



# SCOTLAND RESIDENTS' VIEW ON TOURISM 2021

## A FOCUS ON THE ROLE OF TOURISM AND COMMUNITY ENGAGEMENT (58 SLIDES)

# KEY SECTIONS

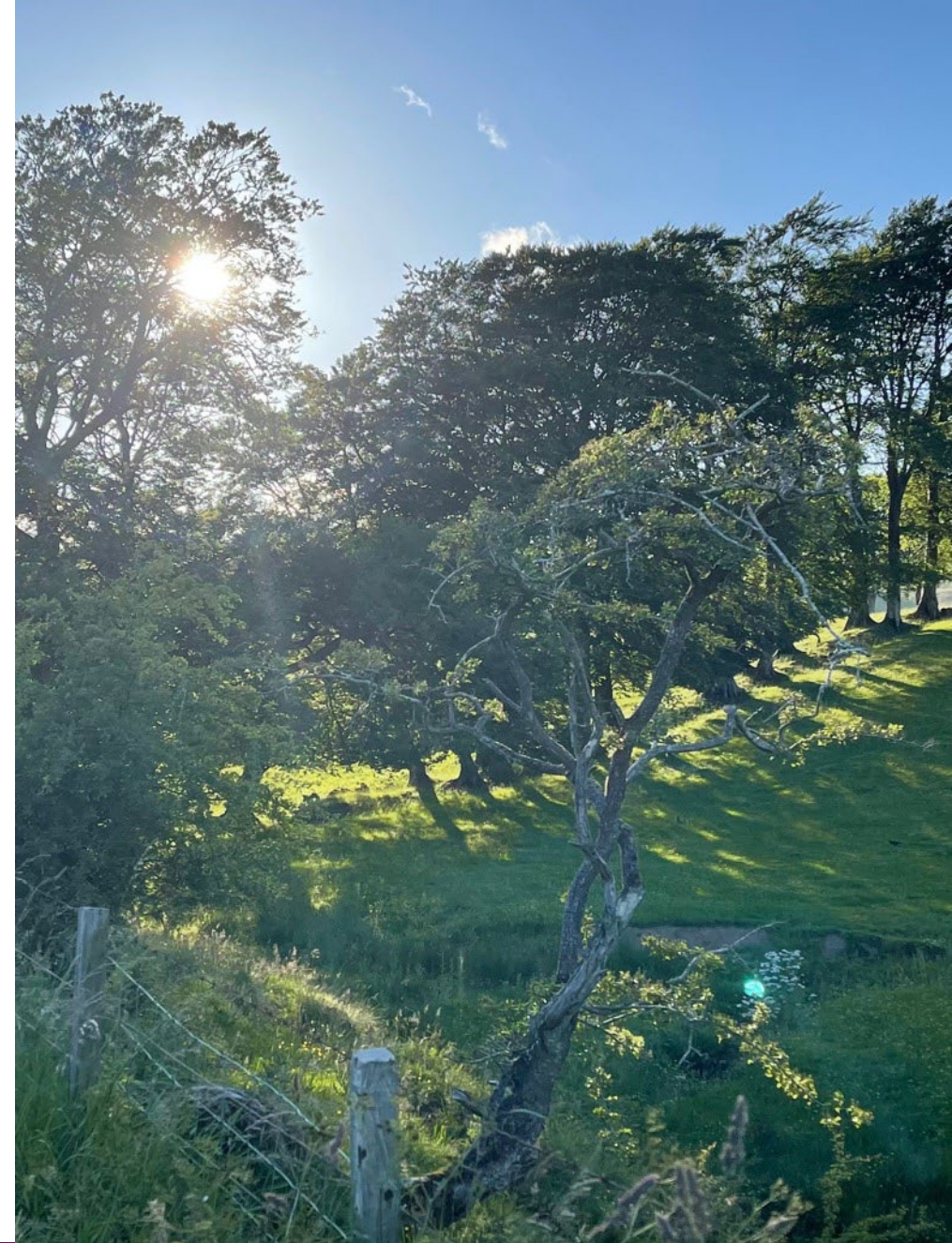
1. The perceived role and value of Scottish tourism (slides 8 to 19 )
2. Perceptions of the local area as a tourist destination (slides 20 to 23)
3. Perceptions of volume of tourists before the pandemic versus 2021 (slides 24 to 26 )
4. Positives and negatives of tourism(slides 27 to 50 )
5. The role of VisitScotland (slides 51 to 53)

# BACKGROUND

- **There has been no other time over recent decades when there has been so much disruption to our everyday lives than has been seen during the Coronavirus pandemic.** In 2020, when tourism began to re-open in mid-July, the Scots home holiday market was key. International tourism and indeed visits from other parts of the UK were extremely limited, hence the industry maximised its efforts to appeal to the Scots resident market
- **On 23rd February 2021, the First Minister of Scotland outlined a roadmap for recovery from lockdown in March and April 2021.** The emergence of new strains of the virus has left the situation uncertain and highly responsive to legislative changes, however initial restrictions for the tourism industry began to be lifted from 26 April 2021 allowing people to engage in activities and the tourism industry in Scotland to re-open for business
- **As these restrictions began to be reduced in 2021,** *56 Degree Insight* were commissioned by VisitScotland to survey Scotland's residents and to explore attitudes to various aspects of tourism in Scotland

# RESEARCH METHODOLOGY

- The study focuses on an online survey which is based on a representative sample of Scotland residents. The analysis provides a representative viewpoint of the Scottish adult population
- A quota sampling approach was followed with targets to ensure representative coverage of the Scottish population aged 18+ on the basis of **sex, age, socio-economic grade and region**
- To enable measurement of opinion among sub-segments, a sample size of 1,000 respondents was agreed to obtain robust national data (+/- 3.1%) and a greater ability to undertake sub-analysis
- The fieldwork for this wave was undertaken between 27<sup>th</sup> October and 4<sup>th</sup> November 2021
- Respondents were recruited from *Yonder Data Solutions'* consumer panel, and 1,000 respondents completed the questionnaire





# INTERPRETATION NOTES

- The questionnaire order is not reflected in the ordering of this report.
- Respondents did not initially know the subject matter was tourism to ensure an objective view on the scale and importance of different industrial sectors could be obtained.
- The questionnaire then took the respondent through the role of tourism in Scotland at a national, general level, to an understanding of the role of tourism in their own local authority area

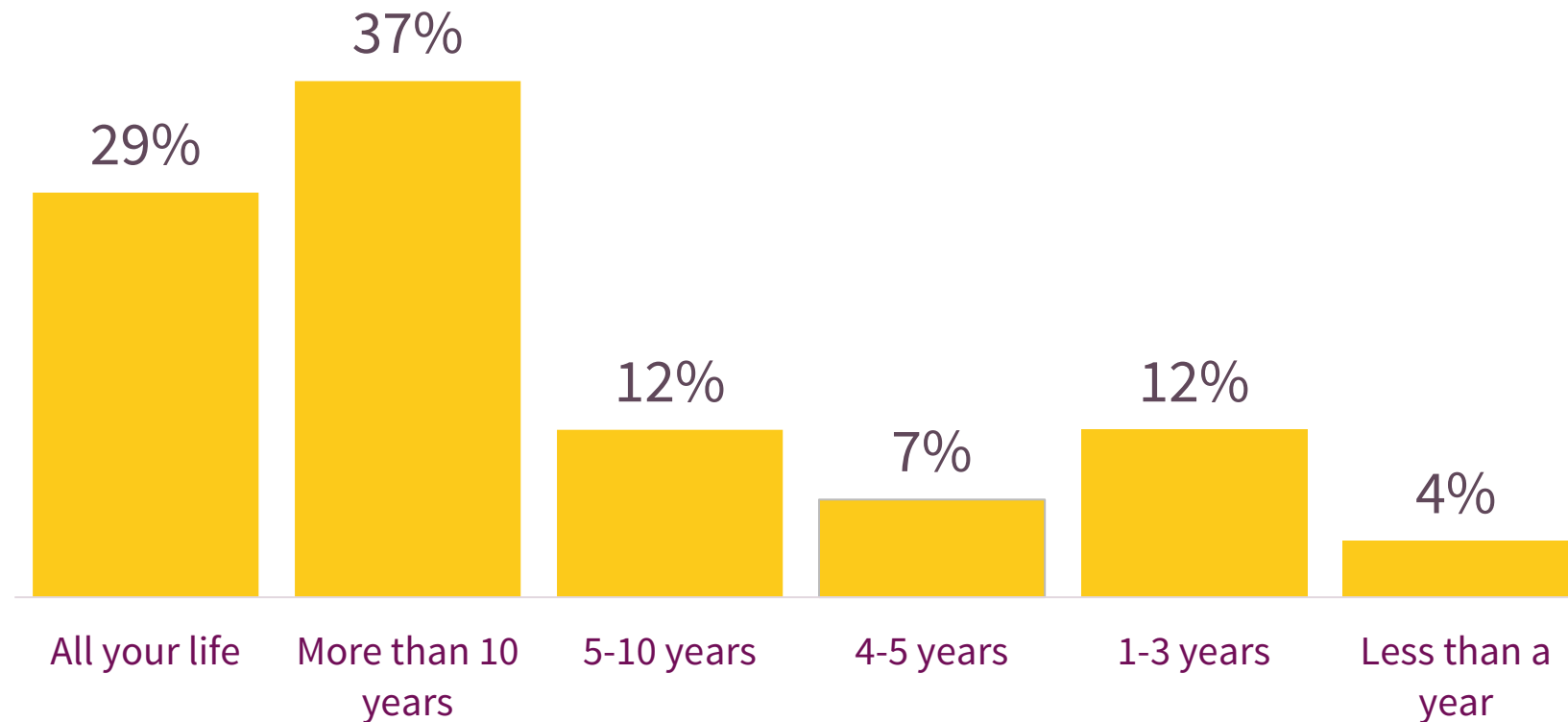
# SAMPLE: WHO WE SPOKE TO



- There was a broad spread of **ages** with three in ten aged under 35 (29%), just under a third aged 35-54 (32%) and four in ten aged 55+ (39%)
- Almost four in ten respondents (38%) are **empty nesters** (55+, no children) whilst just under a quarter (23%) are **families** (dependent children in the household). 20% are **Young Independents** (18-35, no kids) whilst 19% are **Older Independents** (35-54, no kids)
- The sample is geographically representative of the Scottish adult population. Just under half live in the west (45%) with the City of Glasgow (14%), and Lanarkshire (13%) accounting for the largest proportions. The east accounts for 35% (10% living in the City of Edinburgh) whilst the north represents 15% of the sample. The remaining 5% live in the south of Scotland
- **Just under three quarters of the sample live in urban locations (74%)**
- Seven in ten have no health conditions/ impairments (70%). 18% identify that they have a long-term illness, 10% mobility impairments and 5% partial hearing loss

# TWO THIRDS HAVE STAYED IN THE AREAS WHERE THEY CURRENTLY LIVE FOR A LONG TIME

Just under three in ten have stayed where they currently live all of their life (29%) while 37% have stayed there for more than 10 years. Consequently, the vast majority of respondents' opinions about their communities are based on many years' experience.



# THE PERCEIVED ROLE AND VALUE OF SCOTTISH TOURISM





# TOURISM IS RECOGNISED AS THE MOST IMPORTANT INDUSTRY TO THE SCOTTISH ECONOMY AMONGST SCOTLAND'S RESIDENTS

Respondents were presented with a list of 15 industries/sectors and asked to rate the level of importance in terms of broad value to the economy.

Nine in ten (87%) of Scotland's residents rated Tourism as 7-10 out of 10 in terms of importance to the economy, higher than any other industry.

Energy, Agriculture and Oil and Gas each received a top 4 box rating among 82%, whilst 'Other hospitality' was rated at this level by 81%.

Tourism was also rated as the most important Scottish industry in terms of the proportions scoring 10 out of 10 (34%), though Whisky was not far behind at 30%.

| Top 4 Box                       |     |
|---------------------------------|-----|
| Tourism                         | 87% |
| Energy (electricity and gas)    | 82% |
| Agriculture                     | 82% |
| Oil and gas                     | 82% |
| Other hospitality and leisure   | 81% |
| Whisky                          | 79% |
| Public sector                   | 73% |
| Retail                          | 72% |
| Fishing                         | 71% |
| Financial services              | 69% |
| Construction                    | 69% |
| Public transport (including...) | 68% |
| Manufacturing                   | 68% |
| Electronics                     | 58% |
| Textiles                        | 53% |

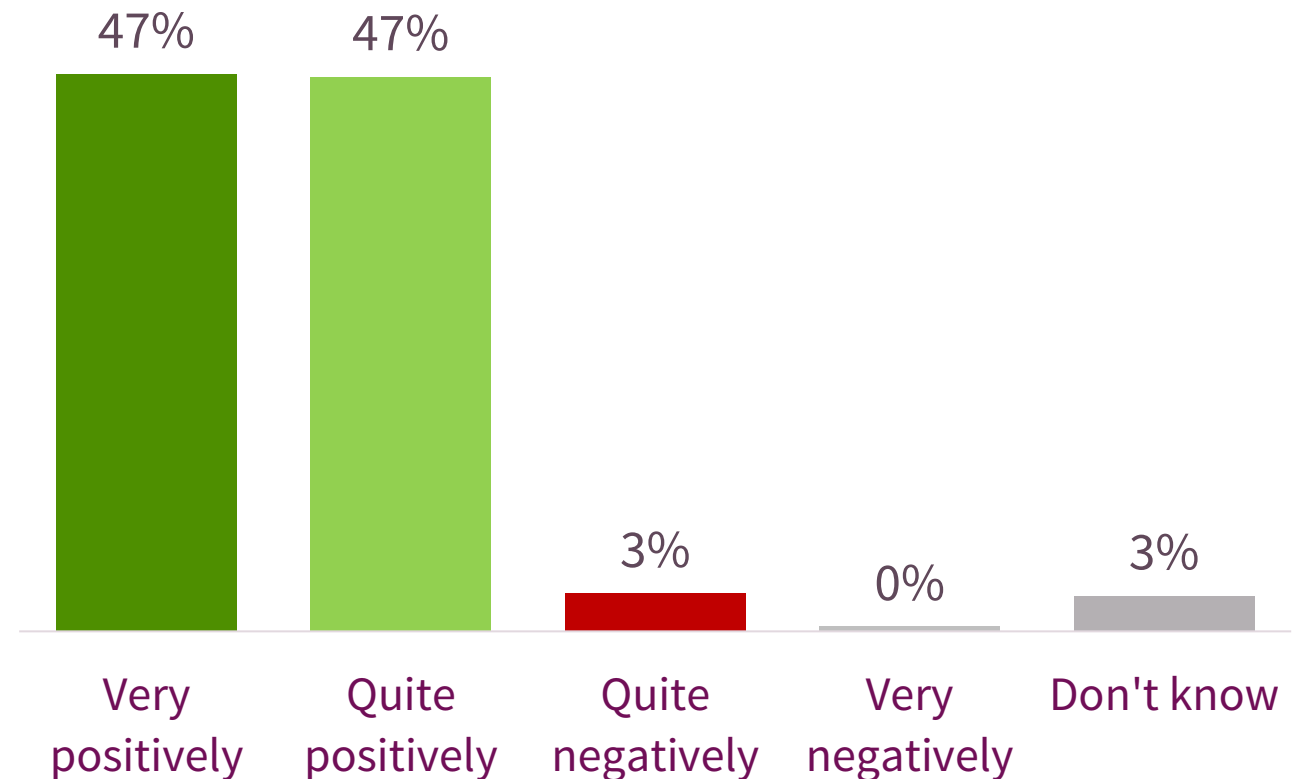
# THE TOURISM INDUSTRY IS VIEWED POSITIVELY IN SCOTLAND BY SCOTTISH RESIDENTS

On balance, how do you view tourism as an industry in Scotland?

**47% are very positive about the tourism industry and 47% are quite positive. Only 3% are negative**

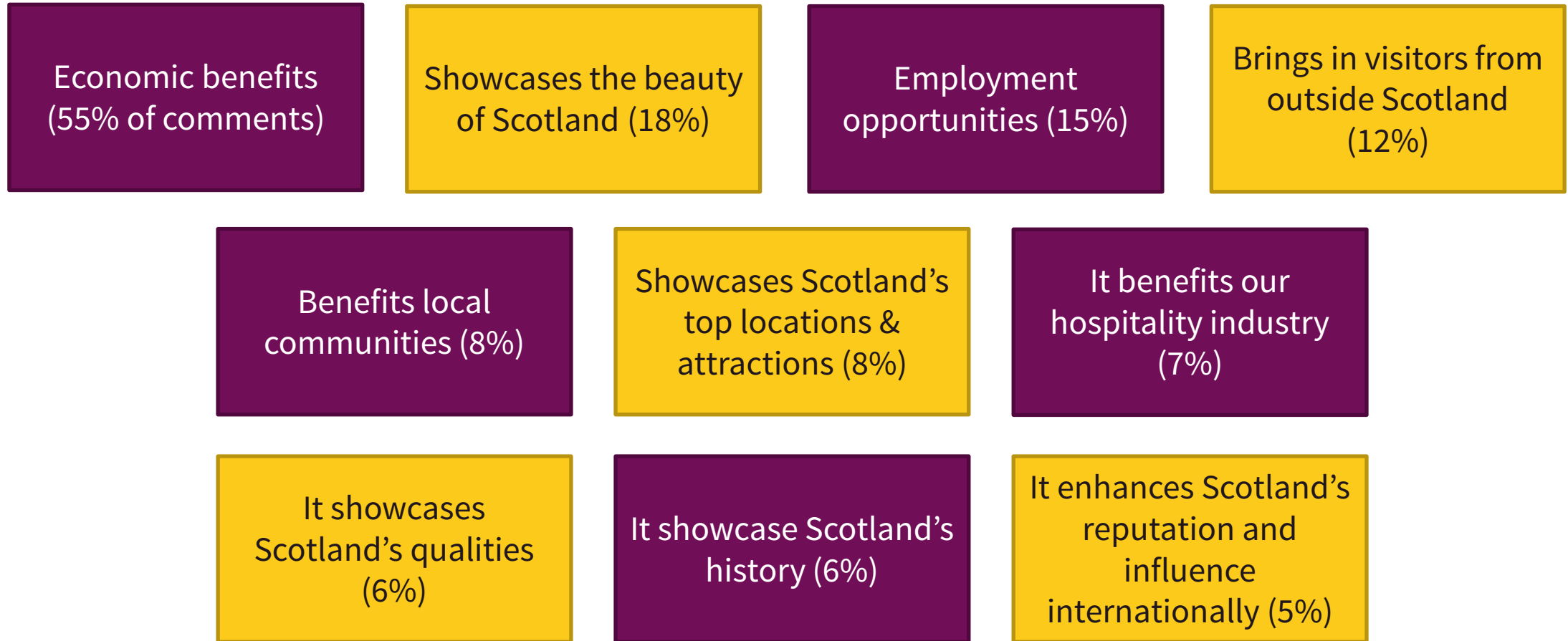
Regular Scots holiday takers and those who live in year-round tourism communities are most likely to be very positive (55% and 53%).

There is slightly higher negativity amongst rejectors of Scots holidays (10%).

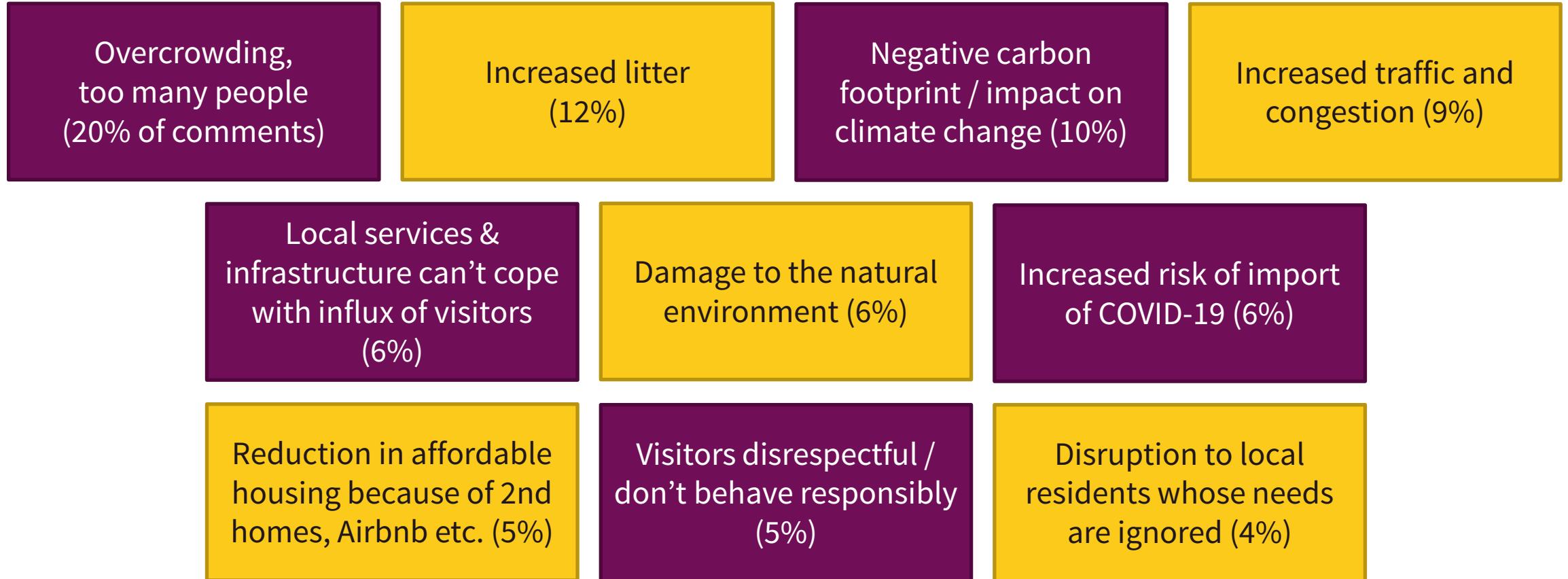


# SCOTLAND'S RESIDENTS WERE ABLE TO CITE A LARGE NUMBER OF POSITIVES ABOUT TOURISM IN SCOTLAND

## THE TOP 10 THEMES EMERGING FROM 1,000 VERBATIMS









# A RANGE OF NEGATIVES ABOUT TOURISM IN SCOTLAND WERE GIVEN THOUGH 17% WERE UNABLE TO PROVIDE ANY AT ALL. THE TOP 10 THEMES WHICH EMERGED FROM 1,000 VERBATIMS



# THE ROLE OF TOURISM

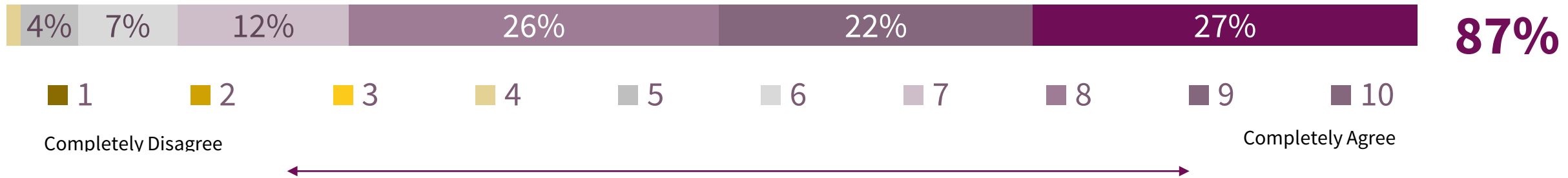
Respondents were presented with 6 statements and asked for their level of agreement or disagreement with each on a scale of 1 to 10. The table below shows 'Top 4 Box' agreement with each statement. Almost 9 in 10 see the benefits of tourism in developing Scotland's reputation overseas (87%), one of the real benefits of tourism in the eyes of the population.

|   |   |     |
|---|---|-----|
|    | Tourism in Scotland helps us to develop a positive reputation overseas                                  | 87% |
|    | Tourism adds to the vitality of Scotland's communities  | 77% |
|    | Tourism helps to protect and conserve Scotland's built heritage   | 74% |
|    | Tourism connects local communities to other cultures  | 71% |
|  | Tourism drives transport infrastructure development around Scotland<br>e.g. train, ferry and bus routes | 70% |
|  | Tourism protects and enhances the natural environment   | 44% |

# 9 IN 10 AGREE THAT SCOTLAND'S OVERSEAS REPUTATION IS ENHANCED BY TOURISM

“Tourism in Scotland helps us to develop a positive reputation overseas”

Top 4 Box



## Top 4 Box – Highest levels of Agreement:



### Life stage:

- Older Independents (89%)
- Empty Nesters (88%)

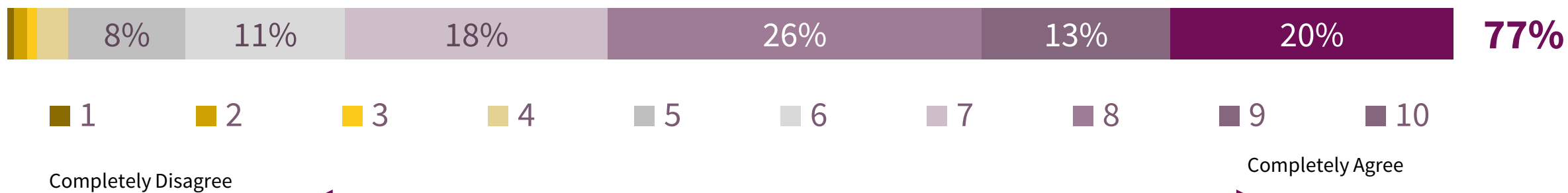
### Type of Location:

- Live in area popular with tourists for specific events (92%)
- Live in an all year round tourism destination (89%)

# OVER THREE QUARTERS AGREE THAT TOURISM ADDS TO THE VITALITY OF SCOTLAND'S COMMUNITIES

“Tourism adds to the vitality of Scotland's communities”

Top 4 Box



## Top 4 Box – Highest levels of Agreement:



### Life stage:

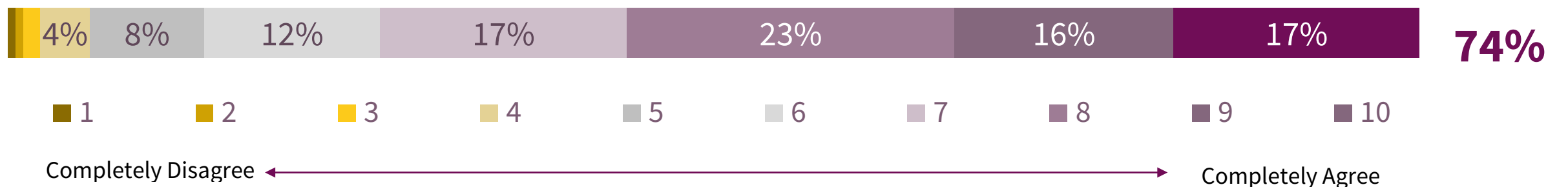
- Families (81%)
- Empty Nesters (79%)

### Type of Location:

- Live in area popular with tourists for specific events (80%)

# THREE QUARTERS AGREE THAT TOURISM HELPS PROTECT AND CONSERVE THE COUNTRY'S BUILT HERITAGE

“Tourism helps to protect and conserve Scotland's built heritage”



## Top 4 Box – Highest levels of Agreement:



### Life stage:

- Families (79%)
- Empty Nesters (76%)

### Type of Location:

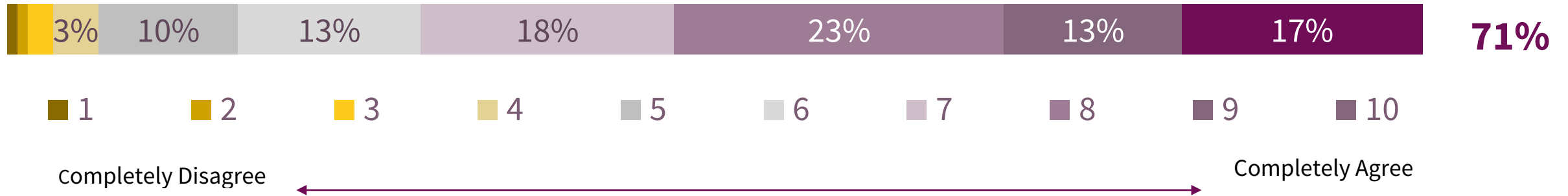
- Live in area popular with tourists for specific events (81%)
- Live in an all year round tourism destination (75%)



# THE OPPORTUNITIES AFFORDED BY TOURISM TO CONNECT COMMUNITIES TO OTHER CULTURES IS RECOGNISED BY 7 IN 10

“Tourism connects local communities to other cultures”

**Top 4 Box**



## Top 4 Box – Highest levels of Agreement:



### Life stage:

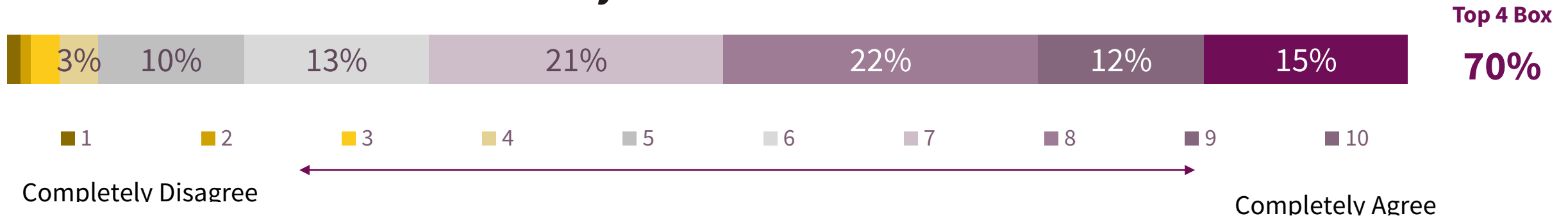
- Families (76%)

### Type of Location:

- Live in area popular with tourists for specific events (76%)
- Live in an all year round tourism destination (73%)

# SEVEN IN TEN RECOGNISED THE TRANSPORT INFRASTRUCTURAL BENEFITS OF TOURISM

“Tourism drives transport infrastructure development around Scotland e.g. train, ferry and bus routes”



## Top 4 Box – Highest levels of Agreement:



### Life stage:

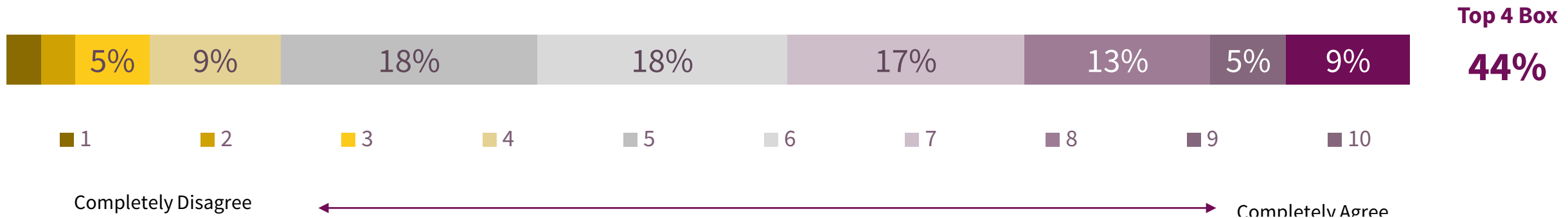
- Families (76%)
- Young Independents (71%)

### Type of Location:

- Live in area popular with tourists for specific events (72%)
- Live in a seasonal tourism destination (71%)

# THERE WAS MORE DISAGREEMENT THAN AGREEMENT THAT TOURISM PROTECTS AND ENHANCES THE NATURAL ENVIRONMENT

“Tourism protects and enhances the natural environment”



## Top 4 Box – Highest levels of Agreement:



### Life stage:

- Families (51%)
- Empty Nesters (47%)

### Type of Location:

- Live in area popular with tourists for specific events (51%)
  - Live in a seasonal tourism destination (47%)
  - Live in a year-round tourism destination (45%)

# PERCEPTIONS OF THE LOCAL AREA AS A TOURIST DESTINATION



# PERCEPTIONS OF LOCAL AREA AS TOURISM DESTINATION

Around a third of Scotland residents feel that the area they live in is undoubtedly a holiday or short break destination (32%). This rises to 85% for residents of Edinburgh and 69% for residents of the Highlands and Islands.



**32%**

Area is undoubtedly a holiday or short break destination



**33%**

Area is visited for holidays and short breaks by some people



**31%**

Area is not really a destination visited for holidays or short breaks

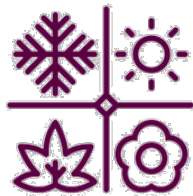
# PERCEPTIONS OF THE STRENGTH OF APPEAL OF THE LOCAL AREA

Just over a third of Scotland residents feel that the area they live in has year round tourist appeal (34%). This is especially the case in Edinburgh (74%), the Highlands & Islands (52%) and the South of Scotland (51%).



**34%**

Area has year round appeal for tourists



**18%**

Area is a seasonal destination



**17%**

Area popular with tourists only when events are held

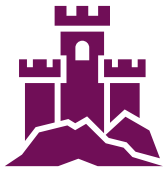


**32%**

Not an area popular with tourists at all

# PERCEPTION OF AREAS MAIN TOURIST ATTRACTION

When asked to choose the one thing that they would describe as the main tourism attraction of their local area, Scotland residents illustrate the breadth of tourism product that they identify with.



21%

Historic sites



17%

Countryside



14%

Coasts/beaches



13%

Cultural/museums



10%

Events/festivals



6%

A must see attraction



5%

Outdoor attractions



4%

Food/drink



3%

Shopping

A13. If you had to choose one thing, what would you say was the main tourism attraction of your local area?

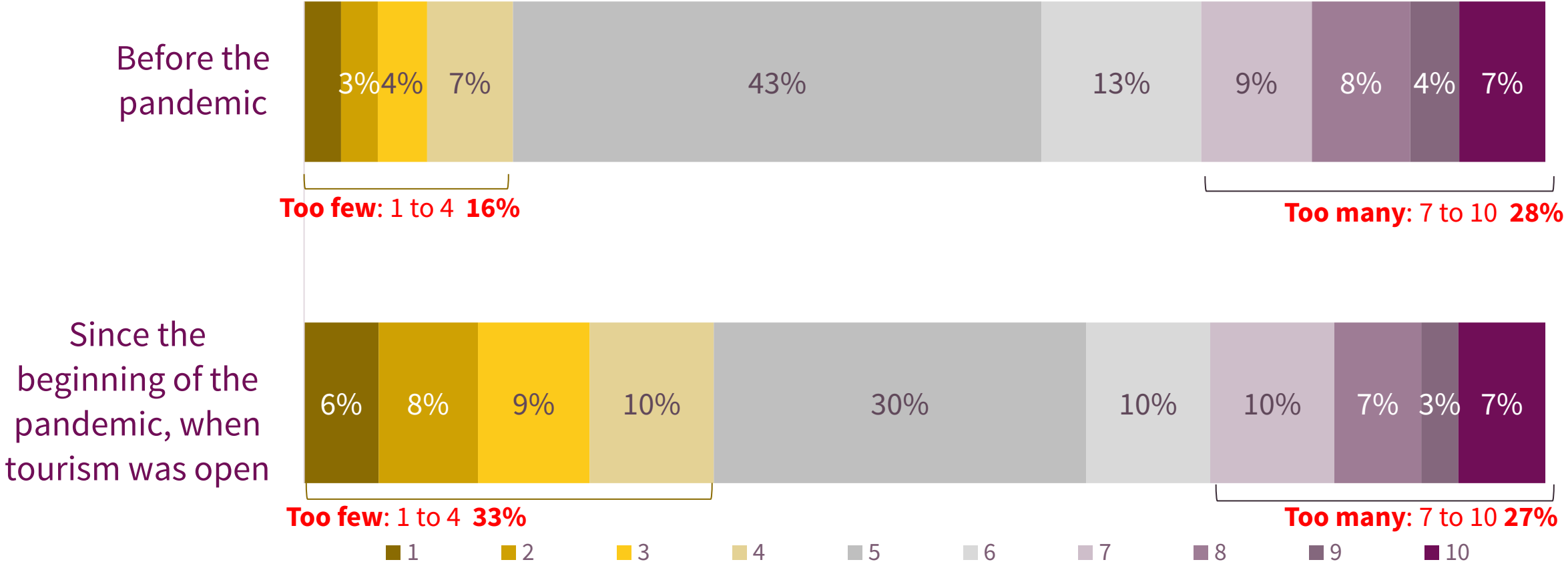
Base: Respondents who live in an area they perceive has tourism appeal (n=707)



# PERCEPTIONS OF VOLUME OF TOURISTS BEFORE THE PANDEMIC VS. 2021



# IN 'TOURISM AREAS', THERE IS A FEELING THAT TOO FEW VISITORS HAVE BEEN AROUND SINCE THE PANDEMIC – PERHAPS SUGGESTING GREATER APPRECIATION OF THE IMPORTANCE OF TOURISM TO THESE LOCAL COMMUNITIES



F2. Still thinking about the area where you live, did you feel there were too few or too many visitors to your area– A) before the Coronavirus pandemic; and B) since the beginning of the pandemic in 2020/2021 (when tourism was open in Scotland)? Base: Those who do not consider they live in a tourism area (n=677) Visit Scotland | Alba™

# WHEN COMPARING 2021 TO PRE-PANDEMIC, THERE HAS BEEN A CLEAR SHIFT IN MOST AREAS AWAY FROM ‘TOO MANY TOURISTS’ TO ‘TOO FEW TOURISTS’

|                             | * Tourism balance:<br>Too many tourists minus too few tourists |                    |
|-----------------------------|--|--------------------|
|                             | Pre-pandemic   | Since the pandemic |
| <b>OVERALL</b>              | <b>+12%</b>  | <b>-7%</b>         |
| ‘Definitely a tourism area’ | +31%   | +4%                |
| ‘A tourist area for some’   | -6%  | -17%               |
| Year round destination      | +9%  | -3%                |
| Seasonal destination        | +9%  | +5%                |
| Only when events            | +2%  | -18%               |

The greater the positive percentage, the more the balance is towards ‘too many tourists’  
 The greater the negative percentage, the more the balance is towards ‘too few tourists’

# THE POSITIVES AND NEGATIVES OF TOURISM AT THE LOCAL LEVEL



# LOCAL COMMUNITY BENEFITS FROM TOURISM PRIMARILY CENTRE AROUND ITS IMPACT ON THE LOCAL ECONOMY



Respondents living in tourism areas were presented with 9 potential benefits from tourists who visited their area and asked for their level of agreement or disagreement with each on a scale of 1-10. 'Top 4 Box' agreement with each statement:

|   |            |
|---|------------|
| • It supports a range of other jobs such as food, retail and other services     | <b>84%</b> |
| • It improves the local economy and helps generate economic growth in the area  | <b>81%</b> |
| • It creates / increases local employment opportunities                         | <b>79%</b> |
| • It helps to sustain historic buildings and monuments in the area              | <b>76%</b> |
| • It leads to events being held and other activities that residents can enjoy   | <b>71%</b> |
| • It improves local investment, development, & infrastructure spending in area  | <b>69%</b> |
| • It provides an opportunity to meet visitors spending time in my local area    | <b>67%</b> |
| • It increases the availability of local arts and cultural opportunities        | <b>67%</b> |
| • Because of tourism there are more public transport services available locally | <b>42%</b> |

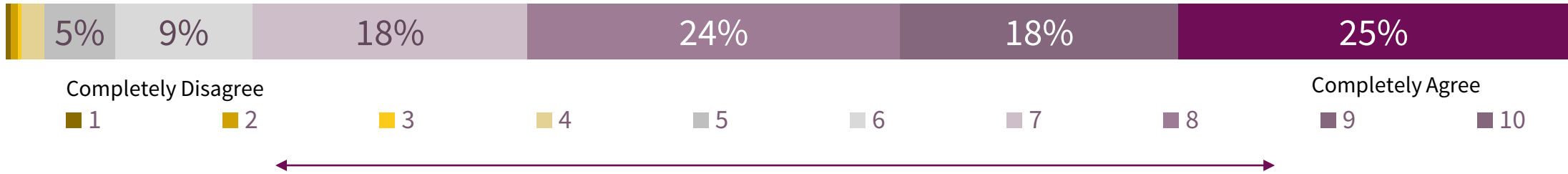
F4. Continuing to think about tourists who visit your own local council area, below are some benefits that others have identified for local communities like your own. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree) Base: Those who consider they live in a tourism area (n=677)

# TOURISM'S ABILITY TO SUPPORT JOBS IN OTHER SECTORS WITHIN THE COMMUNITY WAS THE MAIN BENEFIT IDENTIFIED



“Tourism supports a range of other jobs such as food, retail and other services”

Top 4 Box  
84%



## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Empty Nesters (88%)

### Type of Location:

- Live in an all year round tourism destination (88%)

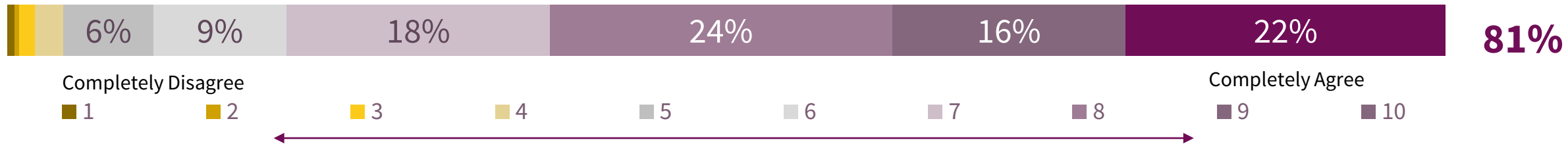
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# THE ABILITY OF TOURISM TO GENERATE ECONOMIC GROWTH IN THE COMMUNITY WAS RECOGNISED BY FOUR IN FIVE



“Tourism improves the local economy and helps generate economic growth in the area”

Top 4 Box



## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Empty Nesters (82%)

### Type of Location:

- Live in an all year round tourism destination (84%)
- Live in an are popular with tourists for specific events (82%)

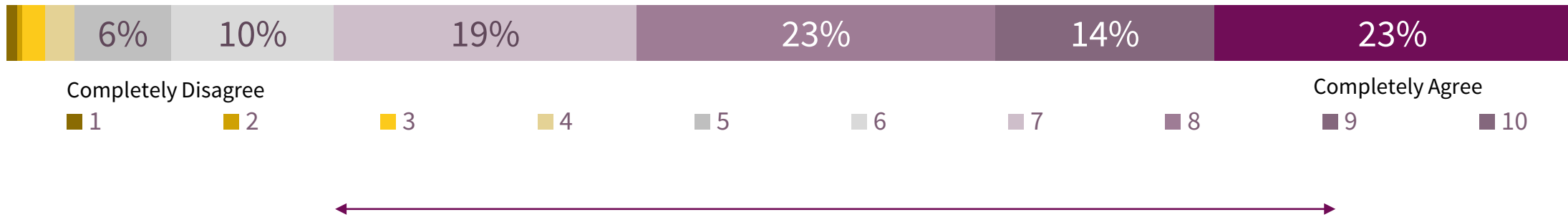
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# FOUR IN FIVE RECOGNISE THE LOCAL EMPLOYMENT OPPORTUNITIES GENERATED BY TOURISM



“Tourism creates / increases local employment opportunities”

Top 4 Box



79%

## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Empty Nesters (84%)

### Type of Location:

- Live in an all year round tourism destination (83%)

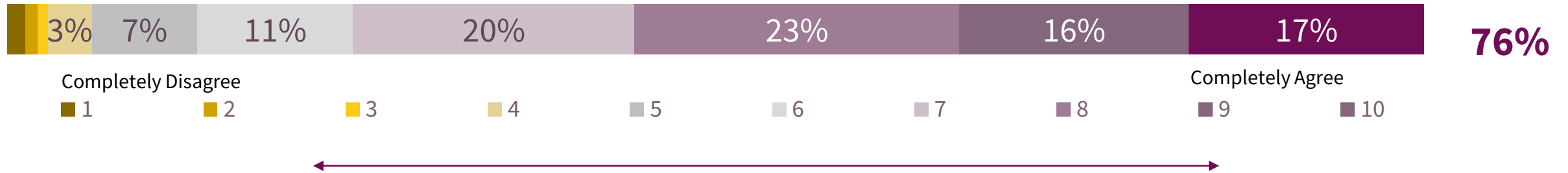
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# THE ROLE PLAYED BY TOURISM IN SUSTAINING THE BUILT HERITAGE IS RECOGNISED BY THREE QUARTERS



Top 4 Box

“Tourism helps to sustain historic buildings and monuments in the area”



## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Families (79%)

### Type of Location:

- Live in an area popular with tourists for specific events (83%)
- Live in an all year round tourism destination (77%)

F4. Continuing to think about tourists who visit your own local council area, below are some benefits that others have identified for local communities like your own. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree) Base: Those who consider they live in a tourism area (n=677)

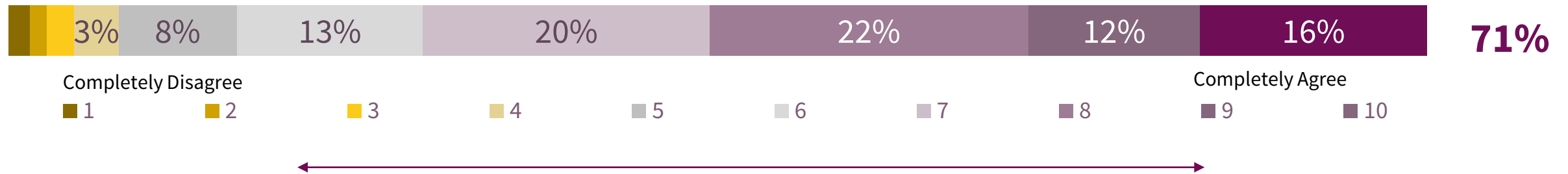


# SEVEN IN TEN SEE THE BENEFITS FROM EVENTS AND OTHER ACTIVITIES THAT WOULD NOT HAPPEN WITHOUT TOURISM



Top 4 Box

“Tourism leads to events being held and other activities that residents can enjoy”



## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Families (75%)
- Young Independents (74%)

### Type of Location:

- Live in an area popular with tourists for specific events (77%)
- Live in an all year round tourism destination (74%)

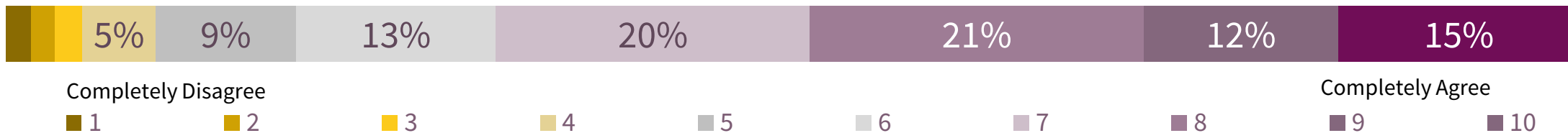
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# INCREASED INVESTMENT AND DEVELOPMENT ARISING FROM TOURISM IS RECOGNISED BY SEVEN IN TEN



“Tourism improves local investment, development, and infrastructure spending in the area”

Top 4 Box



69%

## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Families (75%)

### Type of Location:

- Live in an area popular with tourists for specific events (79%)

F4. Continuing to think about tourists who visit your own local council area, below are some benefits that others have identified for local communities like your own.

Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree)

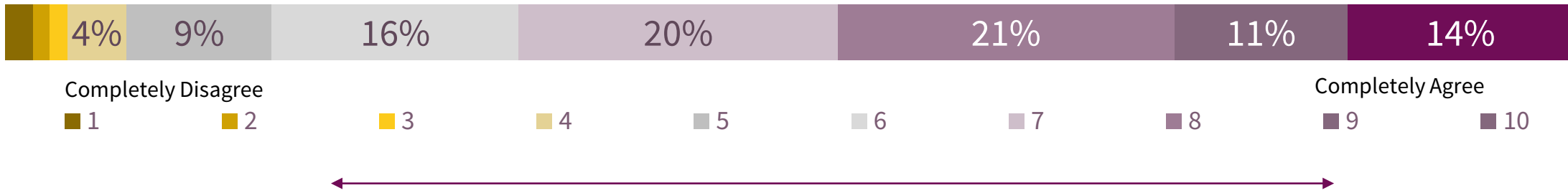
Base: Those who consider they live in a tourism area (n=677)

# TWO THIRDS ALSO FEEL THAT TOURISM INCREASES ARTS AND CULTURAL OPPORTUNITIES IN THEIR AREA



Top 4 Box

“Tourism increases the availability of local arts and cultural opportunities”



67%

## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Families (71%)
- Young Independents (70%)

### Type of Location:

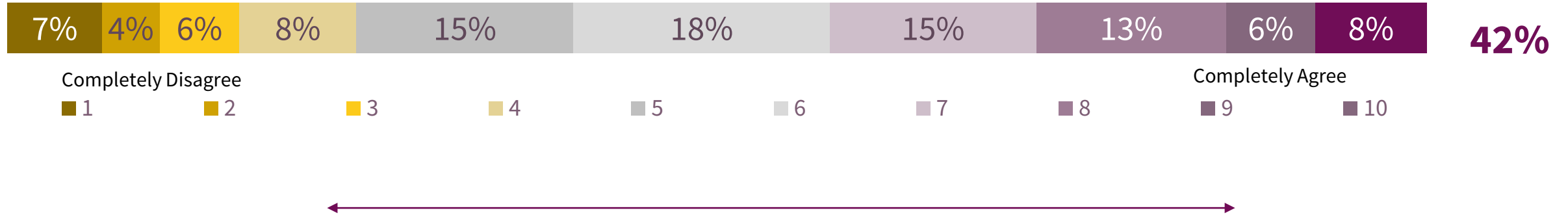
- Live in an all year round tourism destination (72%)

# THERE IS MUCH LOWER SUPPORT FOR THE SUGGESTION THAT TOURISM IMPROVES LOCAL PUBLIC TRANSPORT



Top 4 Box

“Because of tourism there are more public transport services available locally”



## Top 4 Box Benefits – Highest levels of Agreement:



### Life stage:

- Families (56%)
- Young Independents (49%)

### Type of Location:

- Live in an area popular with tourists for specific events (50%)
- Live in an all year round tourism destination (45%)

# THE MAIN DISADVANTAGE ASSOCIATED WITH TOURISM BY LOCAL COMMUNITIES WAS TRAFFIC CONGESTION AND DELAYS



Respondents living in what they defined as tourism areas were presented with 7 potential disadvantages arising from tourists who visited their area and asked for their level of agreement or disagreement with each on a scale of 1-10. the chart below shows 'Top 4 Box' agreement with each statement

|   |            |
|---|------------|
| • It adds to the amount of traffic on the roads and results in congestion and delays                    | <b>51%</b> |
| • It limits parking spaces available for local people   | <b>43%</b> |
| • It increases prices for many local services and amenities   | <b>43%</b> |
| • It is harmful to the natural environment in parts of my local area                                    | <b>34%</b> |
| • There are too many visitors in my local area which lead to it being too busy at certain times         | <b>33%</b> |
| • It increases demand for local historical & cultural attractions making them less available for locals | <b>28%</b> |
| • It reduces the ability of locals to access local services and facilities                              | <b>28%</b> |

F5. Others have also identified some disadvantages from tourists visiting the immediate areas where they live.

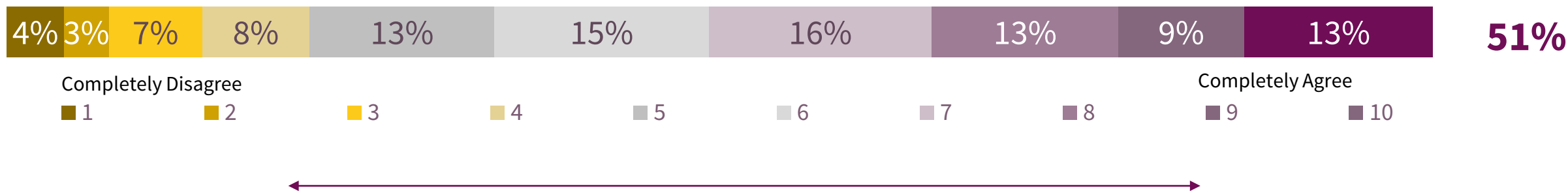
Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree) Base: Those who consider they live in a tourism area (n=677)

# THE MAIN DISADVANTAGE ARISING FROM TOURISM IN LOCAL COMMUNITIES IS INCREASED TRAFFIC AND CONGESTION



Top 4 Box

“Tourism adds to the amount of traffic on the roads and results in congestion and delays”



## Top 4 Box Disadvantages – Highest levels of Agreement:



### Life stage:

- Young Independents (55%)
- Families (52%)

### Type of Location:

- Live in an all year round tourism destination (54%)
- Live in a seasonal destination (53%)

F5. Others have also identified some disadvantages from tourists visiting the immediate areas where they live. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree)

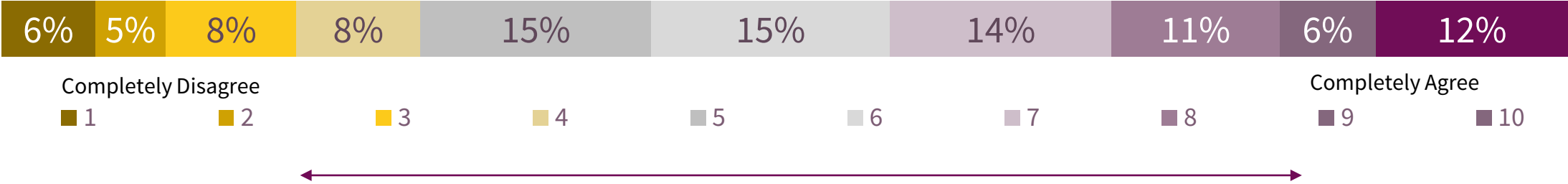
Base: Those who consider they live in a tourism area (n=677)

# LINKED TO INCREASED TRAFFIC, 43% FEEL THAT CAR PARKING IS AVAILABILITY IS ADVERSELY AFFECTED BY TOURISM



“Tourism limits parking spaces available for local people”

Top 4 Box



## Top 4 Box Disadvantages – Highest levels of Agreement:

### Life stage:

- Young Independents (54%)
  - Families (51%)
- Older Independents (44%)

### Type of Location:

- Live in a seasonal destination (47%)



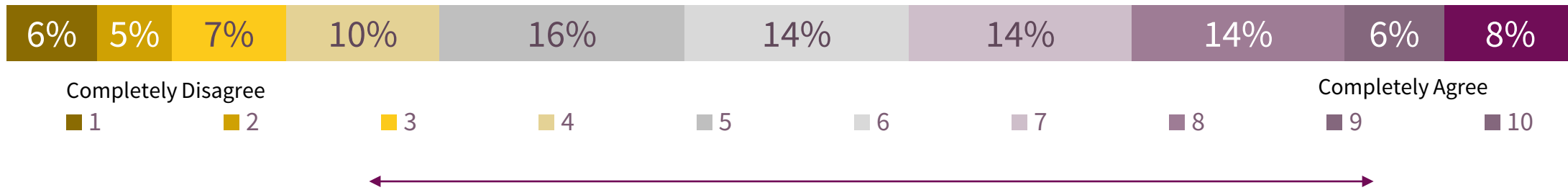
F5. Others have also identified some disadvantages from tourists visiting the immediate areas where they live. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree)  
 Base: Those who consider they live in a tourism area (n=677)

# THE IMPACT OF TOURISM ON THE PRICES OF LOCAL AMENITIES AND SERVICES IS HIGHEST AMONGST EDINBURGH RESIDENTS



“Tourism increases prices for many local services and amenities”

Top 4 Box



43%

## Top 4 Box Disadvantages – Highest levels of Agreement:



### Life stage:

- Families (48%)
- Young Independents (48%)
- Older Independents (45%)

### Type of Location:

- Live in an all year round tourism destination (45%)

F5. Others have also identified some disadvantages from tourists visiting the immediate areas where they live. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree)

Base: Those who consider they live in a tourism area (n=677)

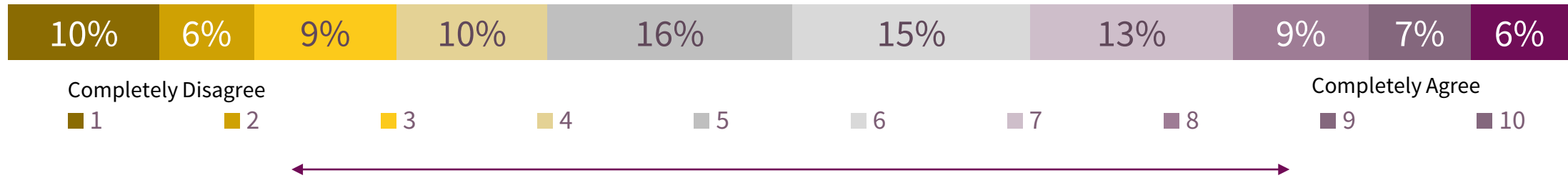


# PERCEIVED NEGATIVE IMPACTS OF TOURISM ON THE ENVIRONMENT ARE RECOGNISED BY JUST OVER A THIRD OF SCOTS



“Tourism is harmful to the natural environment in parts of my local area”

Top 4 Box



## Top 4 Box Disadvantages – Highest levels of Agreement:



### Life stage:

- Young Independents (44%)
- Older Independents (35%)

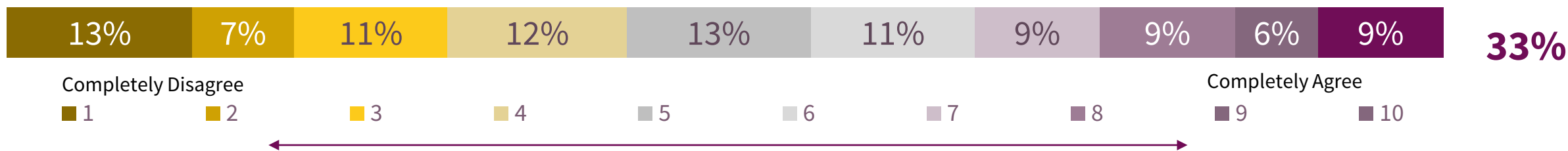
### Type of Location:

- Live in an all year round tourism destination (38%)

# A THIRD FEEL THAT TOURISTS RESULT IN THEIR AREA BEING TOO BUSY AT CERTAIN TIMES



“There are too many visitors in my local area which lead to it being too busy at certain times” Top 4 Box



## Top 4 Box Disadvantages – Highest levels of Agreement:



### Life stage:

- Young Independents (41%)
  - Families (38%)
- Older Independents (34%)

### Type of Location

- Live in an all year round tourism destination (39%)

F5. Others have also identified some disadvantages from tourists visiting the immediate areas where they live. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree)

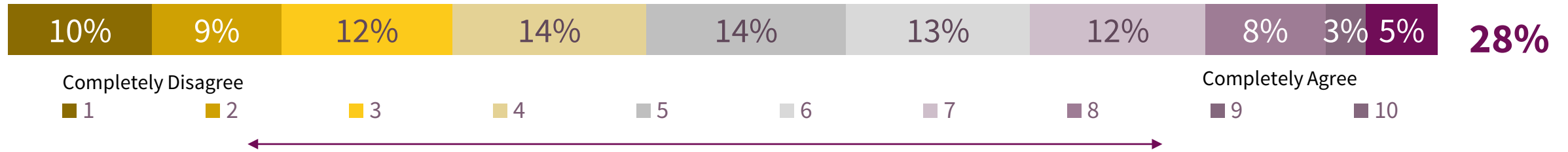
Base: Those who consider they live in a tourism area (n=677)

# JUST UNDER THREE IN TEN FEEL THAT THE INCREASED TOURISM DEMAND FOR KEY ATTRACTIONS MAKES THEM LESS AVAILABLE TO LOCALS



“Tourism increases demand for local historical and cultural attractions making them less available for locals”

Top 4 Box



## Top 4 Box Disadvantages – Highest levels of Agreement:

### Life stage:

- Young Independents (36%)
  - Families (33%)
- Older Independents (30%)

### Type of Location:

- Live in a seasonal tourism destination (29%)
- Live in an all year round tourism destination (29%)



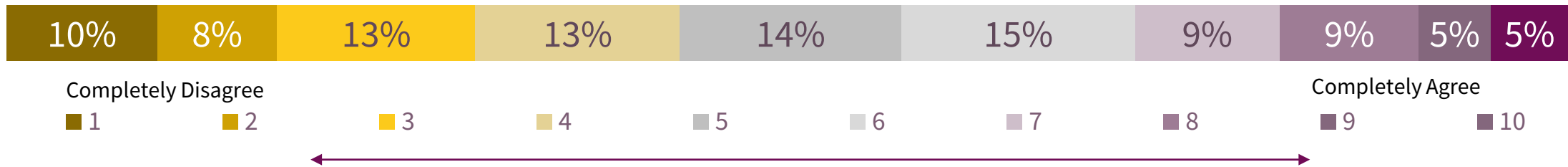
F5. Others have also identified some disadvantages from tourists visiting the immediate areas where they live. Please indicate to what extent you agree or disagree with each of them from 1 (Completely Disagree) to 10 (Completely Agree)  
Base: Those who consider they live in a tourism area (n=677)

# AGAIN, JUST UNDER THREE IN TEN FEEL THAT TOURISM MAKES IT HARDER FOR LOCALS TO ACCESS SERVICES AND AMENITIES



Top 4 Box

“Tourism reduces the ability of locals to access local services and facilities”



## Top 4 Box Disadvantages – Highest levels of Agreement:



### Life stage:

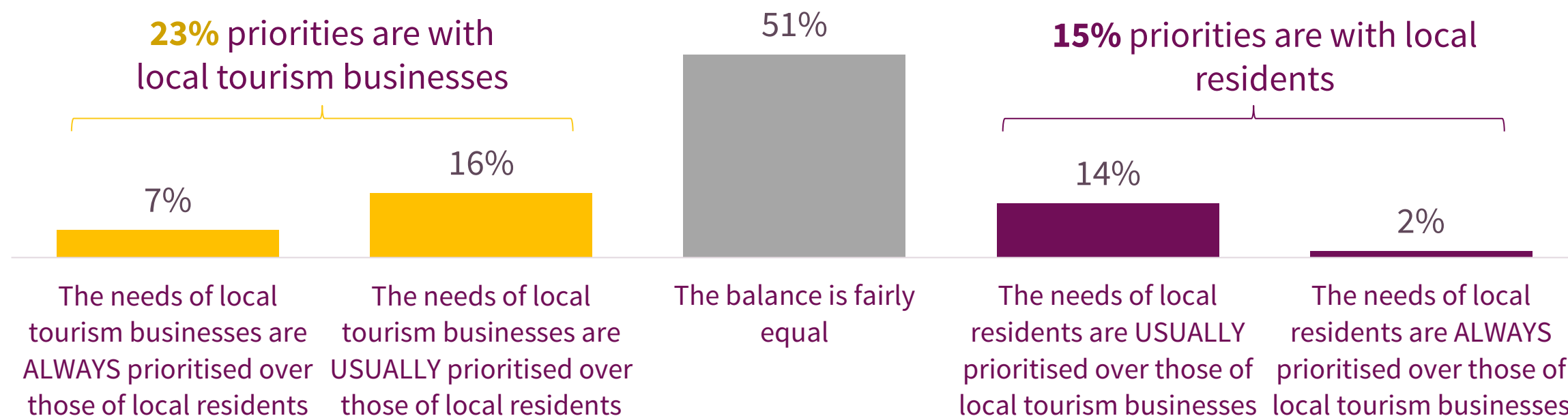
- Young Independents (39%)
- Families (34%)

### Type of Location:

- Live in an all year round tourism destination (30%)

# AMONGST RESIDENTS OF AREAS POPULAR WITH TOURISTS, 51% FELT THE BALANCE OF PRIORITIES WAS FAIRLY EQUAL

Some 23% felt it was more skewed towards tourism businesses and 15% felt it was more skewed towards local residents – a net of 8% towards businesses.



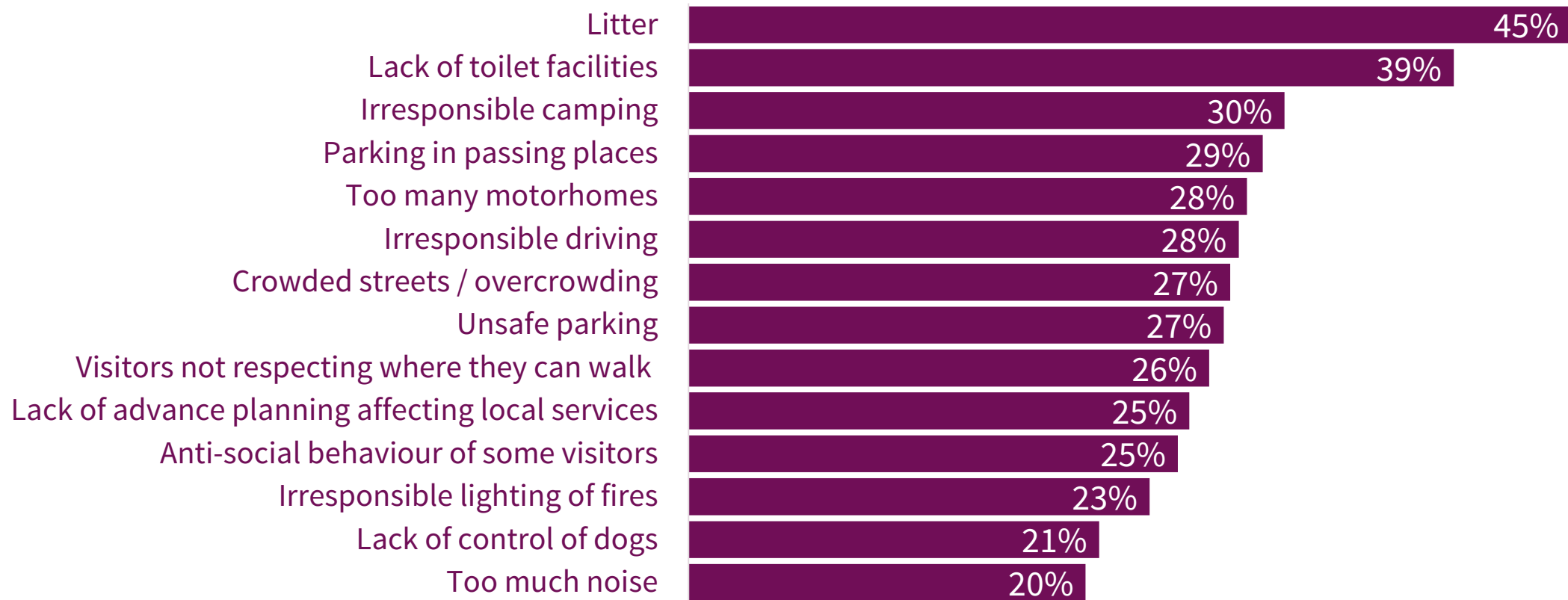
**Overall, the balance is 8% towards local tourism businesses being prioritised over local residents**

F6: Thinking about decisions that are made in your area and the priorities that are given to local tourism businesses as opposed to the residents themselves, in your opinion, which of the statements most closely describes the situation where you live?

Base: Those who consider they live in a tourism area (n=677)

# LITTER AND LACK OF TOILET FACILITIES ARE THE MOST FREQUENTLY MENTIONED ISSUES RAISED BY RESIDENTS WHICH THEY ATTRIBUTE TO TOURISTS/VISITORS

Respondents living in tourism areas were presented with 14 potential problems arising from tourists who visited their area and asked to rate the extent to which each was a problem caused by visitors and tourists on a scale of 1-10. The chart below shows 'Top 4 Box' agreement – a major problem arising from tourists



F12. Thinking about tourism in your area over the last few months, to what extent do you feel the following have been issues/problems arising from visitors/tourists to your local council area during 2021? from 1 (Not a problem at all) to 10 (A major problem)

Base: Those who consider they live in a tourism area (n=677)

# RECOGNISING THAT ALL OF THESE ISSUES ARE NOT NECESSARILY DOWN TO VISITORS ALONE, JUST UNDER HALF BLAMED INCREASED LITTER ON LOCALS WHILST 2 IN 5 CITED ANTI-SOCIAL BEHAVIOUR BY LOCALS AS A PROBLEM

Respondents living in tourism areas were presented with 11 potential problems arising from locals from their area and asked to rate the extent to which each was a problem caused by locals on a scale of 1-10. the chart below shows 'Top 4 Box' agreement – a major problem arising from locals



F14. Some of these problems may not have been caused by tourists to your area. To what extent do you feel that the following have been issues/problems arising from irresponsible behaviour amongst some local people in your local area during 2021 from 1 (Not a problem at all) to 10 (A major problem) Base: Those who consider they live in a tourism area (n=677)

# SEVERAL OF THE ISSUES WHICH HAVE BEEN PRESENT IN LOCAL COMMUNITIES IN 2021 ARE MORE A RESULT OF BAD BEHAVIOUR OF SOME LOCALS MORE THAN VISITORS TO THE AREA

Litter problems are the biggest issue but they are attributed equally to locals and visitors (described as a major problem by 45% in each case).

## Problems more attributed to LOCALS:

- Anti-social behaviour
- Irresponsible driving
- Lack of dog control
- Unsafe parking
- Too much noise

## Problems more attributed to VISITORS:

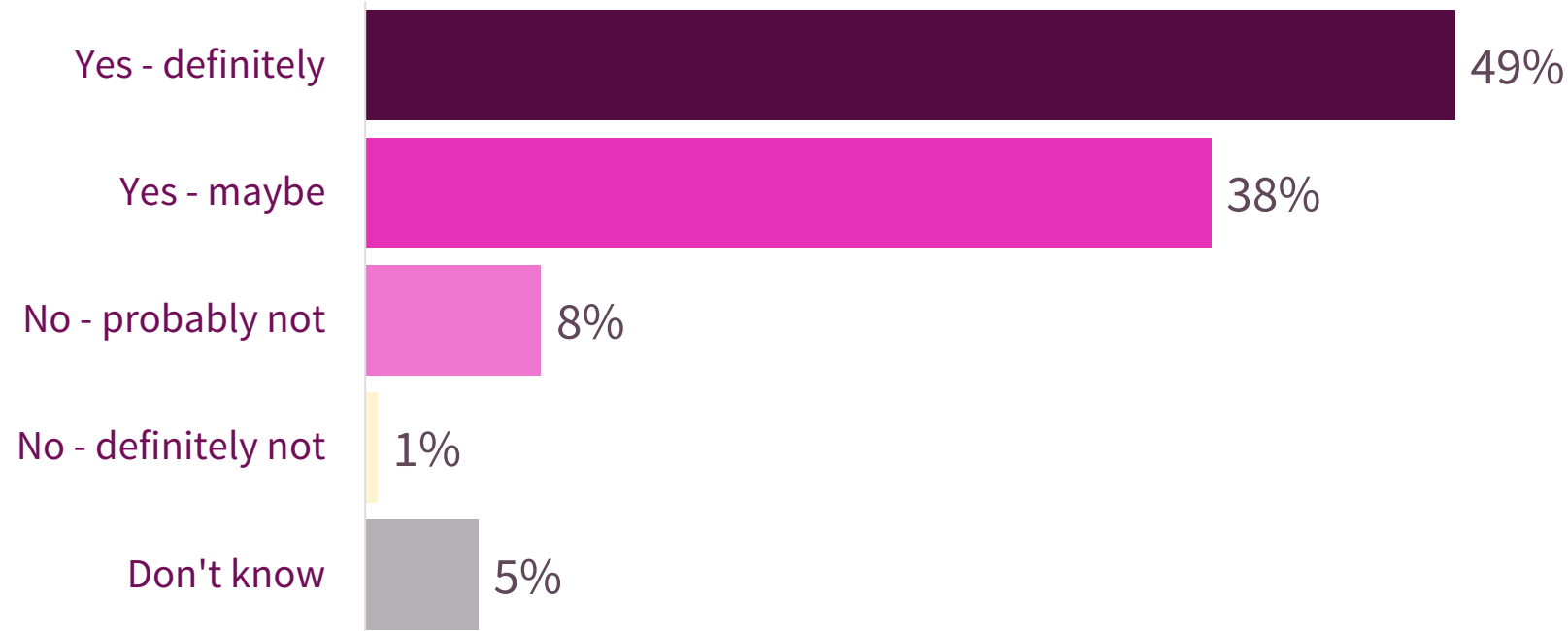
- Lack of toilet facilities
- Irresponsible camping
- Parking in passing places
- Too many motorhomes
- Crowded streets



# ALMOST NINE IN TEN BELIEVE THAT TOURISM WILL HELP LOCAL RECOVERY FROM COVID

Some 87% of those living in tourist areas believe that tourism will aid recovery following Covid. Only 9% do not think that will be the case.

## Positive role for tourism in local area recovery following Covid?



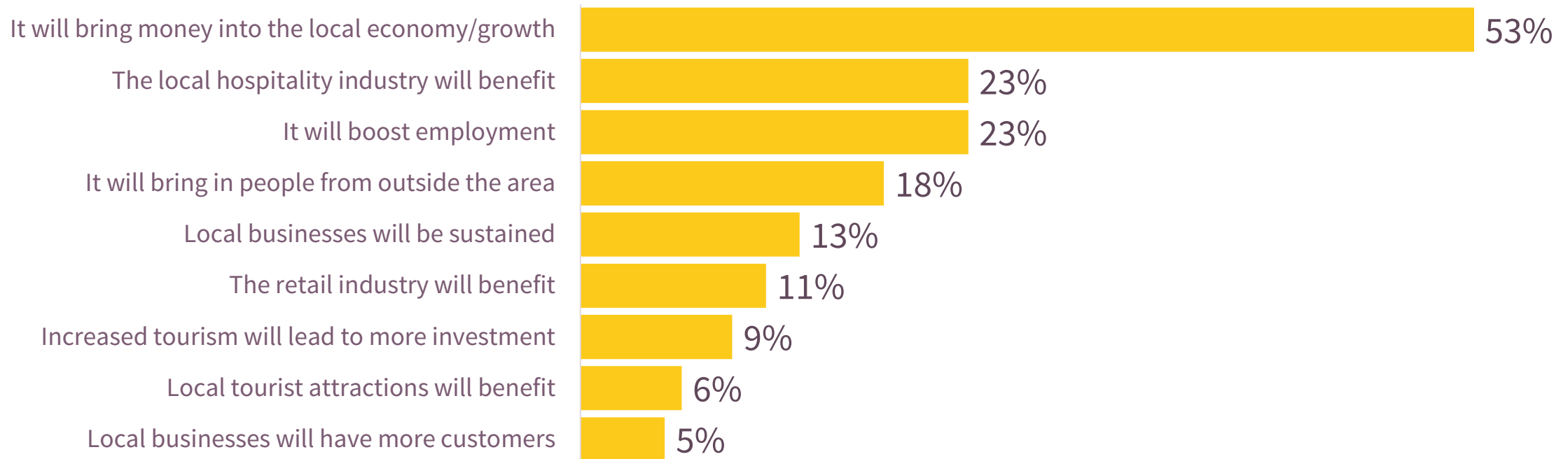
F10. Do you think tourism has a positive role to play in the recovery of your local council area (i.e. economically and socially) following the Coronavirus pandemic?

BASE: Those who consider they live in a tourism area (n=677)

# TOURISM WILL HELP LOCAL RECOVERY MOST IN TERMS OF ECONOMIC GROWTH

Amongst those who thought there was a role for tourism in local area recovery, over half of them cite the money and growth it can bring to the local economy (53%) whilst just under a quarter feel that it will help the hospitality sector specifically (23%) and that it will boost employment (23%)

These are grouped themes from verbatims provided by respondents – some 587 provided comments  
**In what way will tourism help?**



F11. In what way do you think tourism can help in the economic recovery of your local area?

BASE: Those agreeing that tourism has a role to play at F10 (n=587)

# THE ROLE OF VISITSCOTLAND



# AWARENESS OF VISITSCOTLAND AMONGST SCOTTISH RESIDENTS IS VERY HIGH

Have you heard of the national tourist board for Scotland, VisitScotland?



**90% aware of VisitScotland**

## By Holiday Taking Behaviour

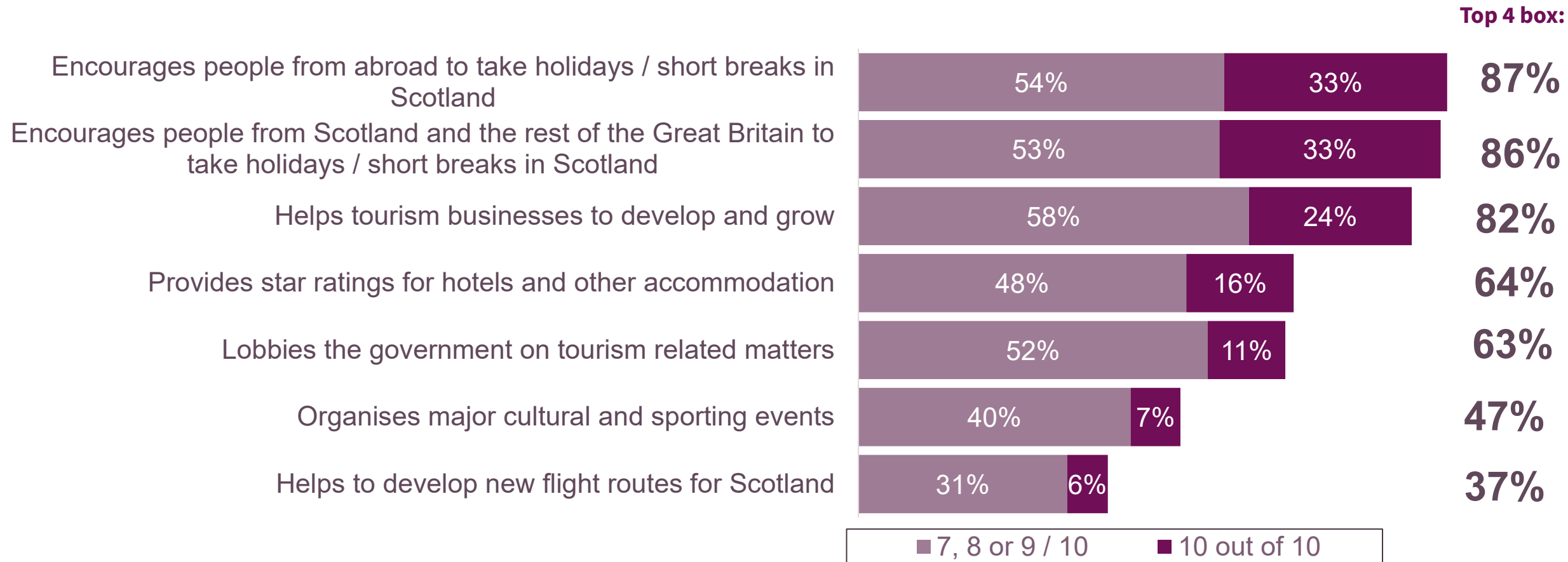
- Regular holiday takers in Scotland (95%)
- Occasional holidays in Scotland (92%)
- Lapsed holidays in Scotland (89%)
- Never taken a Scottish holiday (75%)  
(see appendix for descriptions)

## By Life stage:

- Empty Nesters (93%)
- Older Independents (93%)
- Families (87%)
- Young Independents (83%)

Nine in ten residents are aware of VisitScotland and awareness increases as we climb the Loyalty Ladder. It is also higher amongst older residents and lower amongst Young Independents.

# TWO KEY ROLES ARE RECOGNISED BY ALMOST 9 IN 10 SCOTS, ENCOURAGING VISITS TO SCOTLAND FROM HOME AND ABROAD. OVER 4 IN 5 ALSO BELIEVE THAT VISITSCOTLAND HELPS TOURISM BUSINESSES TO GROW



F17. VisitScotland has a range of roles. To what extent do you think it undertakes each of the following. For each potential role, please move the slider to the position you feel is closest to their role from 1 (This is not their role at all) to 10 (This is their main role) BASE: All Respondents who had heard of VisitScotland (n=903)

# IN SUMMARY.....



# SUMMARY – HEADLINE ATTITUDES TO TOURISM IN SCOTLAND



**87%**

rate tourism as 7-10/10 in terms of importance to the Scottish economy – number one across all industries



**94%**

view the Scottish tourism industry positively



**87%**

agree that tourism helps Scotland develop a positive reputation overseas



**77%**

feel that tourism adds to the vitality of Scotland's communities

# SUMMARY – HEADLINE ATTITUDES TO TOURISM IN LOCAL AREAS



**84%**

agree that locally, tourism supports jobs in food, retail and other sectors



**81%**

think tourism improves the local economy and generates economic growth



**51%**

believe tourism increases local traffic congestion and delays



**43%**

feel that tourism limits parking spaces and increases prices locally – to the detriment of locals



# APPENDIX: DEFINITION OF TERMS USED

Regular holiday takers: Prior to the pandemic, I **often** took short breaks or holidays in Scotland at least once every 6 months

Occasional: Prior to the pandemic, I **sometimes** took short breaks or holidays in Scotland at least once every couple of years

Lapsed: I have taken a short break or holiday in Scotland **once or twice before** but not in the 5 years prior to the pandemic

Rejector: Pre-pandemic I have **never been** on a short break or holiday in Scotland

Young independents: aged 18-35 with no children in the household

Older independents: aged 35-54 with no children in the household

Empty nesters: aged 55 and over with no children in the household



# THANK YOU

## CONTACT US:

Insight Department, VisitScotland  
[research@visitscotland.com](mailto:research@visitscotland.com)

[www.visitscotland.com](http://www.visitscotland.com)

[www.visitscotland.org](http://www.visitscotland.org)

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