



*Visit
Scotland* | *Alba*[™]

TRENDS FOR 2025: THE EXPERIENCE ECONOMY

January 2025

Contents

Trends for 2025:

The Experience
Economy

1. The Experience Economy

2. Passion Travel

- 2.1 Why Passion?
- 2.2 Why is this trend relevant to Scottish tourism?
- 2.3 Passion Travel Trend Spotlight: Celebbreaktions
- 2.4 Passion Travel Trend Snapshot: Gig Tripping
- 2.5 Passion Travel Trend Snapshot: Hobbidays
- 2.6 Passion Travel Trend Snapshot: Set-Jetting
- 2.7 Passion Travel Trend Snapshot: Instant Inspo

3. Wellness Tourism

- 3.1 Why Wellness?
- 3.2 Why is this trend relevant to Scottish tourism?
- 3.3 Wellness Tourism Trend Spotlight: Snoorie (or Sleep Tourism)
- 3.4 Wellness Tourism Trend Snapshot: Biohacking Wellness Tech
- 3.5 Wellness Tourism Trend Snapshot: Outdoor Therapy

4. Actionable Insight Summary

- 4.1 Passion Travel Trends
- 4.1 Wellness Tourism Trends

1. THE EXPERIENCE ECONOMY

What is the Experience Economy?

Simply put, the experience economy is the value generated by a consumer's experience. When looked at through a tourism lens, visitors are looking for more than just a holiday or trip; they want to ensure that their money and time is spent on meaningful experiences that create lasting memories.

For Scotland, the opportunity to embrace the experience economy can lead to transformative tourism through...

- Immersive meaningful experiences driving longer stays, higher and repeat visitor spend
- Seasonal spread through a diverse portfolio of experiences tailored to drive year-round visitation
- Sustainable growth by meaningful connections with communities delivering greater loyalty, premium rates and returns

In this report, we explore the types of experiences that visitors are looking for, how they relate to Scottish tourism, and how businesses can capitalise on these motivations in the coming year.



2. PASSION TRAVEL

Two tangible elements of the Experience Economy mega-trend are...

Passion



Prioritising personal interests as the driver behind destination choice

Wellness



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

2.1 Why Passion?

Travellers increasingly seek **experiences** rather than material items. They yearn for meaningful moments to take home memories rather than souvenirs.

Trips are also increasingly being built around a particular event or activity.

People are travelling all year round for different 'big ticket' events, such as personal milestones or special occasions, concerts and music tours, sporting events, or ticking off challenges related to their hobbies or self-fulfilment.





2.2 Why is this trend relevant to Scottish tourism?

Findings from the most recent *Scotland Visitor Survey* highlight that travellers are looking for experiences related to their interests when choosing a holiday destination. There is also a propensity for visitors to look for opportunities to celebrate special occasions when on their holiday in Scotland.

Motivations for visitors when considering potential holiday destinations

- 19% of respondents were considering booking a holiday because of a particular interest, which increased to 26% for the long-haul respondents.

Trip profile of visitors to Scotland

- 10% of visitors to Scotland were on a “trip of a lifetime”, rising to 29% for long haul visitors.
- 21% of visitors to Scotland were on a “special holiday” such as a celebration, rising to 33% for long haul visitors.
- 19% of long haul visitors were travelling with members of their extended family.

2.3 Passion Travel Trend Spotlight

Celebreaktions

“Celebreaktions” are the opportunity for special celebrations to be transformed into holidays; taking existing occasions as a chance for multigenerational groups to get together and extend quality time.

An increased cost of living, or decrease in disposable income for leisure, means that these breaks offer a chance to save money. Weddings, birthdays and other family occasions can be rolled into one holiday.

Group bookings and exclusive access to attractions, activities and excursions will be key to ensuring a memorable celebration for all involved.

1.2M

Domestic overnight trips in Scotland which included attendance at a personal event or celebration.

£322M

Spend associated with domestic overnight trips in Scotland which included attendance at a personal event or celebration.

Motivations to take Celebreaktions

- Milestones and bucket lists
- Making the most of it

Celebreaktions

Milestones and bucket lists

The concept of bucket list holidays are nothing new. However, tying these trips in with milestones such as ‘big’ birthdays, anniversaries, weddings and graduations is a growing trend.

The COVID-19 pandemic lockdowns limited the ability for family and friends to celebrate such occasions in person, so to compensate for lost time some are using the existing occasion as an “excuse” to go on holiday together – and often this is resulting in something bigger and better than normal!

What’s happening in Scotland?

10% of visitors to Scotland in 2023 were on a ‘trip of a lifetime’, and 21% were on special holiday or short break to celebrate an occasion. Both reasons for visiting Scotland were more prevalent for long haul visitors, with 29% on the trip of a lifetime and 33% on a special holiday or short break.

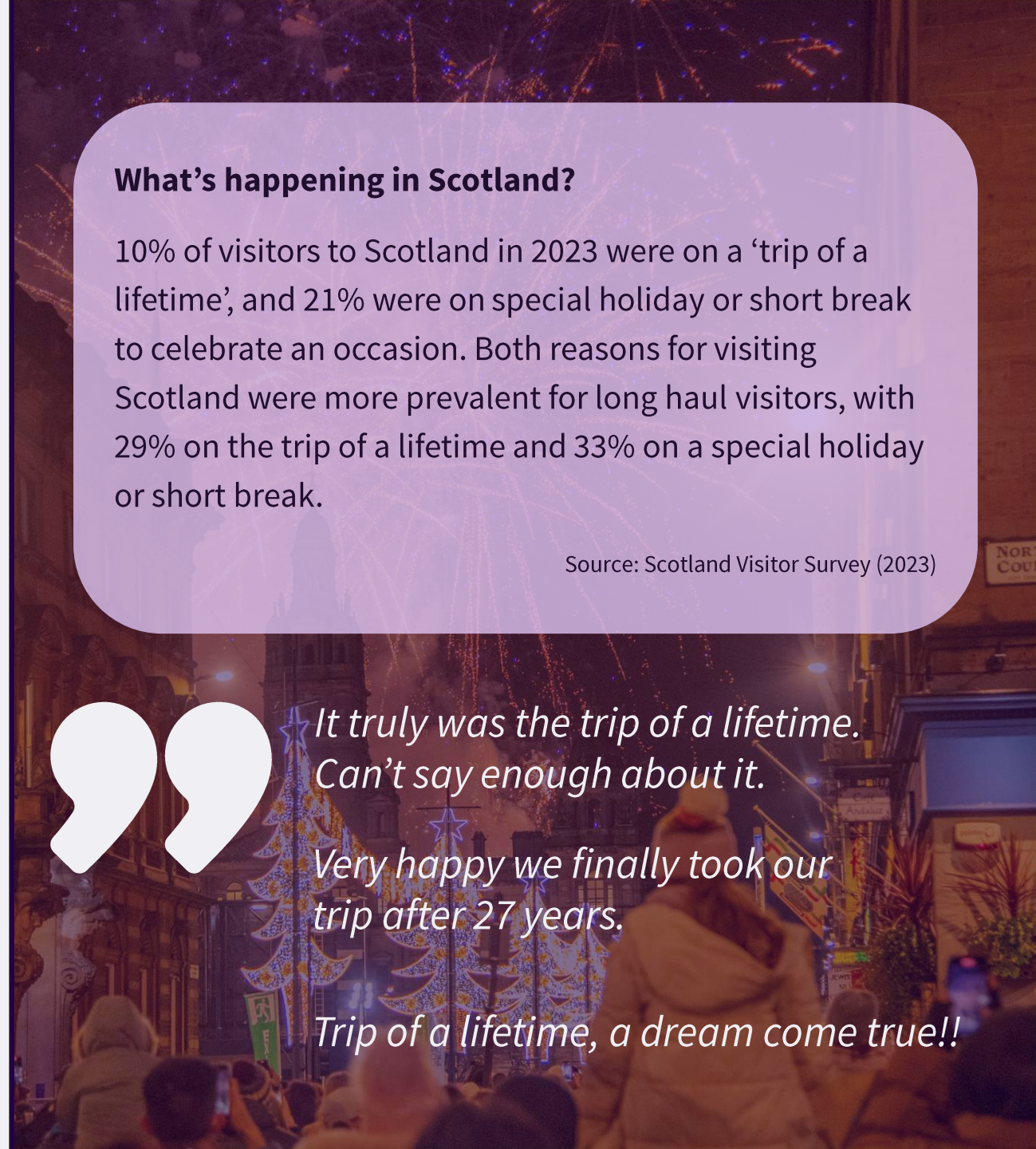
Source: Scotland Visitor Survey (2023)



*It truly was the trip of a lifetime.
Can't say enough about it.*

*Very happy we finally took our
trip after 27 years.*

Trip of a lifetime, a dream come true!!



Celebreaktions

Making the most of it

While taking a trip is often an optional activity, special occasions are a more common and immovable occurrence in people's lives. If someone is travelling for an event which their friends and family are also attending, it may make sense to extend their stay somewhere to optimise family time together, or to explore a lesser-known area. Travellers can create a travel itinerary around the event – either before or after – to make the most of their stay.

Weddings are a good example of this. While most weddings in Scotland involve at least one Scottish resident, 27% of weddings in 2023 involved one or both individuals travelling either from elsewhere in the UK or internationally to Scotland. This offers up additional opportunities associated with friends and family travelling as part of a larger trip.

What's happening in Scotland?

Cameron Lodges on Loch Lomond has a selection of discounts for booking in advance and extended stays. The "Book Early & Save" offer gives 10% off an apartment, cottage, or lodge escape four or more months in advance - ideal for planning special occasions well ahead of time. Additionally, the "Stay More, Save More" package gives complimentary nights, making it easy to enhance your getaway with one free night when booking a three- or four-night stay, or two free nights on a week-long escape.

Total marriages registered in Scotland: 26,753

- **Scottish residents: 73%**
- **UK residents: 22%**
- **International residents: 5%**

Celebreaktions

Opportunities for Scotland

This trend provides opportunities for Scottish tourism businesses to think about their offering to visitors who are celebrating a special occasion, either at their establishment or in the local area.

Tailor packages around memorable experiences, considering photo opportunities, bookable experiences, shareability, and/or exclusive access to rooms or private spaces

Incentivise early booking with deals and flexible group booking to secure the date

If you cater to large groups, consider providing discounts for visitors above a certain number or exclusive use options

Collaborate with local suppliers e.g. preferred supplier lists, articles on each other's websites. Consider each stage of the supply chain, from food and drink to travel

2.4 Passion Travel Trend Snapshot | Gig Tripping

Trend Summary

Seeing bands and musicians can be seen as a 'once in a lifetime' opportunity for fans, with some seeking to make it a unique getaway experience. This has led to people planning trips around concerts and festivals. With artists often releasing tickets far in advance, visitors have plenty of time to decide how they want to spend their time.

Relevance to Scotland

In 2023, 1.6 million music fans visited Scotland, spending almost £500 million and sustaining 4,000 jobs across the country. Scotland's largest cities are well-known hosts for musical talent, with Glasgow named as UNESCO City of Music. Venues of various sizes across the music venue sector contributed a total of over £44 million to the Scottish Economy in 2023.

What's happening in Scotland?

Scotland plays host to a huge range of brand new and long-established live music events each year. From large-scale arenas to intimate venues, Scotland's music scene spans multiple genres. 2025 will see Oasis, Scissor Sisters, Billy Joel, Robbie Williams and Kylie all perform. There's also Celtic Connections, Tiree Music Festival, Shetland and Orkney Folk Festivals, to name but a few.

Opportunities for Scotland

- Actively research concerts or festivals that are going on in the area and the types of visitors it may bring. Tickets go on sale in advance, so early preparation is key.
- Offer tailored or themed experiences inspired by the music artist(s) such as guided tours or food trails.

Relevance to Scotland Sources: Music Tourism, UK Music (2024); Annual Report Scotland, Music Venue Trust (2023)

2.5 Passion Travel Trend Snapshot | Hobbidays

Trend Summary

Going on an experience-focused trip does not need to be luxurious or expensive. One of the easiest ways to practice self-care and unleash creativity is the pursuit of hobbies. The concept of “hobbidays” combines these two ideas, where travellers can choose their next destination based on places that promote and facilitate their favourite hobbies.

Relevance to Scotland

89% of respondents participated in at least one type of activity* on their trip to Scotland. This rose to 91% of visitors from Europe and 96% for long-haul visitors.

1.6 million domestic overnight trips and 43.8 million domestic tourism day visits in Scotland during 2023 involved taking part in hobbies and interests.

What’s happening in Scotland?

Serenity Scotland plan and provide creative holidays and immersive skills experiences for individuals or groups. Iain Stewart, the founder, organises bespoke 'Traditional Skills' tours including experiences in traditional music, fiddle playing, singing, ceramics, weaving, stonework, and printmaking.

Opportunities for Scotland

- Offer and promote the opportunity for visitors to “try something new”. Personalising a bespoke experience is a bonus.
- Use available space to host workshops and events with local businesses and communities that specialise in certain skills.
- Provide hands-on visitor experiences such as “meet the maker.”

*Examples of activities undertaken included hill walking and hiking, shopping, watching wildlife, boat trips, guided tours, viewing architecture and sporting activities

2.6 Passion Travel Trend Snapshot | Set-Jetting

Trend Summary

Increase in media consumption during the COVID-19 pandemic heightened the appetite of visiting such locations “IRL” as soon as possible. With a plethora of film and TV locations, it’s not surprising that 7 in 10 international leisure visitors to the UK visited a film or TV location in the last 10 years.

Relevance to Scotland

19% of respondents mentioned a 'film, TV or literature featuring Scotland' as a source of inspiration to visit. This rose to 36% of visitors from Europe and 37% for long-haul visitors. Outlander was the most mentioned TV show by respondents, followed by Shetland. Braveheart and Harry Potter were the most commonly referenced films.

What’s happening in Scotland?

Destinations and businesses in Scotland are highlighting links to various film locations to inspire set-jetting trips. Visitors can explore the fishing village St Abbs in the Scottish Borders - home to 'New Asgard' in Avengers: Endgame. For visitors who would like a guided tour, Rabbies offer several Outlander tours ranging from daytrips to 5 days experiences.

Opportunities for Scotland

- Offer tours of the area with round-trip transport and photoshoot spots.
- Create walking, food or drinking trails of top locations.
- Consider indirect links with film, TV and literature such as actors’ hometowns or local legends.

Trend Summary Source: The influence of Film and TV locations on visitors to the UK, VisitBritain (2023)

Relevance to Scotland Source: Scotland Visitor Survey (2023)

2.7 Passion Travel Trend Snapshot | Instant Inspo

Trend Summary

As highlighted by [Skyscanner](#), social media channels like Instagram and TikTok are one of the most important sources of travel inspiration for 2025, with 27% of survey respondents citing this source. With younger people already using these platforms in relation to travel, it makes sense to cater to their thirst for experiences on trips.

Relevance to Scotland

13% of respondents were inspired to come to Scotland based on information from travel bloggers and influencers. This rose to 24% of visitors from Europe and 23% for long-haul visitors.

56% of those aged 16 to 34 with no children were inspired to come to Scotland by digital sources, over-indexing on information from travel bloggers and influencers (34%).

What's happening in Scotland?

Partnerships between social media channels and Scottish tourism events have been used to target specific audiences. For example, in March 2024, VisitScotland partnered with Chinese social media influencer “Travel Lin” for a live stream on Weibo, showcasing Scotland’s culture and agritourism. The live stream attracted 818K viewers and generated over 19K engagements.

Opportunities for Scotland

- Identify local events or experiences that can be associated with your tourism business and showcase them on your channel(s), either through direct partnership or sharing their content.
- Showcase lesser-known things to do in your area so that visitors can get a more authentic, “off the beaten track” experience.

3. WELLNESS TOURISM

3.1 Why Wellness?

Wellness is an established travel trend that is still relevant in 2025

We first identified wellness as an area for growth a decade ago, but this trend is here to stay. Despite considerable global changes and shifts over the past 10 years, Scotland remains the perfect place to unwind.

Consumer expectations of travel and tourism for wellness are constantly evolving. Our fast-paced world has many wanting to slow down and take time for themselves. With people living longer, there is also a greater focus on lifelong health and prosperity.

Sometimes wellness is the primary motivator when planning a trip. However, wellness often comes as an added benefit from Scotland's unique offering. Whether a primary or secondary motivator, wellness experiences appeal to consumers of all ages and life stages.



3.2 Why is this trend relevant to Scottish tourism?



Findings from the most recent Scotland Visitor Survey highlight that wellness remains a motivation to come to Scotland and a benefit of Scottish holidays.

For a quarter of visitors (26%), a key driver in coming to Scotland was 'I needed to get away from it all and have a rest'. Once in Scotland, visitors saw benefits to their wellness; 59% of visitors agreed that their trip in Scotland enhanced their physical, mental and emotional wellbeing.

The *Wellness in Tourism Policy Toolkit* provided by the Global Wellness Institute identifies the need to integrate the local economy with the wellness tourism economy, suggesting the following actions.

Action 2: Increase local business and consumer participation in the wellness tourism economy.

- 2.1. Strengthen local business participation in the wellness tourism value chain.
- 2.2. Support and welcome local consumers at wellness tourism establishments.

3.3 Wellness Tourism Trend Spotlight

Snoorie (or Sleep Tourism)

Scotland is already world famous for “coorie”, embracing cosiness and comfort. “Snoorie” takes this concept one step further, providing a Scottish twist on the global trend of sleep tourism and encouraging rest as part of the Scottish visitor experience.

According to The Sleep Charity, the UK is in the midst of a sleep crisis which impacts our health, economy and society.

They point to a normalisation of poor sleep and factors contributing to a ‘sleep stealing environment’, such as workplace stresses, poor living conditions, noise pollution and uncomfortable sleep environments.

'Getting away from it all' is a key driver for taking a holiday or short break. We're diving into three key areas of the sleep tourism trend, aka “snoorie”.

9 in 10

People are currently experiencing sleep issues in the UK.

43%

State stress and anxiety as key factors for not getting a good night's sleep.

Snoorie Trends

- The best night's sleep
- Long haul flight recovery
- More rest than play

Snoorie

The best night's sleep

Accommodation providers are recognising the importance of prioritising quality sleep as part of the visitor experience and enhancing their sleep environment offering.

- Sensory experiences are key, with a focus on temperature, sound and light control.
- Investment in sleeping equipment has been another approach, with organic and natural mattresses, smart beds and pillow menus on offer.
- Complimentary products such as aromatherapy oils and specialist teas are provided as sleeping aids.
- An emerging trend is the “sleep divorce”, where couples are sleeping in separate beds to optimise their rest.
- For a more holistic experience, dedicated "sleep retreats" are a developing corner of the luxury tourism market.

What's happening in Scotland?

A new partnership between Highland Coast Hotels and Highland BlindCraft Beds is providing over 220 handcrafted beds along the North Coast 500 route. Not only is this collaboration encouraging sleep as part of the visitor experience, it is also an example of an ethical business with a local supplier. Founded in 1881, Highland BlindCraft is the only organisation of its kind in the Scottish Highlands, providing training and employment to individuals living with visual impairments and other disabilities.

What's happening in global tourism?

CitizenM hotels provide an online sleep quiz to personalise your stay and “sleep like a champion”. Questions about sleep and wake times, purpose of stay and time zone shifts lead to a categorisation of “sleep type” and suggestions of sleep hygiene improvements.

Snoorie

Long haul flight recovery

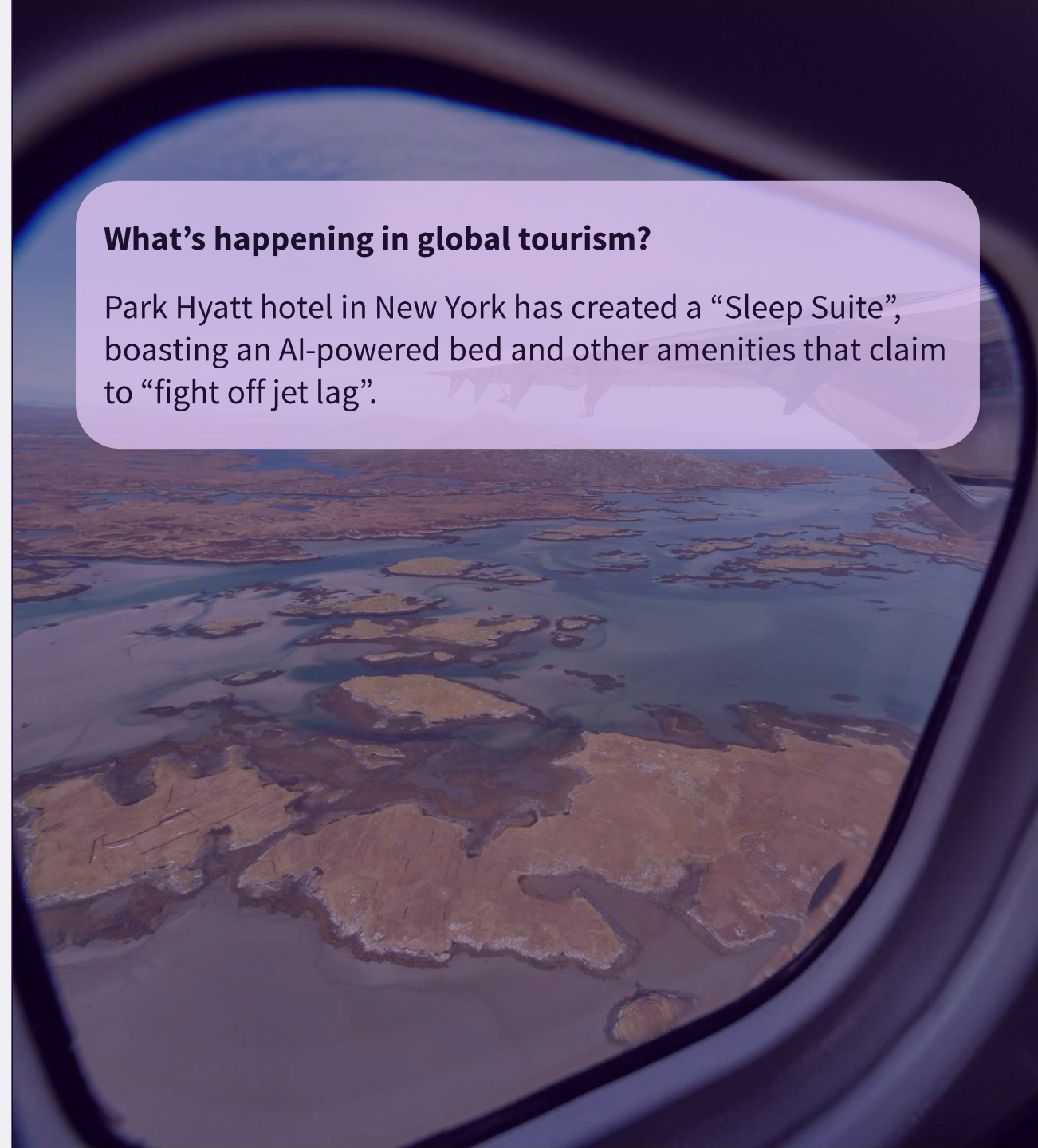
International travel often comes at the cost of jet lag. This phenomenon can lead to issues with sleep, impaired thinking and shifts in mood.

The preparation and handling of jet lag is a topic that has grown in popularity. There are now specific apps ([such as Timeshifter](#)) to tackle this problem. The Sleep Charity – a national organisation providing sleep advice and support – have a dedicated guidance document for [dealing with jet lag](#). While preparation ahead of travel is key, what happens to visitors' sleep when they arrive in their destination?

With 42% of international travellers to Scotland in 2023 coming from outside of Europe, investing in softening the effects of jet lag may improve the early visitor experience.

What's happening in global tourism?

Park Hyatt hotel in New York has created a “Sleep Suite”, boasting an AI-powered bed and other amenities that claim to “fight off jet lag”.



Snoorie

More rest than play

While sleep tourism is naturally associated with nighttime, there are many ways that daytime activities can encourage restfulness and healthy sleep.

Wellness activities that have relaxation at their core are the most obvious, from yoga and meditation to reflexology and massage. Sleep hygiene literature also encourages time spent outdoors and engagement in hobbies during the day.

Rest itself does not always equate to sleep. As highlighted by [mental health app Calm](#), there are potentially up to seven different types of rest which are thought to tackle burnout.

A secondary benefit to promoting wellness experiences is helping visitors to feel recharged from their time in Scotland.

What's happening in Scotland?

The Sheepy Sleepover Mindful Yoga Retreat from Naughty Sheep near Loch Lomond takes a holistic approach with three nights of yoga, forest bathing and calming interactions with Herdwick sheep, all set to promote a good night's sleep.

Seven Types of Rest to Tackle Burnout

Physical

Mental

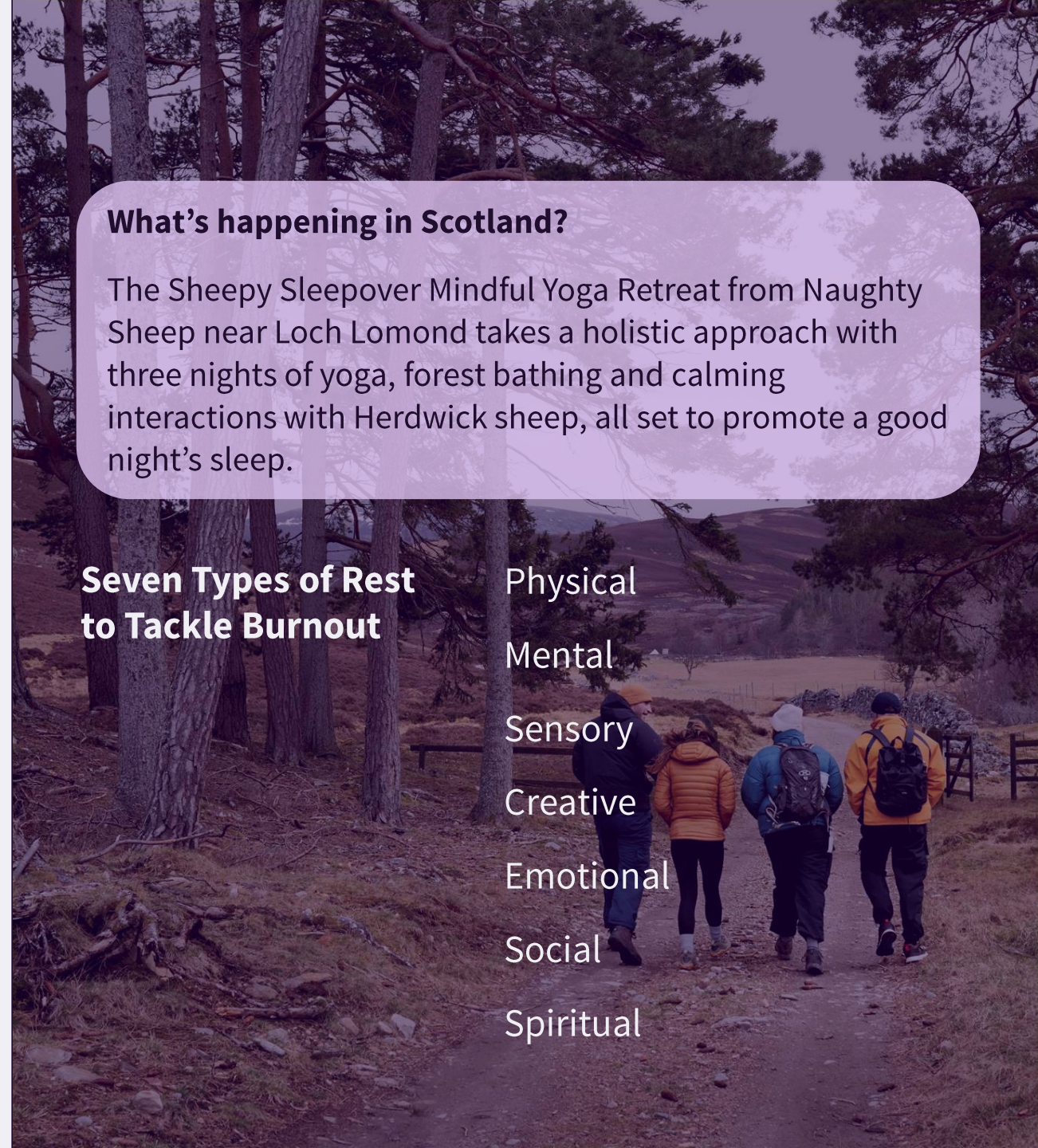
Sensory

Creative

Emotional

Social

Spiritual



Snoorie

Opportunities for Scotland

This trend provides opportunities for various tourism businesses - and not just for accommodation providers.

There are several ways to demonstrate to visitors to Scotland that their rest is a priority.

If you have beds...

- Think about investing in optimised sleep “equipment”. This can range from beds and “smart” blinds, to quality bedding, eye masks, or herbal teas.
- Offer personalisation that could improve sleep, such as pillow menus, the possibility of separate beds in the same room, or later check outs for international visitors who may be experiencing jet lag.
- Provide sleep hygiene tips and promote relaxation routines. These could be in the form of packages / programmes, or as simple as a leaflet provided in your rooms.

If you don't...

- Highlight how your product may help a good night's sleep e.g. exposure to Scottish fresh air, physical activities.
- Promote opportunities for visitors to earn their rest through exercise, creativity, mindfulness or spending time outdoors.
- Take the focus away from sleep specifically and onto how your offering can benefit the other types of rest, i.e. how it is 'good for the soul'!

3.4 Wellness Tourism Trend Snapshot | Biohacking Wellness Tech

Trend Summary

As technology has grown and evolved a wellness element has emerged allowing people to utilise tech to ‘hack their biology’. The term “biohacking” refers to a DIY approach that people can take to enhance their life by making changes to your body, diet and lifestyle to improve wellbeing.

Examples

- Wearable tech such as smart watches which can track your steps, heart rate and sleep.
- Light therapy with the goal of lifting your mood.
- Sleep therapy for improving sleep quality.

What’s happening in Scotland?

Edinburgh Salt Rooms is a sanctuary offering holistic treatments. Advanced high-tech therapies are available such Zero Gravity Massage Therapy which aims to aid enhanced recovery whilst evenly distributing body weight. The PEMF Loungers can offer complementary benefits by using pulsed electromagnetic fields.

Opportunities for Scotland

- “Biohack” the mind: Offer visitors a range of holistic experiences unique to the Scottish environment such as wild swimming in the sea, ice baths and forest bathing.
- “Biohack” the body: Tailored experiences or packages to enhance visitors' physical wellbeing such as unique spa trips (e.g. oxygen therapy).

3.5 Wellness Tourism Trend Snapshot | Outdoor Therapy

Trend Summary

For some travellers, it is important to switch off from day-to-day life. More people are recognising the benefits of being in nature in relation to wellbeing and mental health. Outdoor therapy can include visiting a specialised retreat, or as simple as stepping away from the constraints of the home or office environment and out into nature.

Relevance to Scotland

This concept resonates well with visitors' motivations to taking a holiday. 26% of visitors to Scotland stated that they "needed to get away from it all and have a rest". Connection with nature and the outdoors was also a motivation rated highly by all audiences (38%). However, it was the top motivation for the "older independent" lifestage.*

What's happening in Scotland?

Wild Scottish Sauna offers a unique sauna experience surrounded by the great Scottish outdoors. Saunas boast numerous health benefits such as relaxation and better sleep. Wild Scottish Sauna also offers a Sauna and Sea Experience, combining cold water therapy followed by a warm up in the sauna.

Opportunities for Scotland

- When the weather allows, move indoor activities outdoors e.g. arts and crafts, yoga classes and gyms. Be adaptable and tailor these activities to changing conditions.
- Create opportunities for outdoor eating experiences.
- Personalise experiences by asking visitors in advance of their outdoor preferences and providing a list of ideas and locations for outdoor therapy.

4.0 Actionable Insight Summary

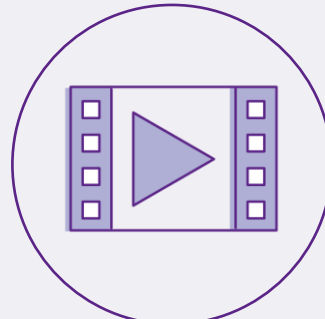
This section of the report highlights the key takeaways for Scottish tourism businesses in relation to the Experience Economy Trends. Use the key below to identify which insights relate to which trend.



Gig Tripping



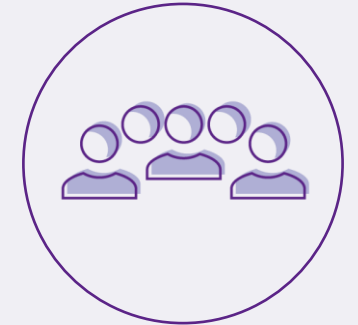
Hobbidays



Set-Jetting



Instant Inspo



Celebreaktions



Snoorie



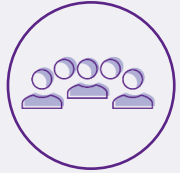
**Biohacking
Wellness Tech**



**Outdoor
Therapy**

4.1 Passion Travel Trends

Celebreaktions, Gig Tripping, Hobbidays, Set-Jetting and Instant Inspo



Tailor packages around memorable experiences, considering photo opportunities, bookable experiences, shareability, and/or exclusive access to rooms or private spaces.

Visitors will often know their preferred date in advance, so consider providing cheaper early booking options to “lock” the date in. If you cater to large groups, consider providing discounts above a certain number.

Explore collaboration opportunities with local suppliers e.g. preferred supplier lists, articles on each other’s websites. Consider each stage of the supply chain, from food and drink to travel.



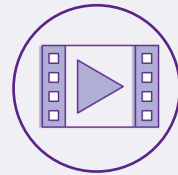
Actively research concerts or festivals that are going on in the area and the types of visitors it may bring. Offer tailored or themed experiences inspired by the music artist such as guided walks or food trails.



Offer and promote the opportunity for visitors to “try something new”. Personalising a bespoke experience is a bonus.

Use available space to host workshops and events with local businesses and communities that specialise in certain skills.

Provide hands-on visitor experiences such as “meet the maker.”



Offer tours of the area with round-trip transport and photoshoot spots. Create walking, food or drinking trails of top locations.

Consider indirect links with film, tv and literature such as actors’ hometowns or local legends.



Identify local events or experiences that can be associated with your tourism business and showcase them on your channel(s).

Showcase lesser-known things to do in your area so that visitors can get a more authentic, “off the beaten track” experience.

4.1 Wellness Tourism Trends

Snoorie, Biohacking Wellness Tech and Outdoor Therapy



Think about investing in sleep “equipment”. This can range from beds and “smart” blinds, to quality bedding, eye masks or herbal teas.

Offer personalisation that could improve sleep, such as pillow menus, the possibility of separate beds in the same room, or later check outs for international visitors who may be experiencing jet lag.

Provide sleep hygiene tips and promote relaxation routines. These could be in the form of packages / programmes, or as simple as a leaflet provided in your rooms.

Highlight how your product may help a good night’s sleep e.g. exposure to Scottish fresh air, physical activities. Promote opportunities for visitors to earn their rest through exercise, creativity or spending time outdoors.

Take the focus away from sleep specifically and onto how your offering can benefit the other types of rest.



“Biohack” the mind: Offer visitors a range of holistic experiences unique to the Scottish environment such as wild swimming in the sea, ice baths and forest bathing.

“Biohack” the body: Tailored experiences or packages to enhance visitors' physical wellbeing such as unique spa trips (e.g. oxygen therapy).



When the weather allows, move indoor activities outdoors such as arts and crafts, yoga classes or outdoor gyms.

Create opportunities for outdoor eating experiences such as personalised picnics, meals under the stars and outdoor cooking activities.

Personalise experiences by asking guests in advance of their outdoor preferences and providing a list of personalised ideas and locations for outdoor therapy.



Disclaimer

This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.

Contact Us:
Insight Department
visitscotland.org
visitscotland.com
research@visitscotland.com

Images © VisitScotland