Travel Trends for Scotland

January 2024

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Global Consumer Drivers

And their role in shaping the global travel and events industry today

Value

High inflation and rising costs are impacting travel decisions, with visitors seeking out value for money. High-income visitors are most resilient

Convenience

Consumers increasingly expect travel to be seamless, through online bookings and digital tools such as AI and AR
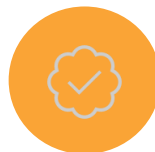
Wellness

Travel is seen as a chance to escape and refresh, both physically and mentally. Outdoor pursuits, relaxation opportunities and the emotional stimulation of connection to a place are all key

Authenticity

More visitors are moving beyond the well-beaten tourist trails, seeking out experiences that are genuinely rooted in place and tradition

Discovery

Off the beaten path tourism also drives visitors to seek out the unexpected - hidden gem locations and hyper local traditions, foods and customs - and feel that their experience is unique

Responsibility

Consumers, especially younger generations, are increasingly conscious of their impact on communities and the environment, and seek for their tourism to do no harm, or actively give back

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Three Key Trends for Scotland

Top global trends that will impact the Scottish tourism and events industry over 2024-2027

| TREND 1 | TREND 2 | TREND 3 |

People with Passion

Evolution towards more connected travel experiences that gives rise to a tourism model that focuses on deep, authentic community engagement and tailored journeys placing people at the heart

Places and Immersive Experiences

Global shift towards authentic travel, prompting the industry to offer deeper cultural connections and personalised exploration, particularly for Scotland's rich heritage and hidden gems
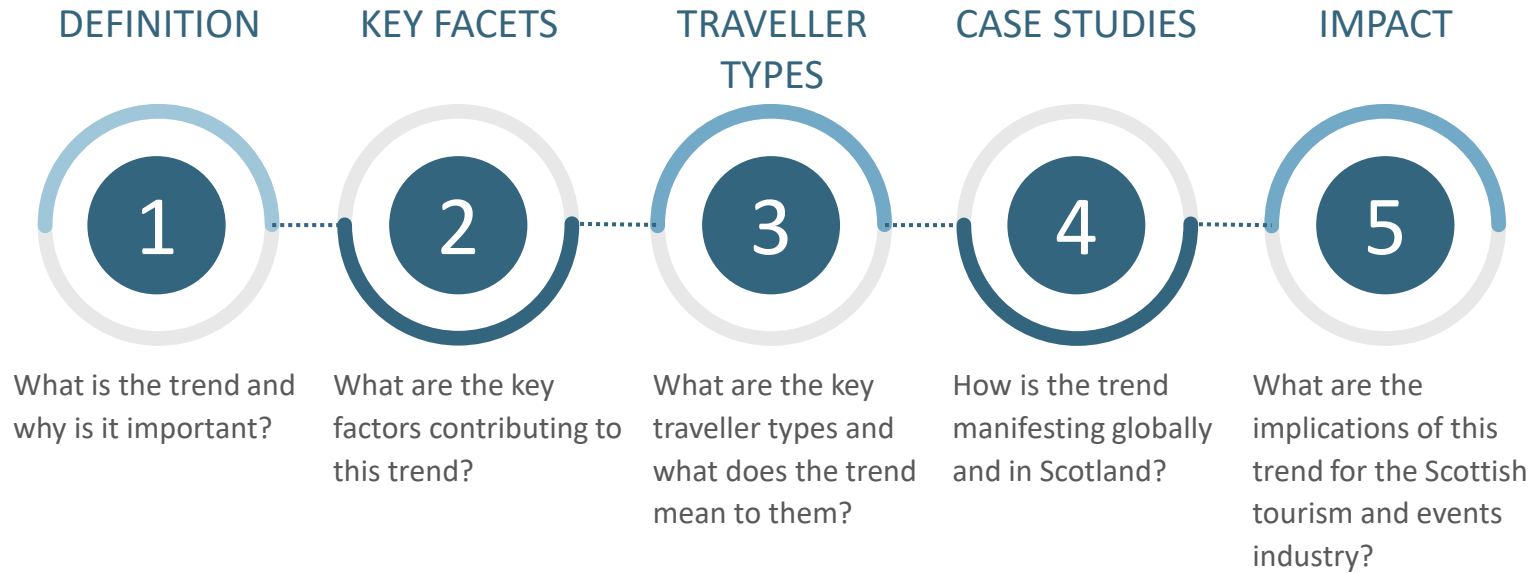
Power to Change

A new generation of travellers are increasingly eager to access responsible and meaningful experiences and events. Businesses will need to continue to adapt and embrace to fulfil this consumer desire

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For each trend, we created a structure to explore its meaning, influence and impact for Scotland

DEFINITION	KEY FACETS	TRAVELLER TYPES	CASE STUDIES	IMPACT
1	**2**	**3**	**4**	**5**
What is the trend and why is it important?	What are the key factors contributing to this trend?	What are the key traveller types and what does the trend mean to them?	How is the trend manifesting globally and in Scotland?	What are the implications of this trend for the Scottish tourism and events industry?

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60%

Seek curated experiences tailored to themselves (66% among 30-44 year-olds)

63%

Feel that being active in their community is important to them

38%

Are looking to engage more in their community in the next 5 years

PEOPLE WITH PASSION

Placing people at the heart of tourism is a key pathway to success in a market where visitors are increasingly looking for **connection, authenticity and personalisation**. **Quality of experience** is paramount for visitors, encouraging return visits and word-of-mouth marketing. Visitors who are primarily interested in **experiencing a new culture and willing to pay for curated or authentic local experiences** are an increasingly important group, and the drive towards longer stays, due to the rise of the digital nomad, opens up further opportunities to build community relationships. Personal connection and deeper community engagement does not just improve visitor experience, it can also help **foster a mutually beneficial relationship between visitor, community and the tourism sector and its employees**.

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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People with Passion

The global tourism landscape is increasingly being shaped by the desire for authentic experiences and the integration of special interests and values into travel. Over the next 1-3 years, these factors will drive significant change:

KEY PILLARS

Visitors

Seek out unique experiences that reflect personal values

Communities

Benefit from tourism that respects their heritage

Staff

Ambassadors providing insight and access

ENABLERS

Authentic Experiences

Empowered by technology to align with the individual

Tech and Digital

VR previews, AI recommendations, seamless booking

Marketing to the Power of One

Individualised campaigns with tailored messages

ATTRIBUTES

Human Centric

Ensures prioritisation of personal health and wellbeing

Local and Authentic

Allows visitors to engage deeply

MEGATRENDS

Experience More

A shift from material possessions to the pursuit of memorable, meaningful experience

Personalisation

Becoming a norm with travellers expecting to tailor experiences to their own needs and desires

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Key Traveller Types

Travellers wishing for personalised, unique engagement range from those looking for a tailored luxury service to those wishing to get involved in direct voluntary work

Cultural Explorer
*Personal and **Authentic***

Personalisation for the Cultural Explorer is about having a unique and authentic holiday experience, and to engage directly with local communities. Target with: Supper clubs with local foods, homestays, local craft markets, individual or small group guided tours.

73%

Are willing to pay 10%+ more for local immersion (such as homestays, meeting local communities, local craft markets, eating with locals)

Luxury Seeker
*Personal and **Premium***

For the Luxury Seeker, personalisation is important, and needs to be high end. This group looks for quality and status and is eager to buy unique items. Target with: Private tours (jewellery workshops, sightseeing), chef's table, private theatre box, personal shoppers.

28%

Pick their destination based on the quality of shopping; 34% like to shop in person, in store

Adventure Lover
*Personal and **Bold***

Adventure Lovers want a unique experience that others would not dare pursue - outdoor activities engaged in wild nature are exciting for them. Target with: Personal specialist guides into wilderness areas, multi-day small group treks or adrenaline-fuelled activities.

67%

Are willing to pay 10%+ more for nature and outdoor activities

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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💡 Hyper local, small businesses

📍 Ireland

ENNISKILLEN TASTE EXPERIENCE

Small group guided tours around this off the beaten path Irish town, stopping at multiple small businesses and local producers to sample local foods and drinks, and hear the stories around them. This is cultural immersion which feels authentic and seamless.

Private and bespoke tours are also available, to cater to the Luxury Seeker segment.


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Immersion through hyper local tradition and community cluster

Scotland

A' THE AIRTS, COMMUNITY ARTS CENTRE, DUMFRIES & GALLOWAY

This small community arts centre is part of Scotland's BeLocal initiative, encouraging visitors to be "temporary locals" immersed in local communities and culture, and to give back. The centre is home to a wide range of classes and events in partnership with other local bodies. Its attraction to tourists is Sanquhar Knitting, a local tradition. It offers tours to visitors, including private bespoke tours, as well as selling locally-knitted items (in person and online), and is part of a Scotland knitting tour.

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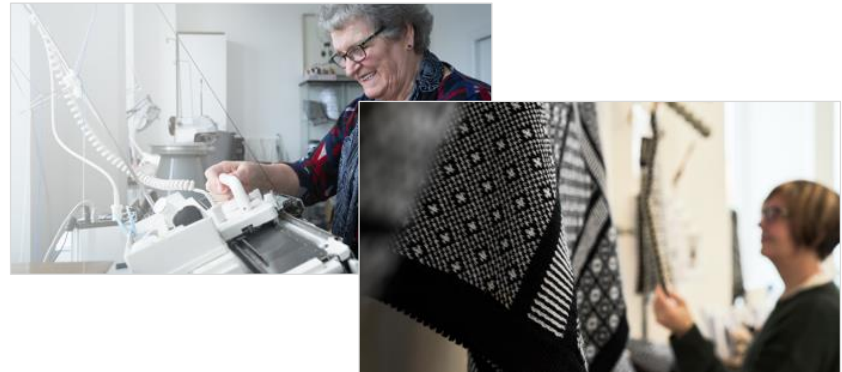
People with Passion
What does the trend mean for Scotland?

In Scotland, the People with Passion trend will manifest in a tourism **industry that puts people first, crafting marketing strategies that speak to individuals, leveraging technology to deliver personalised journeys, and nurturing the local character and authenticity** that draw visitors. Scottish tourism will need to **balance innovation with tradition**, offering personalised, value-driven experiences that resonate with both visitors and locals. This evolution will require a symbiotic relationship between visitors, communities and staff, each playing a pivotal role in creating a sustainable, enriching tourism sector that contributes to Scotland's cultural vibrancy and economic prosperity.

People with Passion

Foundations
Personal stories
Create connection through micro-narratives

Engage more deeply with visitors by weaving narratives around characters
- Museums might use stories naming specific outstanding local people
- Cafés and restaurants can feature recipes named after family members
- Self-guided routes can track the footsteps or daily life of a local figure
- Events might theme around a local character or myth
- Encourage staff to engage warmly and authentically with visitors

Second steps
Segment and specialise
Marketing to the power of one

Define target audience through customer profiling to tailor offer
- This helps create a quasi-personalised experience based on group needs
- Craft markets targeting Cultural Explorers might focus on local artisans, traditional techniques and materials, while those targeting Eco Adventurers might ensure sustainable material sourcing, or incorporate an entry fee or donation that is funnelled to a local charity

Third steps
Digital tailoring
Leverage AI and AR

Target Luxury Seekers and Digital Travellers with digital visit planning
- Machine learning to turn customer feedback into recommendations
- Big data learning and AI can help to upsell specific products and activities, enhance a guided tour service, or to sell a specific destination or lodging

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67%

Consider it important to experience cultures other than their own

USD162 BN

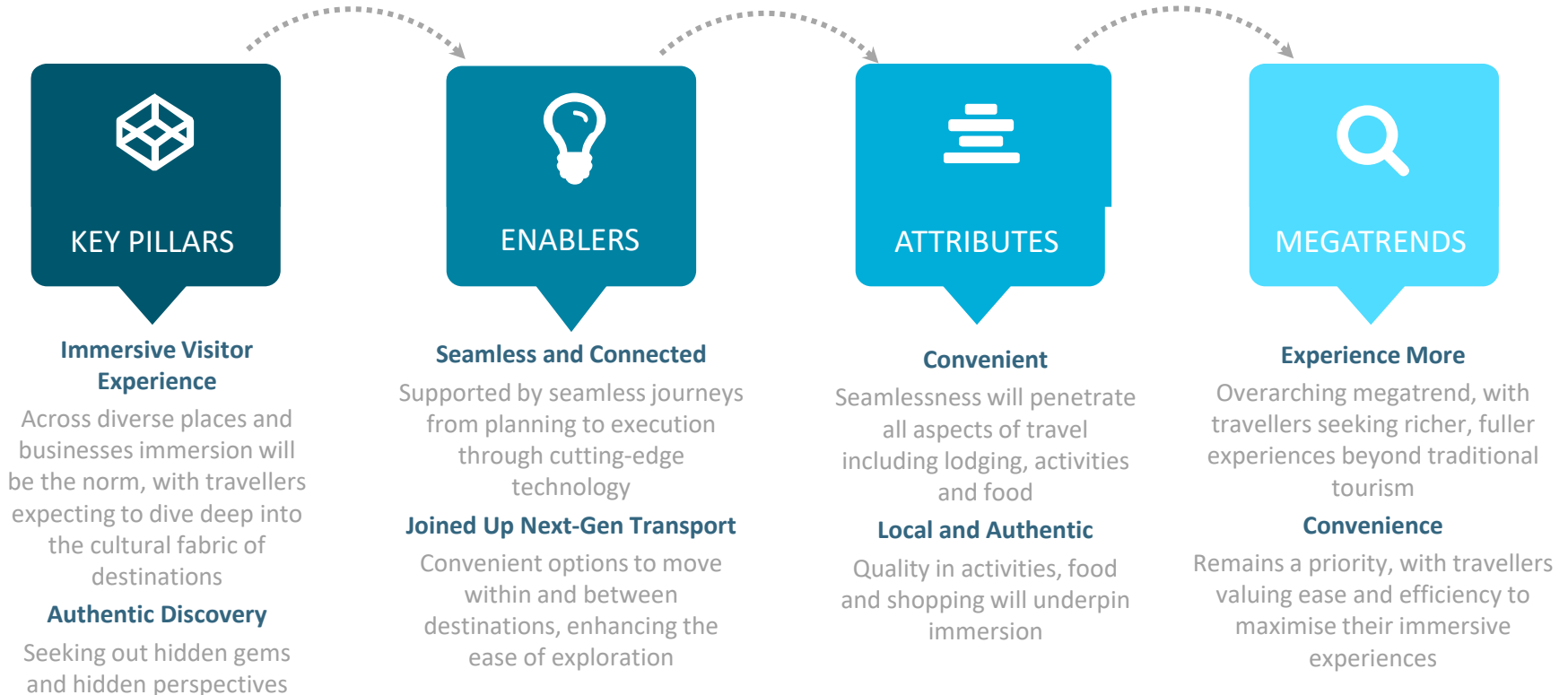Global spending on tourism experiences, 2023

Source: Euromonitor International

34%

Increase in global value spend on tourism food and dining, 2022-2023

Source: Euromonitor International

PLACES AND IMMERSIVE EXPERIENCES

Travellers are increasingly **seeking personalised immersive experiences that allow them to delve into new cultures in a more meaningful way**. Over the next few years, this **pursuit of authentic engagement** - whether through local cuisine, natural wonders, unique activities, or lesser-known locales - **will shape the travel industry**. The global travel industry will pivot to accommodate this trend, including investing in streamlined booking systems, integrated transport solutions and a focus on promoting undiscovered gems that offer a fresh perspective even on well-known destinations. Businesses will be tasked with crafting experiences that reveal the country's hidden treasures and allow visitors to connect with the country's heritage, landscapes and people in a way that feels personal and direct.

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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Places and Immersive Experiences

The trend is set to redefine global tourism in the next 1-3 years, emphasising depth over breadth in travel. This shift is characterised by the following:

KEY PILLARS

Immersive Visitor Experience

Across diverse places and businesses immersion will be the norm, with travellers expecting to dive deep into the cultural fabric of destinations

Authentic Discovery

Seeking out hidden gems and hidden perspectives

ENABLERS

Seamless and Connected

Supported by seamless journeys from planning to execution through cutting-edge technology

Joined Up Next-Gen Transport

Convenient options to move within and between destinations, enhancing the ease of exploration

ATTRIBUTES

Convenient

Seamlessness will penetrate all aspects of travel including lodging, activities and food

Local and Authentic

Quality in activities, food and shopping will underpin immersion

MEGATRENDS

Experience More

Overarching megatrend, with travellers seeking richer, fuller experiences beyond traditional tourism

Convenience

Remains a priority, with travellers valuing ease and efficiency to maximise their immersive experiences

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Key Traveller Types

A range of visitor types seek out immersive experiences and hidden gems. Most want these experiences to be as seamless as possible, especially for travel between different elements

Cultural Explorer
Immersive and Sensorial

Experiencing new places and exploring all aspects of local life - history, art and food - is central, and they are willing to spend for high-quality options. Target with: Small, specialist museums, quirky local foods, walking tours in lesser trodden urban areas

73%
Are willing to pay 10%+ more for quality food and dining

Digital Traveller
Immersive and Seamless

Lost without the internet, this group stays committed to easy digital booking even while branching out into more adventurous travel. Target with: Online booking, joined up services, QR codes for deeper cultural information.

73%
Are willing to pay 10%+ more for convenient travel options

Luxury Seeker
Immersive and Relaxed

Luxury seekers are increasingly interested in cultural immersion but do not want the hard work of discovery. They are willing to pay a premium for a top end, relaxed experience. Target with: Boutique hotels with local advice, local produce tasting menus or whisky flights.

22%
Prioritise relaxation; 15% prioritise convenient travel

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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Premium digitised personalisation

Global

ORIGIN TRAVEL SUBSCRIPTION SERVICE

Origin is a luxury high-end, high-tech subscription service and app that uses AI and local expertise to give travellers personalised recommendations and itineraries, based on feedback from previous trips. It charges USD3,000 for an annual membership that comes with unlimited access to trip planning and local support.

This caters to Luxury Seekers looking for an authentic and unique experience, outsourcing the process of discovery.

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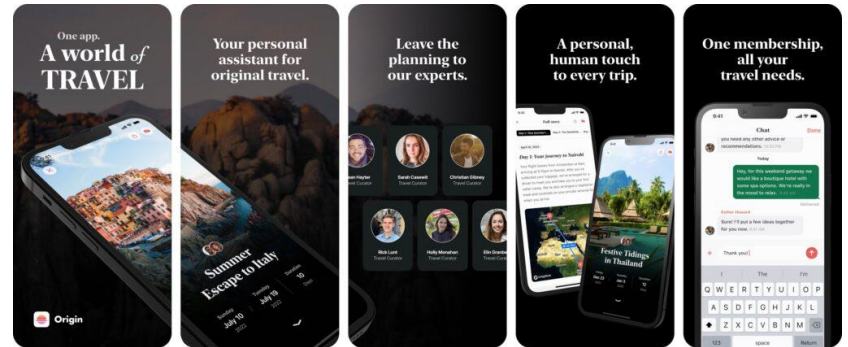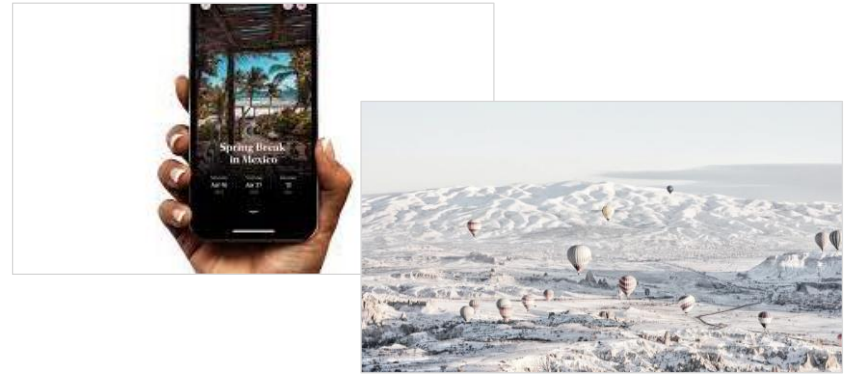
Hyper local, community cluster, local storytelling, transport solutions, responsible tourism

Scotland

LOCH NESS HUB

This one-stop community-run location facilitates a community cluster of small businesses, signposting visitors to local attractions and accommodation. It also smoothly links visitors up to simple transport options (hiking and biking trails, boat trips, baggage transfer services for walkers) while leveraging eco trends (e-bike hire, EV charging points). Visitors are also able to give back - money spent at the Loch Ness Hub feeds back into community projects.

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Places and Immersive Experiences
What does the trend mean for Scotland?

For Scotland, this trend signifies an opportunity to redefine its tourism narrative. Scottish businesses will be tasked with **crafting experiences that reveal the country's hidden treasures and allow visitors to connect with Scotland's heritage, landscapes and people in a way that feels personal and direct**.

Digital innovation will play a key role in providing the tools that enable travellers to seamlessly explore Scotland's rich tapestry of experiences. This will not only satisfy modern travellers' appetite for authenticity but also contribute to sustainable tourism practices that benefit both visitors and local communities alike.

Places and Immersive Experiences

Foundations
Hyper local
Brand identity cluster for small businesses

Hyper local: Small business clusters, storytelling, simple digital engagement
- Leverage theme around local history, industry, product or wildlife
- Signpost visitors through multiple linked attractions that retain identity
- Small festivals, markets, cultural events around local themes
- Self-guided tours using QR codes, signposting shops, museums, cafés

Second steps
Information dissemination
Support visitors to explore independently

Information dissemination: Using digital lite to help people move around
- Support visitors into discovery, promote ease of movement
- Small tour groups, private tours, self-guided tours
- Digital lite: Online booking systems, links to transport bookings
- Ride shares, bicycle hires, private taxis, concierge-led transport booking

Third steps
Next-gen joined up transport
Accessible, seamless, interlinked travel

Visitor discovery needs to be supported by seamless travel options
- Digitally integrated journeys from planning to execution
- Simple-to-use multimodality
- Real-time digital travel information

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USD53 BN

Global spend on adventure and eco-tourism packages, 2023

33%

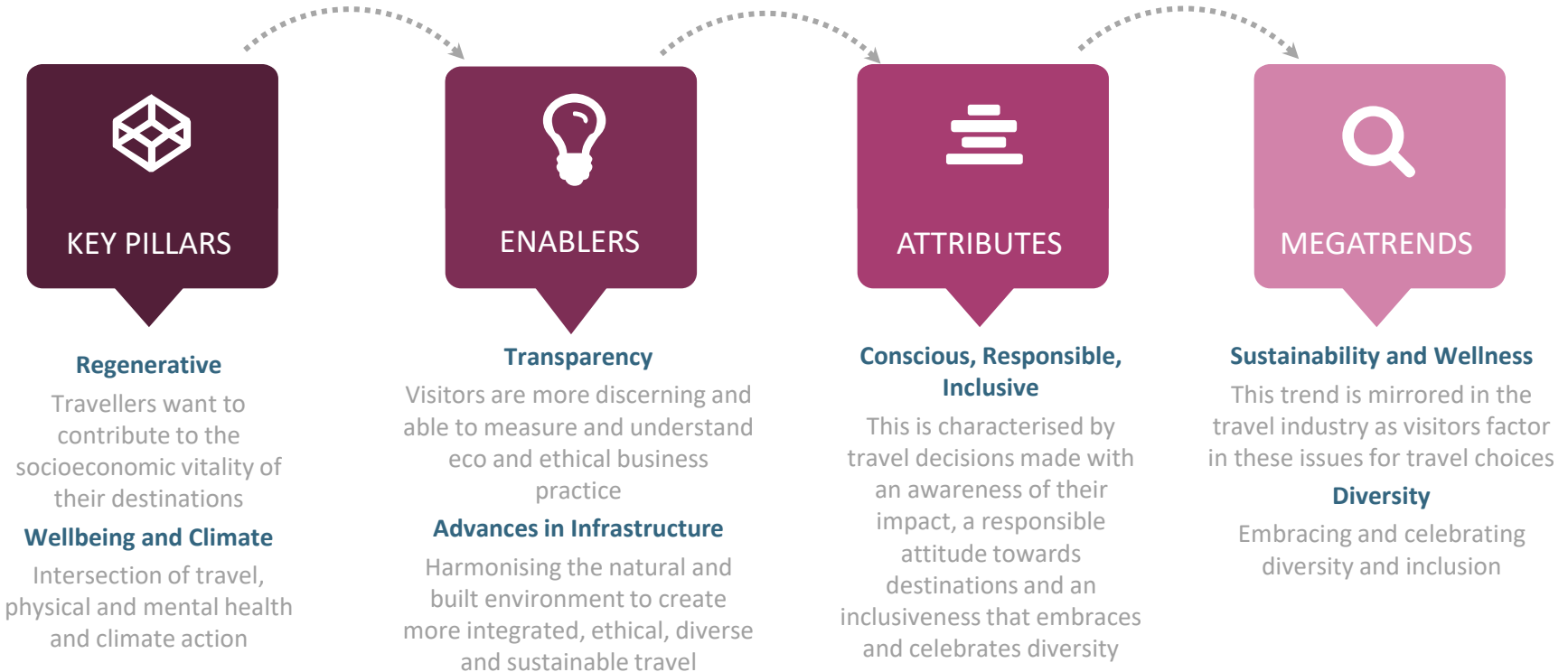Of consumers aged 30-44 buy brands that are aligned with their social and political views

64%

Of consumers globally try to have a positive impact on the environment through everyday actions

POWER TO CHANGE

Scotland's abundance of nature and culture is not enough alone to target new generations of travellers, who have additional expectations on top of this. Visitors want travel options that offer environmental and social benefits, as well as physical and mental health benefits. They expect accessibility and inclusivity, and they expect all this to be delivered through digital transformation: Businesses need to embrace change to deliver on these points. Concerns over the climate crisis, a commitment to diversity and personal wellbeing, and demand for convenience are driving this shift, with visitors showing a readiness to invest more in travel that answers this. **Eco-tourism is evolving to meet this change, transcending its traditional no-frills approach as it begins to cater to Luxury Seekers, Digital Travellers and Wellness Enthusiasts. These consumers are no longer satisfied with the basics; they demand sustainable travel that does not compromise on comfort, convenience or service quality**.

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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Power to Change

The trend is forecast to significantly shape global tourism within the next 1-3 years, prioritising meaningful travel with a positive footprint. This shift is characterised by the following:

KEY PILLARS

Regenerative

Travellers want to contribute to the socioeconomic vitality of their destinations

Wellbeing and Climate

Intersection of travel, physical and mental health and climate action

ENABLERS

Transparency

Visitors are more discerning and able to measure and understand eco and ethical business practice

Advances in Infrastructure

Harmonising the natural and built environment to create more integrated, ethical, diverse and sustainable travel

ATTRIBUTES

Conscious, Responsible, Inclusive

This is characterised by travel decisions made with an awareness of their impact, a responsible attitude towards destinations and an inclusiveness that embraces and celebrates diversity

MEGATRENDS

Sustainability and Wellness

This trend is mirrored in the travel industry as visitors factor in these issues for travel choices

Diversity

Embracing and celebrating diversity and inclusion

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Key Traveller Types

Preferences for sustainable travel, responsible and ethical travel and for the ease of tech-assisted services permeate through many types of traveller

Adventure Lover
*Eco and **Discovery***

Adventure lovers are at one with nature: They want to explore but do no harm, and if possible, give back to the community and environment. Target with: Eco lodges, wild camping, cycling, walking, self-guided tours based on public transport

30%
Try to shop in locally-owned stores

Digital Traveller
*Eco and **Online***

The Digital Traveller is all about online seamless services and prefers shopping to nature; but still considers sustainability an important factor in travel. Target with: Sustainable transport solutions, online paperless booking systems.

27%
Pick their travel destinations based on the quality of the shopping

Eco Adventurer
*Eco and **Ethical***

Sustainability is a prime motivator but willingness to pay more for it is lower than others. Ethically motivated, they are more likely to spend on voluntourism. Target with: Nature activities that contribute towards conservation (such as wildlife sightings, reporting, eco lodges)

83%
Would spend 10%+ more for voluntourism

Note: Voluntourism refers to tourism where travellers participate in voluntary work, often for a charity

Source: Euromonitor International Lifestyles Survey 2023, n=40,691, global respondents

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Luxury eco-tourism

Brazil

CRISTALINO LODGE, ALTO FLORESTA, BRAZIL

Cristalino Lodge elevates eco-tourism into the luxury segment. While basic rooms are an option, luxury bungalows feature a private garden with outdoor bath and shower; the restaurant serves high-end Amazonian food and quality local wines, while the floating deck adds luxurious relaxation into the mix.

The lodge exists to protect and conserve the forest, with all architecture design and materials sustainable.

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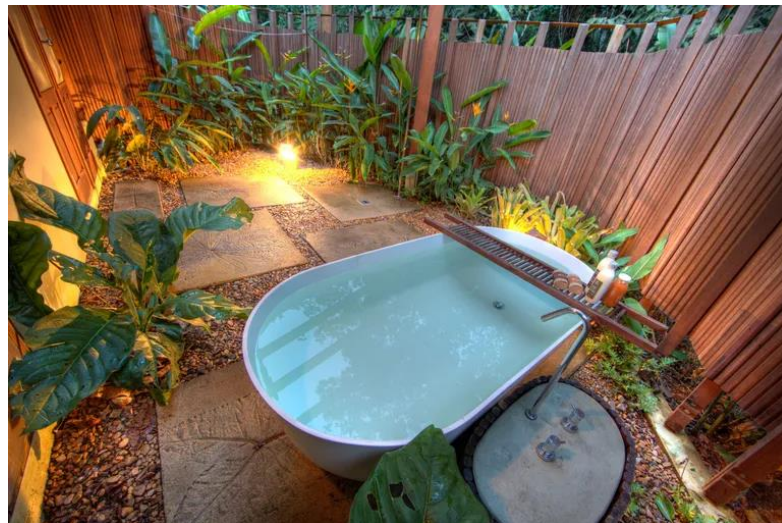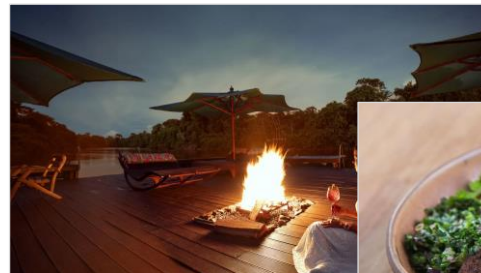
Sustainable discovery and adventure

Scotland

WILD DISCOVERY

Scotland-based wildlife travel company Wild Discovery embraces conservation tourism with its small group tailor-made tours, combining sustainability, discovery and personalisation and adding all-inclusive pricing into the mix. The focus is on Scotland, but the company also offers tours across the world.

The company partners with conservation programmes and sustainable initiatives, and with local food producers.

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Power to Change
What does the trend mean for Scotland?

For Scotland, this means **embracing and embedding these global movements into the very fabric of its tourism strategy**. Businesses are encouraged to adapt to meet the changing needs of consumers. This will involve **developing tourism offerings that are regenerative, promote holistic wellbeing, are inclusive and accessible, are digitally convenient and are rooted in the principles of sustainability and resilience**. Scottish tourism is thus poised to become a leader in responsible travel, setting an example for how destinations can thrive by aligning with these values.

Power to Change

Foundations
Highlight values
With a focus on younger travellers and visitors

Second steps
Build sustainable positioning
Simple steps to improve ethical standing

Third steps
Invest and commit
Sustainable buildings, tech solutions

Ensure marketing materials highlight eco, ethical and accessibility
- These are important selling points for many younger consumers
- Highlight any local sourcing, CSR initiatives, sustainable practices
- Ensure online presence with simple efficient booking systems

Take steps to create a sustainable, diverse, ethical positioning
- Purchase local where possible and collaborate with other local businesses
- Offer vegan and vegetarian options, donate leftover food to local charities
- Partnerships with local conservation groups
- Events should seek to be plastic free, use renewable energy, recycle or compost waste, and use LED lighting
- Task employees to lead in specific green and DEI strategies, offer rewards

Invest in more expensive and complex initiatives to fully benefit
- Address transportation with electric charging points, bike hire, shuttle bus
- Automation: Smart showers, occupancy sensors for light and thermostat
- Solar panels, water recovery and reuse systems, geothermal cooling towers

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