DOMESTIC TOURISM TRENDS

Presentation based on domestic tourism tracker fieldwork from July to September

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 63rd wave – the first wave having been conducted in May 2020, with a weekly, fortnightly and now monthly cadence thereafter

This report

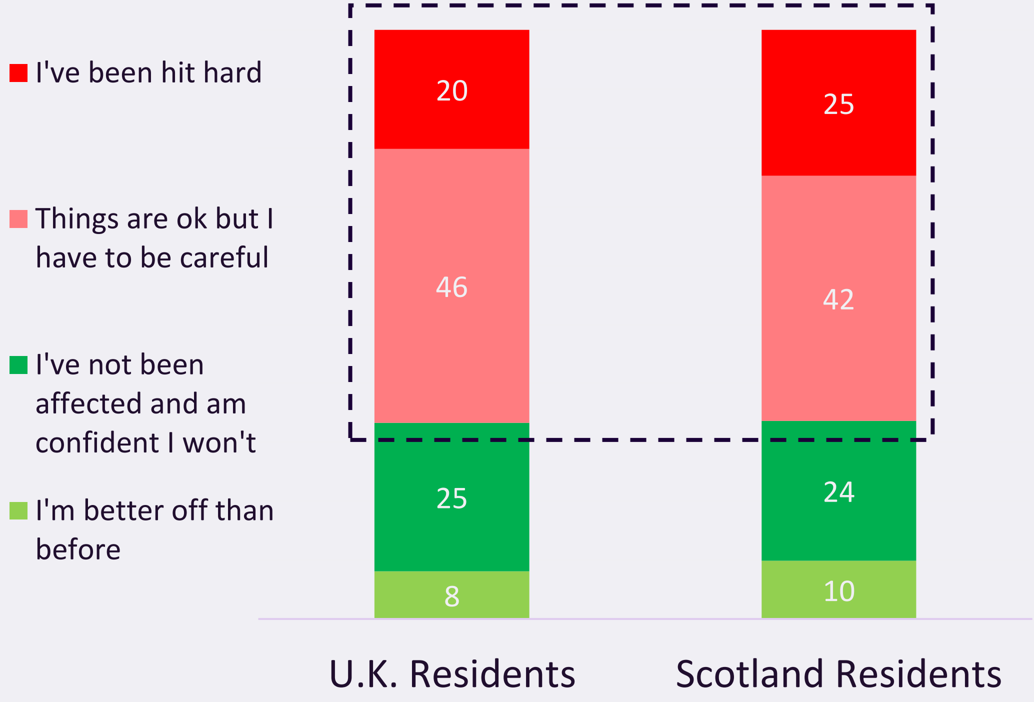
This presentation is based on research conducted in Waves 60-63 (July to October) with references to previous waves where applicable.

CURRENT ATTITUDES TO THE COST-OF-LIVING CRISIS

The UK and Scottish public remain broadly pessimistic in relation to the cost-of-living crisis, and it is clearly impacting their behaviour

Perceptions of the cost of living crisis (%)

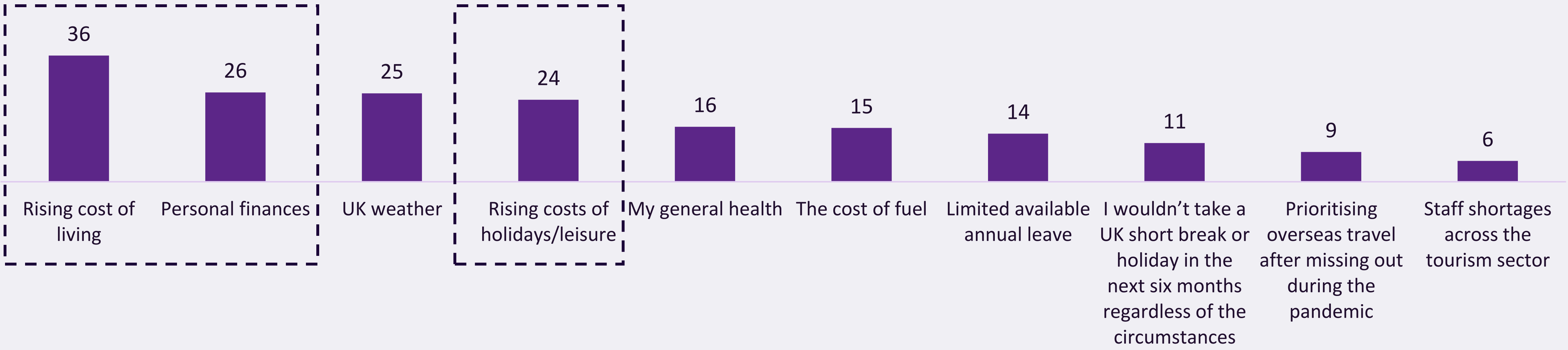
Impact of the cost of living crisis (%)



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? 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.268

Finances are still the main barriers to taking a domestic holiday or short break in the next six months

Top 10 Barriers to taking an overnight UK trip in next 6 months (%)



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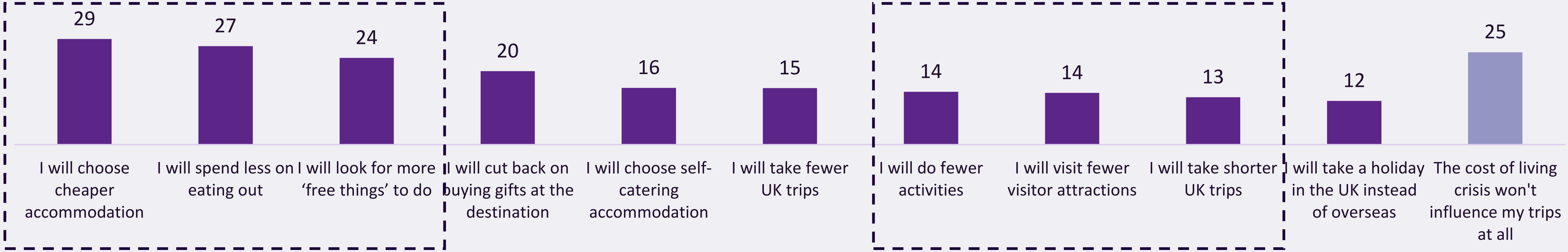
VB7b. Which, if any, of the following factors do you see as potential barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=1,756; All Scotland respondents n=268.

This doesn’t necessarily mean that people won’t take trips – but it’s very likely they will cut back on their spending *on the trip* (particularly on accommodation and eating out)

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



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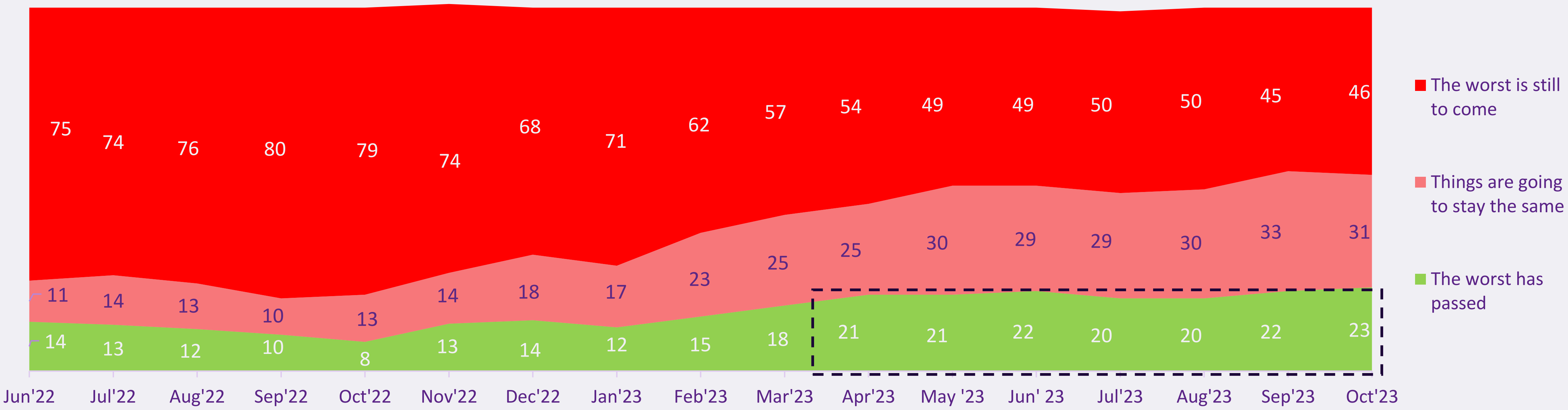
VB7iii. How, if at all, would you say the ‘cost-of-living crisis’ is likely to influence your UK short breaks or holidays in the next six months?
Base: All UK respondents. n=1,756; All Scotland respondents n=268.

Despite the public still being concerned, there are signs of increased optimism – although the over-riding sense is of 'stasis', 'the worst has passed' barely moving since April 2023

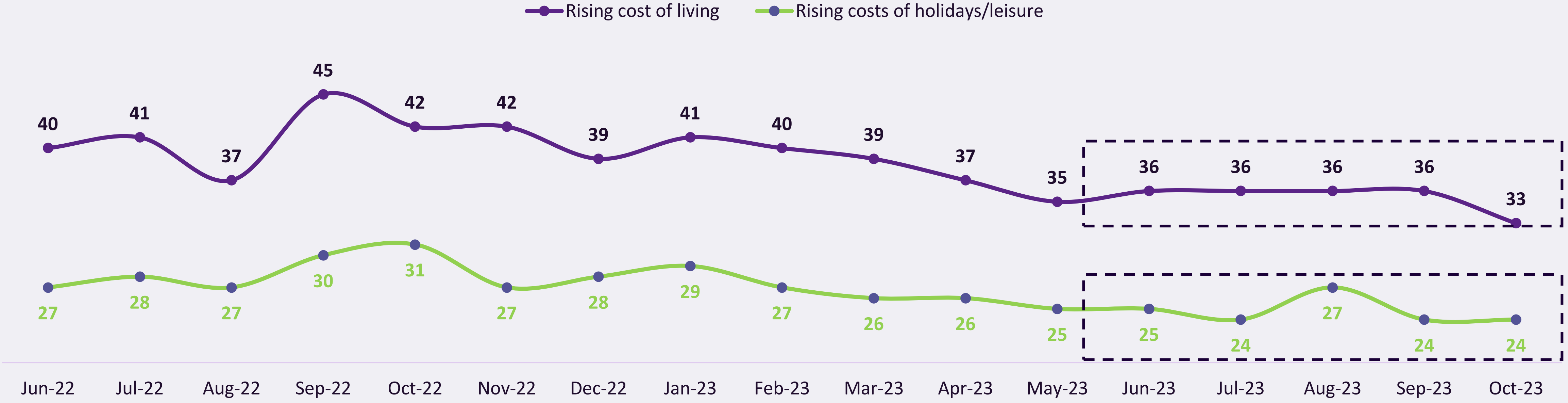
Perceptions of the cost-of-living crisis over time (%)



Q7b: And now regarding the 'cost-of-living crisis' in the UK and the way it is going to change in the coming few months, which of the following best describes your opinion? Base: All UK respondents. n=c.1,750. All Scotland respondents n=c.268

This sense of stagnation is also evident in financial barriers to taking overnight trips – barriers that had been declining up until May, are currently unmoved

Selected financial barriers to an overnight trip in the UK in next 6 months (%)



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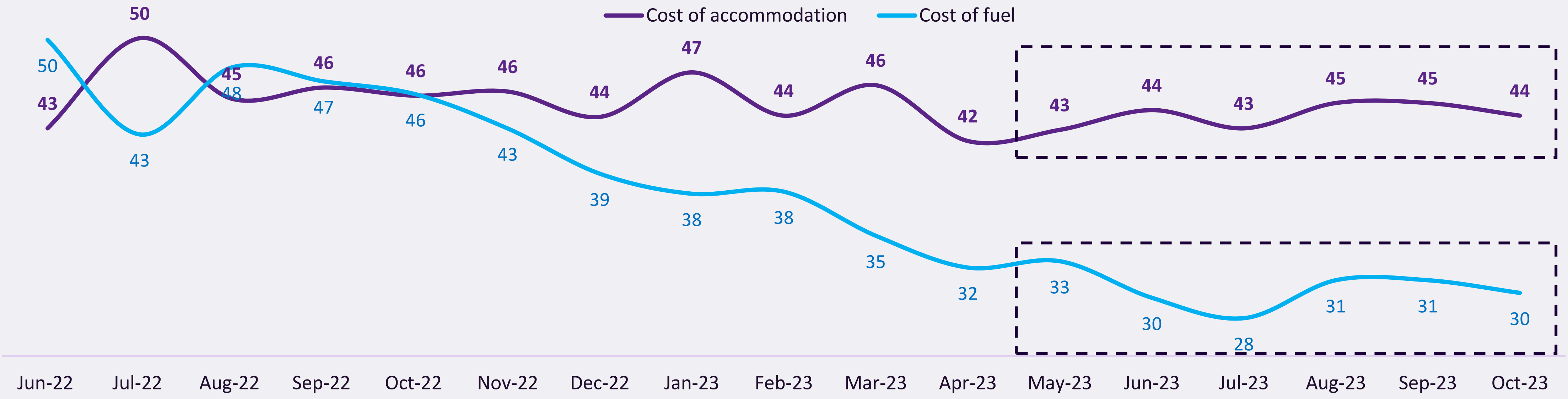
VB7bii. Which, if any, of these costs are the main financial barriers to you taking a UK short break or holiday in the next six months?
Base: All UK respondents. n=1,756

The picture is similar with ‘cost of accommodation’ as a barrier and even ‘cost of fuel’ which had dropped sharply prior to April

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



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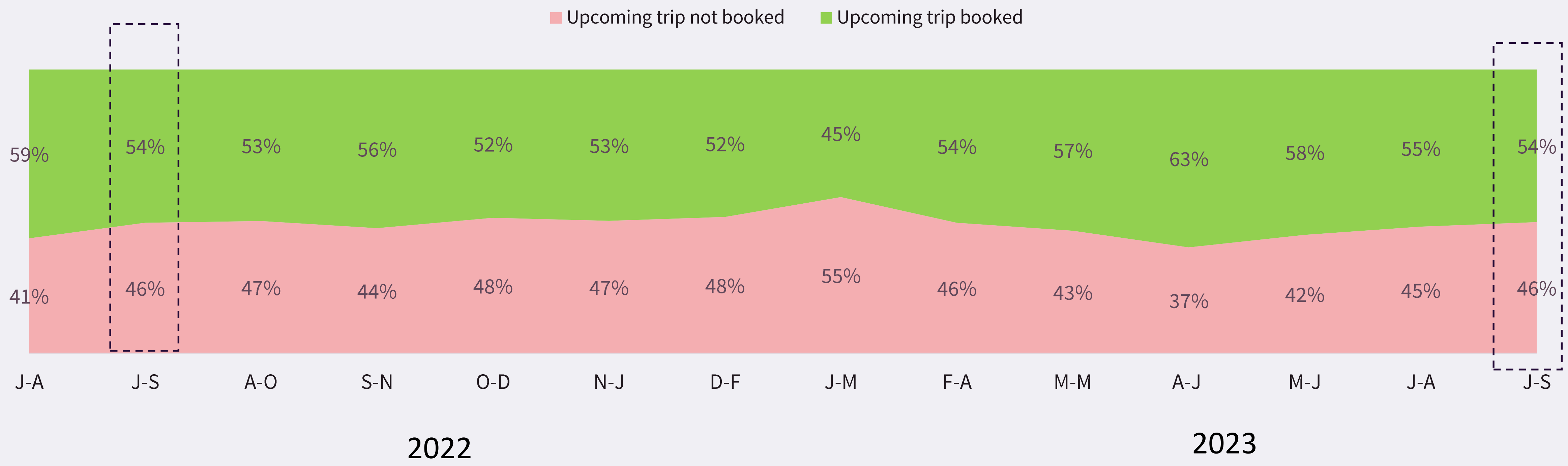
VB7iii. How, if at all, would you say the ‘cost-of-living crisis’ is likely to influence your UK short breaks or holidays in the next six months?
Base: All UK respondents. n=1,756; All Scotland respondents n=268.

It is important to note that at any given time in since June 2022, only around half of planned trips are booked within 3 months of taking them

Booking status of trips planned within next 3 months (%)



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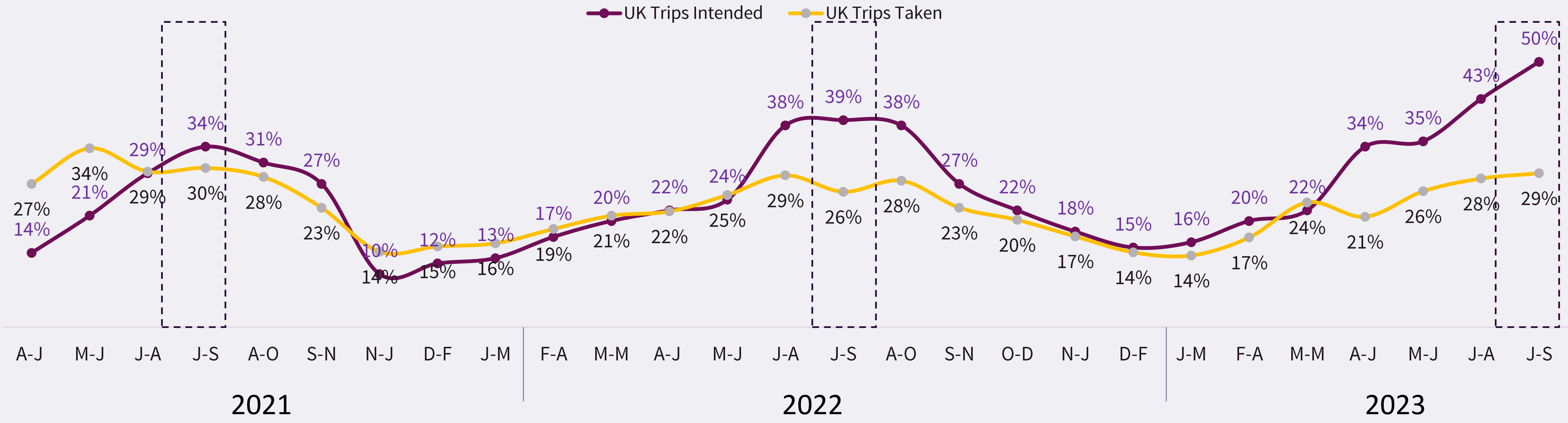
VB2e. Which of the following best describes how close you are to booking your next overnight UK trip in <INSERT MONTH FROM VB2c(III)>?
Base: All UK respondents. n=c.350 each wave

One of the unforeseen research consequences of the cost-of-living crisis is that people are not following through with the trips they have planned

UK trips planned/taken in 3 month periods (%)



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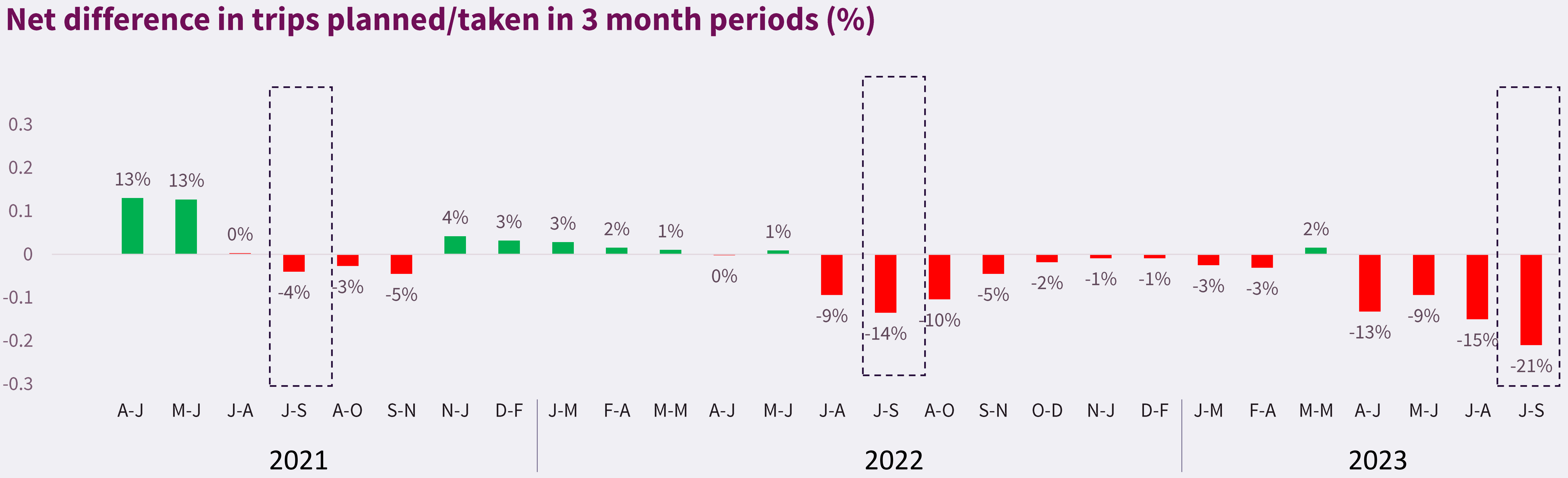
VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?

Base: All UK respondents. n=1750 each wave *Actual trips taken is only available from April 2021 up to December 2022. Please note questionnaire was updated in April 2023 so there may be some artificial up

…this leads to a huge drop-off in trips against intentions, particularly within the peak months, meaning our predictions need to be heavily caveated

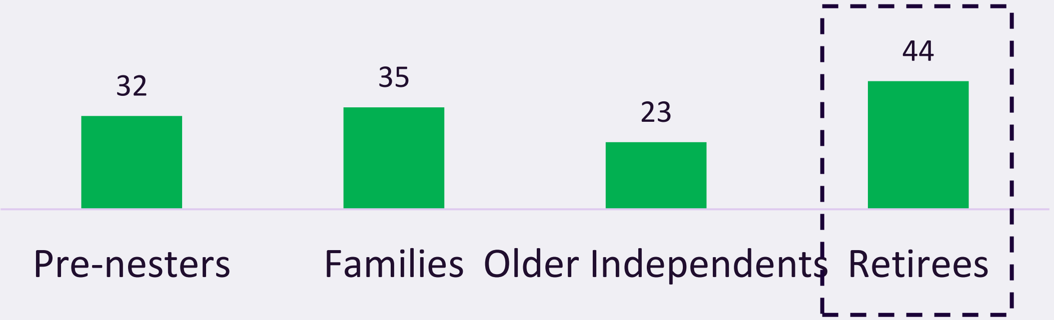


VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?

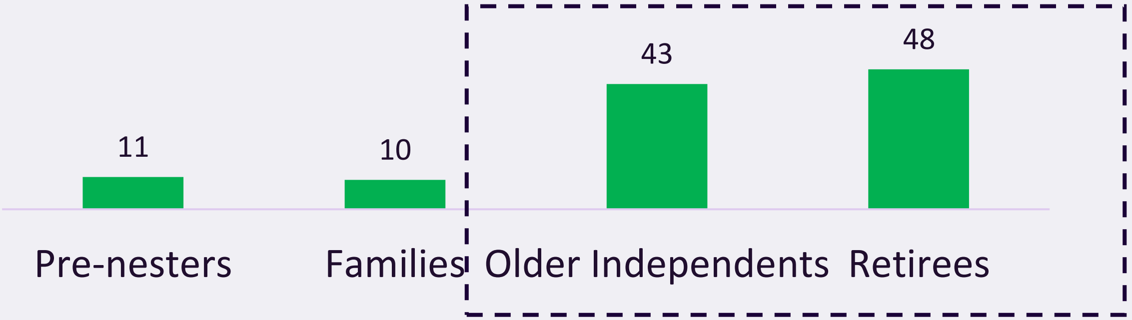
Base: All UK respondents. n=1750 each wave *Actual trips taken is only available from April 2021 up to December 2022. Please note questionnaire was updated in April 2023 so there may be some artificial up

The picture is not uniform across life stage though – retirees less likely to be impacted by cost-of-living, to claim no barriers to a trip, and to have booked a trip

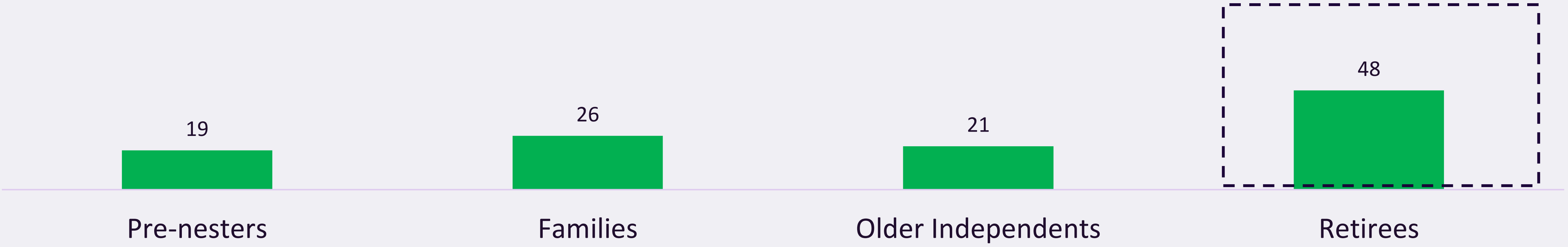
Not impacted by cost-of-living crisis (%)



No barriers to domestic holidays (%)



Already booked my next planned domestic trip (%)



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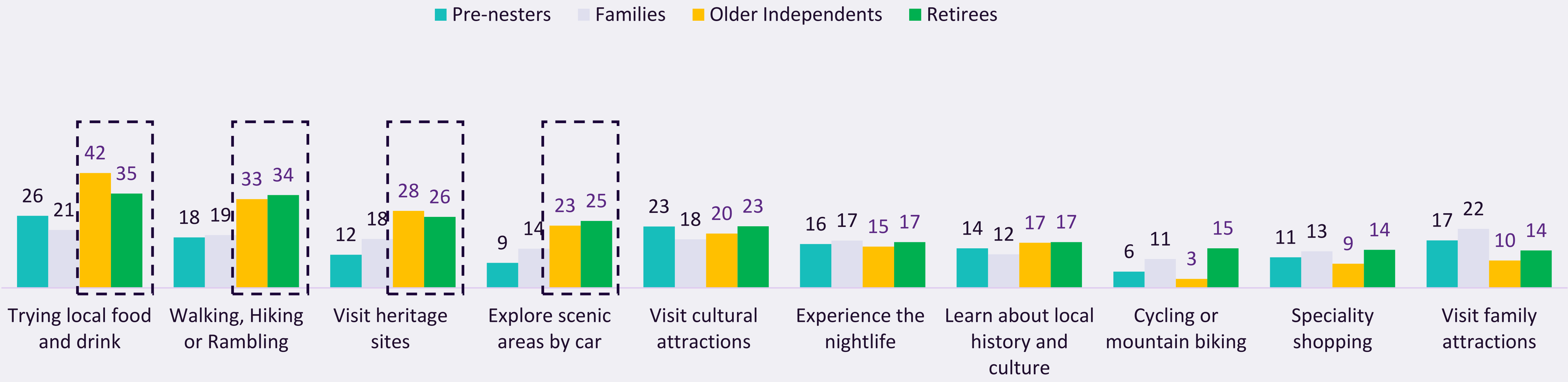
There are strong implications of a domestic trip-taker with an 'older skew' – local food and drink, walking, heritage and exploring scenic areas all more important

Motivations for domestic autumn/winter breaks (%)

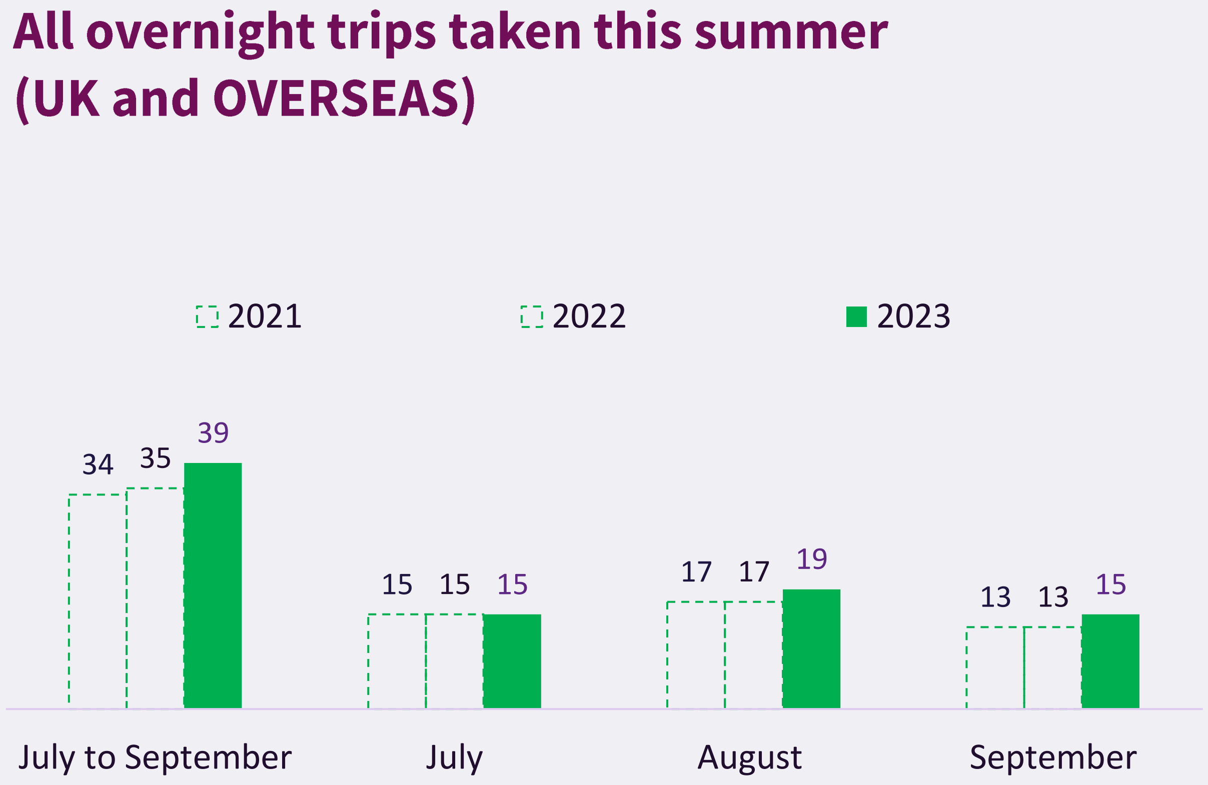


VB6fiii. Which, if any, of these activities are you likely to do on your next UK short break or holiday in <month>]? Base: All intenders planning to take a trip exclusively in Scotland. Base: All intenders planning to take a trip exclusively in Scotland. All Scotland autumn/winter 2023 intenders n=97

Reflections on the summer

The overall trip-taking picture from the summer is positive – more UK residents took overnight trips in 2023 than in 2022 or 2021

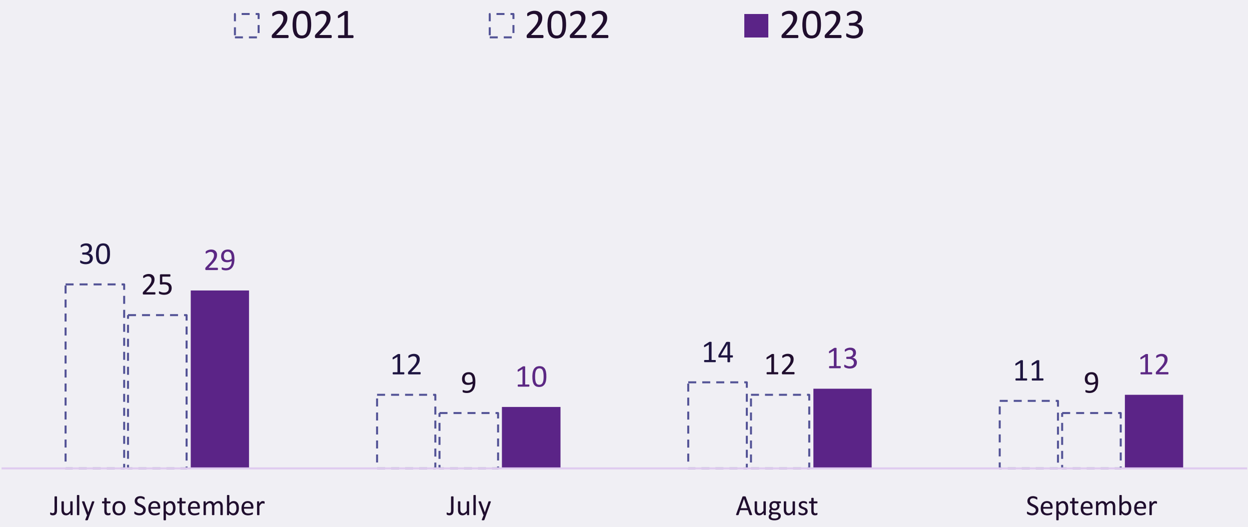
Overnight trip-taking amongst the UK public is inching upwards



The picture is also relatively positive at a UK level – more took trips in 2023 than in 2022, driven by September. However, it's likely trip-takers cut back on costs when doing so.

UK trips increased slightly – driven by September – although the picture is flat

Proportion taken a UK overnight trip (%)



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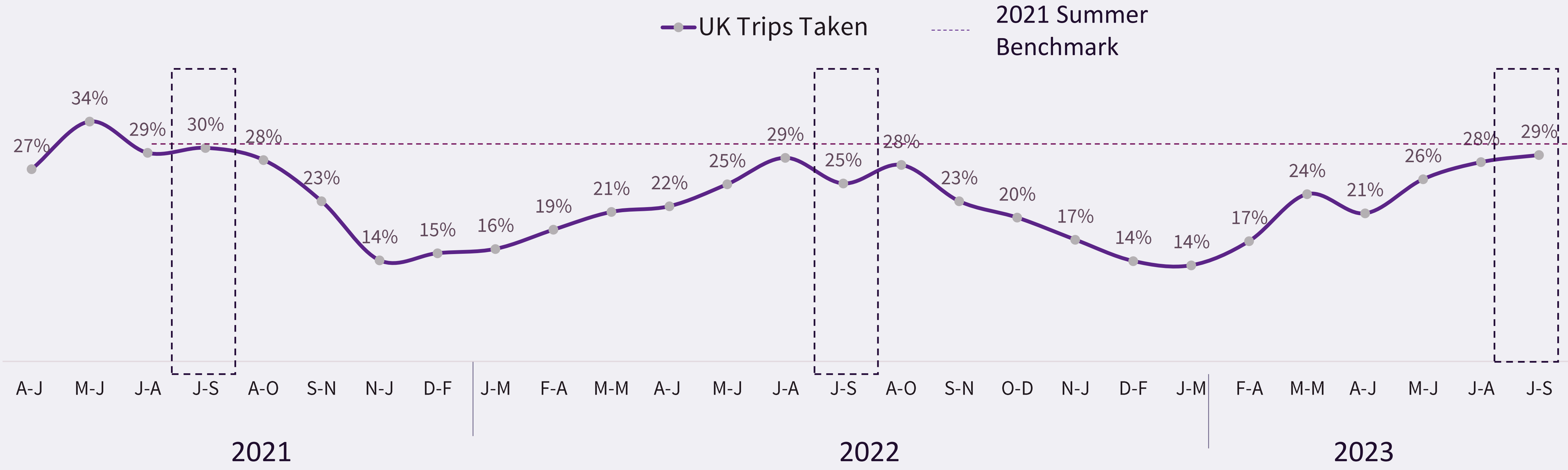
That said, over time the picture is relatively flat with ‘the heights’ of spring/ summer 2021 not hit in either 2022 or 2023

UK overnight trips taken in last 3 months trended over time (Proportion of population)



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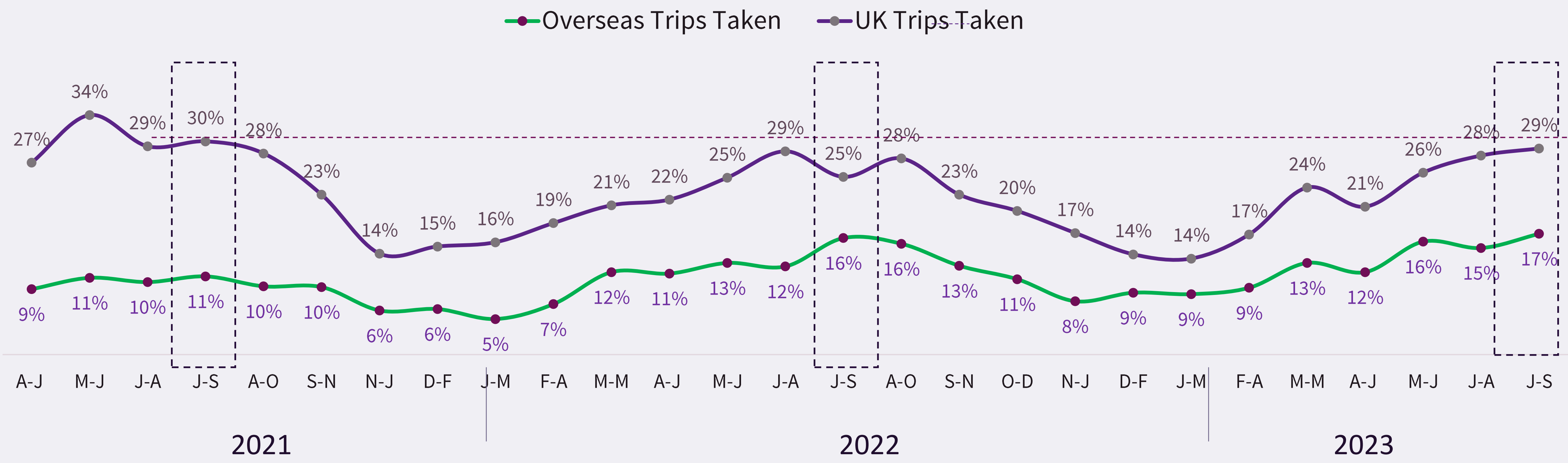
There is also evidence that the gap between UK and overseas travel is closing – although cost-of-living is likely holding overseas travel back somewhat

UK overnight trips taken in last 3 months trended over time (Proportion of population)



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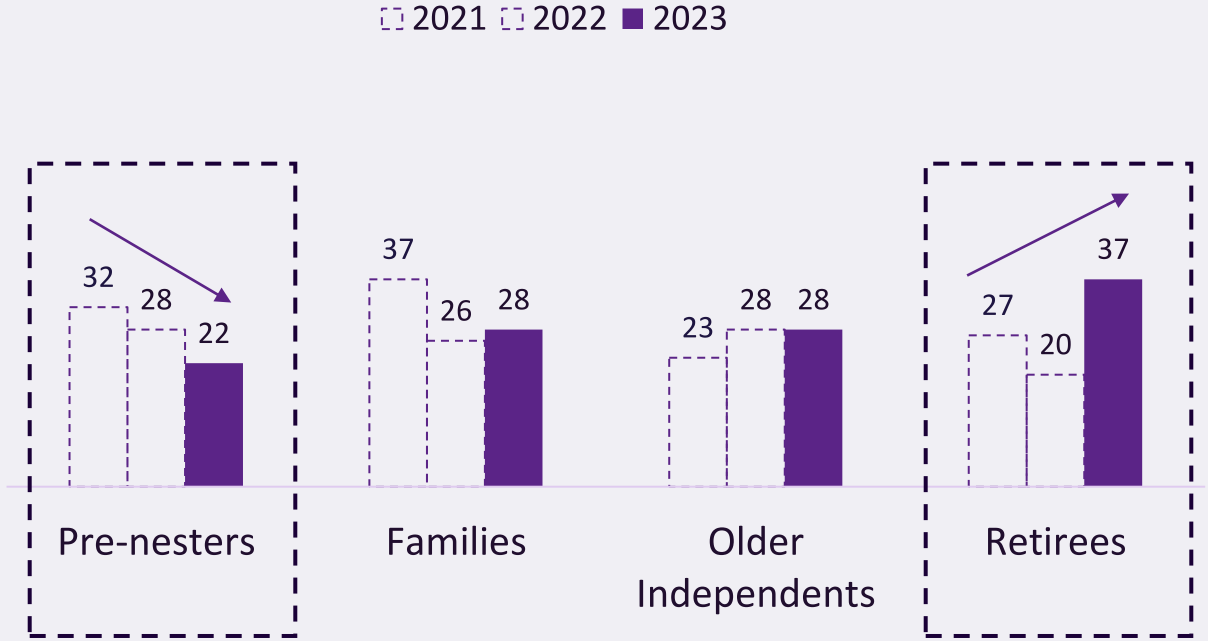
Pre-nesters are significantly less likely to be taking domestic summer trips, with retirees significantly more likely to – aligning with cost-of-living indicators

There has been a clear shift in life stage representation

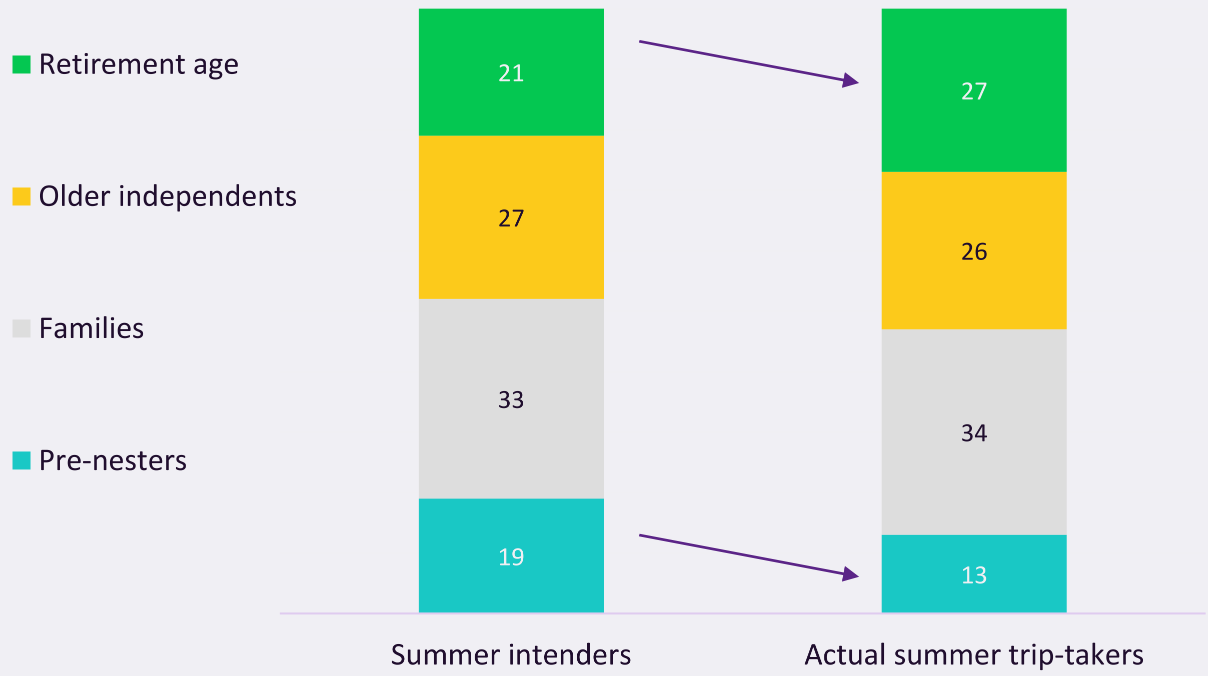
Proportion taken a UK overnight trip by life stage (%)



The fall in younger life stages and rise in retirees also accounts for the fall into intended versus actual trip-takers

The summer trip profile also supports the theory that retirees are more likely to follow-through on trips

UK domestic summer trip-takers versus actual trip-takers (%)



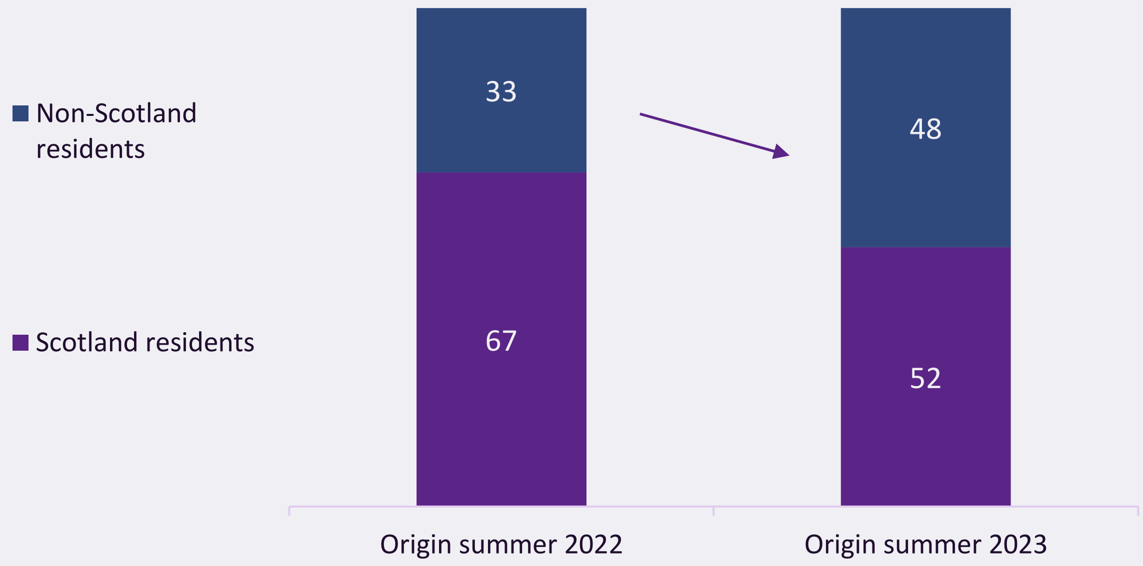
The picture in Scotland was relatively flat – although again, this will not account for moderation in spending, trip-length or accommodation choice

Where stayed on most recent summer overnight trip (%)

One positive development was the shift in non-Scotland residents travelling to Scotland compared to 2022

People appear to be travelling further afield – likely a return to pre-pandemic behaviour

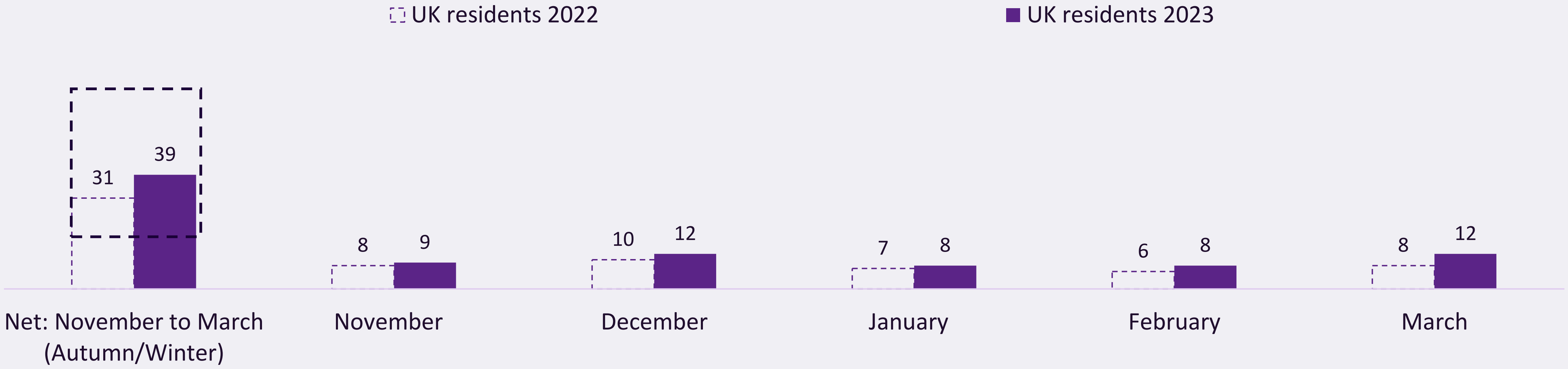
Scotland summer trip-takers by region of residence (%)



Travel intentions for autumn/winter (November to March)

2 in 5 of the UK population plan on taking a domestic holiday or short break this autumn/winter – a rise on 2022 (although actual trips are likely to be lower)

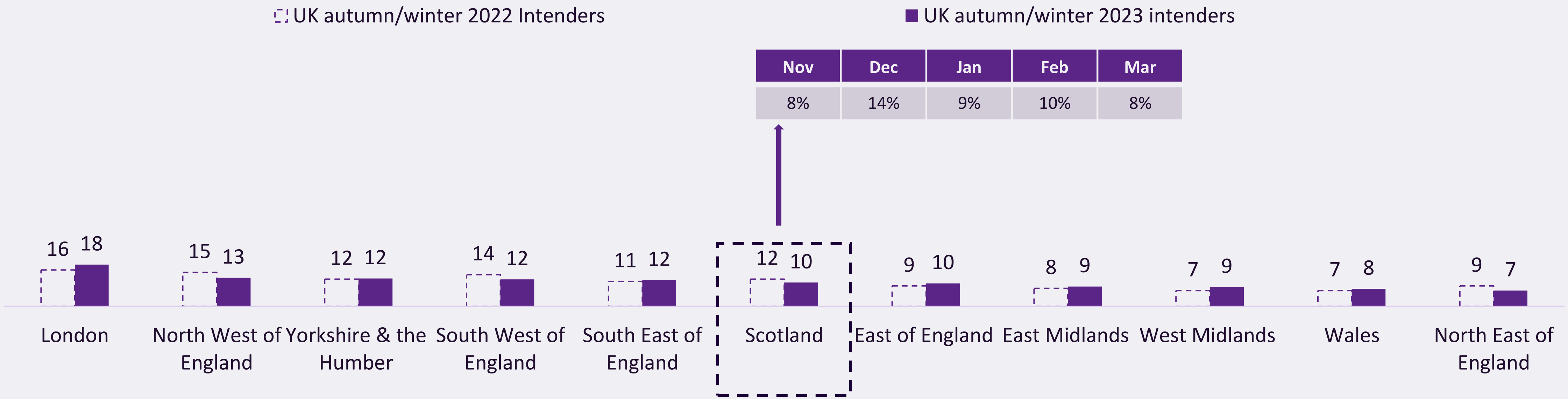
Proportion anticipating going on any overnight UK trips (%)



VB2a. Thinking of the next UK/overseas holiday or short break you are likely to take, when are you likely to plan, book and go on this trip?
VB2b. And when else do you anticipate going on a UK/overseas holiday or short break? Base: All UK respondents. n=1,756; All Scotland respondents n=268

10% of trip-intenders plan on travelling to Scotland – a slight, but not significant, drop on 2022. December is the most popular month for a Scotland trip

Where planning on staying on next UK overnight trip in autumn/winter (%)



Nov	Dec	Jan	Feb	Mar
8%	14%	9%	10%	8%

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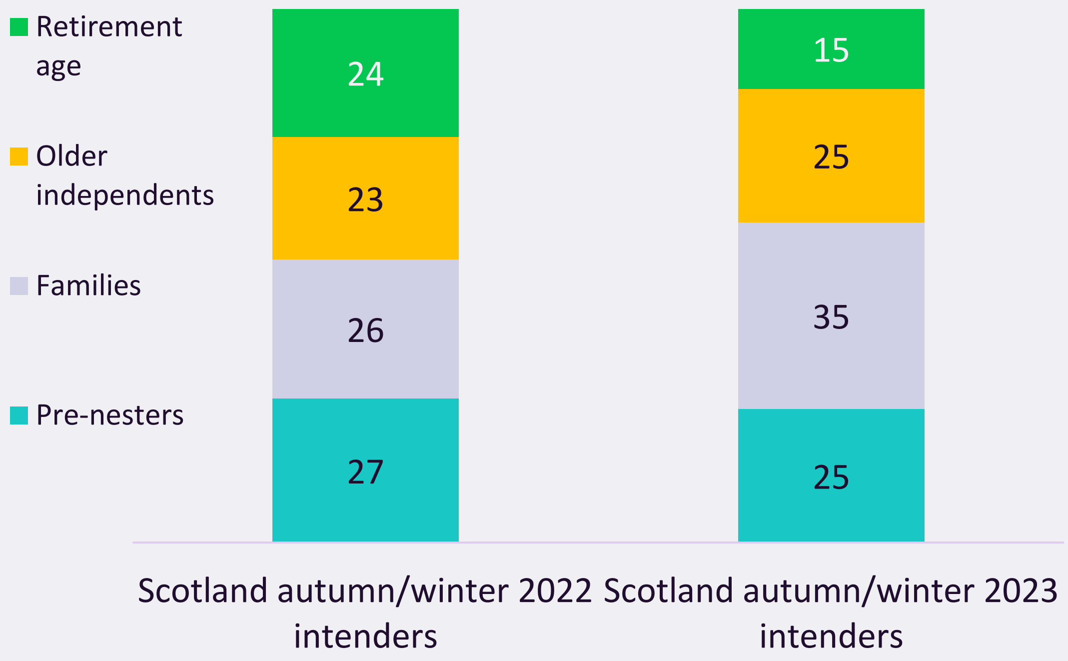
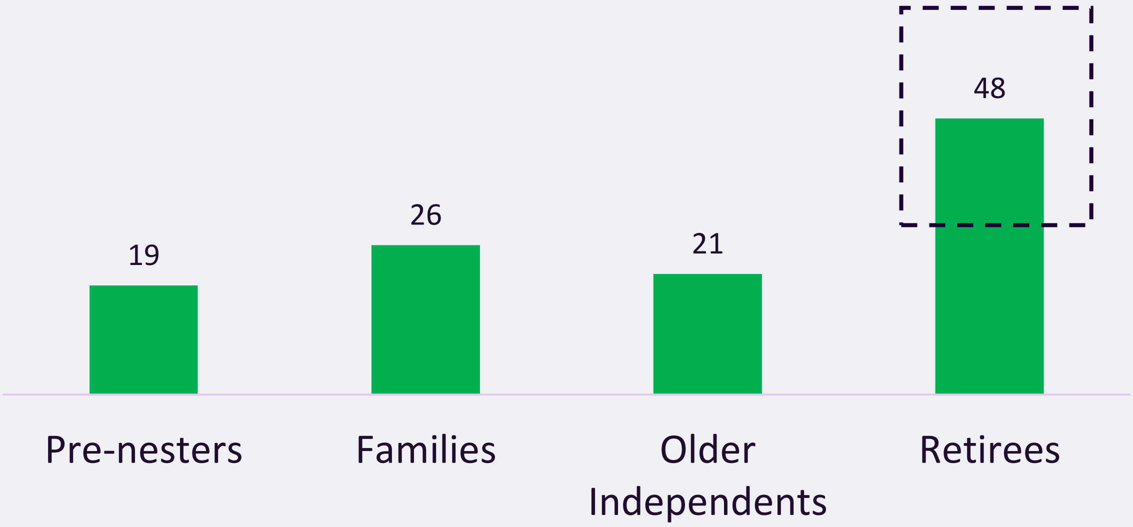
QVB4a. Where in the UK are you likely to stay on this next trip in <INSERT MONTH FROM VB2(III)>?
Base: UK autumn/winter 2022 intenders n=1,352; UK autumn/winter 2023 intenders n=2,294; Scotland resident autumn/winter 2023 intenders n=142;

Families make up the largest proportion of Scotland-intenders, retirees the smallest – but with retirees twice as likely to have booked, it's likely they will be better represented for actual trips

Breakdown of Scotland intenders by life stage (%)



Already booked my next planned Scotland domestic trip (%)

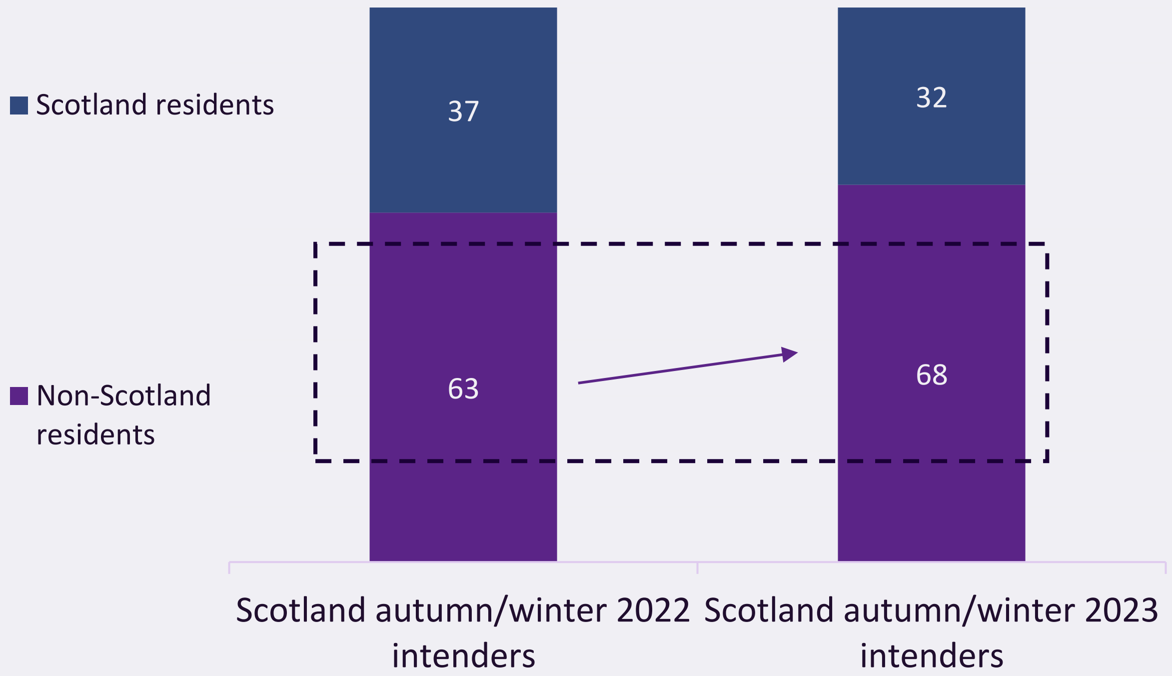


Source: Demographics.
Base: All respondents. UK population n=5,281; All Scotland autumn/winter 2022 intenders n=131; All Scotland autumn/winter 2023 intenders n=120

The summer shift in non-Scottish residents is also apparent this autumn/winter. Scotland residents appear to be more interested in trips outside Scotland than in 2022, with non-Scotland based residents also going further afield

Scottish residents planning a domestic break in Scotland (%)

Origin of Scotland intenders by region of residence (%)



Source: Demographics.
Base: All respondents. UK population n=5,281; All Scotland autumn/winter 2022 intenders n=131; All Scotland autumn/winter 2023 intenders n=120

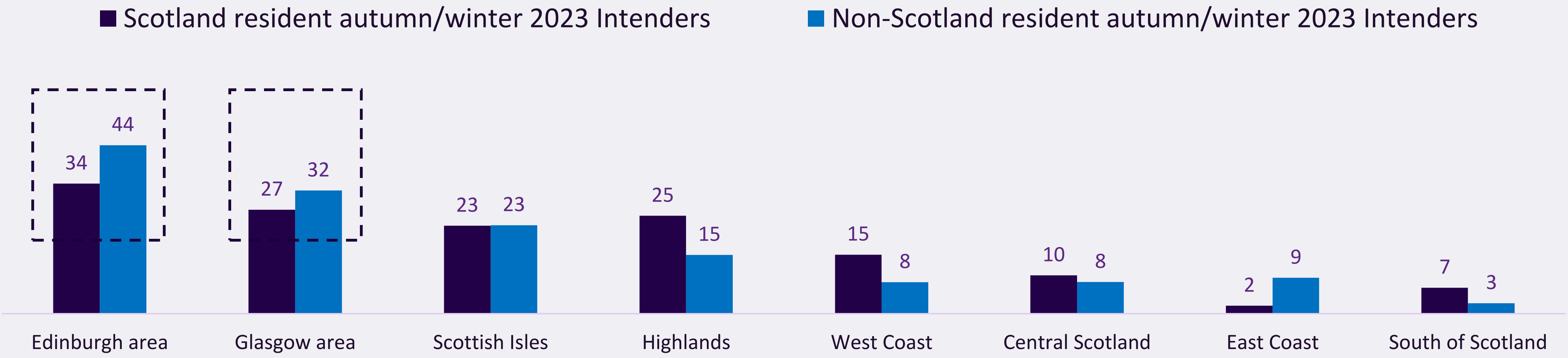
Edinburgh and Glasgow are the leading destinations for autumn/winter breaks, with interest in Scottish Isles also higher, and Highlands interest lower

Planned destination for Scotland autumn/winter 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/winter 2022 intenders n=130; All Scotland autumn/winter 2023 intenders n=120; All Scotland autumn/winter 2023 resident intenders n=55; All Scotland autumn/winter 2023 non-resident intenders n=65

Notably, the appeal of Scotland's cities is also strong amongst Scotland residents for the first time since this research programme started.

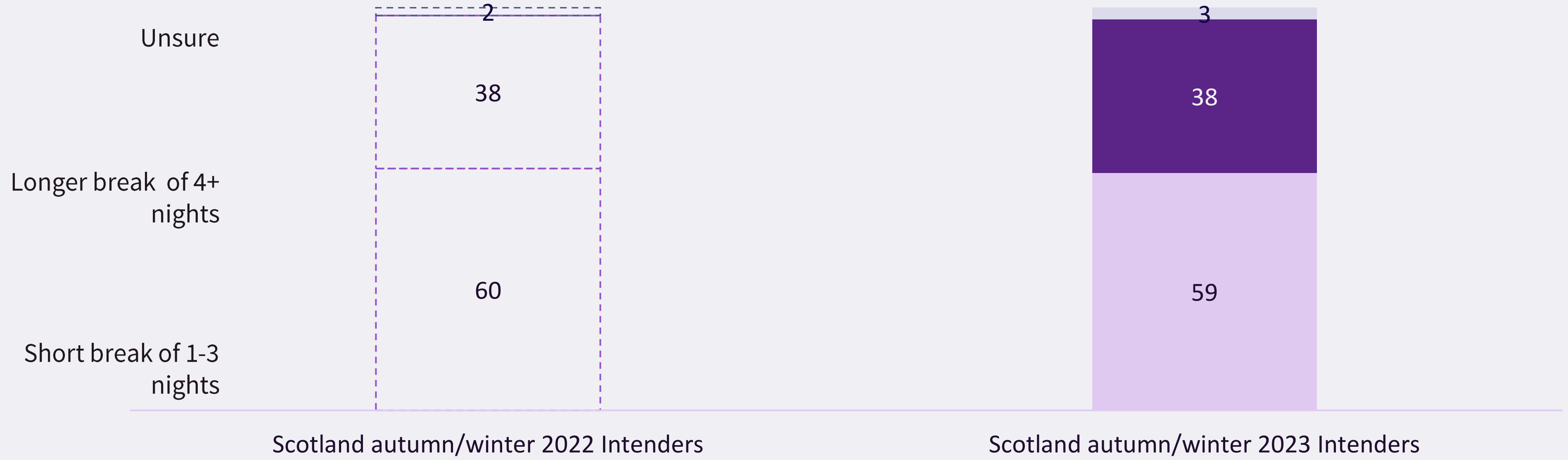
Planned destination for next Scotland trip for autumn/winter intenders (%)



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/winter 2022 intenders n=96; All Scotland autumn/winter 2023 intenders n=120; All Scotland autumn/winter 2023 resident intenders n=55; All Scotland autumn/winter 2023 non-resident intenders n=65

The majority of autumn/winter trips are likely to be short breaks of 1-3 nights – near identical to 2022

Length of next autumn/winter holiday or short break in Scotland (%)

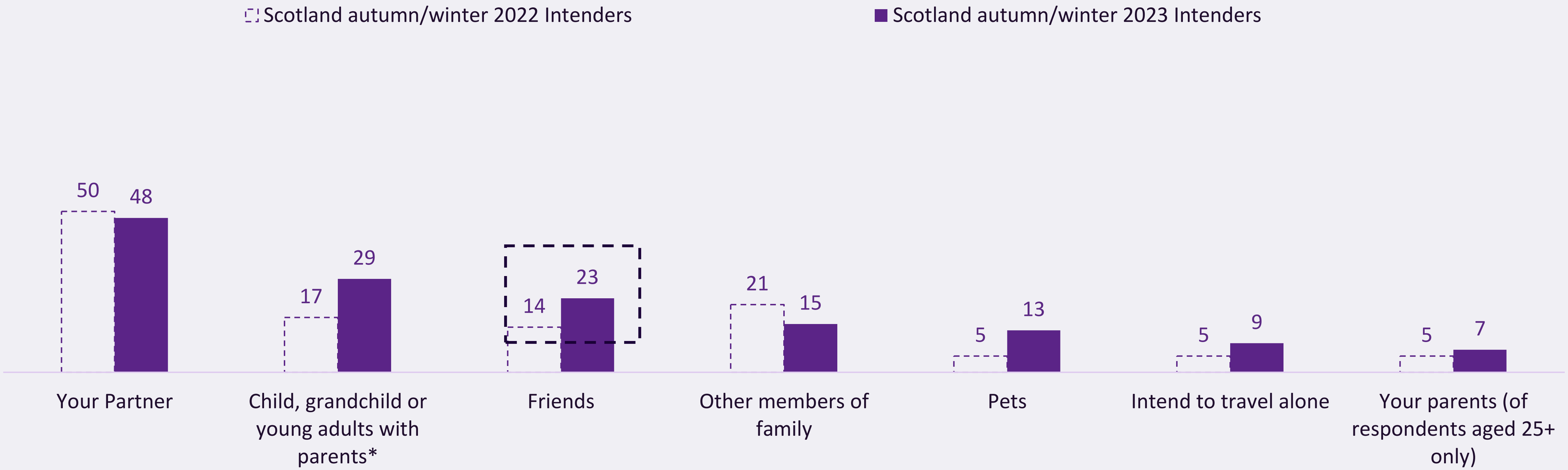


QVB3. Is this next trip likely to be a short break (1-3 nights) or a holiday (4+ nights)?

Base: All intenders planning to take a trip exclusively in Scotland. All Scotland autumn/winter 2022 intenders n=97; All Scotland autumn/winter 2023 intenders n=97

Scotland intenders are most likely to travel with a partner, although there has been an increase in trips planned with children, friends or pets

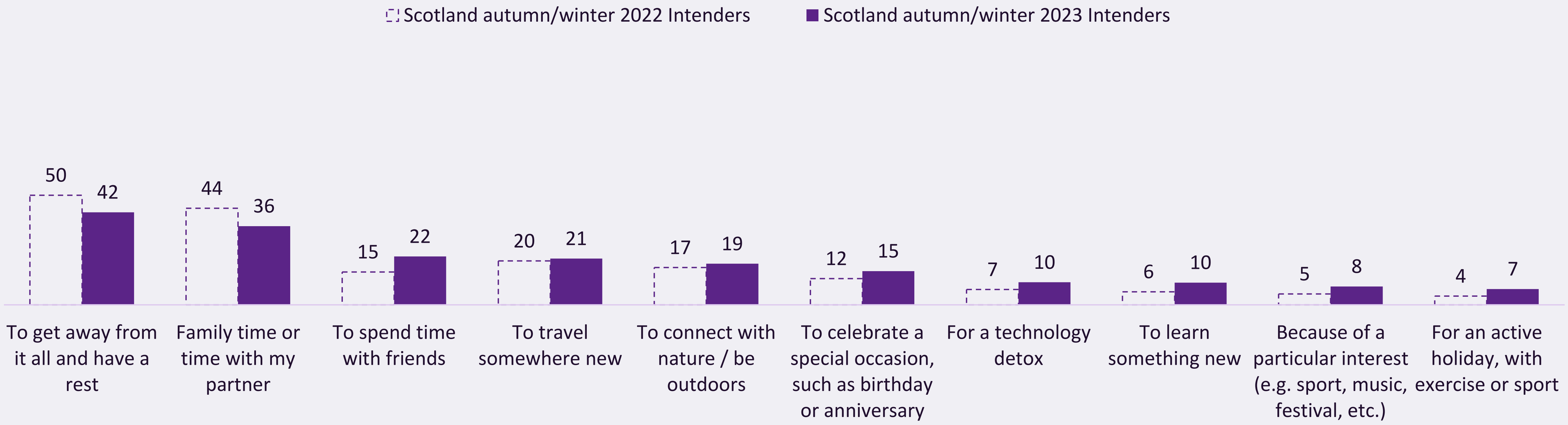
Visitor party make-up for Scotland autumn/winter intenders (%)



QVB4d. With whom are you likely to be spending your holiday? Base: All intenders planning to take a trip exclusively in Scotland. All Scotland autumn/winter 2022 intenders n=97; All Scotland autumn/winter 2023 intenders n=97 July n=97; August n=94; September n=76

Social motivations dominate – be it with family or friends – with ‘travel somewhere new’ or ‘connecting with nature’ also important

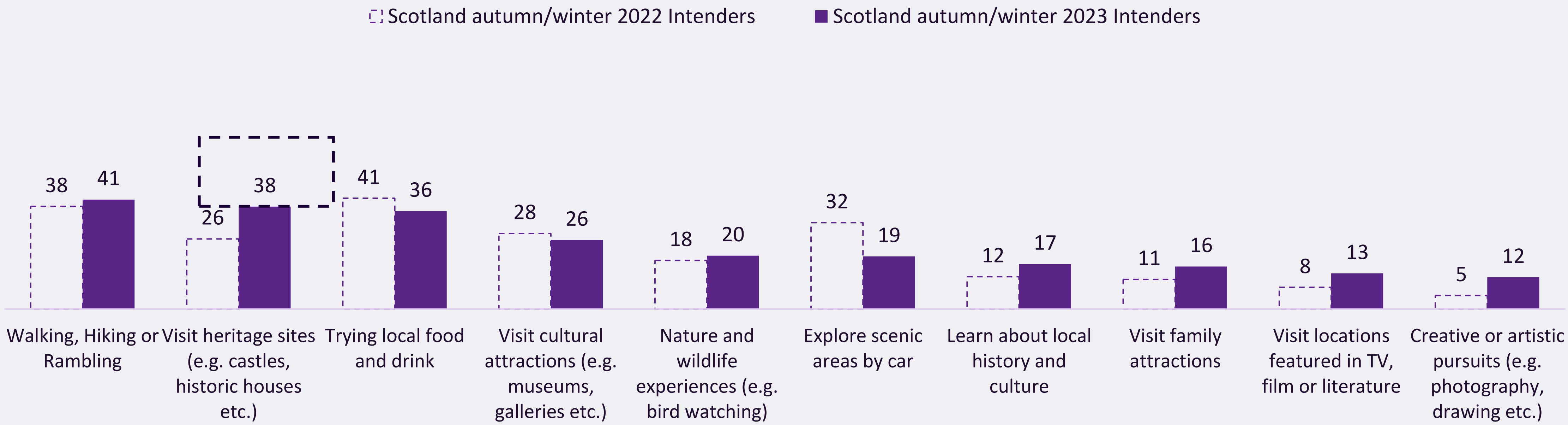
Motivations for Scotland autumn/winter overnight trip (%)



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 autumn/winter 2023 intenders n=97

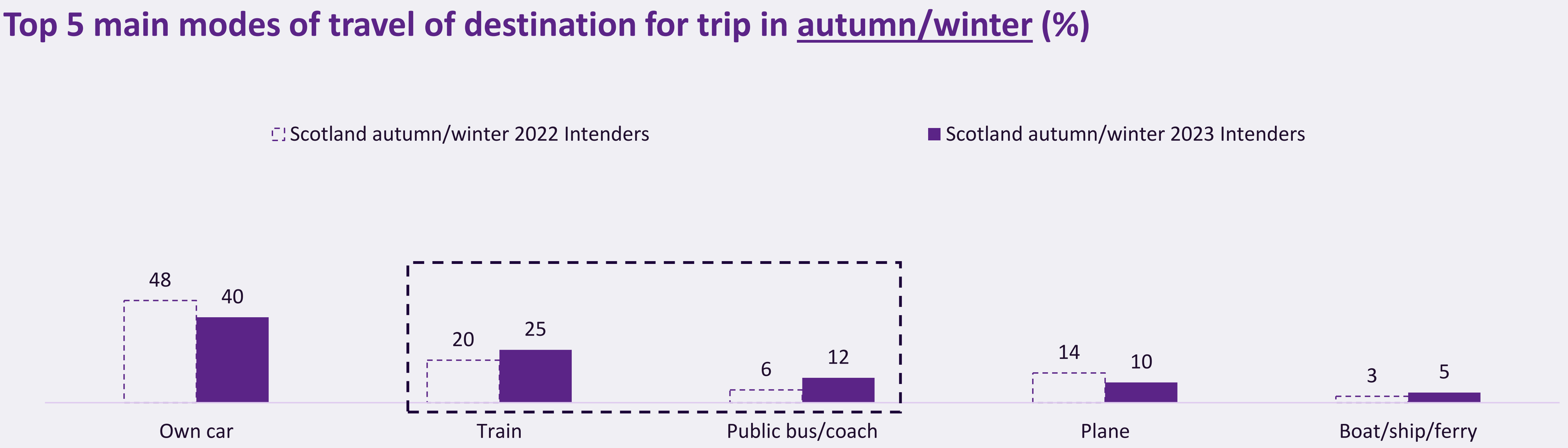
‘Walking, hiking or rambling’, ‘visiting heritage sites’ and ‘trying local food and drink’ are the leading three activities planned – heritage higher than in 2022

Activities for Scotland holidays and short breaks in autumn/winter (%)



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. Base: All intenders planning to take a trip exclusively in Scotland. All Scotland autumn/winter 2023 intenders n=97

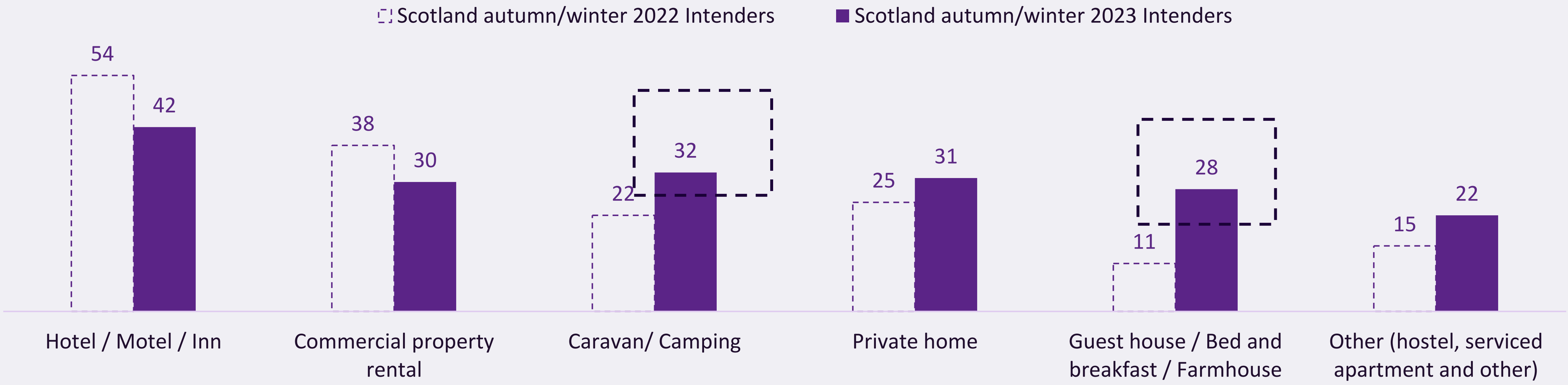
Mode of transport remains relatively consistent with 2022, with a slight rise in those planning on using public transport (driven by city destinations)



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 autumn/winter 2022 intenders n=97;

Notably, the intention to stay in a hotel/motel/inn is lower than in 2022, with private homes and guest houses/B&Bs rising. An indication of a more cost-conscious trip-taker perhaps?

Accommodation planning on staying in on next UK overnight trip for Scotland autumn/winter intenders (%)

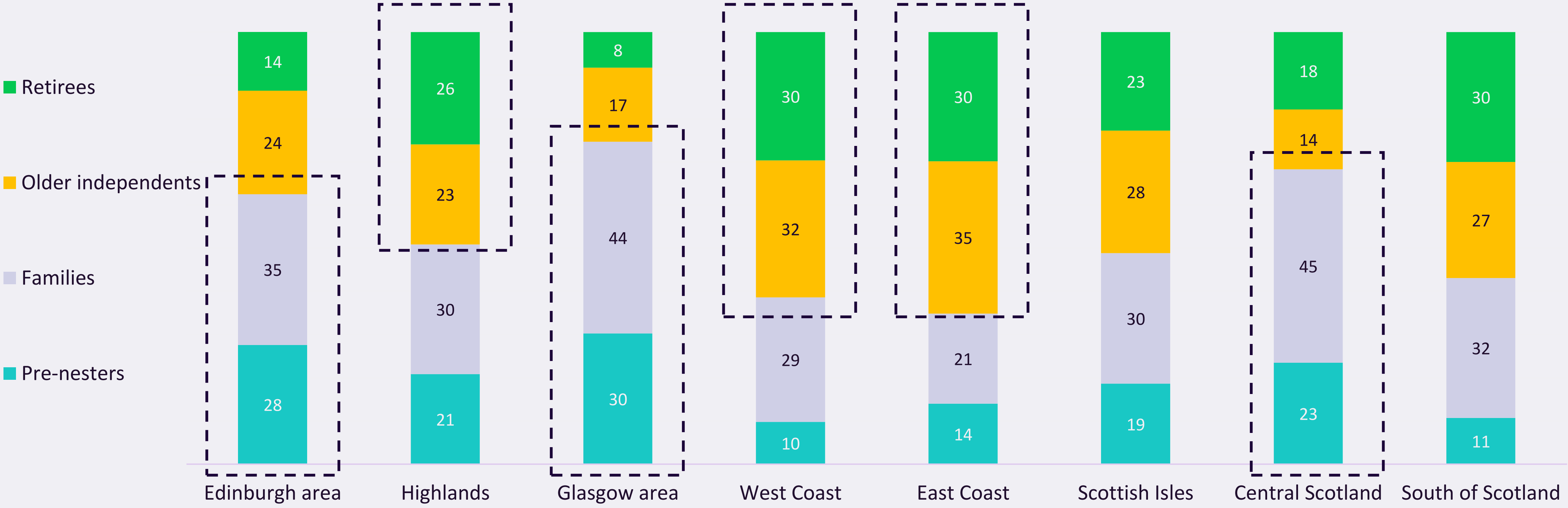


QVB6a. What type/s of accommodation do you expect to be staying in during your UK trip in <insert month>?
Base: All intenders planning to take a trip exclusively in Scotland. All Scotland autumn/winter 2022 intenders n=97; All Scotland autumn/winter 2023 intenders n=97.

Destination profiles

Life stage breakdown by Scotland destination – all next year intenders

Life stage breakdown of destination interest across the whole year (%)



Profile difference by Scotland destination – all next year intenders

	Edinburgh area	Glasgow area	Highlands	West Coast	East Coast
Profile	• Younger • Live in London	• Younger • Live outside Scotland (not London)	• Majority older • Live in Scotland	• Older • Scotland/North of England based	• Older • Scotland/North of England
Motivations/activities	• Family time • Time with friends • Cultural activities	• Family time • Time with friends • To pursue an interest	• Family time • Getting away from it all • Nature-based activities • Exploring by car	• Family time/escape • Nature-based activities	• Family time • Getting away from it all • Nature-based activities
Trip composition	• Travel with friends • Shorter trip length • Staying in a hotel	• Travel with friends • Shorter trip length • Staying with friends or relatives	• Travel with partner • Slightly Longer trips • Commercial property rental	• Travel with your children • Longer trip • Caravan/camping	• Travel with children • Mix of trip lengths • Staying with friends or relatives

Profile difference by Scotland destination – all next year intenders

Scottish Isles	Central Scotland	South of Scotland
Profile • Older • Live in Scotland	**Profile** • Families • Scottish based	**Profile** • Majority older • Live in North West England
Motivations/activities • Family time • Getting away from it all • Nature-based activities	**Motivations/activities** • Family time • A range of activities	**Motivations/activities** • Nature and heritage activities
Trip composition • Travel with family • Longer trip length • Staying in commercial rental	**Trip composition** • Your children • Longer trip length • Staying in hotel	**Trip composition** • Travel with partner, pets and friends • Majority short breaks • Staying in commercial rental

KEY FINDINGS AND DISCUSSION POINTS

SUMMARY OF KEY FINDINGS

TRIP INTENTION IS STRONG - THE PUBLIC ARE *CUTTING BACK ON SPEND* RATHER THAN *GIVING UP* ON DOMESTIC TRIP-TAKING

ACCOMMODATION IS THE FIRST AREA WHERE PEOPLE WILL CUT BACK, FOLLOWED BY LOOKING FOR MORE FREE THINGS TO DO, AND PLACES TO EAT OUT

BOOKING LEAD-TIMES DIFFER BY LIFE STAGE (YOUNGER BOOKING LATER) – CAN MARKETING OR PRICING REFLECT THIS?

THE SCOTTISH VISITOR IS MORE LIKELY TO COME FROM THE REST OF THE UK THAN PREVIOUS YEARS, WITH AN OLDER SKEW

THIS OLDER, NON-SCOTTISH VISITOR IS LIKELY TO LOOK FOR A MORE AUTHENTICALLY SCOTTISH EXPERIENCE

SCOTLAND'S CITIES LOOK TO HAVE RETURNED TO POPULARITY, EVEN AMONGST SCOTS!