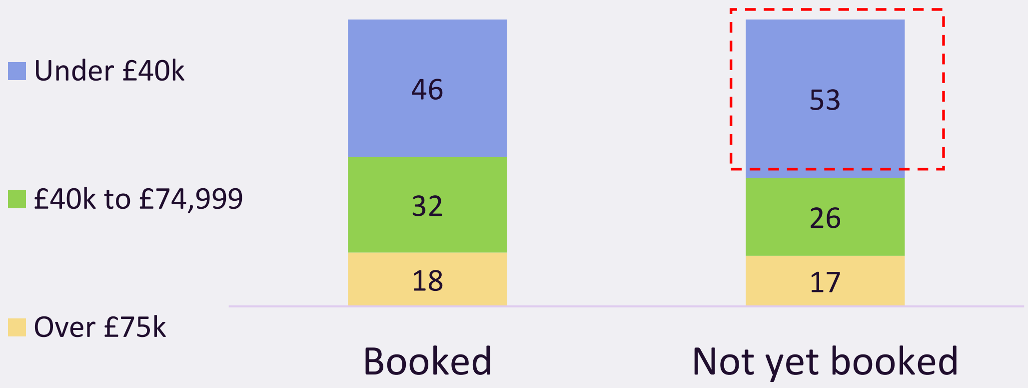
Impact of cost-of-living crisis (%)



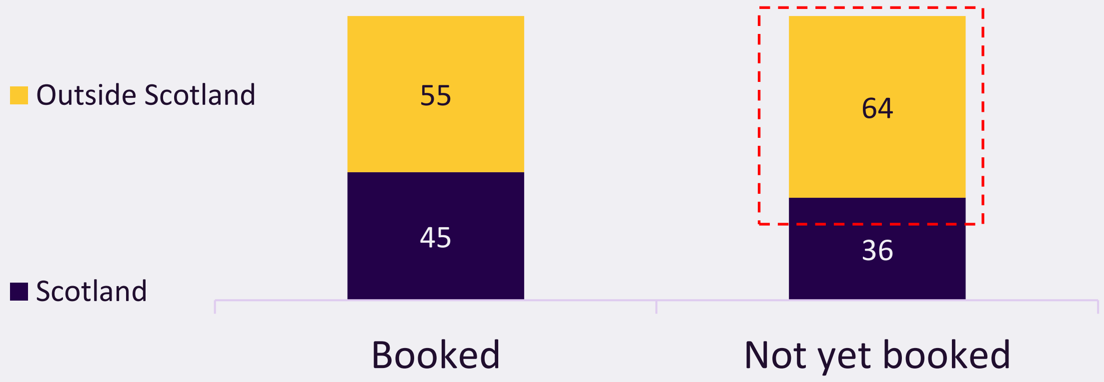
Life stage (%)



Household income (%)



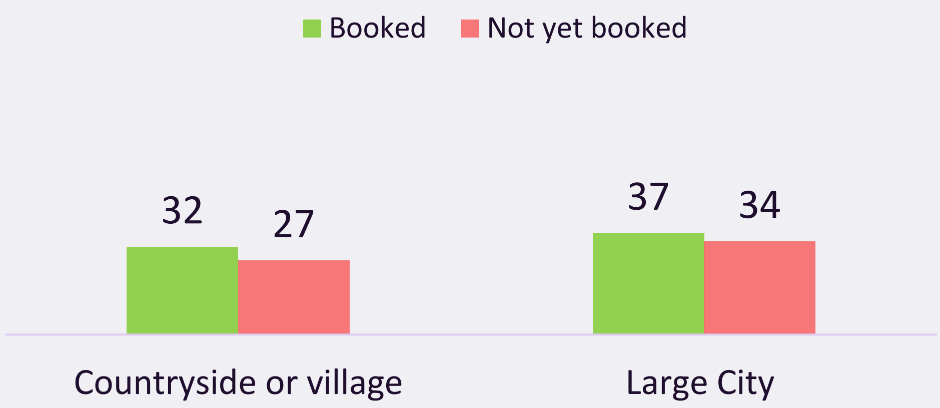
Origin (%)



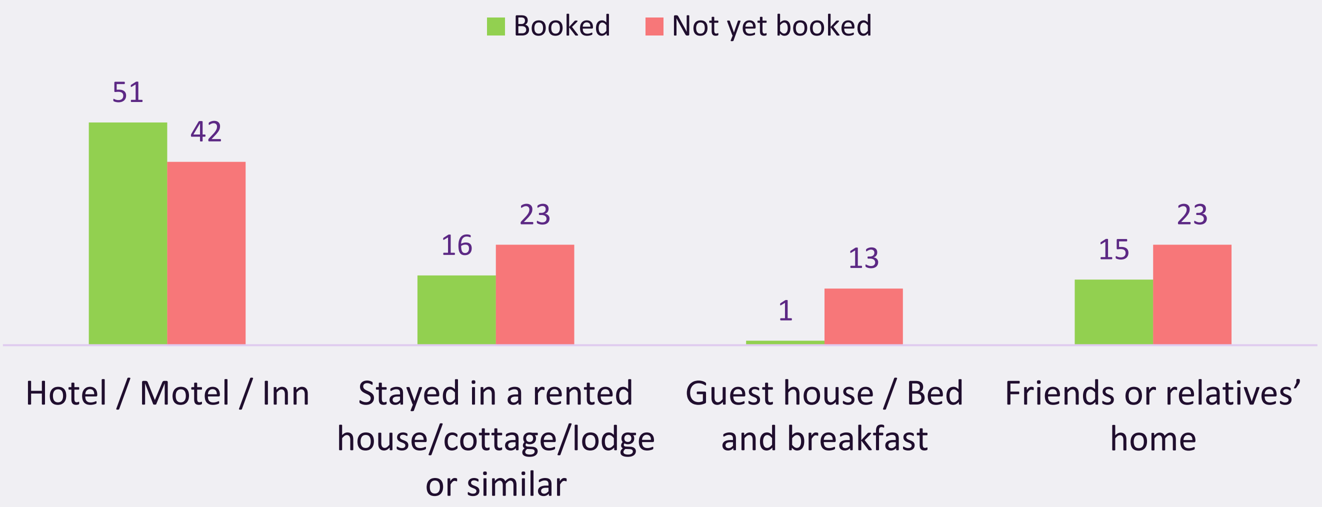
Planning to visit Scotland in Apr-Sep 2025 Already booked trip n=71; Not booked trip n=149

Non-bookers are split between visiting Edinburgh and Glasgow, staying rented cottages or with friends/family. They are more likely to be planning a short break.

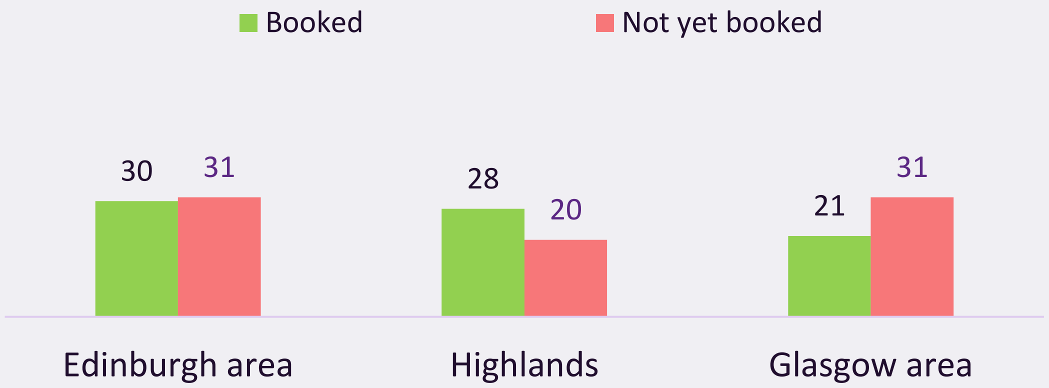
Destination type (%)



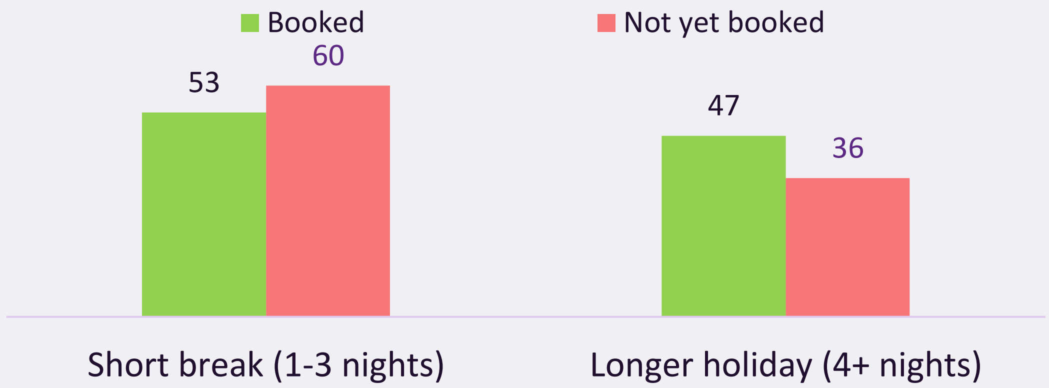
Accommodation type (%)



Area of Scotland (%)



Length of trip (%)



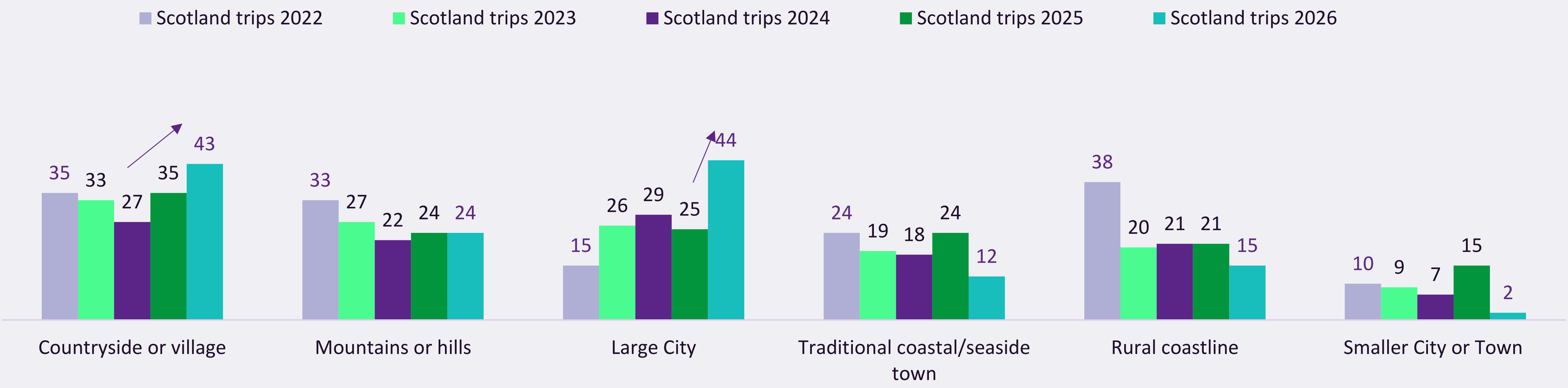
Planning to visit Scotland in Apr-Sep 2025 Already booked trip n=71; Not booked trip n=149

Key finding 5: The appeal of large cities

This year sees a shift back to large cities, as well as countryside – in particular, interest in visiting Glasgow has grown to 3 in 10

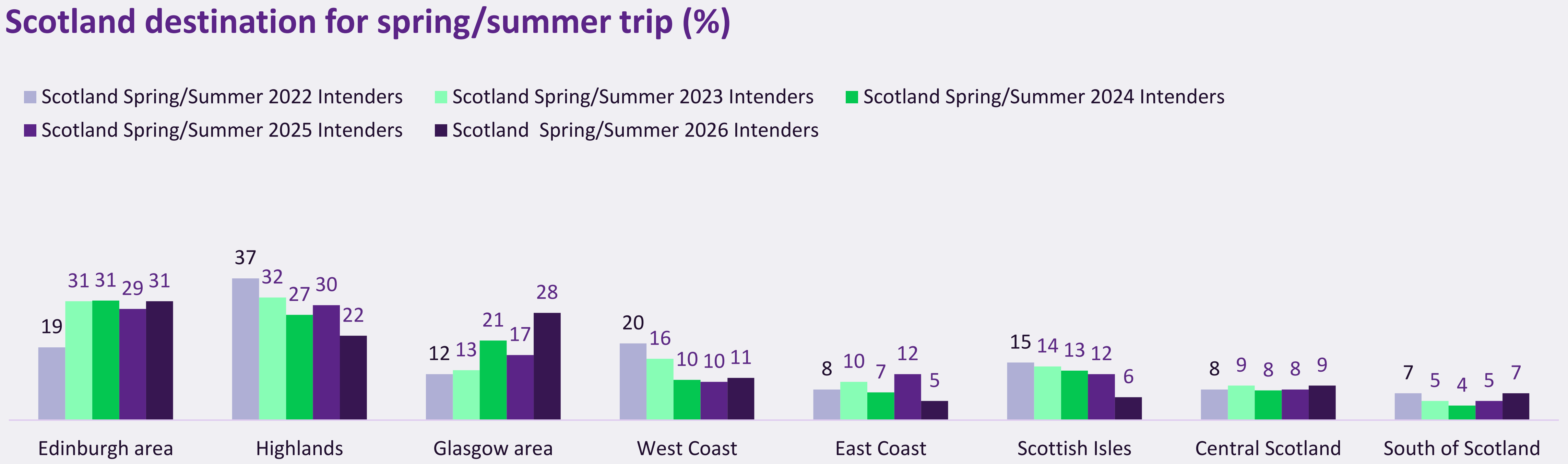
The intention to visit Scotland's large cities has increased this year with 44% of those planning to visit planning to spend some time there. However, interest in the countryside has also increased.

Destination type for Scotland 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 Spring/Summer 2023 intenders n=321; All Scotland Spring/Summer 2024 intenders n=400; All Scotland Spring/Summer 2025 intenders n=488; All Scotland Spring/Summer 2026 intenders n=124

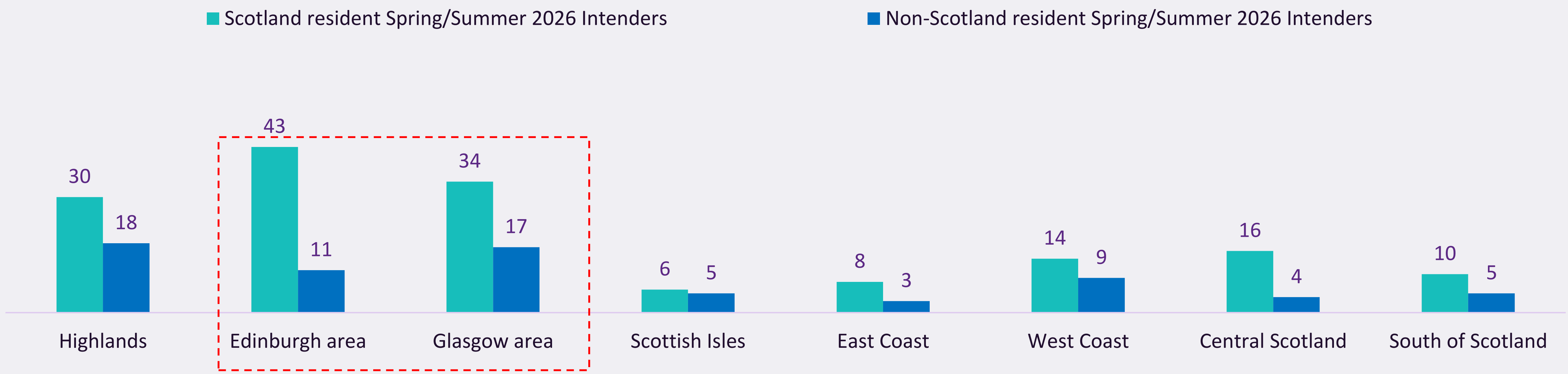
3 in 10 are planning a visit to Edinburgh or Glasgow, with Glasgow up on last year, while planned trips to the Highlands are down a little



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 Spring/Summer 2023 intenders n=419; All Scotland Spring/Summer 2024 intenders n=485 All Scotland Spring/Summer 2025 intenders n=488 All Scotland Spring/Summer 2026 intenders n=124

It's important to remember that intended destination varies considerably by region of origin – if non-Scottish intenders do not follow through with trips, actual stays in Edinburgh and Glasgow are likely to drop

Scotland destination by region of residence (%)



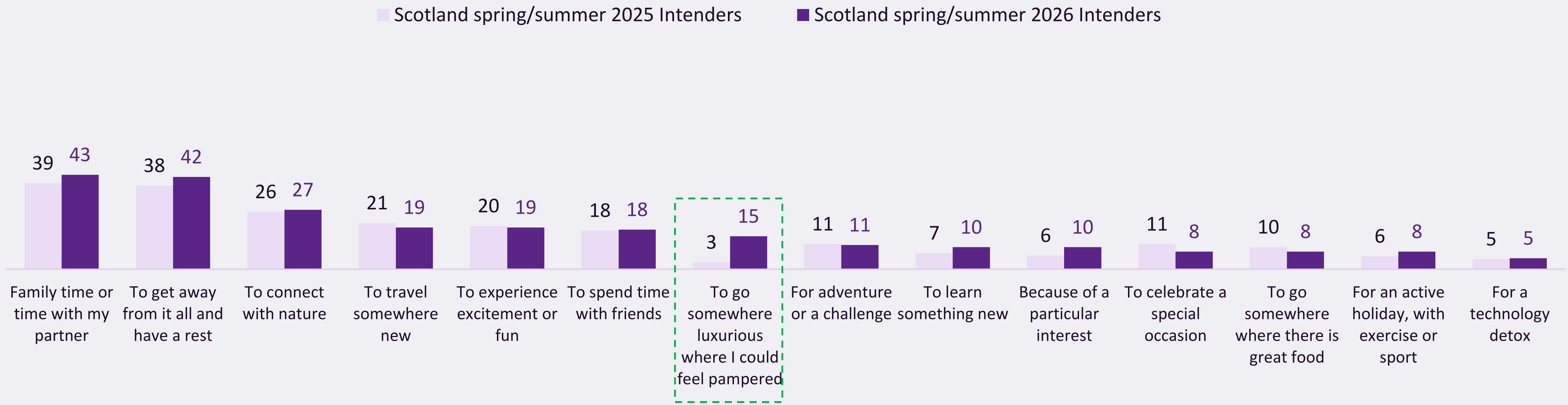
QVB5ix. Where in Scotland do you expect to be staying on this next holiday or short break?
Base: All Scotland resident Spring/Summer 2026 intenders n=63; All Scotland non-resident Spring/Summer 2026 intenders n=61

Key finding 6: Motivations and activities

Scotland intenders have a range of motivations and activities. Spending time with family is key, and interest in culture has grown as a key activity while on holiday

Scotland domestic intenders visit Scotland for a range of reasons, with spending time with families and getting away from it all the top motivations. Going somewhere to feel pampered has grown as a motivation compared to last year.

Motivations for Scotland Spring/Summer overnight trip (%)

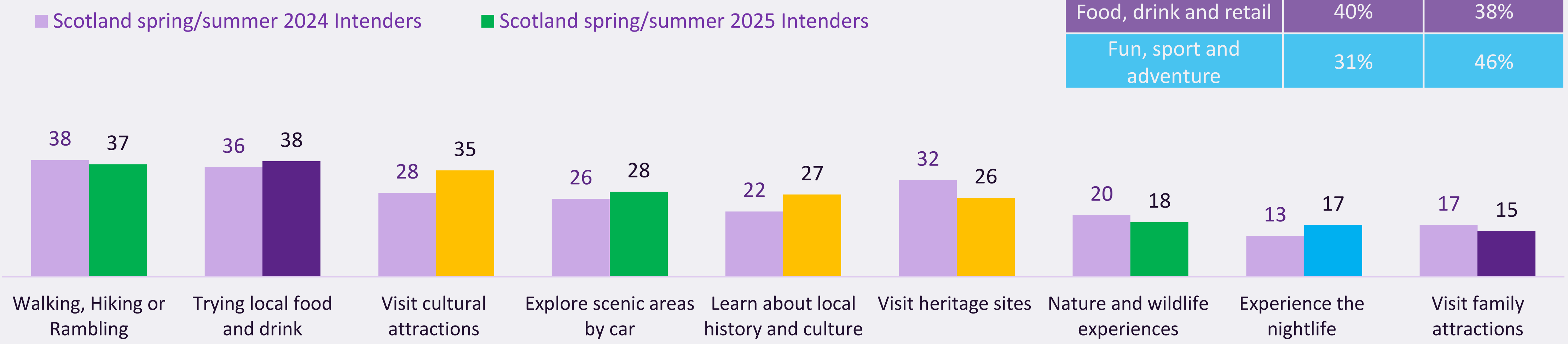


VB6fii. Which of the following best describe your motivation/s for this trip? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Spring/Summer 2025 intenders n=488

Interest in visiting Scotland to explore its heritage and cultural attractions has grown this year, although nature also remains key.

Activities for Scotland overnight trip (%)

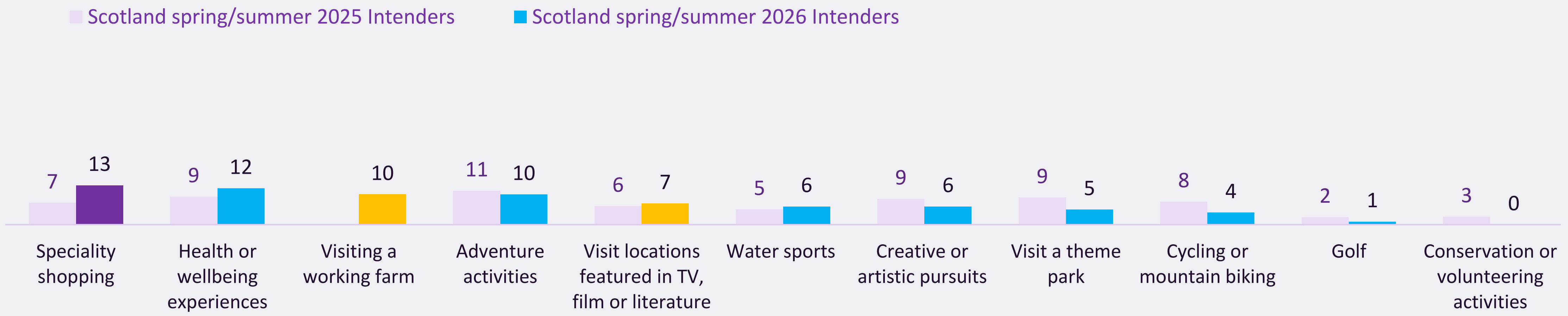
Net categories	2025	2026
Nature focus	59%	56%
Heritage and culture	53%	62%
Food, drink and retail	40%	38%
Fun, sport and adventure	31%	46%



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 Scotland. All Scotland Spring/Summer 2025 intenders n=488

Trip-takers also explore a range of other activities

Activities for Scotland overnight trip (%)



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 Scotland.
All Scotland Spring/Summer 2025 intenders n=488

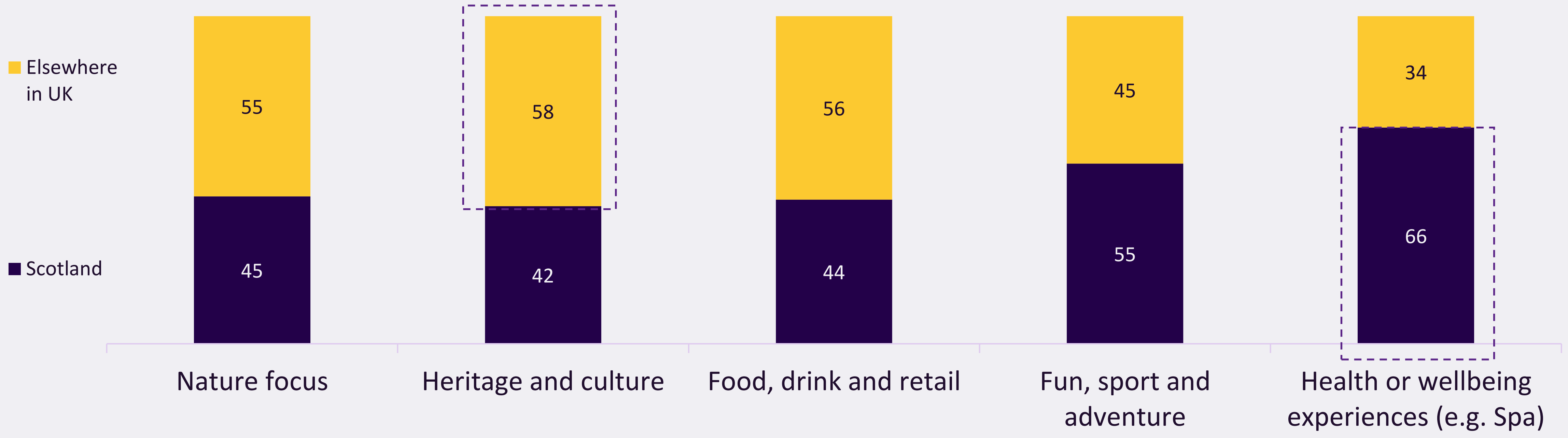
Older age groups tend to favour nature, heritage, and food, drink and retail, while adventure has a younger focus. Health or wellbeing experiences are dominated by older independents

Activities by life stage (%)

Demographics. Nature focus n=61; Heritage and culture n=51; Retail and catering n=48 Sport and adventure n=47; Health or wellbeing experiences n=53

Interest in activities also differ by visitor origin– ‘heritage and culture’ is more of a focus for non residents of Scotland, while Scotland residents are more focused on health and wellbeing

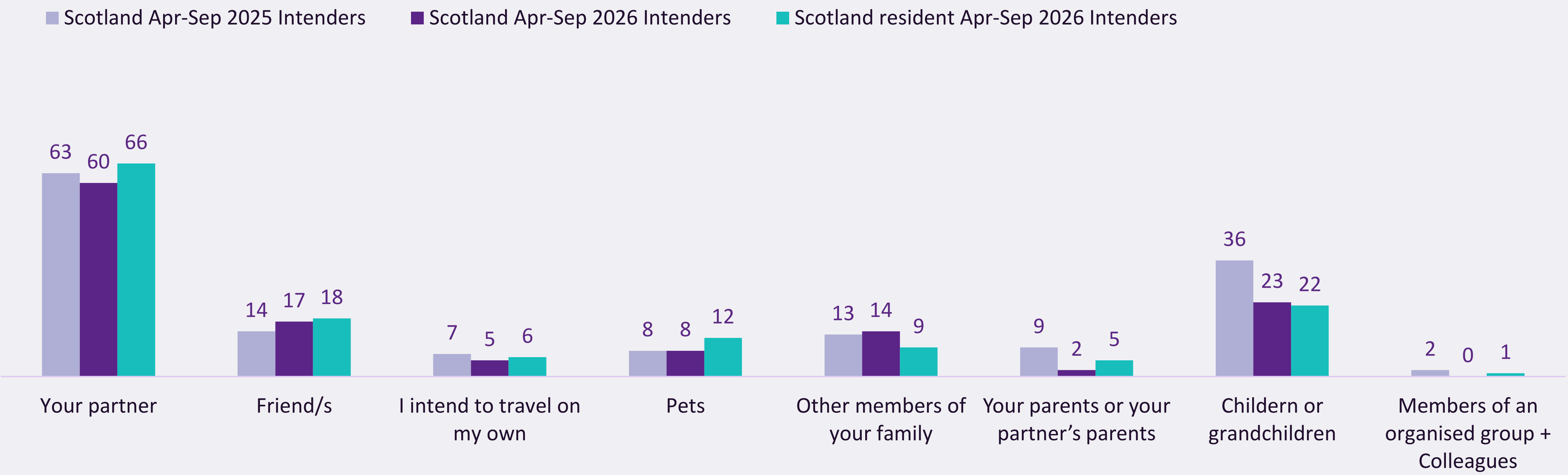
Activities in Scotland by region of origin (%)



Demographics. Nature focus n=61; Heritage and culture n=51; Retail and catering n=48 Sport and adventure n=47; Health or wellbeing experiences n=53

Most Scotland intenders are planning to visit with a partner, followed by children or grandchildren. Those planning to visit with children has increased since last year.

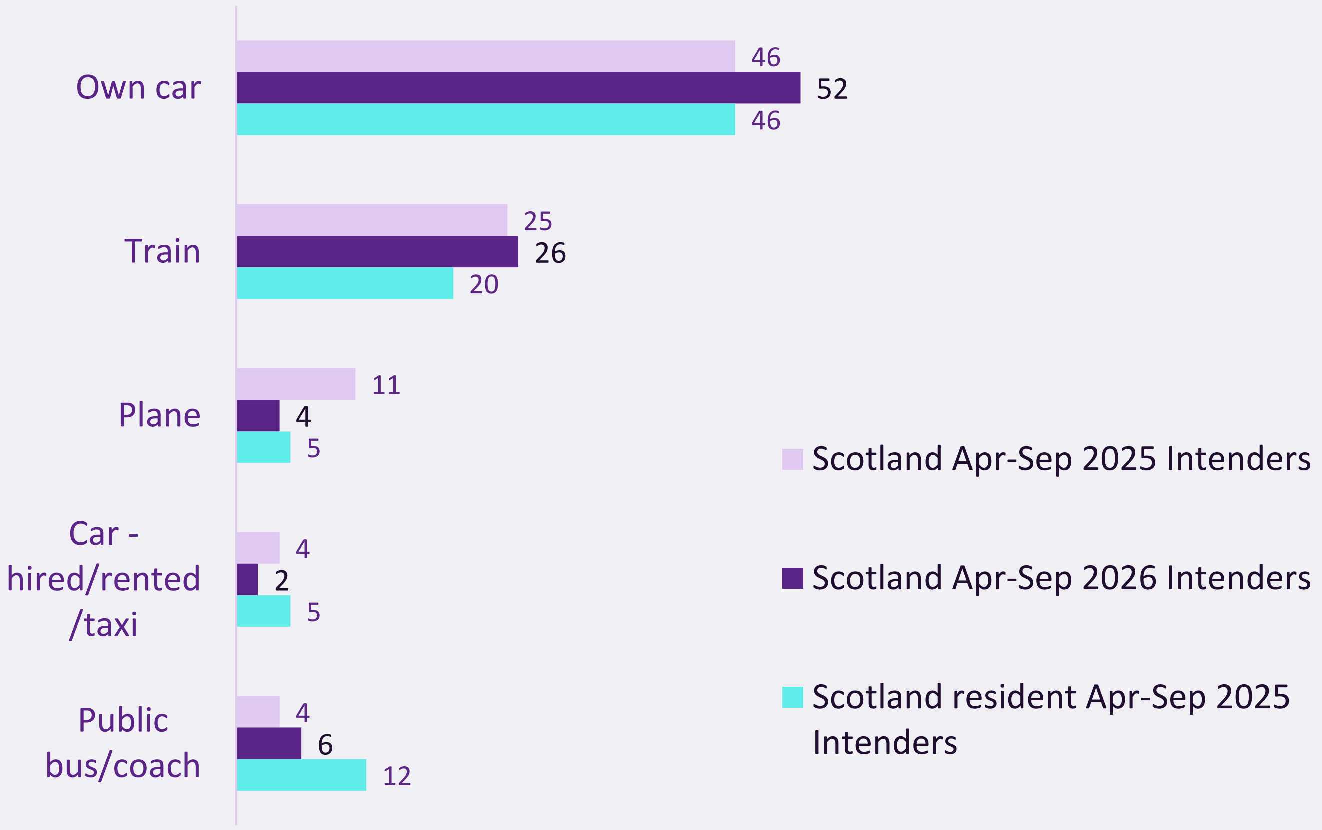
Visitor party make-up for Scotland Apr-Sep intenders (%)



QVB4d. With whom are you likely to be spending your holiday?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland Apr-Sep 2026 intenders n=103; All Scotland resident Apr-Sep 2065 intenders n=61;

‘Own car’ (52%) is the leading mode of transport intended to be used on a trip in Scotland in Apr-Sep 2026, followed by ‘train’ (at 26%). Those living in Scotland are more likely to make use of public buses.

Top 5 main modes of travel of destination for trip in Apr-Sep (%)



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 Apr-Sep 2026 intenders n=103; All Scotland resident Apr-Sep 2026 intenders n=61;

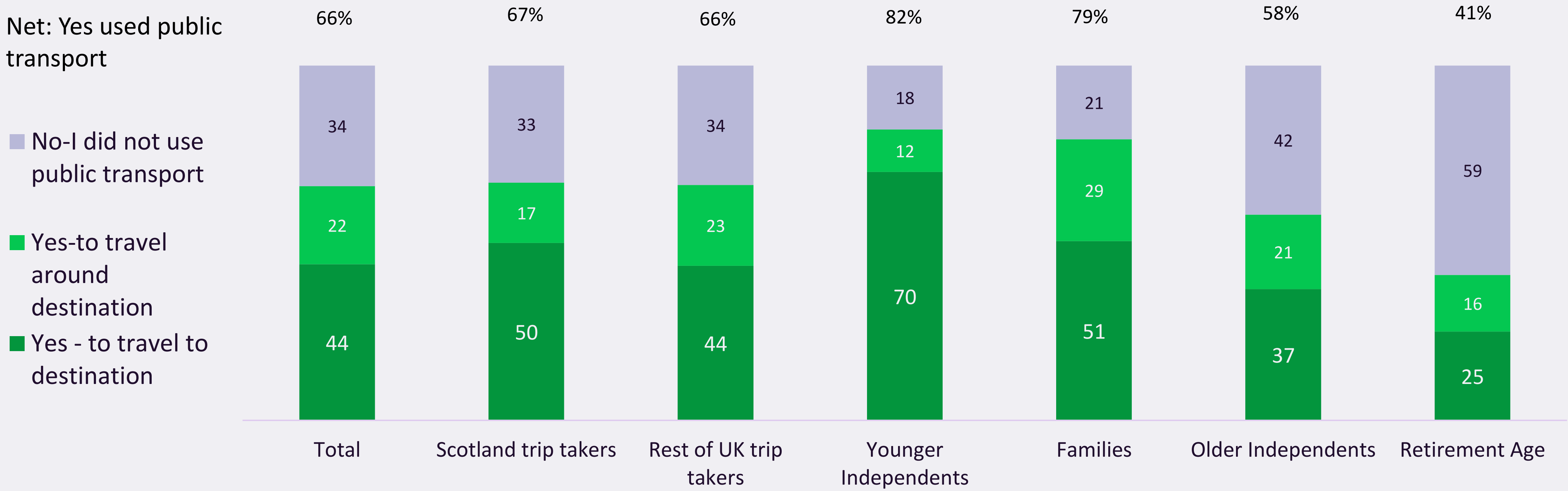
PUBLIC TRANSPORT

Key finding 7: Public Transport

Two thirds used public transport on their last trip – and three quarters would consider it, particularly trains. Despite concerns over flexibility/convenience, those who have used public transport rate it highly

Two thirds use public transport on their trips within the UK, including Scotland. Younger Independents are most likely to use public transport, with Retirement Age least likely

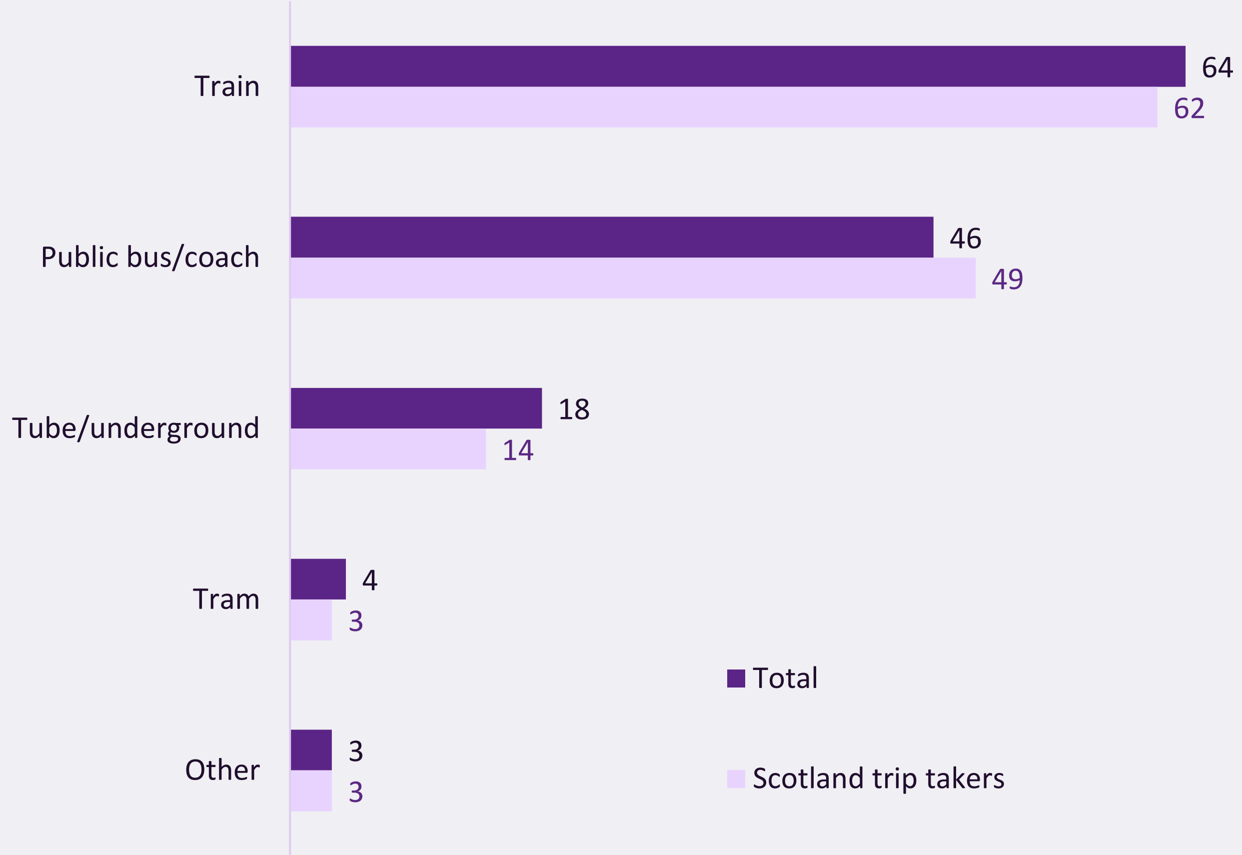
Use of public transport on domestic trip (%) (data from March 2026)



PT1: Did you use a form of public transport on your most recent trip in [pipe: hVB13c] trip?
Base: Total n=1112; Scotland Trip Takers n=118 Rest of UK: 994 Younger Independents: 86 Families: 483 Older Independents: 318 Retirement age: 225

The main transport used is trains, but buses are also used by nearly half of those who use public transport.

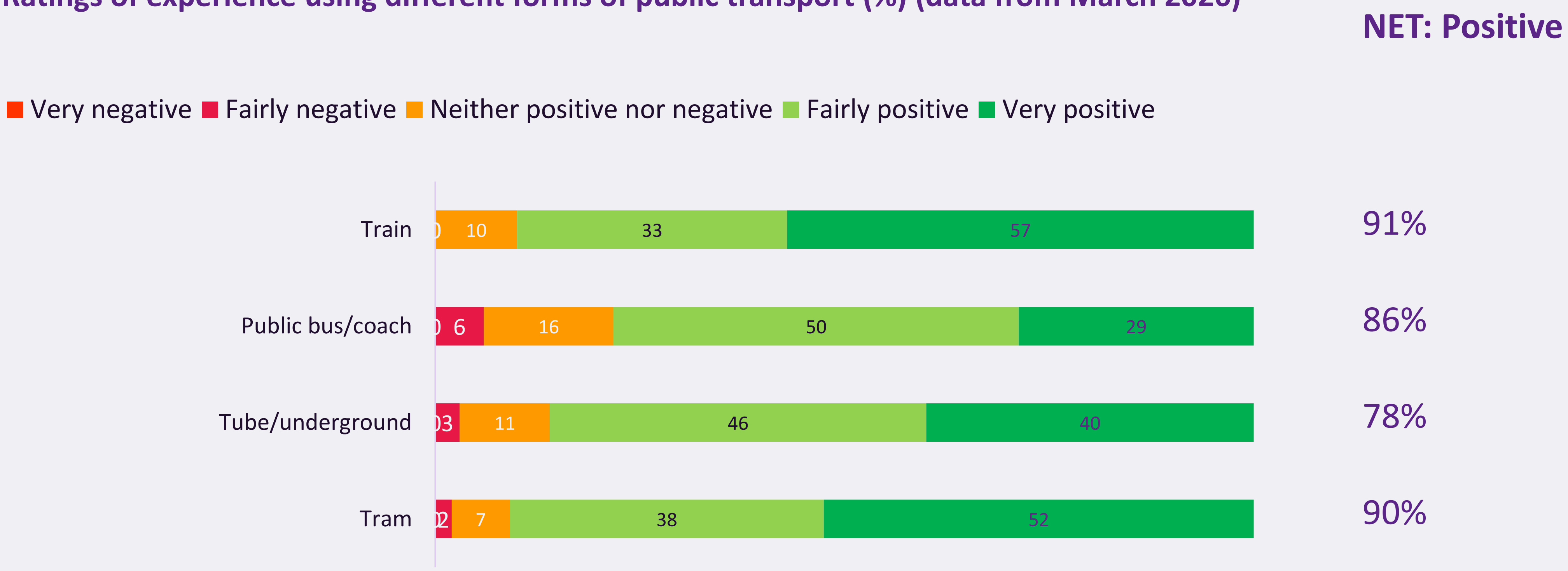
Type of public transport used (%) (March 2026)



PT2. What form of public transport did you use on your most recent domestic overnight trip?
Base: Total: 728 Scotland trip takers: 74

All transport is rated relatively well, trains in particular.

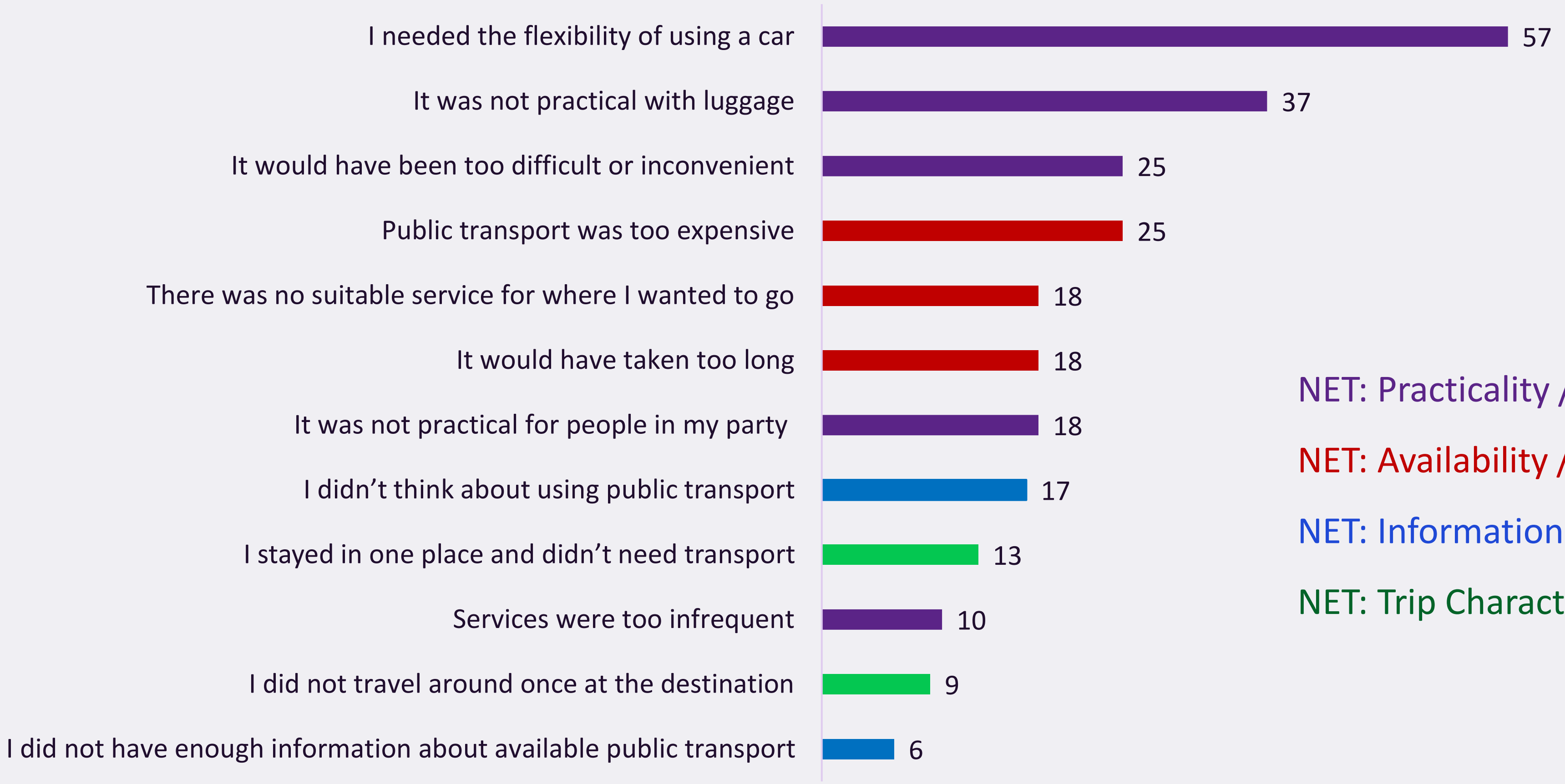
Ratings of experience using different forms of public transport (%) (data from March 2026)



PT3. How would you rate your experience using…
Base: Train: 498 Public Bus: 344 Tube: 136 Tram: 36 NOTE LOW BASE

The main barrier to use is the lack of flexibility. Carrying luggage is also a concern. A quarter cite cost as a barrier – with increasing fuel prices this may be less of a barrier.

Reasons for not using public transport on last trip (%) (March 2026)

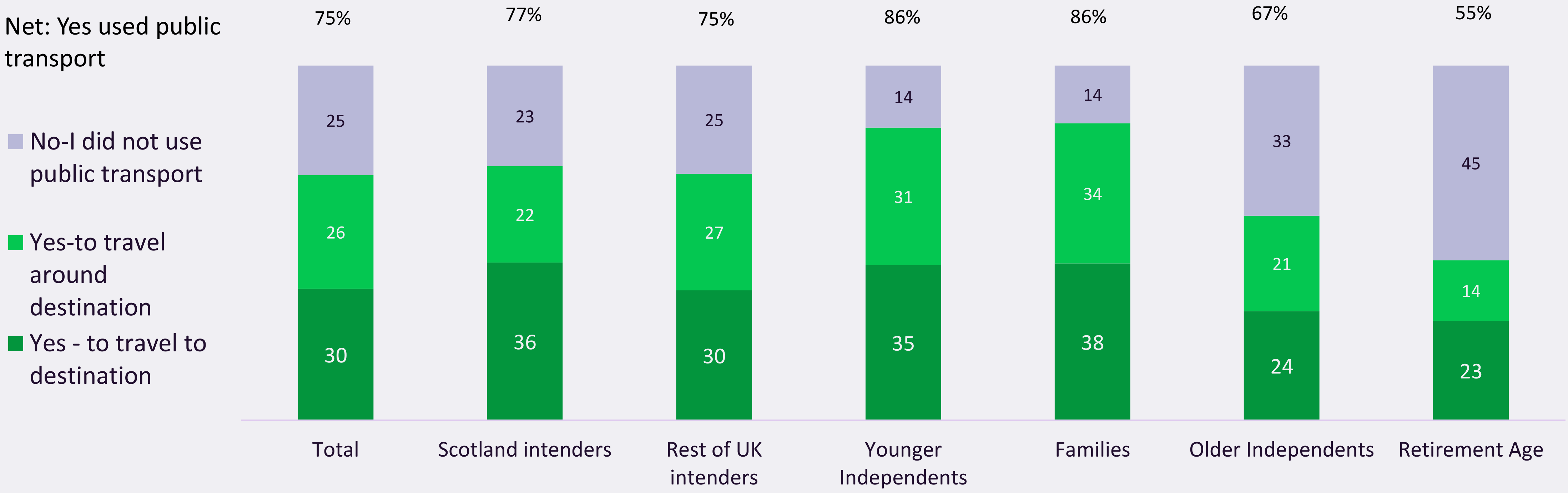


NET: Practicality / Convenience	83%
NET: Availability / Service Issues	38%
NET: Information & Awareness	22%
NET: Trip Characteristics	19%

PT4. You mentioned not using public transport on your last trip. Why was this?
Base: All who didn't use public transport 384

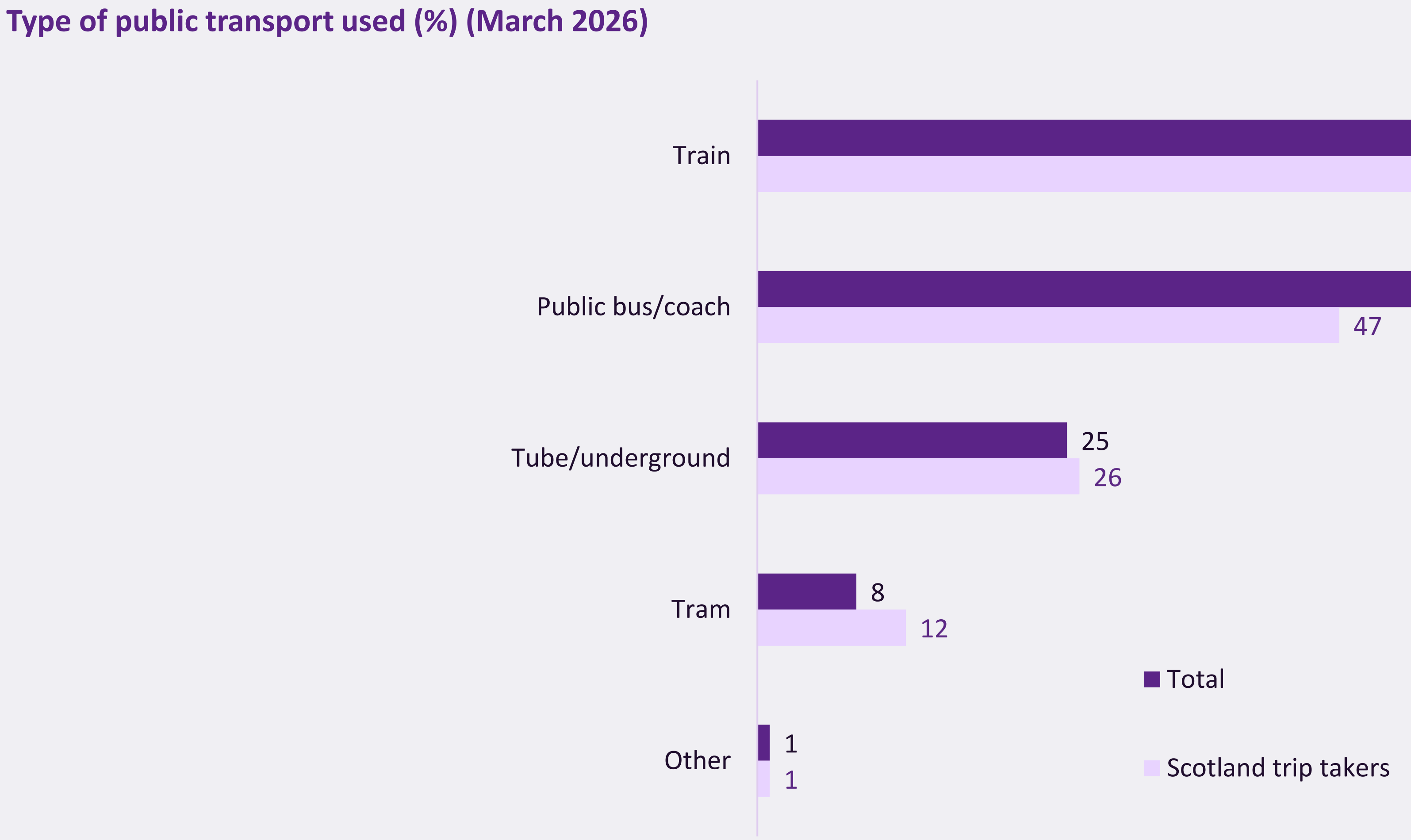
Three quarters would consider public transport for their next trip – again this is highest among Younger Independents

Considered use of public transport on next domestic trip (%) (data from March 2026)



'PT5: Thinking about your next domestic overnight trip, would you consider using a form of public transport …?
Base: Total n=1332; Scotland intenders n=165 Rest of UK: 1167 Younger Independents: 121 Families: 562 Older Independents: 392 Retirement age: 257

The train is most considered – particularly for those planning a trip to Scotland.



PT6. What form of public transport would you consider using on your next UK overnight trip?
Base: Total: 996 Scotland trip takers: 128

The lack of flexibility and convenience are the main barriers to public transport consideration

I prefer using my car. I am not restricted. Can go to different places. Come and go as I please. It’s more flexible. And direct. Quicker journeys. And can spend more time enjoying the scenery. Rather than travelling. Can choose a cheaper accommodation.

We always stay in places in the countryside and often this not near a train station and there are no buses.

It's inaccessible and costly to use other means of transport other than a car. Plus we need the flexibility of a car while on holiday

I would not consider using public transport on my next domestic overnight trip because it can be less flexible and time-consuming compared to driving. Fixed schedules, potential delays, and limited luggage space make it less convenient

It’s just easier and more convenient to use our own car, especially with the kids and all our luggage. Public transport feels too restrictive for timing and flexibility, and we usually stay in places where having a car makes getting around much simpler.

'PT7: You mentioned you would not consider using public transport on your next domestic overnight trip, can you briefly explain why?

SUMMARY OF FINDINGS

Summary of key findings

Conflict in the Middle East has led to renewed concern that the worst is still to come, and more feeling cautious – while there are indications of increased interest in domestic rather than overseas holidays, fuel costs are a rising barrier

Domestic trip *intentions* across the summer are down at a UK wide level, with commitment levels to actually taking trips also lower than last year

Scotland intenders have decreased in proportion and are more likely to visit for a short-break

Scotland summer trips are more vulnerable than the majority of other UK destinations (with less commitment and lower future bookings)

This year sees a shift back to large cities, as well as countryside – in particular, interest in visiting Glasgow has grown to 3 in 10

Scotland intenders have a range of motivations and activities. Spending time with family is key, and interest in culture has grown as a key activity while on holiday

Two thirds used public transport on their last trip – and three quarters would consider it, particularly trains. Despite concerns over flexibility / convenience, those who have used public transport rate it highly

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 91-93 of the domestic sentiment tracker

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