VisitScotland

Net Zero Pathway Benchmark

Scottish Tourism Industry Survey 2021 (52 slides)

Key Sections

Project background and objectives

Background

- The Scottish Government has set an ambitious targets to reduce carbon emissions to net zero by 2045
- A new tourism industry strategy for Scotland was launched in March 2020 with the aim to position Scotland as the world leader in 21st century tourism
- This strategy includes supporting the tourism industry to become more sustainable to meet the Government's net zero target
- VisitScotland, as part of this project, has been tasked with conducting research with Scottish tourism businesses to gain an understanding of the current attitudes and behaviours towards a carbon neutral economy
- This will serve as a baseline that will then be reviewed over time to measure the impact of any future activity carried out as a result of the net zero pathway project

Overarching research objective

- To gain a better understanding of the behaviour and attitudes of tourism industry businesses towards delivering a (responsible) low carbon tourism future

Research method (1)

Quantitative

- Method: computer aided telephone interviewing (CATI) and an online survey with tourism businesses
- Sampling frame (three sources) – a sample list purchased from a list provider (based on agreed SIC codes for target sectors); a database extract from VisitScotland and a list of businesses that have been awarded Green Tourism certification (also supplied by VisitScotland)
- Fieldwork dates: 30 September to 1 November 2021
- Final sample: 460 responses (413 CATI + 47 online)
- This sample provides a margin of error of between +/- 0.91% and +/- 4.75%.

- Margin of error calculated at the 95% confidence level (market research industry standard). This margin of error should be treated as indicative as respondents were a mix of quota controlled (telephone) and self-selecting (online) and not using strict probability sampling
- The final sample may not be fully representative of all tourism businesses in Scotland; it is possible that it is skewed towards businesses with an interest in making environmental improvements due to the inclusion of businesses with green accreditation within the sample frame

Research method (2)

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Qualitative

- Method: depth interviews conducted using online platforms Zoom and Teams. A total of 9 depths were achieved
- Contacts were provided by VisitScotland, including tourism industry bodies, national parks and public sector heritage, cultural and conservation organisations
- Fieldwork dates: 28 October to 16 November 2021
- The size of the organisations varied significantly, with some directly employing only a very small number of staff in a single office, while others were national organisations with staff, premises and estate spread over a wide area

Data analysis

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- Only **statistically significant** differences are reported*
  These are significant at the 90% or 95% confidence level. Where the difference is significant at the 90% level this is noted

- For clarity, some very low percentages are not shown on charts

- Where figures do not add to 100% this is due to multi-coded responses or rounding

Context: fieldwork was undertaken in the lead-up to and during COP26. Because of this, topics regarding the environment and carbon reduction were likely top of mind for many respondents

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UN Climate Change Conference UK 2021 (COP26) took place 31 October to 12 November 2021

Quantitative fieldwork took place 30 September to 1 November 2021

Qualitative fieldwork took place 28 October to 16 November 2021

Sample profile

The sample was predominantly comprised of accommodation providers but attractions were also represented

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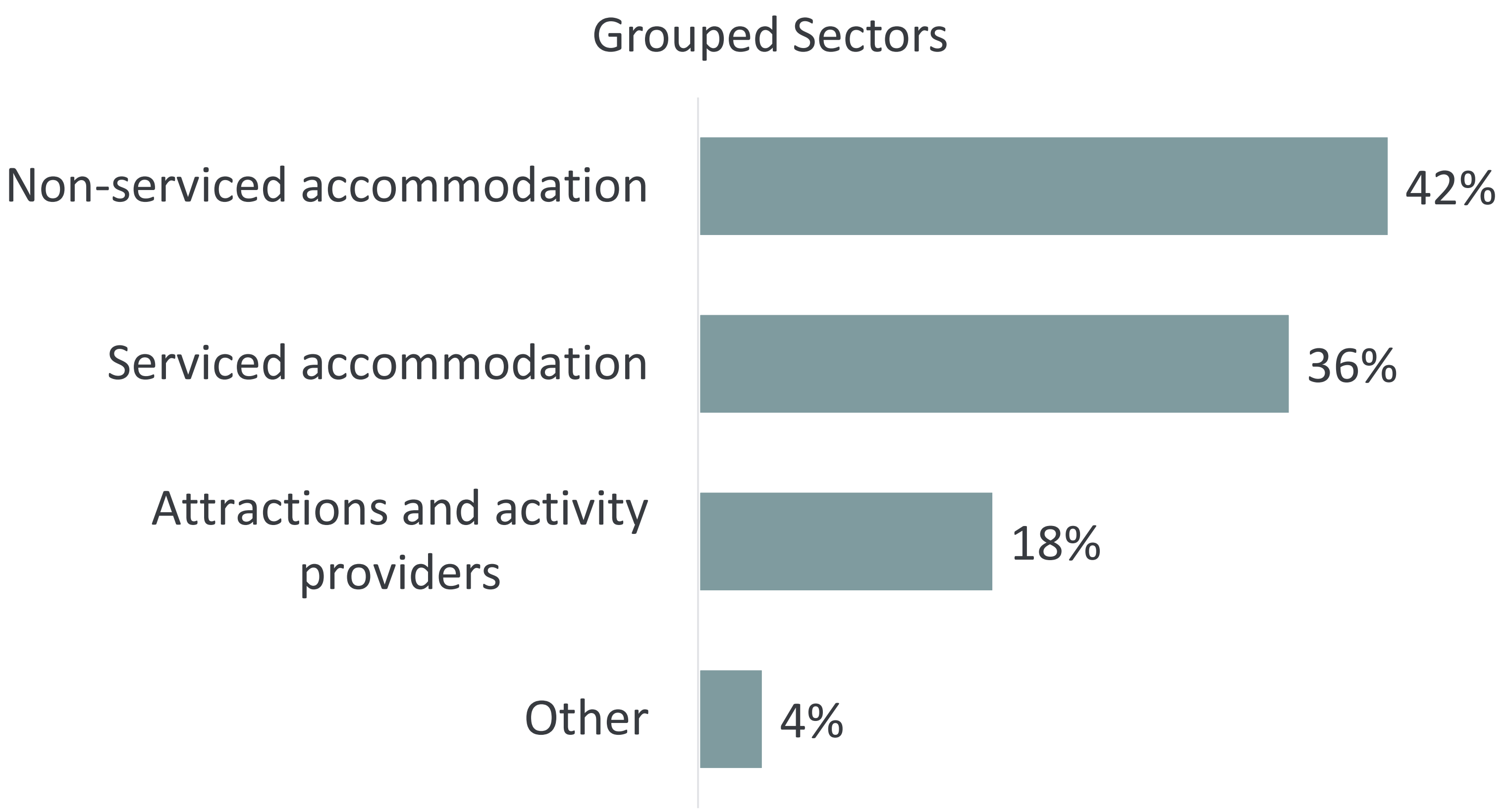
Sector	Number	%
Self-catering	173	38%
B&B/guesthouse	102	22%
Hotel	57	12%
Museums and galleries	28	6%
Caravan/camping/glamping	15	3%
Cultural and/or arts venue	11	2%
Other visitor attraction	10	2%
Outdoor activity operator (land based)	9	2%
Historical visitor attraction	8	2%
Distillery with visitor centre	6	1%
Holiday park	5	1%
Outdoor activity operator (water based)	5	1%
Restaurant with rooms	4	1%
Hostel	4	1%
Exclusive use venue	4	1%
Other food or drink producer with visitor centre	4	1%
Other	15	3%

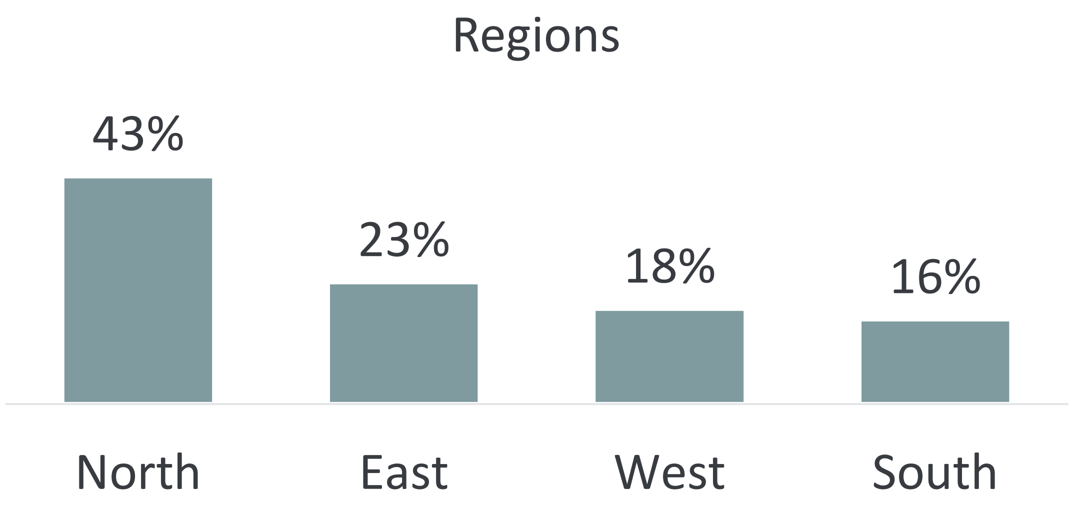
Base (all): 460

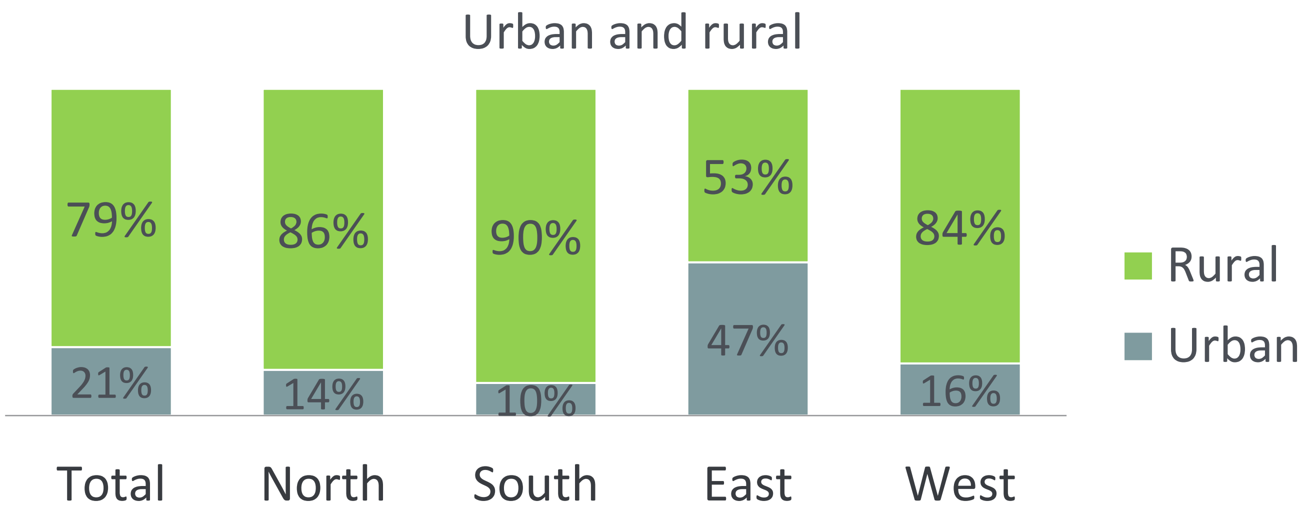
Accommodation providers accounted for almost four fifths of responses



Base (all): 460

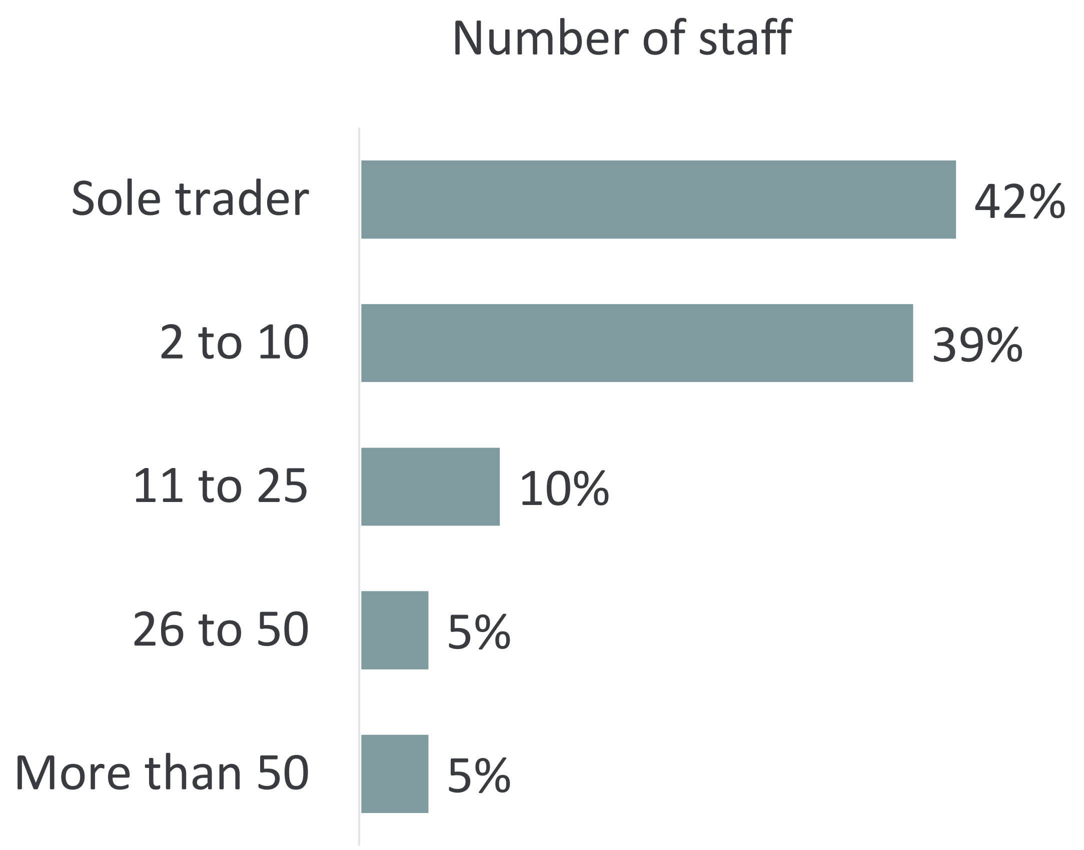
The sample included businesses from across Scotland, with the largest proportion from the North. Four fifths of businesses were rural based





Base (all): 460

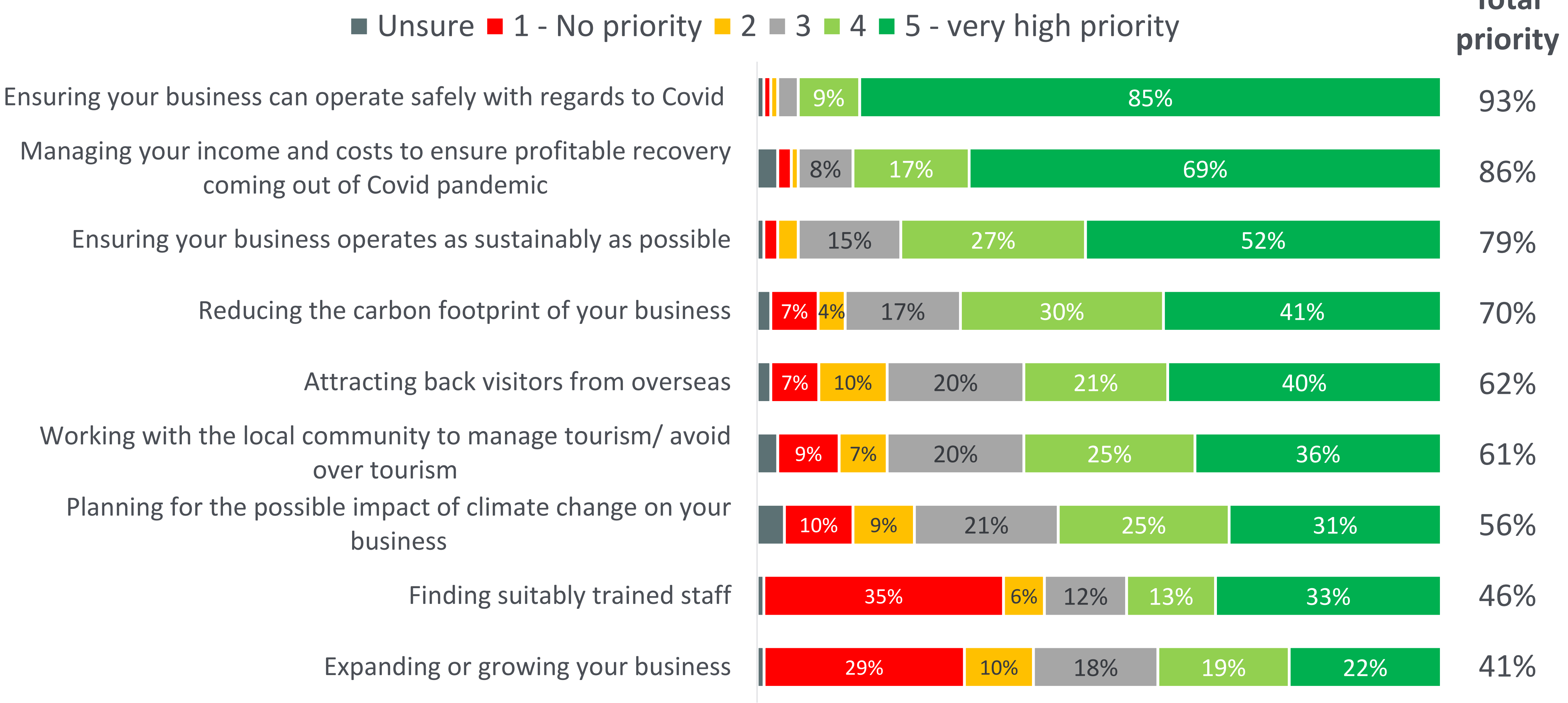
The majority of respondents were from small businesses with ten or fewer employees



Base (all): 460

Attitudes towards becoming more environmental and actions taken

Covid safety and pandemic recovery are still the key priorities. However, being environmentally responsible is also important to the majority of tourism businesses

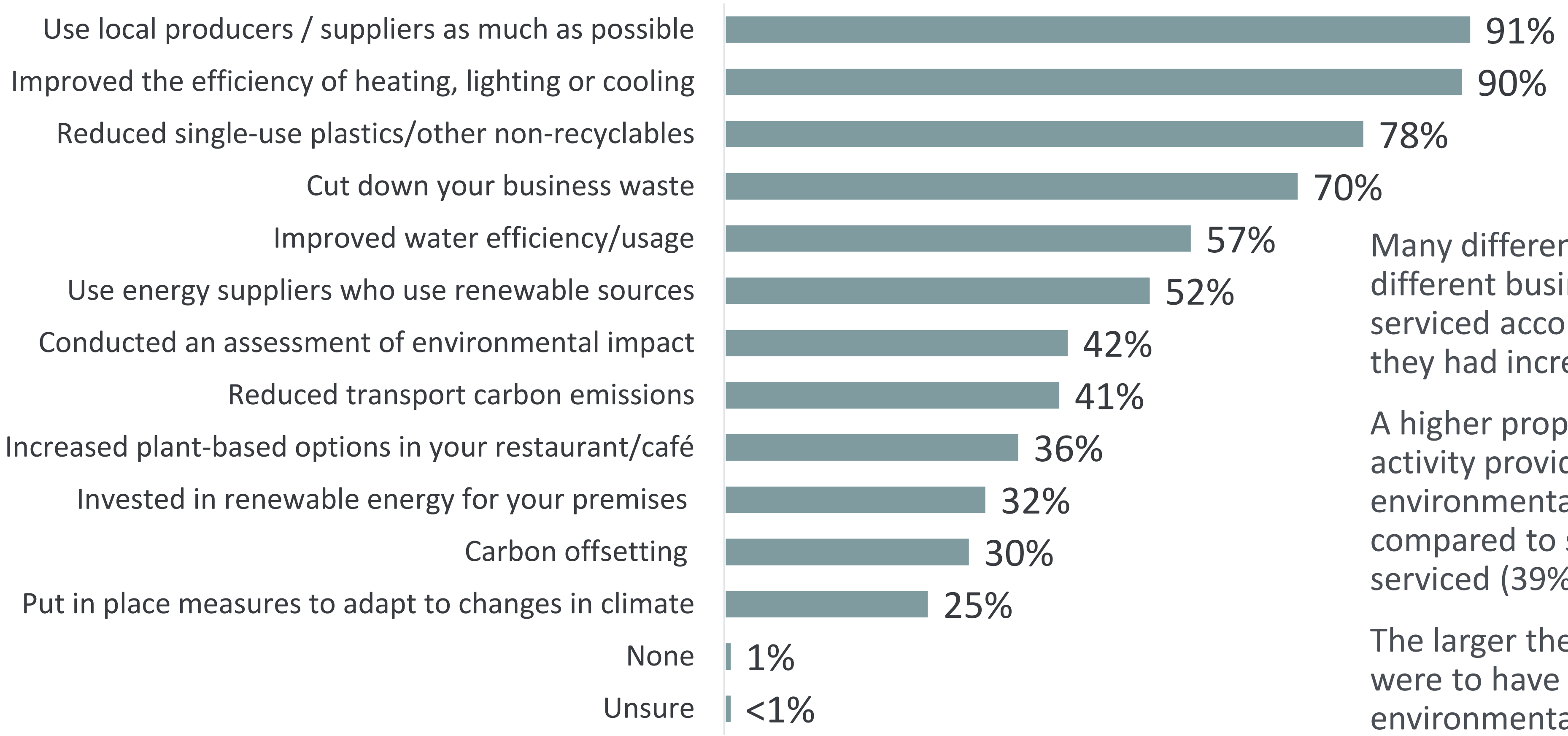


Q8: Please can you give me a mark out of 5 in terms of how much of a priority each of these is to your business in the next 3 years, where 5 would be a very high priority issue and 1 would be an issue which is of no priority at all to your business.

Base (all): 460

Almost all had taken action to reduce environmental harm, most often using local producers and improving energy efficiency

Environmental actions taken (prompted list)



Many differences by sector align with different business activities, e.g., 66% of serviced accommodation providers reported they had increased plant-based food options

A higher proportion of attractions and activity providers (57%) had conducted an environmental impact assessment compared to serviced (34%) and non-serviced (39%) accommodation providers

The larger the business the more likely they were to have undertaken a variety of environmental actions

Q9: Has your business ever undertaken any of the following actions to prevent or reduce harm to the environment and to reduce carbon emissions?

Base (all): 460

Just less than half were currently planning to adopt further environmental actions, most often investing in renewable energy

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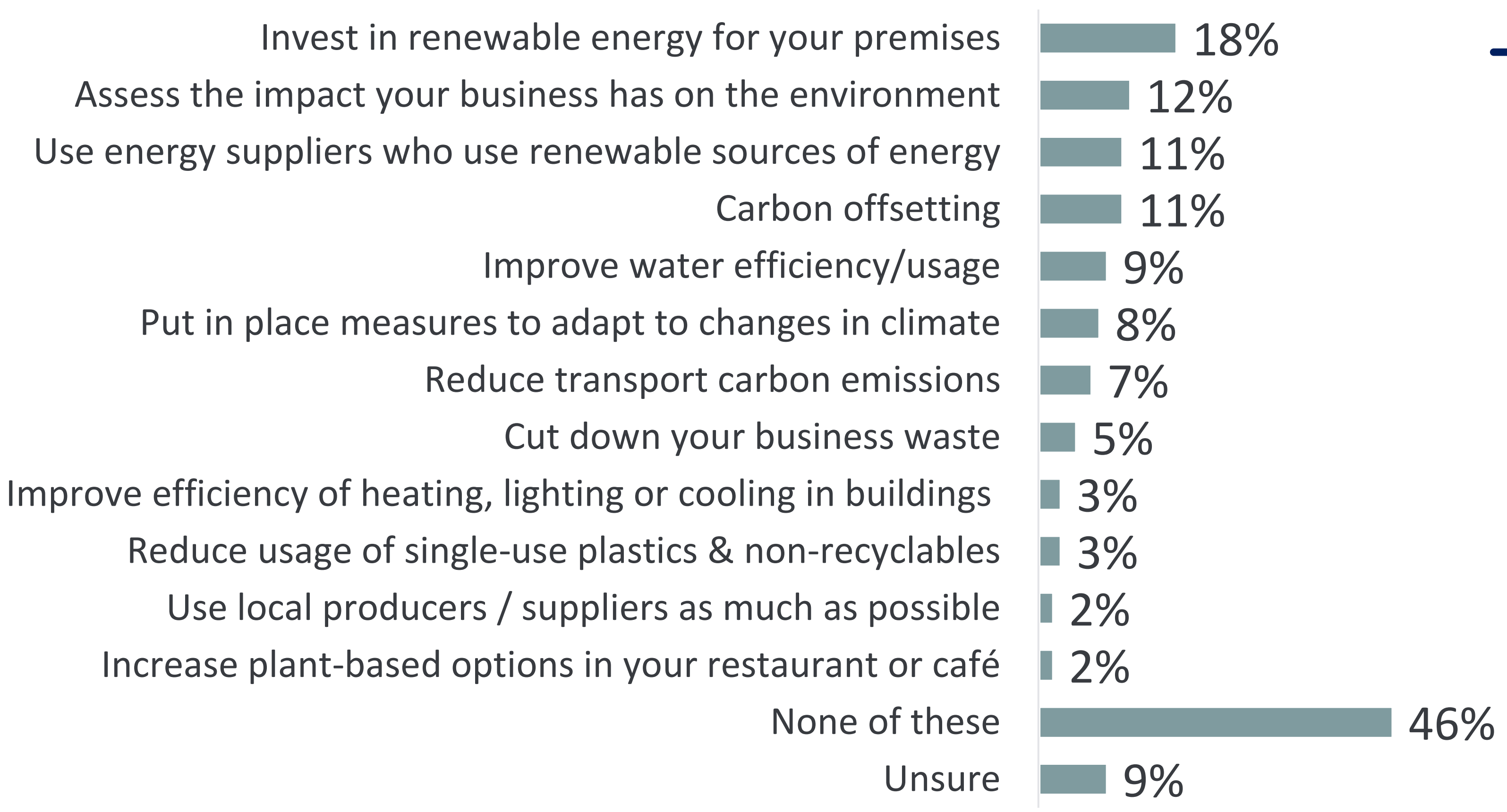
Environmental actions planned (prompted list)



Attractions and activities providers (57%) and serviced accommodation (49%) were more likely to have environmental actions planned than non-serviced accommodation providers (38%)

Note: respondents were only read out actions that they had not already undertaken (Q9)

Q12: Is your business currently planning to adopt any of the following actions to prevent or reduce harm to the environment or to reduce carbon emissions?

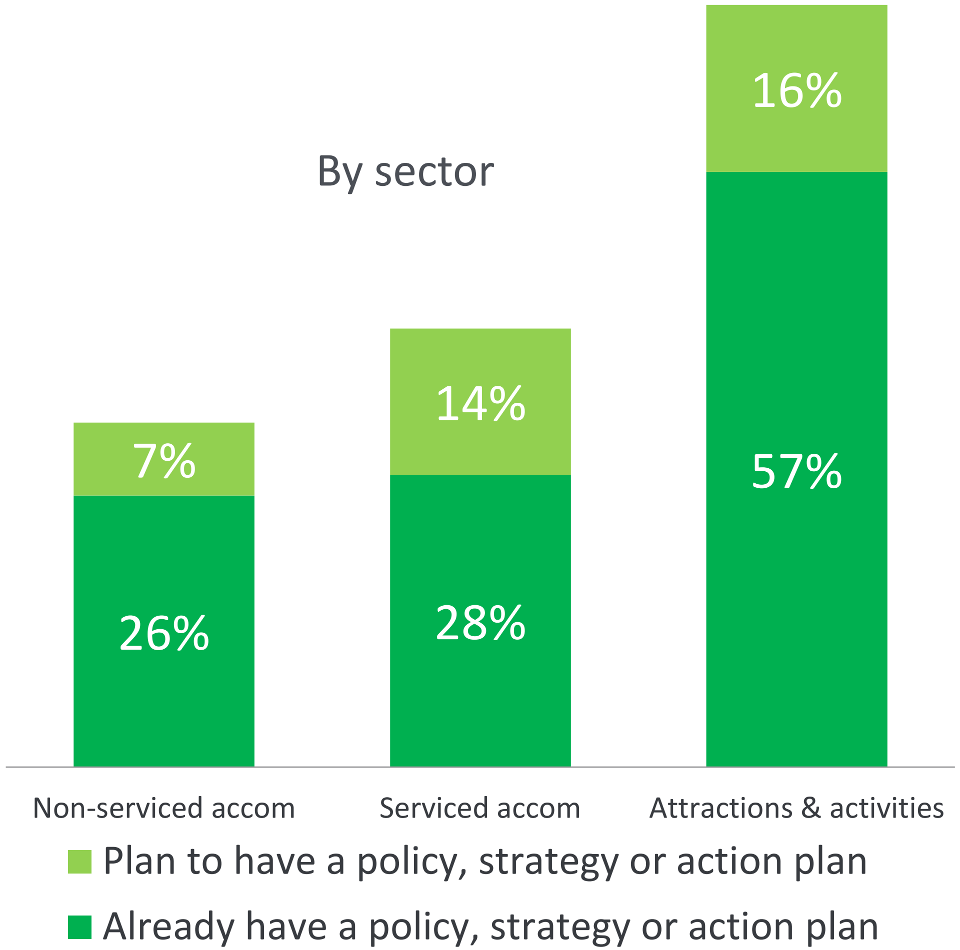
Base (all): 460

One third of businesses already have an environmental policy, strategy or action plan in place and this was most prevalent for attractions and activities

Do you have an environmental policy, strategy or action plan?

Already Have	Plan To	No	Unsure
34%	11%	52%	3%

Environmental strategies were more prevalent in larger organisations. 56% of those with more than 10 employees vs 23% of sole traders and 35% of those with 2 to 10 employees.



Q15: Does your business have an Environmental Policy, strategy or action plan in place or have plans to put one in place?

Base (all): 460

Over two fifths of businesses have a specific role or employee responsible for assessing environmental impact

Do you have a specific role/employee responsible for assessing environmental impact?

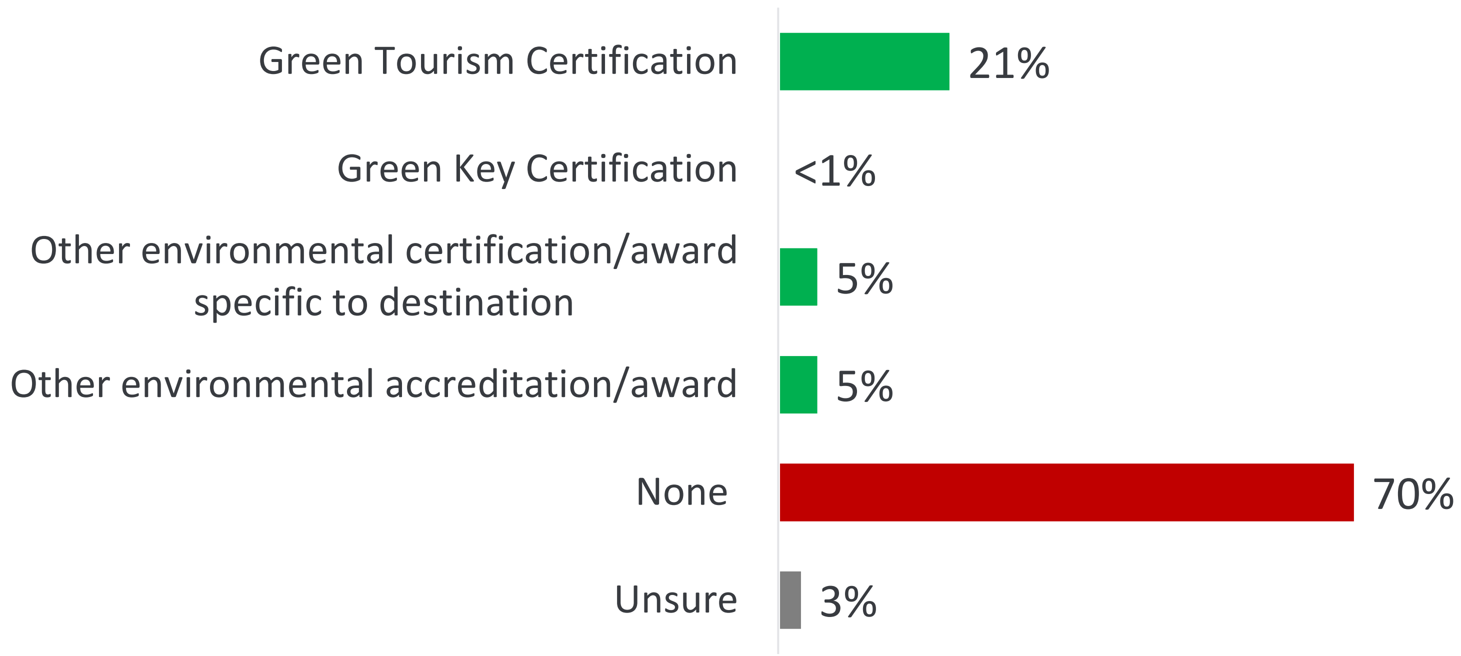
Yes	No	Unsure	
42%	58%	1%	No differences by sector, region or number of employees (except sole traders less likely, as expected).

Q16: Does your business have a specific role or employee who is responsible for assessing environmental impact and taking measures to reduce it?

Base (all): 460

Almost three in ten businesses have environmental certification/awards, and the majority of those who do, promote them to customers

Environmental certification & awards



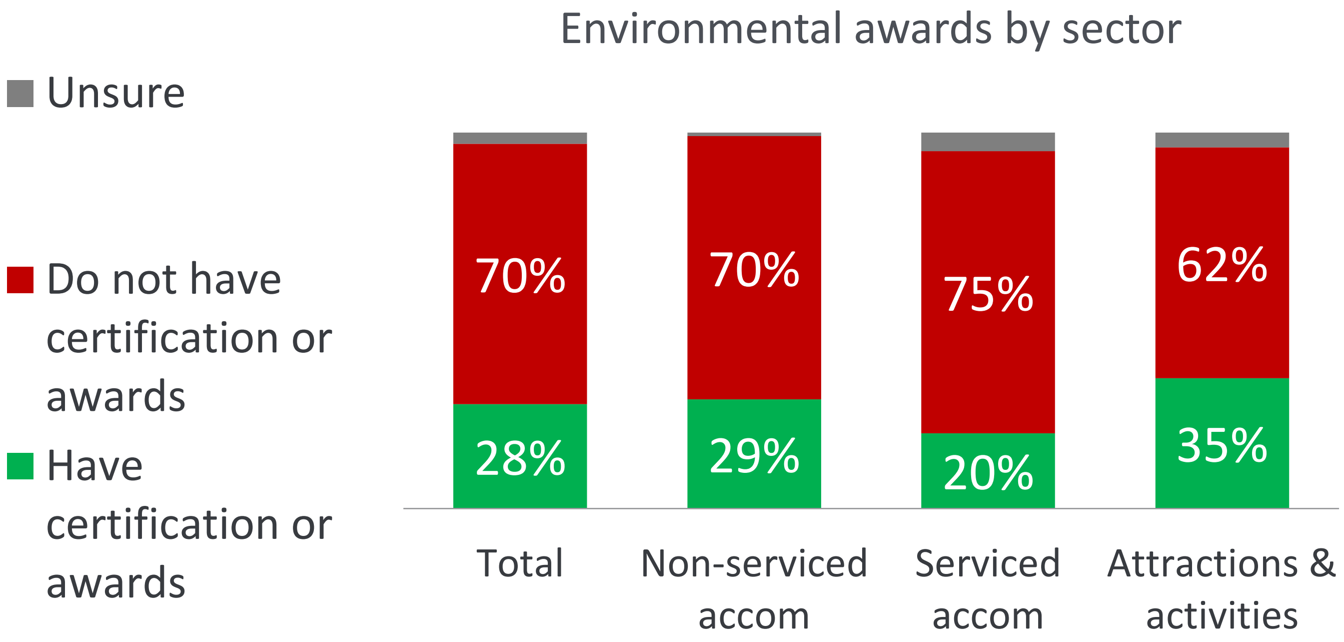
For Those with Green Certification: Do you communicate, advertise or promote accreditation?

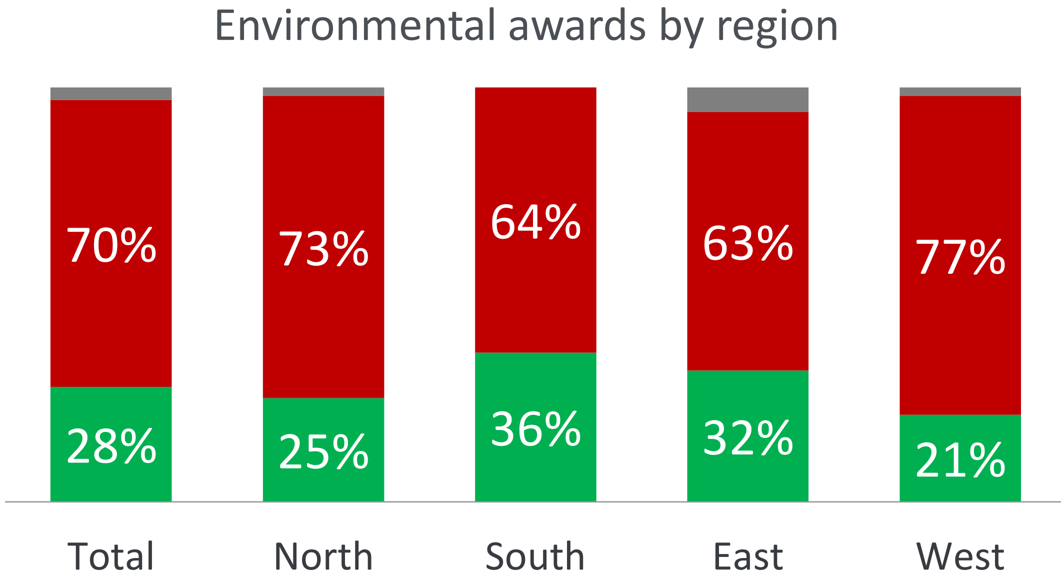
Yes	88%
No	11%
Unsure	1%

Q17: Does your business have any environmental certification or awards, such as Green Tourism, Green Key or others? Q18: Do you communicate, advertise or promote your environmental accreditation or awards to your customers?

Q17 Base (all): 460;
Q18 Base (have green certification): 128

Serviced accommodation providers were less likely to have environmental awards/certification than other sectors. Having awards/certification was slightly more likely in South than in West (West significant at 90% level)



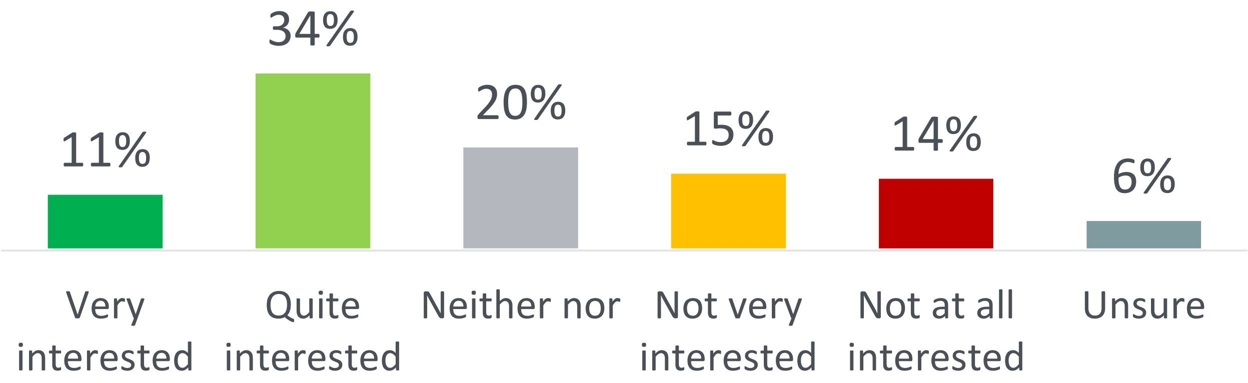


Q17: Does your business have any environmental certification or awards, such as Green Tourism, Green Key or others?

Base (all): 460

Interest from customers in environmental activities/actions was evident but fairly weak. Less than half of businesses believe they are interested

Customer interest in how environmental the business is?



Total Interest (Very/Quite Interested)

Non Serviced Accommodation	Serviced Accommodation	Attractions/ Activities
40%	38%	62%

Overall 45% felt their customers were interested (very or quite interested)

Businesses with green certification/awards were more likely to report customer interest (67%) than those with no certification/awards (35%).

Those based in rural areas also reported higher levels of interest (48%) than urban based businesses (33%).

Q28: To what extent would you say your customers are interested to know about how environmentally conscious your business is?

Base (all): 460

The journey to net zero

Three quarters of businesses were aware of the Scottish Government's 2045 net zero target. Awareness was highest for visitor attractions and activity providers

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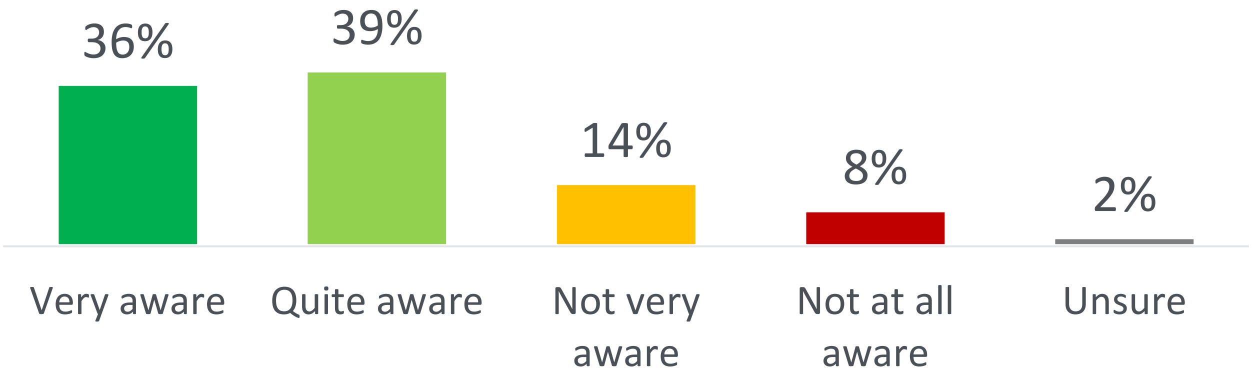
Awareness of Net Zero target



Total Aware (Very/Quite)

Non Serviced Accommodation	Serviced Accommodation	Attractions/ Activities
75%	70%	84%

Overall 75% were aware of the 2045 net zero target

Overall awareness was consistent across regions, however, those based in the South were more likely to say they were very aware (42%) than businesses based in the East (29%), significant at 90% level.

There were no significant differences in awareness by sizes of business

Q20: The Scottish Government has set a target of achieving Net Zero greenhouse gas emissions in Scotland by 2045. How aware are you of this target?

Base (all): 460

The majority have at least started to think about how to achieve net zero, and three in ten have implemented actions to move towards net zero

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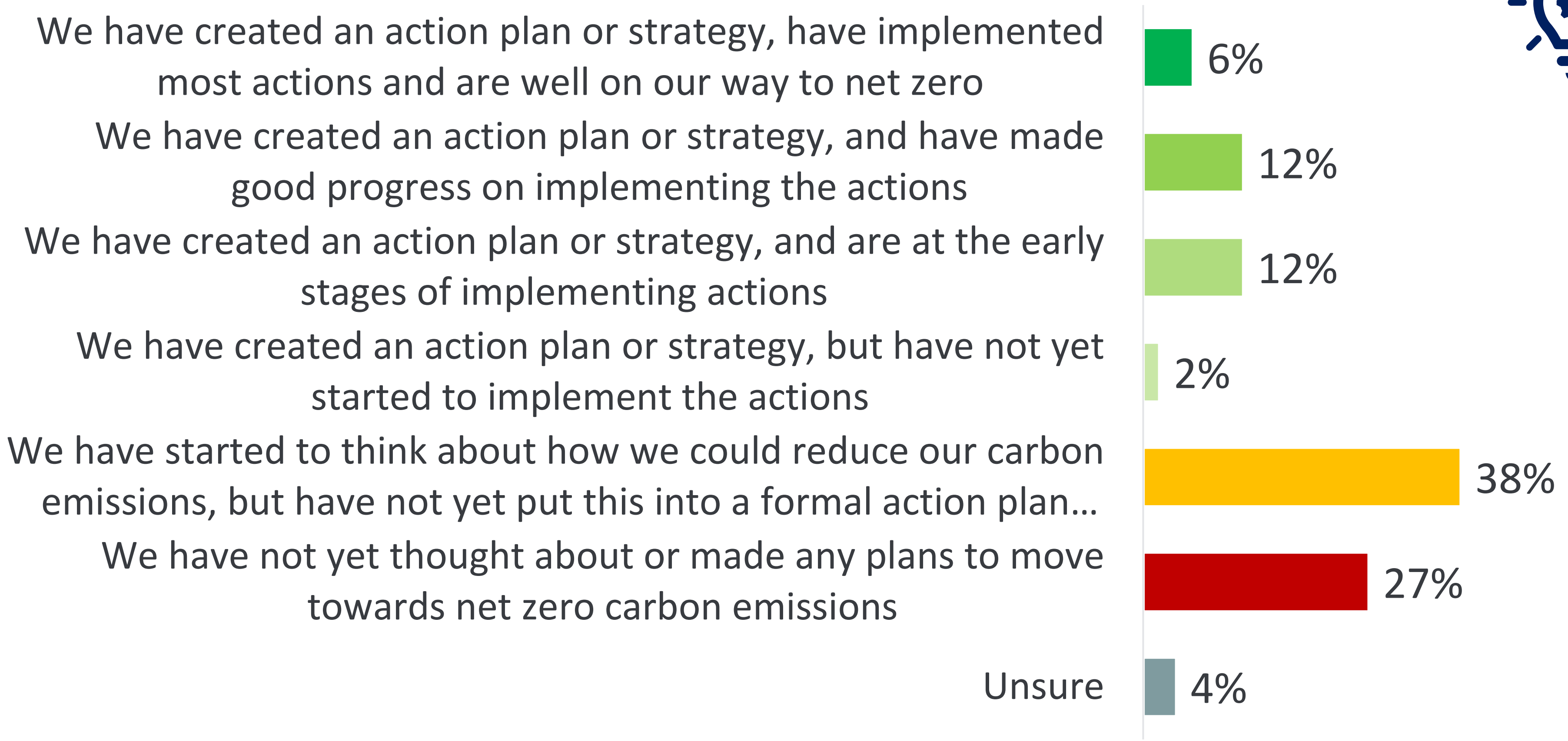
Stage in process towards net zero

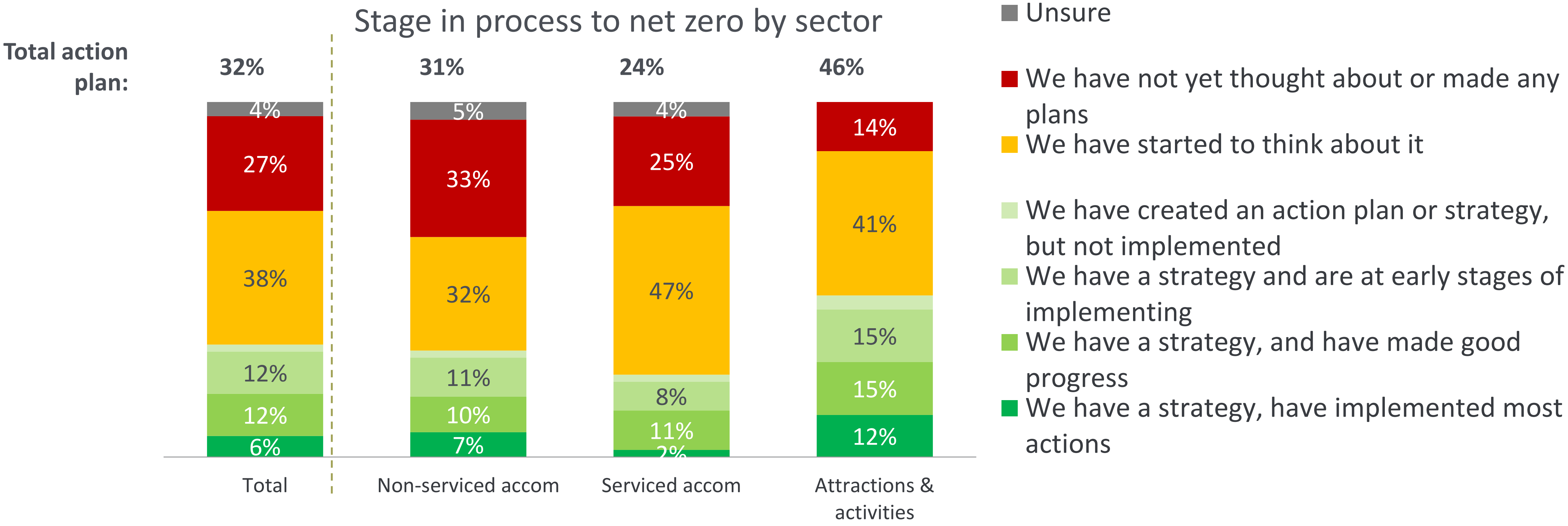


Overall 29% have created an action plan or strategy and started actions in some way. An additional 2% intend to take action, taking the proportion who have created an action plan to 32%

Q24: Which if the following best describes where your business is in terms of progress towards reducing your carbon emissions to net zero?

Base (all): 460

Attractions & activities have made more progress towards net zero than accommodation providers. Progress was also better for larger businesses



Larger organisations were also more likely to have a strategy which they have started to implement – 44% of businesses with more than 10 employees, compared with 23% of sole traders and 29% of those with 2 to 10 employees.

Businesses that have a Green Tourism award were more likely to have a strategy and started implementing action (55%) than those who did not have any awards (19%).

Progress on the journey towards net zero was consistent across the four regions and between businesses based in urban and rural areas.

Q24: Which if the following best describes where your business is in terms of progress towards reducing your carbon emissions to net zero?

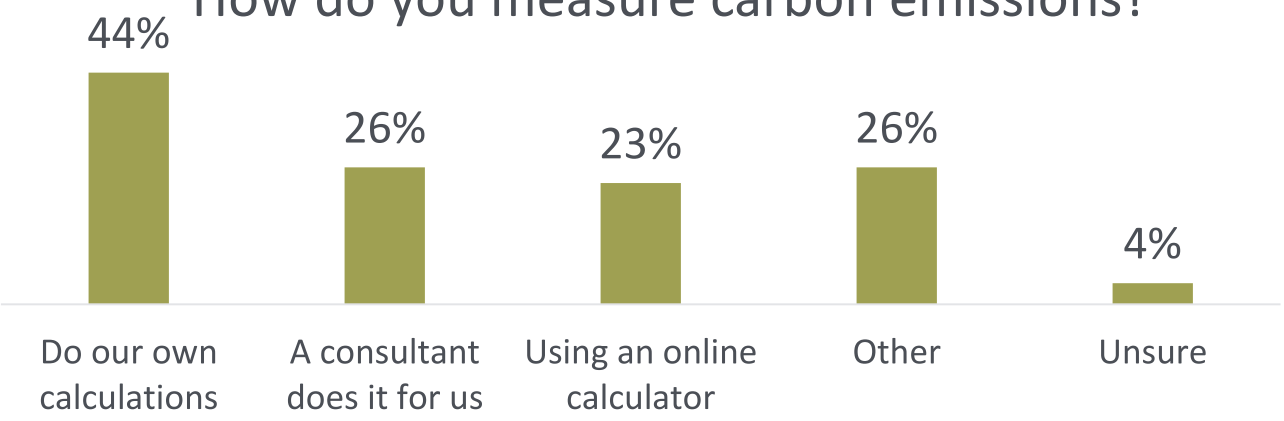
Base (all): 460

Just over one in ten reported that they measure their carbon emissions. This proportion was higher for attractions and activity providers and larger businesses

Do you measure/report carbon emissions?

Yes, measure and report	8%
Yes measure but do not report	5%
No	85%
Unsure	3%

How do you measure carbon emissions?



Q21: Does your business currently measure and/or report its carbon emissions?
Q22: How does your business measure its carbon emissions?

A higher proportion of visitor attractions and activity providers reported that they measure their carbon emission (19%) than non-serviced (10%) and serviced (8%) accommodation providers

Larger businesses with more than 10 employees were also more likely to measure their carbon emissions (29%) than sole traders (8%) or businesses with 2 to 10 employees (9%)

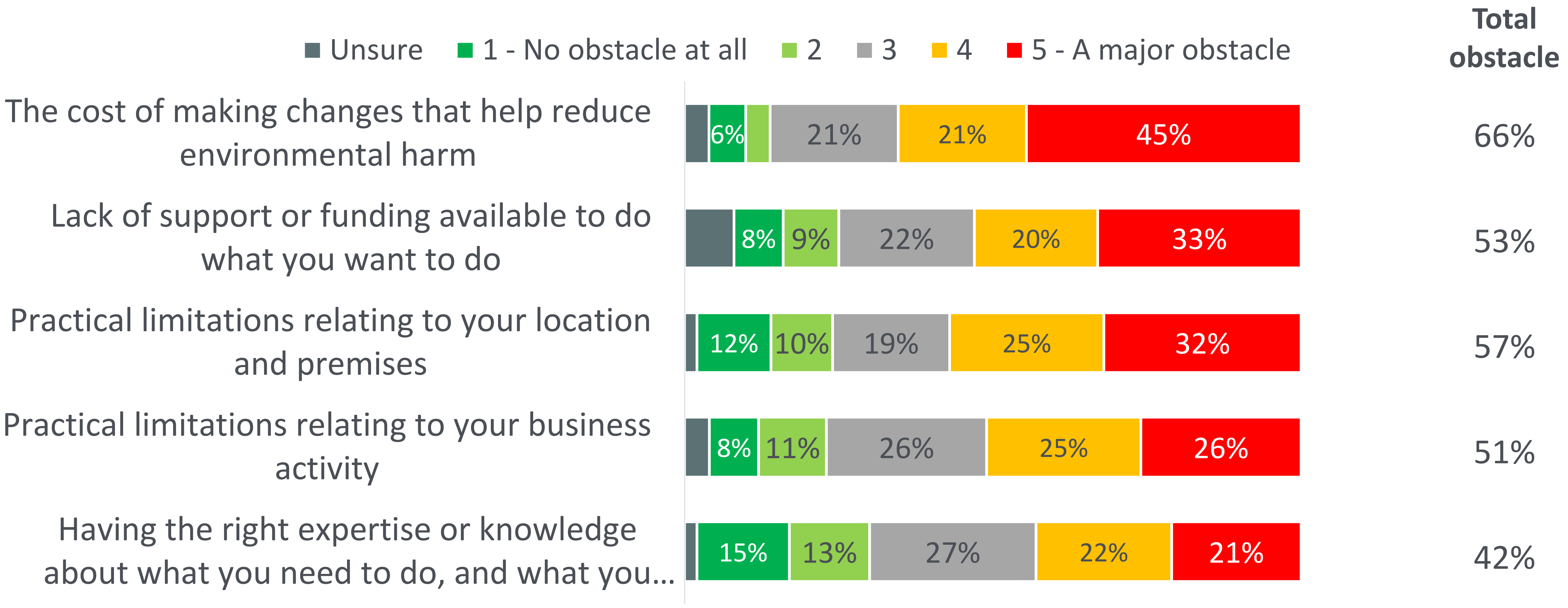
Businesses with a Green Tourism award were more likely to measure carbon emissions (32%) than those with no awards (5%)

Measurement of carbon emissions was consistent across regions and between urban and rural based businesses

Q21 Base (all): 460; Q22 Base (all who measure): 57

Challenges and barriers to improving environmental performance

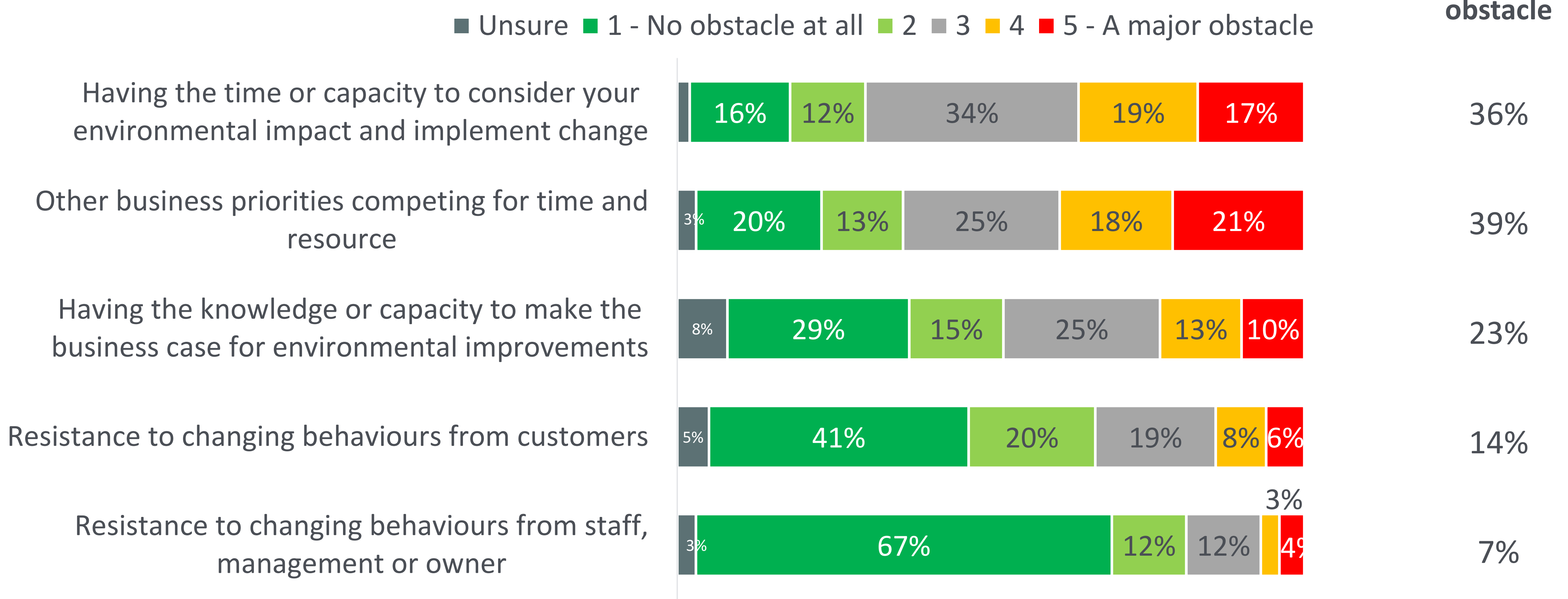
Cost and funding are the main barriers to businesses implementing environmental measures, although many also constrained by practical limitations



Q25: I am going to read you out a list of factors that some businesses say are obstacles to them becoming more sustainable, reducing their environmental harm and reducing carbon emissions. For each of these, please can you give me a mark out of 5 in terms of how much of an obstacle each is to your business, where 1 is no obstacle at all, and 5 is a major obstacle?

Base (all): 460

The attitudes of customers, staff and management were seldom seen as a barrier to change



Q25: I am going to read you out a list of factors that some businesses say are obstacles to them becoming more sustainable, reducing their environmental harm and reducing carbon emissions. For each of these, please can you give me a mark out of 5 in terms of how much of an obstacle each is to your business, where 1 is no obstacle at all, and 5 is a major obstacle?

Base (all): 460

A quarter of businesses reported other barriers that prevent them from being more environmental, most of which were external, e.g. regulations, finding suppliers and government policies

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Other issues / barriers facing businesses

Responses of less than 3% not shown

Q26: Are there any other issues or concerns that make implementing change to reduce environmental harm or carbon emissions difficult for your business? Q27: What other issues or concerns make implementing change to reduce environmental harm and carbon emissions difficult for your business?

Base (all who mentioned other issues): 116

Support and information

Almost half have received information, guidance or support to become more sustainable and reduce carbon emissions. The proportion was highest amongst attractions and activity providers and larger organisations

Received information, guidance or support about how to be more sustainable or reduce carbon emissions

Yes	No	Unsure
45%	52%	4%

Higher amongst attractions and activity providers (52%) compared to serviced (38%) accommodation providers. Just less than half (46%) of non-serviced accommodation providers had sought information or support.

Larger organisations with more than 10 employees were more likely to have been provided with information or support (57%) than sole traders (38%).

Just less than half of those with 2 to 10 employees (46%) had sought information or support from another organisation.

Q29: Have any organisations provided you with information, guidance or support about how to make your business more sustainable or reduce carbon emissions?

Base (all): 460

The main sources of information and support were VisitScotland, Green Tourism, Zero Waste Scotland and Energy Saving Trust

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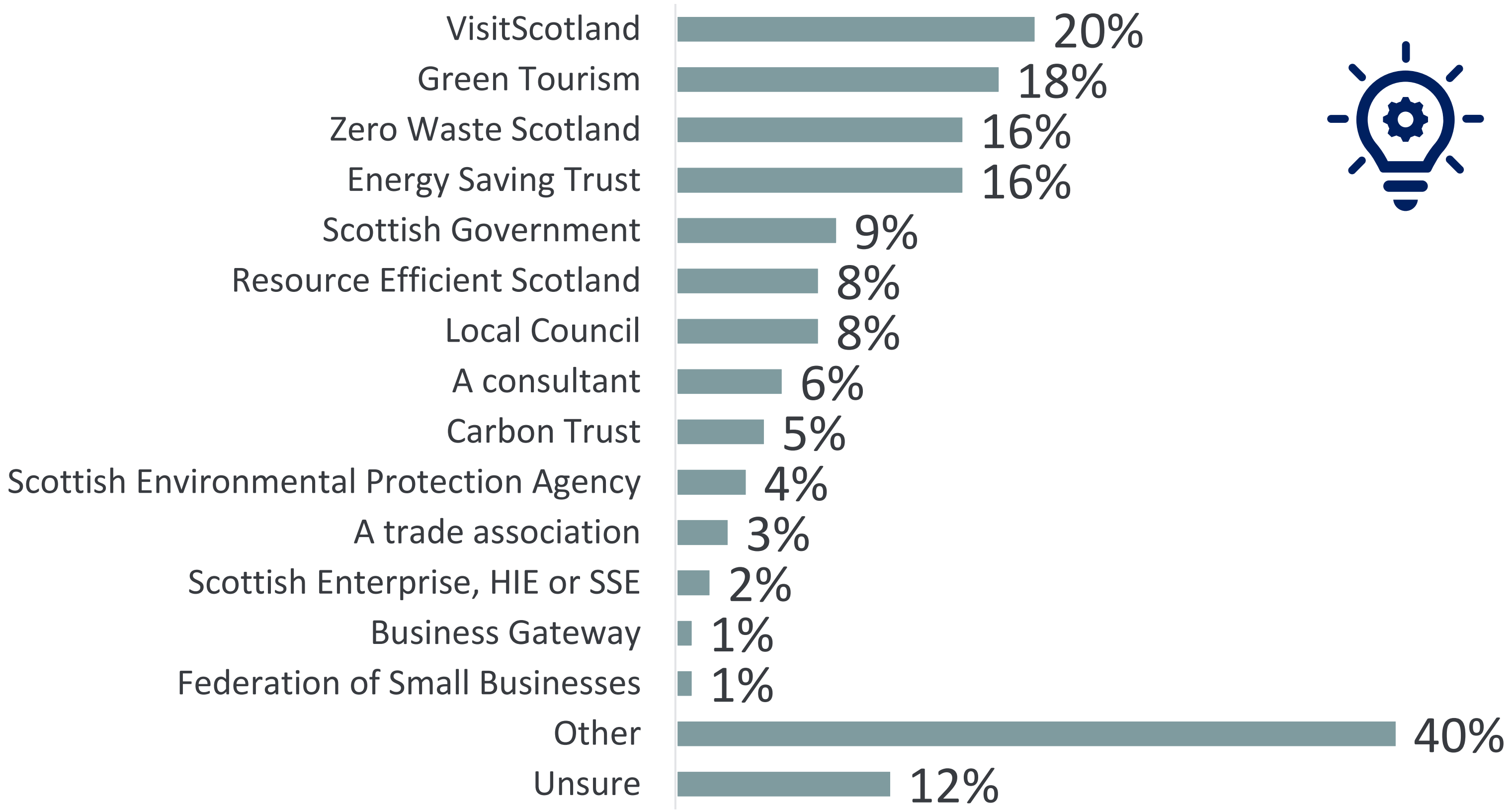
Organisations who have provided info, guidance or support?



The smaller base size for this question limits sub-sample analysis, however, Zero Waste Scotland was particularly likely to be mentioned by businesses with more than 10 employees (28%) and those based in the East (28%)

Base (all who have received info, guidance or support): 206

Q30: Which organisations have provided you with information, guidance or support?

Local and national government and VisitScotland were the most likely to be approached for information and support

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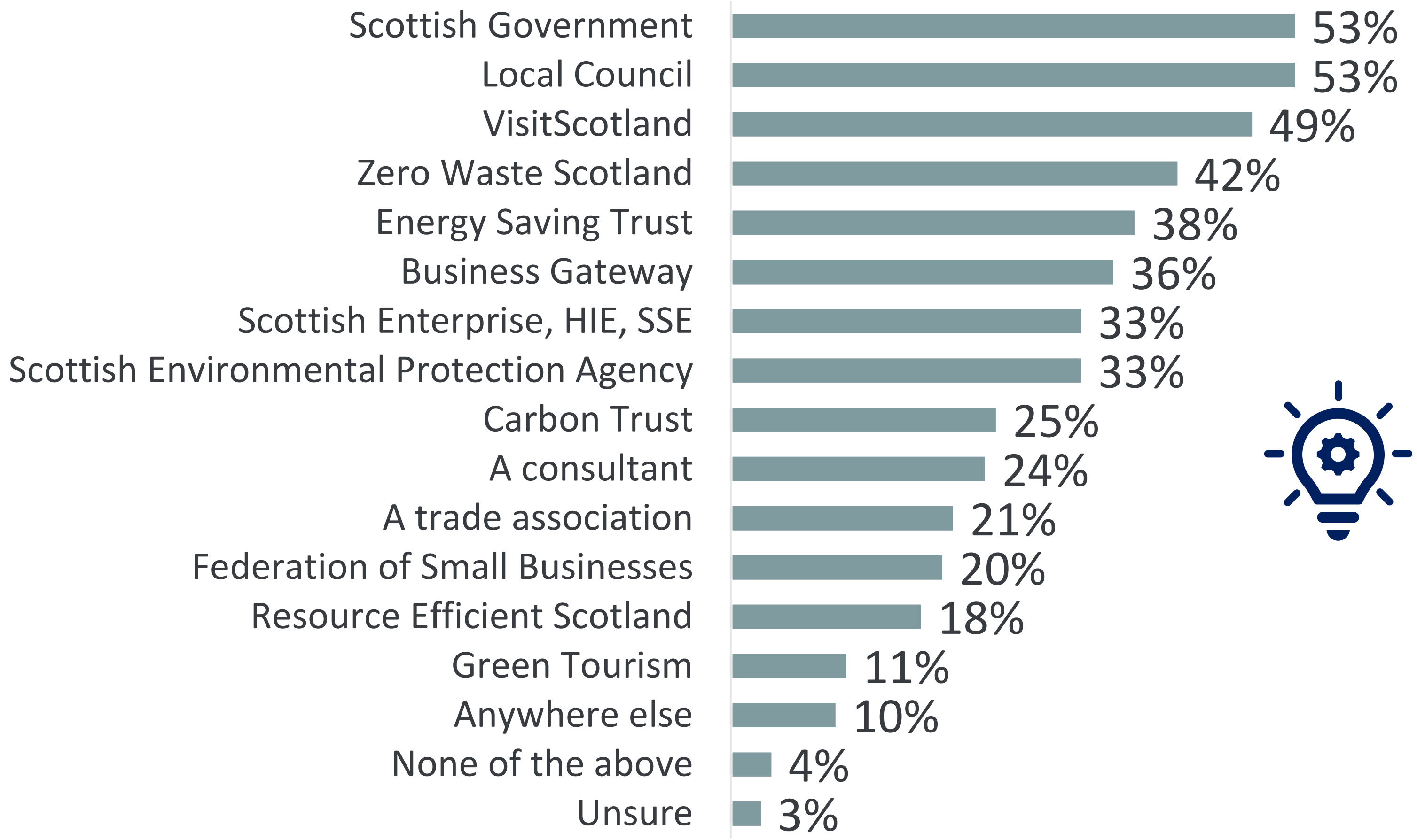
Organisations you would go to for info, guidance or support



Businesses in the attractions and activity providers sector were more likely to mention some sources than accommodation providers, including Carbon Trust (36%) and a consultant (35%)

Q31: Which of the following organisations would you go to for information, guidance or support on making your business more sustainable and reducing carbon emissions?

Base (all): 460

Only a minority have so far applied for funding, but three in ten intend to do so. Applications highest for attractions and activity providers

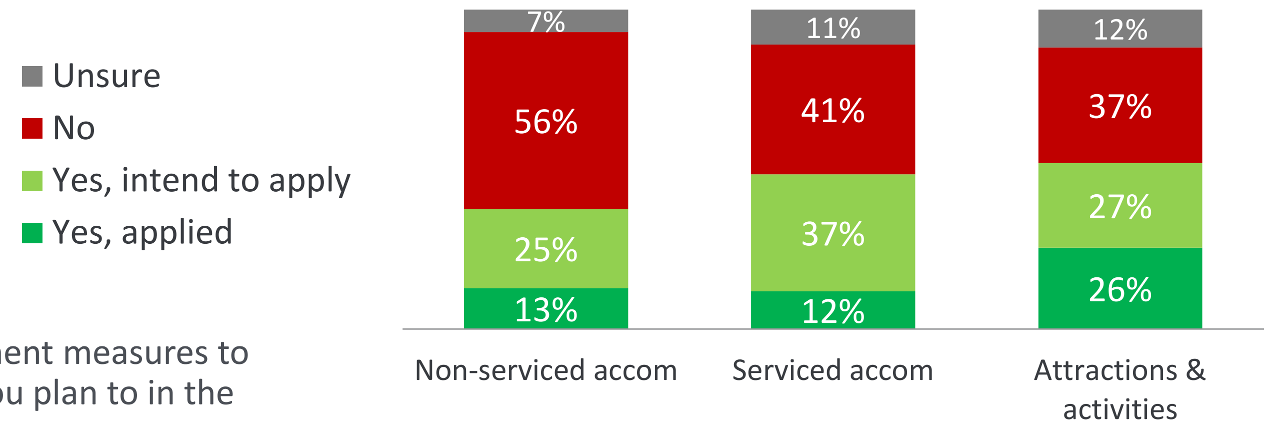
Applied for Funding or Grants To Help Implement Measures

Have Applied	Intend To Apply	No	Unsure
16%	29%	46%	10%

Larger organisations were both more likely to have applied for funding (24%) and intending to apply (41%), compared with sole traders (13% and 23% respectively) and those with 2 to 10 employees (16% and 30%).

There were no significant differences by region.

By sector



Q32: Have you applied for funding or grants to implement measures to reduce your business's environmental impact, or do you plan to in the future?

Base (all): 460

Financial support was the most often cited as helpful to businesses to become more sustainable and reduce environmental harm

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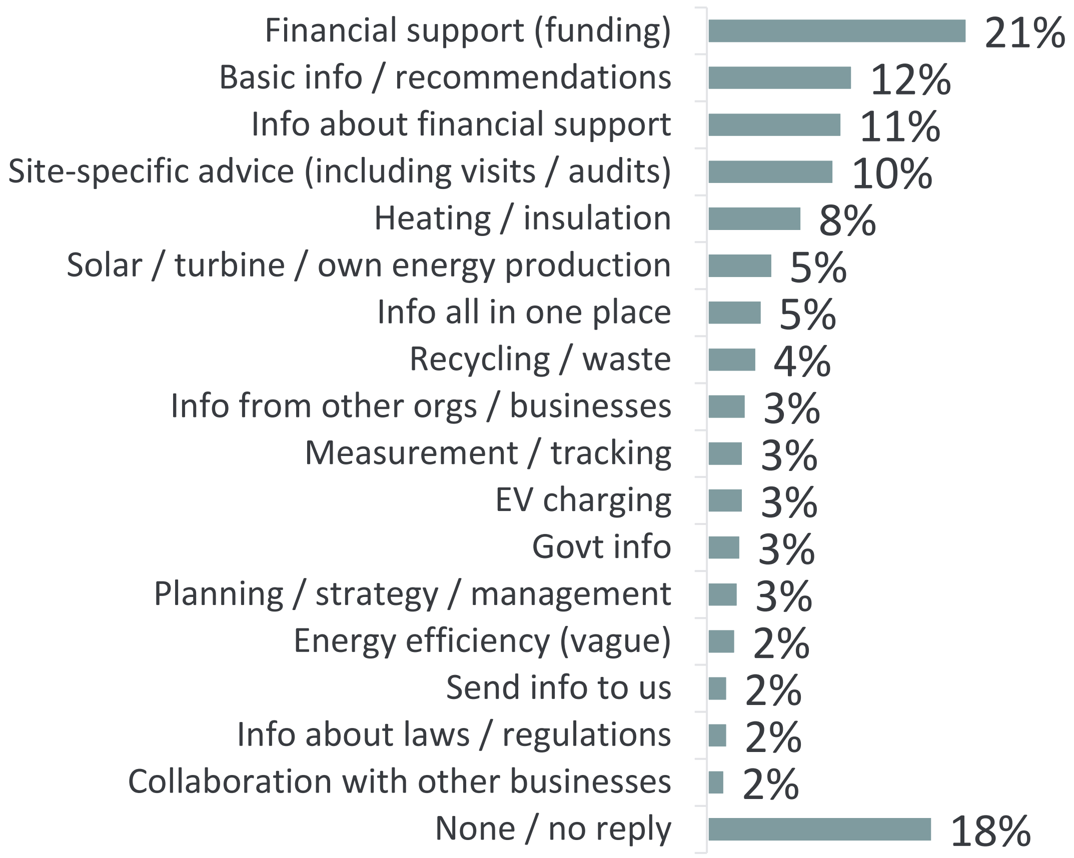
Most useful information and support



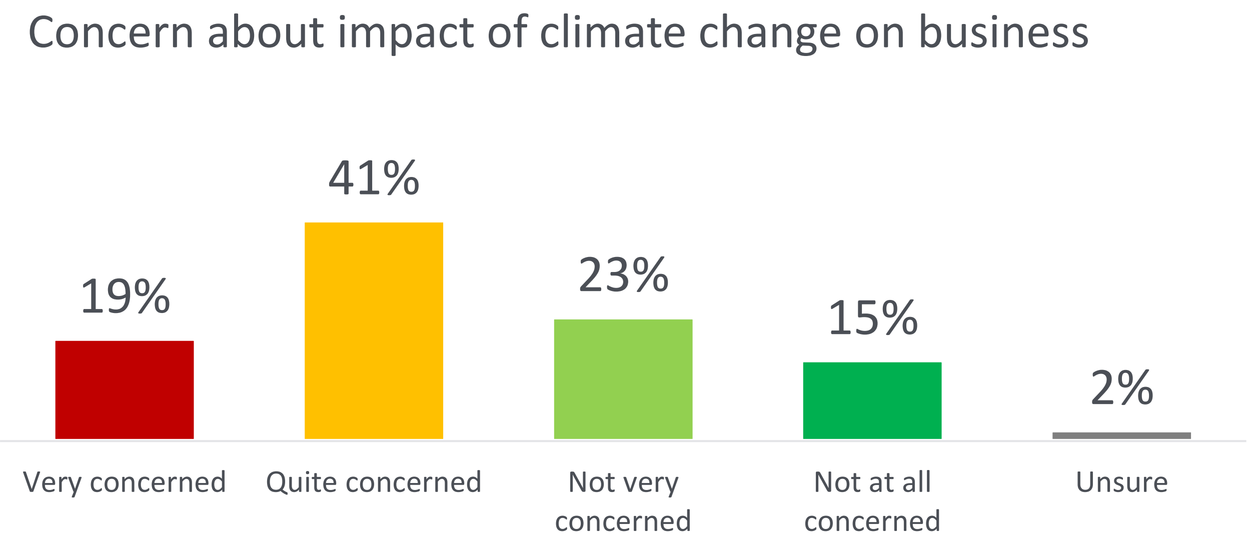
Q33: What information or support would be most helpful to your business to help you become more sustainable and reduce environmental harm? Open ended

Responses of less than 2% not shown

Base (all): 460

Impact of climate change

Six in ten businesses are concerned about the impact of climate change. Concern was higher for attractions and activity providers and serviced accommodation providers



Total Concerned (Very/Quite)

Non Serviced Accommodation	Serviced Accommodation	Attractions/ Activities
52%	63%	75%

Overall 61% are concerned about the impact of climate change on their business (very/quite concerned)

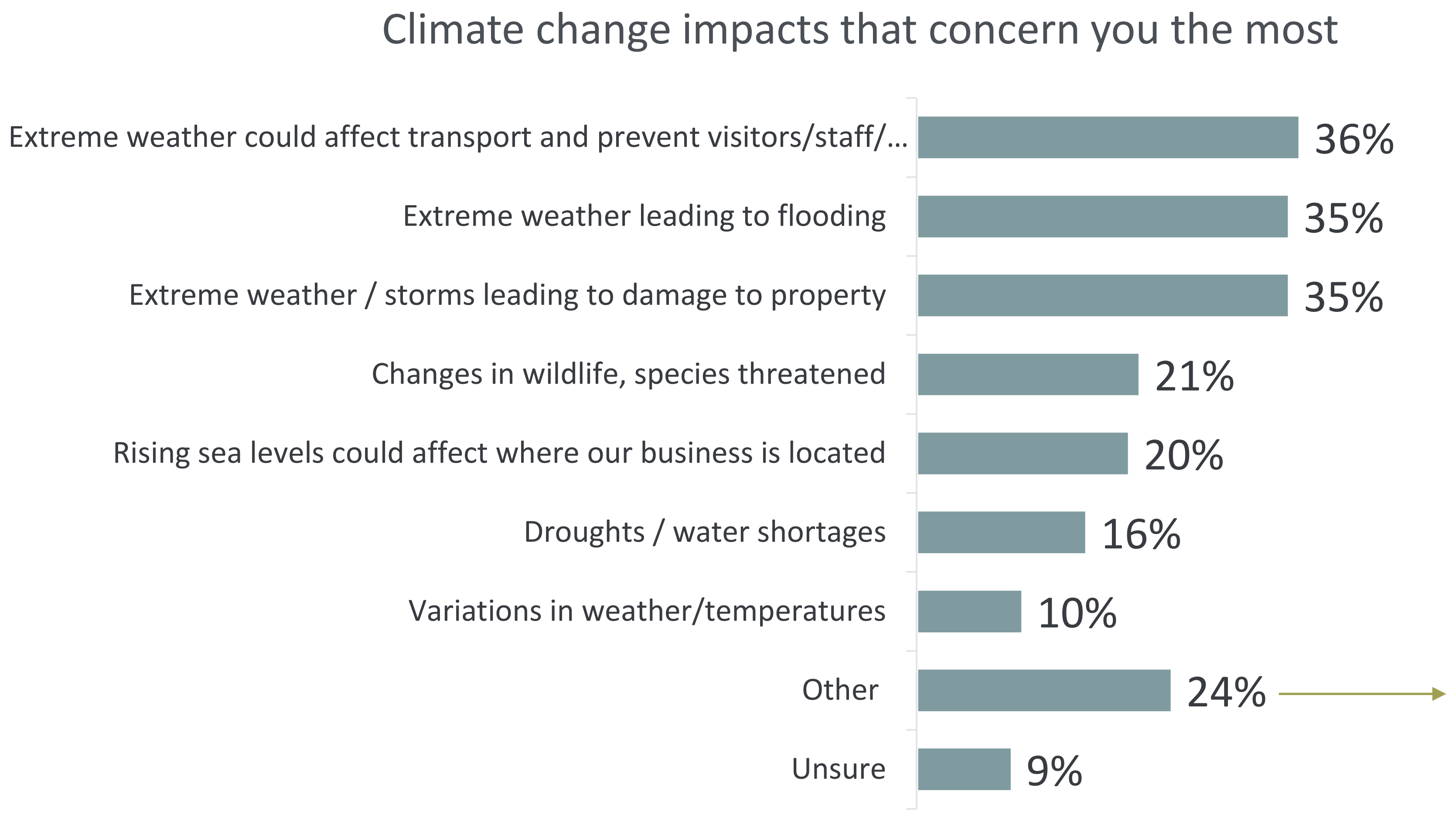
Businesses with more than 10 employees were also more concerned overall (74% concerned) than sole traders (56%) or those with 2 to 10 employees (59%).

There were no significant differences by region.

Q34: How concerned are you about the impact of climate change on your business?

Base (all): 460

A number of climate change impacts concerned businesses, especially impacts on transport, flooding and property



Other concerns included fewer tourists coming to Scotland, increased costs, impact on farming/food production and impact on the provision of energy/fuel.

Q35: What climate change impacts concern you most? What are the biggest threats to your business?

Base (all concerned): 385

Qualitative research

Summary of qualitative findings (1)

- Being sustainable was **a high priority** for the organisations - most had immediate plans to become more sustainable and were making progress towards goals.

- Organisations were also keenly aware of **the conversation around sustainability.**

- Many reported they are actively **encouraging their staff, stakeholders, members and visitors** to adopt environmentally-friendly practices.

- The **barriers** to being more sustainable described by the qual respondents were **multifaceted and interlinked**.
  - **Cost** - activities, such as generating own electricity, are expensive, whilst funding and grant availability to carry out largescale sustainability measures is limited
  - The **nature of the organisation** (in terms of location and activities) was also a common challenge.
  - Sustainable practices that required large spaces (such as implementing hydro, solar, wind power facilities) were not possible for **organisations with small site**

Summary of qualitative findings (2)

- Perceptions about **future challenges** were dependent on how 'far' the organisation had come in terms of net zero priorities.
  - Those further along the journey were mindful that they had '**done the easy bit**', and **the real challenge lies ahead**.

- Organisations reported two main challenges in the future:
  - That being an environmentally-friendly business is contingent on **widespread, systemic change in other, interconnected industries** (travel, food, procurement etc.) - requiring **cross-sector partnership working** and **system-wide decarbonisation agreements**.
  - **Cost** – both for their organisation and their membership/stakeholders, particularly for members/stakeholders that were SMEs.

- Some organisations were unsure whether they could meet net zero targets because of a **lack of understanding** of how to achieve the targets, specifically, what to measure, and how to measure it.

Summary of qualitative findings (3)

- The organisations most commonly cited as sources of advice and guidance were **VisitScotland** and **Green Tourism**.

- **Cross-sector working** was also mentioned, e.g. relationships with the **Scottish Tourism Alliance** and **Zero Waste Scotland.**

- In terms of information provision, organisations want **the concept of net zero to be comprehensible**.
  - There's a need for **greater transparency** around net zero and what it means
  - **Some information perceived to be too 'high-level'** – can be off-putting and discouraging

- There were also requests for **a 'toolkit' or guidance sheet** of things that they would be able to implement to achieve net zero – either from a central organisation (e.g., Scottish Government or VisitScotland) or from consultants in the sector.

Summary and conclusions

Summary: Attitudes and behaviours

Most tourism businesses are concerned about climate change and are motivated to take action to minimise the environmental impact of their activities

- Although not the top priority at the current time, being sustainable and reducing emissions were rated as important priorities by the majority of businesses. Once businesses recover from the pandemic restrictions (currently the top priority for many), it is likely that sustainability and carbon reduction will come to the fore even more.
- Almost all had taken steps to reduce the environmental impact of their activities, and just less than half have a strategy in place or are in the process of creating one.
- Many have also made someone responsible for improving their environmental performance, although only 3 in 10 have recognised accreditation or awards.
- Larger organisations and attractions and activity providers tended to have made more progress – they were more likely to have a strategy in place and have implemented measures than smaller organisations and accommodation providers.

Summary: The Net Zero Pathway

Whilst awareness of the Scottish Government's net zero target is strong, most have not yet made a plan on how to achieve this and do not measure their emissions

- Three quarters of businesses were aware of the Scottish Government's 2045 net zero target.
- However, only a third have made an action plan to get emissions down to net zero – although it is encouraging that most of those with a plan have started to implement its actions. Visitor attractions and activity providers were more likely to have made progress on the journey to net zero than accommodation providers.
- The qualitative findings indicate that there is a lack of understanding of what net zero practically means for businesses, and what they need to do to achieve it. Others felt progress to the target would be restricted by reliance on other organisations/businesses and the general interconnectedness of sectors of the tourism industry.
- Only one in ten businesses overall currently measure carbon emissions, with this proportion higher for attractions and activity providers and larger organisations.

Summary: Barriers to change

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A number of barriers to change were highlighted, particularly cost and practical limitations

- The key barriers to implementing measures to reduce environmental impact were cost, a lack of funding/support, practical constraints due to location/property and the practical limitations of their business activity.

- It is encouraging, however, that resistance to change, both internally from staff/management and externally from customers, was a barrier to only a small minority. Having the time or capacity to implement changes was also generally not seen as an impediment to becoming more environmental.

- There were some variances in barriers between sectors and size of businesses, indicating that targeted support would be effective in overcoming these.

- Qualitative responses suggest that even where organisations have made significant progress towards net zero, there is recognition that the 'easier wins' have been achieved and future progress will be more challenging.

Summary: Information and support

Financial support was the most cited way to encourage businesses to implement environmental improvements, and almost half have applied for funding or intend to

- The most often cited type of support required to help businesses improve their environmental performance was financial, although some were also looking for basic information about how to be more environmental, a plain English explanation of how to become net zero, or information tailored to their specific businesses needs. A number were also looking for a central, easily accessed source of information.

- Sources of information and support were varied. Almost half had already sought out information or support, most often from VisitScotland, Green Tourism, Zero Waste Scotland and Energy Saving Trust. However, when all businesses were asked where they would go for support in the future, the highest proportions said national and local government and VisitScotland.

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Appendix: Sub-samples

- Industry sector and regional sub-samples are defined as follows.

Industry sector
Serviced accommodation: Hotel, B&B/Guesthouse, Restaurant with rooms, Hostel
Non-serviced accommodation: Self-catering, Caravan/Camping/Glamping, Holiday Park
Attractions and activity providers: Cultural and/or arts venue, Historical visitor attraction – e.g., castle, stately home, historic site, etc., Museums and galleries, Distillery with visitor centre, Other food or drink producer with visitor centre, Other visitor attraction, Outdoor Activity Operator - Land Based, Outdoor Activity Operator - Water Based
Other: Exclusive Use Venue, Conference Centre, Other

Region
North of Scotland: Eilean Siar, Highland, Orkney Islands, Shetland Islands, Aberdeen City, Aberdeenshire and Moray
West of Scotland: Argyll & Bute, Clackmannanshire, West Dunbartonshire, Falkirk, Stirling, City of Glasgow, East Dunbartonshire, East Renfrewshire, Inverclyde, North Lanarkshire, Renfrewshire and South Lanarkshire
East of Scotland: Perth & Kinross, Angus, City of Dundee, Fife, City of Edinburgh, East Lothian, Midlothian and West Lothian
South of Scotland: Scottish Borders, Dumfries & Galloway, Easy Ayrshire, North Ayrshire and South Ayrshire

Technical appendix

Quantitative: method and sampling

- The data was collected by telephone interviews and an online survey.
- The target group for this research study was a representative sample of businesses within the Tourism sector in Scotland.
- The sample type was non-probability. Respondents were selected using a stratified random sampling technique, where interviewers worked to specified quota controls on key sample criteria, and selected respondents randomly within these quotas
- The sample source was a purchased database of tourism business from Sample Answers (based on agreed SIC codes), a database extract from VisitScotland's CRM system and a list of businesses that have been awarded Green Tourism certification (also supplied by VS).
- The target sample size was 450 and the final achieved sample size was 460. The reason for the difference between these two samples was standard sampling procedures allowing for slight overage.
- Fieldwork was undertaken between 30th September and 1st November 2021.
- For the online element, all contacts that had an available email address, but no phone number were invited to participate in an online version of the survey. Some who were contacted by a telephone interviewer requested an online survey as well. Respondents to paper and internet self-completion studies are self-selecting and complete the survey without the assistance of a trained interviewer. This means that Progressive cannot strictly control sampling, and, in some cases, this can lead to findings skewed towards the views of those motivated to respond to the survey.
- The overall response rate to the online survey was 7%. This is based on 660 invitations sent and 47 completing the online survey during the fieldwork period.
- The final sample may not be fully representative of all tourism businesses in Scotland; it is possible that it is skewed towards businesses with an interest in making environmental improvements due to the inclusion of businesses with green accreditation within the sample frame.
- In total, 7 telephone interviewers worked on data collection.
- Each interviewer's work is validated as per the requirements of the international standard ISO 20252. All telephone interviews were recorded and a minimum of 10% were listened to in full for validation purposes. All interviewers working on the study were subject to validation of their work. In addition, interviewers were constantly monitored by the Telephone Unit Manager to ensure quality was maintained throughout each interview.

Technical appendix

Quantitative: data processing and analysis

progressive

- The final data set was not weighted.
- The overall sample size of 460 provides a dataset with a margin of error of between +/- 0.91% and +/- 4.75%, calculated at the 95% confidence level (market research industry standard). Each sub sample of 100 provides a dataset with a margin of error of between ±1.95% and ±9.8%.
- Our data processing department undertakes a number of quality checks on the data to ensure its validity and integrity.
- For **online questionnaires** these checks include:
  - Responses are checked for duplicates where unidentified responses have been permitted.
  - All responses are checked for completeness and sense.
- For **CATI questionnaires** these checks include:
  - All responses logged by the interviewers are checked for completeness and sense. Any errors or omissions detected at this stage are referred back to the field department, who are required to re-contact respondents to check and if necessary, correct the data.
  - Data is entered into our analysis package SNAP and data is stored on CATI booths until imported and stored in our secure workfiles.
- A computer edit of the data carried out prior to analysis involves both range and inter-field checks. Any further inconsistencies identified at this stage are investigated by reference back to the raw data on the questionnaire.
- Where “other” type questions are used, the responses to these are checked against the parent question for possible up-coding.
- Responses to open-ended questions will normally be spell and sense checked. Where required these responses may be grouped using a code-frame which can be used in analysis.
- The supply of the sample list for this project was sub-contracted to Sample Answers.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.

Technical appendix

Qualitative: method and sampling

- The data was collected by online depth interviews.
- The target group for this research study was organisations operating in the tourism sector in Scotland.
- The sampling frame used for this study was a list of contacts provided by VisitScotland.
- In total, 9 depth interviews were undertaken via Zoom.
- Fieldwork was undertaken between 28th October – 16th November 2021.
- Respondents were recruited by email.
- In total, 4 moderators were involved in the fieldwork for this project.
- It should be noted that, due to the small sample sizes involved and the methods of respondent selection, qualitative research findings do not provide statistically robust data. This type of research does, however, facilitate valid and extremely valuable consumer insight and understanding.
- All research projects undertaken by Progressive comply fully with the requirements of ISO 20252.