

2 April 2024

Your request for information under the Freedom of Information (Scotland) Act 2002 (“the Act”)

Thank you for your request for information which was received by VisitScotland on 14 March 2024 at 11:47am, requesting information about:

A copy of the research done in Sept 23 in regard to the Quality Assurance scheme

VisitScotland’s Response

Please find attached a copy of the “2022-23 Quality Assurance Scheme Business Feedback Survey Topline Results” dated September 2023.

Your right to request a review

If you wish to request a review of your application under either the Freedom of Information (Scotland) Act 2002 or the Environmental Information (Scotland) Regulations 2004, your request should be submitted to us in writing, or another permanent format (for example e-mail or voice recording) to:

Mr Malcolm Roughead
Chief Executive
VisitScotland
Waverley Court
4 East Market Street
Edinburgh
EH8 8BG

Telephone: 0131 472 2201

E-mail: malcolm.roughead@visitscotland.com

The request for a review should be received by us within 40 days of the date of this letter. Any request for a review should also set out, in as much detail as possible, the reasons why you are not satisfied with our response or the manner in which we have dealt with your application.

If you are not satisfied with the result of the review, then you have the right to appeal to the Scottish Information Commissioner.

You can contact the Scottish Information Commissioner at:

Scottish Information Commissioner
Kinburn Castle
Doubledykes Road
St Andrews
Fife

KY16 9DS

Telephone: 01334 464610

Fax: 01334 464611

Email: enquiries@itspublicknowledge.info

You also have the right to appeal to the Court of Session in Scotland on a point of law concerning our response.

A large, stylized purple flower graphic is positioned on the left side of the page. It features a central circular element with a three-petaled flower inside, surrounded by several curved, petal-like shapes that radiate outwards. The entire graphic is rendered in a solid purple color.

*Visit
Scotland* | *Alba*[™]

**2022-23 QUALITY ASSURANCE SCHEME
BUSINESS FEEDBACK SURVEY
TOPLINE RESULTS**

Insight Department, October 2023

Content

Executive summary

Background and research methodology

Profile of respondents

Experience and satisfaction with Quality Assurance Scheme

Future intention and support needed

Executive summary

Satisfaction with the live visit and advisor



87% very satisfied/satisfied with thoroughness of visit.



84% very satisfied/satisfied with usefulness of advice



84% very satisfied/satisfied with the competence/knowledge of the advisor

Satisfaction with QA report



88% very satisfied/satisfied with the time of report delivery.



95% very satisfied/satisfied with the ease of understanding of the report



88% very satisfied/satisfied with the relevance of content to their business



84% very satisfied/satisfied with the usefulness of the report and advice within it.

Overall satisfaction and recommendation



87% very likely to continue being part of the scheme in the next 12 months



Overall, **84%** very satisfied/satisfied with their most recent assessment



Just over half of respondents (52%) said they were highly likely to recommend the QA scheme to others; the Net Promoter Score is lower than 2019 results.



79% very satisfied/satisfied with the value of their participation in the scheme

Executive summary

Top 5 motivations on participating in the QA Scheme

- To build consumer confidence - to empower visitors to make informed choices .
- To enhance my business reputation.
- To access advice from Quality Assurance Advisors .
- To improve my business performance.
- To gain official, independent awards from the National Tourist Board.



87% Very likely/ Quite likely to continue being part of the VisitScotland Quality Assurance Scheme in the next 12 months



Nearly half of businesses prefer to have a grading visit every TWO years



Amongst those 4 Star businesses, 73% wish to remain as 4 Star in the future; of those that are currently rated as 3 Star, over half of them would like to remain as they are (3 Star)

Future intention

Most useful advice needed from QA advisors

- Marketing & promoting my business (74%)
- Legislation relevant to my business (71%)
- Consumer insights and trends (71%)
- Benchmarking advice from other similar businesses (67%)
- Sustainability (61%)
- Digital advice (60%)

Evaluating the Quality Assurance Scheme

- VisitScotland operates a Star graded Quality Assurance (QA) Scheme for a wide variety of businesses. The scheme aims to promote key standards amongst tourism businesses, providing visitors with reassurance of what to expect when they visit and helping businesses to develop the quality of their product.
- Since its inception in 1985, the development of the VisitScotland QA schemes has been informed by research amongst the businesses who participate in the schemes. Research is vital to ensure schemes keep pace with the quality criteria which customers value, and for the schemes to remain relevant and valuable to the tourism industry.
- In September 2023, an anonymous survey was established by VisitScotland to collect feedback from businesses who had a live grading visit between April 2022 and August 2023; it gathered feedback on the quality grading visits, reports, competence of the advisor(s), and participants' overall satisfaction with the scheme as well as their future intention of staying in the scheme.
- 1,374 businesses were surveyed, and 197 completed responses were received (14% completion rate).
- The overall sample size of 197 provides a dataset with a margin of error of $\pm 6\%$, calculated at the 95% confidence level. The margin of error on sub-samples varies by size of base. Data in this report is weighted against the QA database population by business category, to minimize response bias.



Advisory Visits (April 2022 –August 2023)



Grading report
(April 2022 –August 2023)



Feedback collection (Sep 2023)

Research context: a timeline of major events in the market since early 2022



Sources:

The Scottish Parliament Information Centre: <https://spice-spotlight.scot/2023/05/10/timeline-of-coronavirus-covid-19-in-scotland/>

VisitScotland Corporate news: <https://www.visitscotland.org/supporting-your-business/funding/recovery-funding>

Mygov.scot: <https://www.mygov.scot/short-term-let-licences>

BBC news

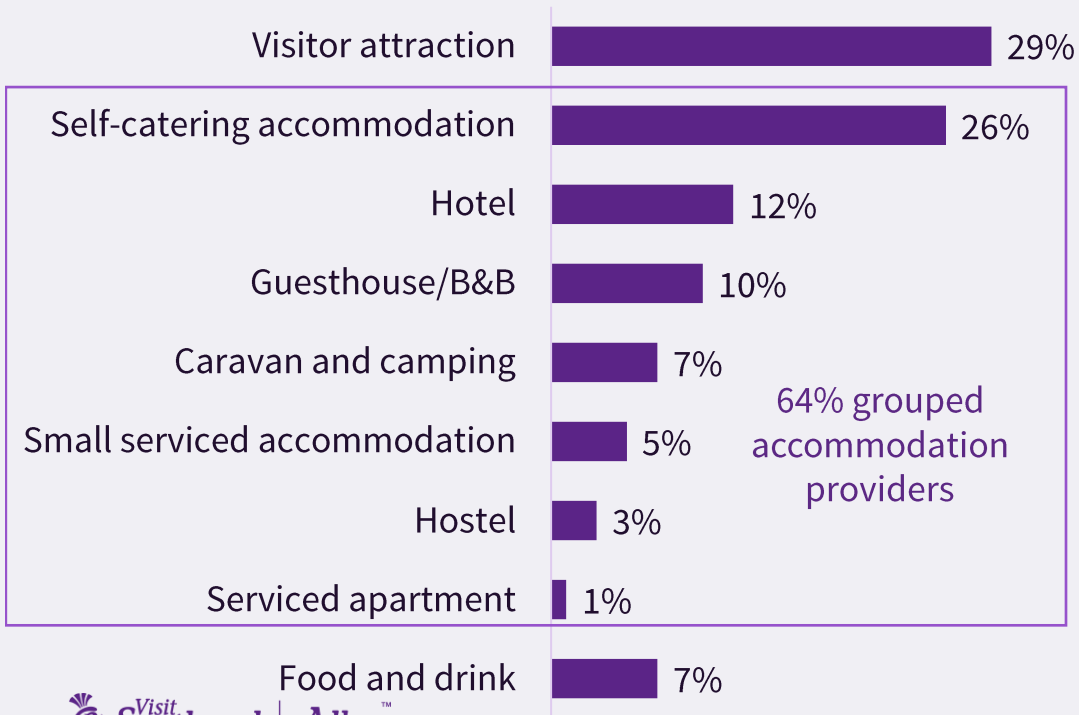
PROFILE OF RESPONDENTS

This section gives the profile of businesses by industry sector, size of business, local authority location, years of trading.

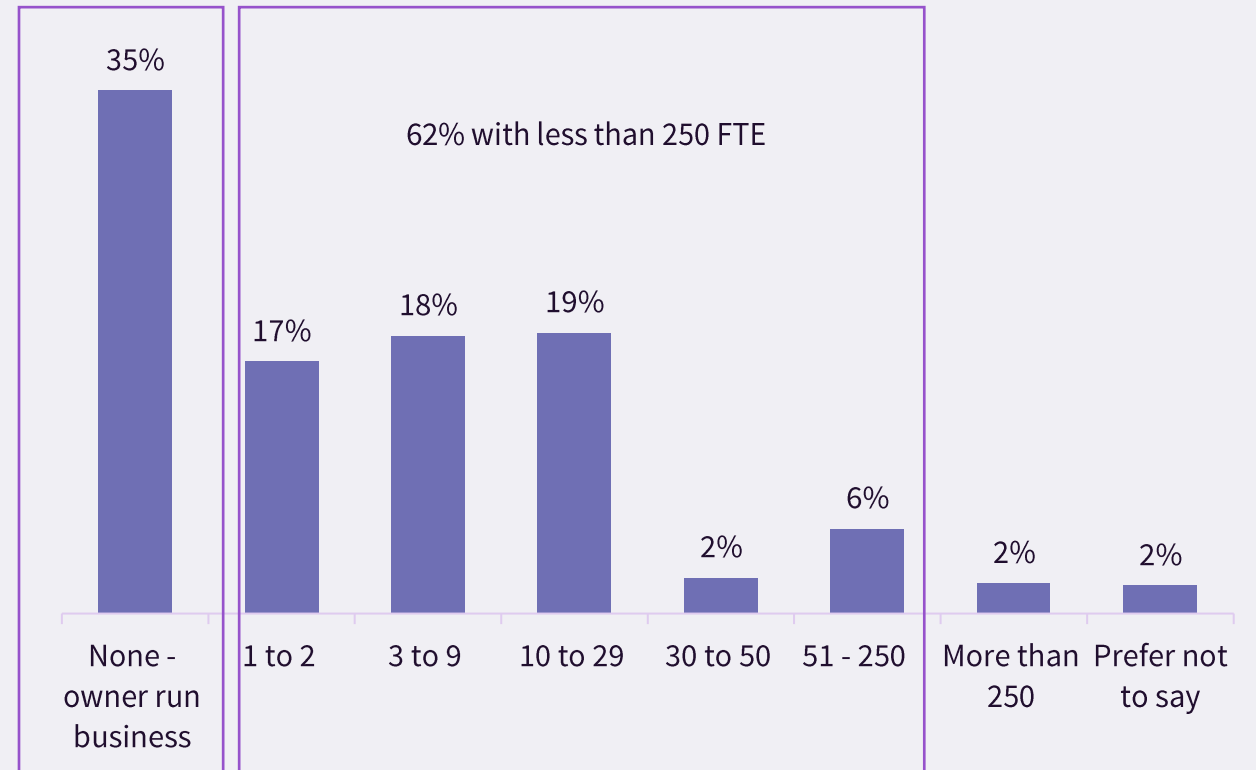
Business category and size

- The accommodation sector had the largest share of the survey responses (64% grouped), followed by visitor attractions (29%), then food and drink businesses (7%).
- Over a third of respondents were solo businesses (without employees); large size business (organizations with more than 250 full-time equivalent staff) only accounted for 2%, which means the vast majority of respondents were from small and medium sized businesses.

Type of business



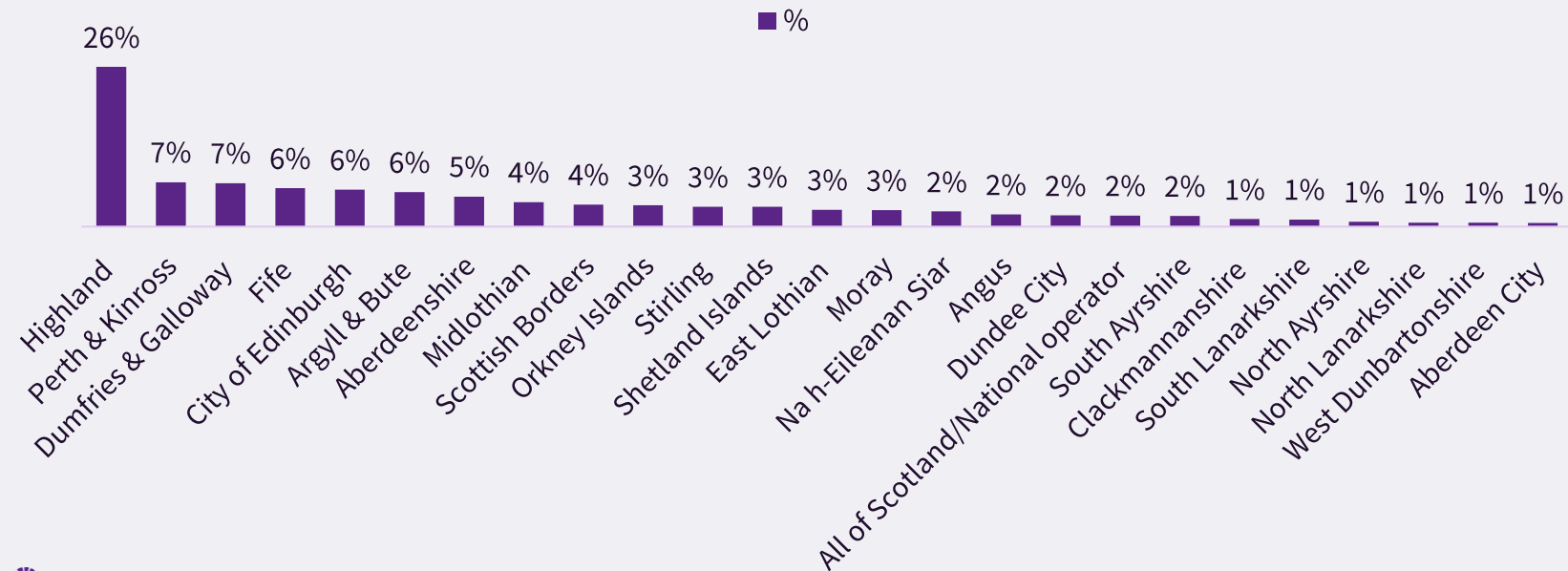
Size of business by No. of full-time equivalent staff



Region of business location by Local Authority

- Over 1 out of 4 respondents are from the Highlands, making it the largest Local Authority area where QA participant businesses are located, followed by Perth & Kinross (7%), Dumfries & Galloway (7%), Fife (6%), City of Edinburgh (6%) and Argyll & Bute (6%).
- Limited responses were received from the Greater Glasgow areas from the 2022-2023 survey.

In which region is your business located?



Years in service (by September 2023)



A scenic landscape of a mountain valley. In the foreground, a dirt path winds through lush green grassy hills. A small stream flows through the valley, surrounded by rocks and vegetation. In the distance, a hiker is visible on the path. The background features steep, rocky mountains under a clear blue sky.

EXPERIENCE AND SATISFACTION WITH THE QUALITY ASSURANCE SCHEME

This section covers respondents' motivation on participating in the Scheme, their specific feedback on advisors, the grading visits and grading reports, together with their overall satisfaction and recommendation of the Scheme.

Motivations on participating in the Quality Assurance Scheme

Please tell us your reasons for participation in VisitScotland Quality Assurance Scheme in 2022/23



Feedback on Quality Assurance Advisor

Did the advisor..	No	Yes	Base n
Make every effort to view all aspects of the property	5%	95%	196
Discuss the visit with you	7%	93%	197
Give an indication of the grading awarded at the time of the visit	22%	78%	197
Provide general advice on improving quality or examples of best practice	3%	97%	197

base n = from 196 to 197

Satisfaction with the Quality Assurance Advisor

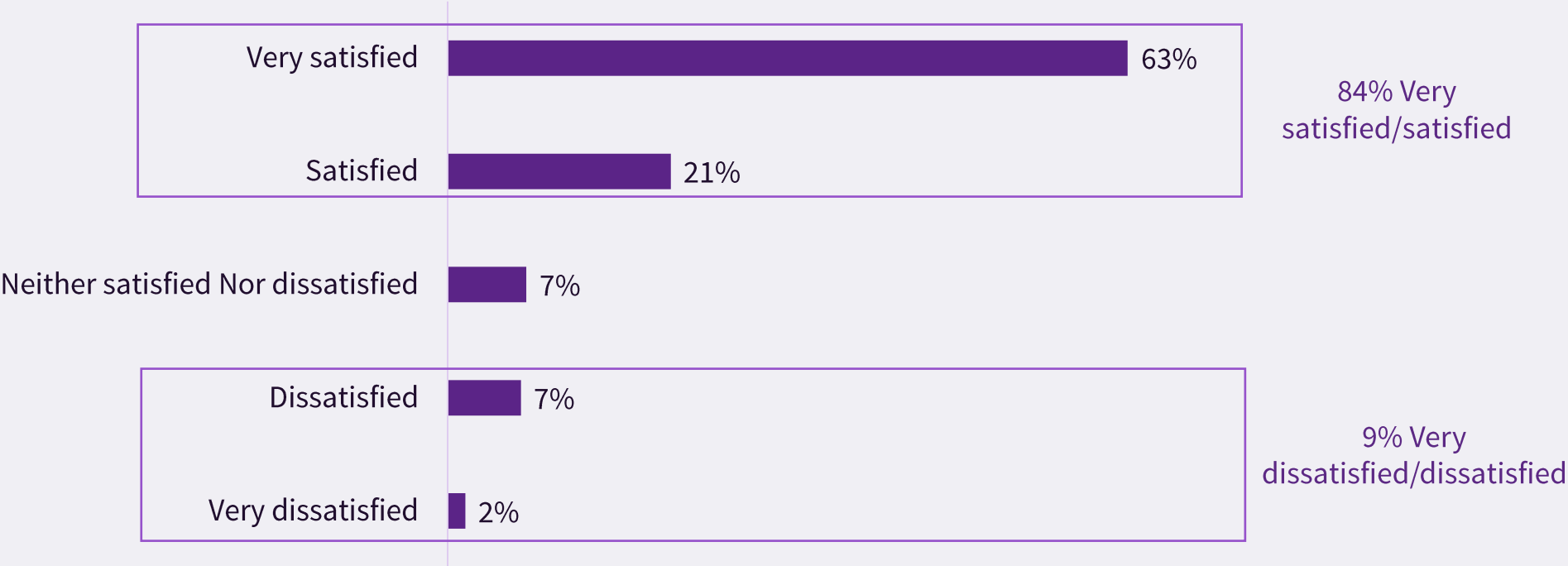
How satisfied were you with	Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Top 2 Satisfaction score (Very Satisfied + Satisfied)	base n
The thoroughness of the visit and what was being assessed	65%	21%	8%	5%	1%	87%	196
The usefulness of the advice provided by the advisor	53%	31%	11%	3%	1%	84%	195
The competence/knowledge of the advisor	65%	19%	13%	3%	1%	84%	195

Satisfaction with the Quality Assurance Grading report

How satisfied were you with	Very Satisfied	Satisfied	Neither satisfied nor dissatisfied	Dissatisfied	Very dissatisfied	Top 2 Satisfaction score (Very Satisfied + Satisfied)	Row n
The time it took between the visit and delivery of the report	50%	38%	4%	7%	1%	88%	196
Ease of understanding of the report	61%	35%	2%	3%	0%	95%	195
Usefulness of report & the advice contained within it	57%	27%	11%	4%	2%	84%	195
Relevance of content to your business	51%	37%	9%	2%	2%	88%	194

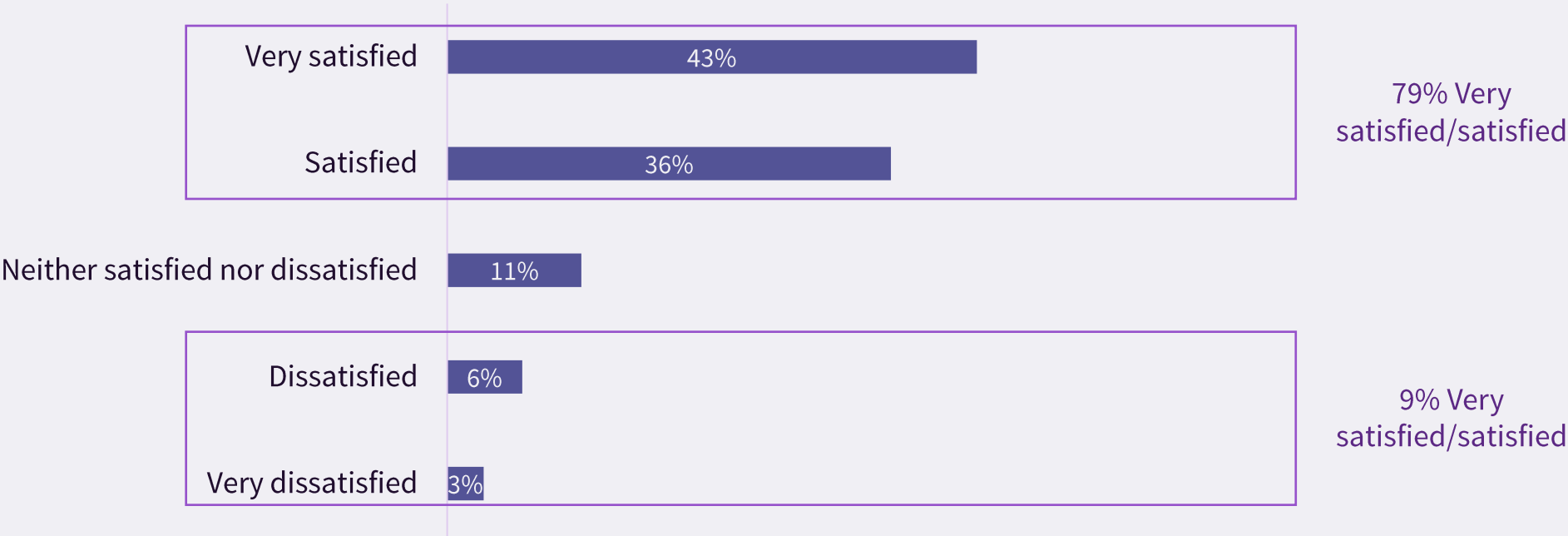
Overall satisfaction with the recent assessment

Overall, how satisfied were you with your most recent Quality Assurance assessment?



Satisfaction with the overall value of participation in the scheme

How satisfied were you with *the overall value* of your participation in the scheme?



'Q. Please give us further comments based on your satisfaction score, if any.

Verbatim comments on satisfaction scores (key themes)

Positive feedback

- Appreciation of the knowledge and professionalism of advisors
- Engaged conversations with advisors
- Thoroughness of information in the reports

Example comments:

“The assessor was very thorough and knew the market well.”

“As expected, a very thorough, detailed and balanced report with highly useful conversation.”

“The reports are invaluable for our 55 properties; we use them to decide on refurbishments and identify problems with individual sites.”

“Excellent service provided by VisitScotland assessor and a personal meetup gave full opportunity to convey commitment and knowledge of owner.”

Constructive feedback

- Relevance of QA requirements to consumer needs
- Lack of return on investment for consumer bookings/recognition of QA Rating by consumers.
- Tailored feedback needed to individual businesses/sectors.
- Feedback is not always actionable when considering the cost

“Some requirements seem a bit outdated”

“I ended up not going ahead with the QA scheme. I have been involved in it for the past five years, but I have found it has had no impact on the number of bookings I receive - I have virtually no enquiries via Visitscotland - and I don't feel the things being assessed really have a bearing on what my customers are looking for.”

“While we were satisfied with the grading, and will use feedback to push for improvements, some of the comments from the assessor demonstrated a lack of understanding of the challenges of operating a visitor attraction from within a listed historic building which protects original features including internal painted doors. We have been unable to engage with the assessor since the assessment to challenge some of these.”

“Those suggestions which require significant financial outlay will have to wait until trading conditions improve considerably.”

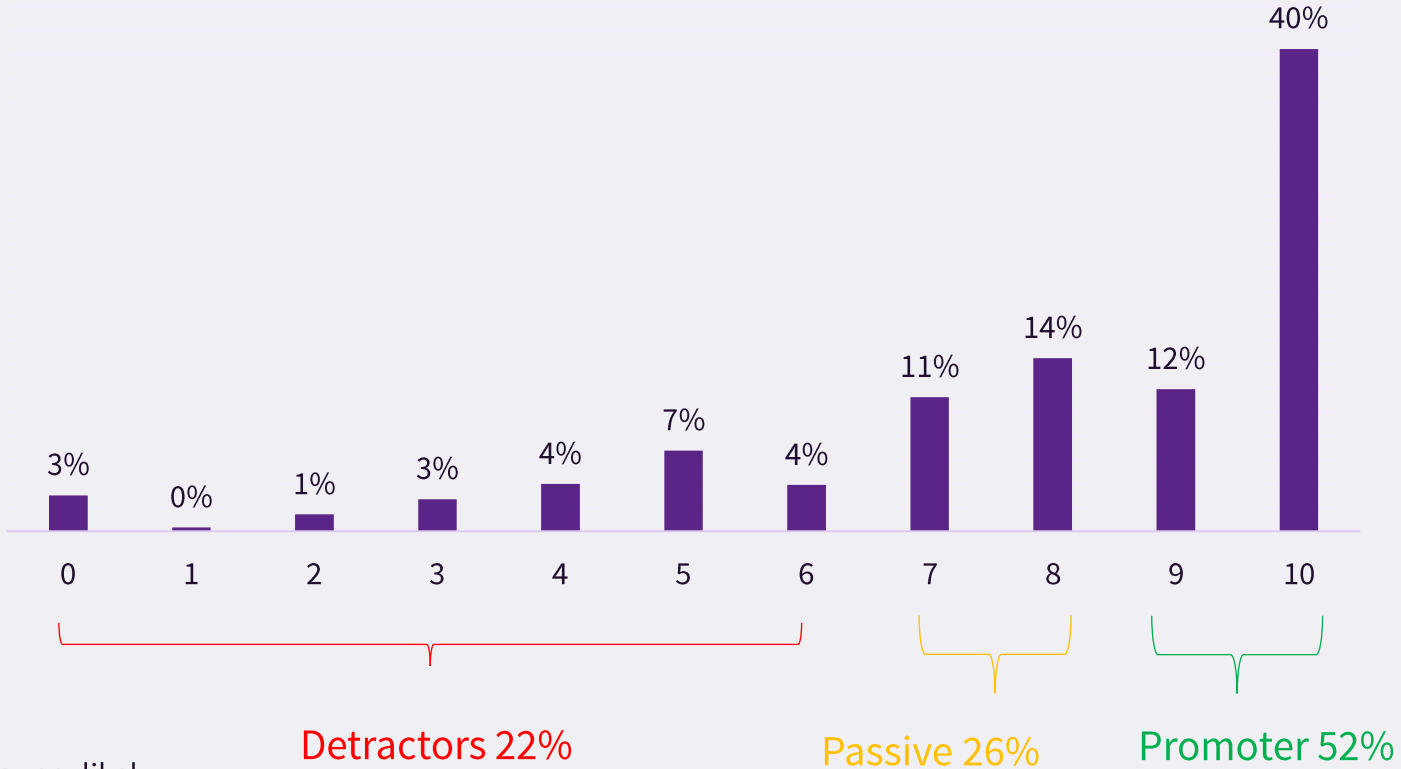
“The only thing I feel would have benefitted us would have been an opportunity to discuss the visit at the time or before a report is generated.”

Likelihood to recommend being part of the Quality Assurance Scheme

How likely are you to recommend being part of VisitScotland's Quality Assurance to other tourism operators?

Net promoter score
 = Promoter score (52) – Detractors Score (22)
 = Net promoter score 30

NPS is a trademarked term used for market research analysis. The NPS score in 2023 study is lower than 2019 survey (49).





FUTURE INTENTION AND SUPPORT NEEDED

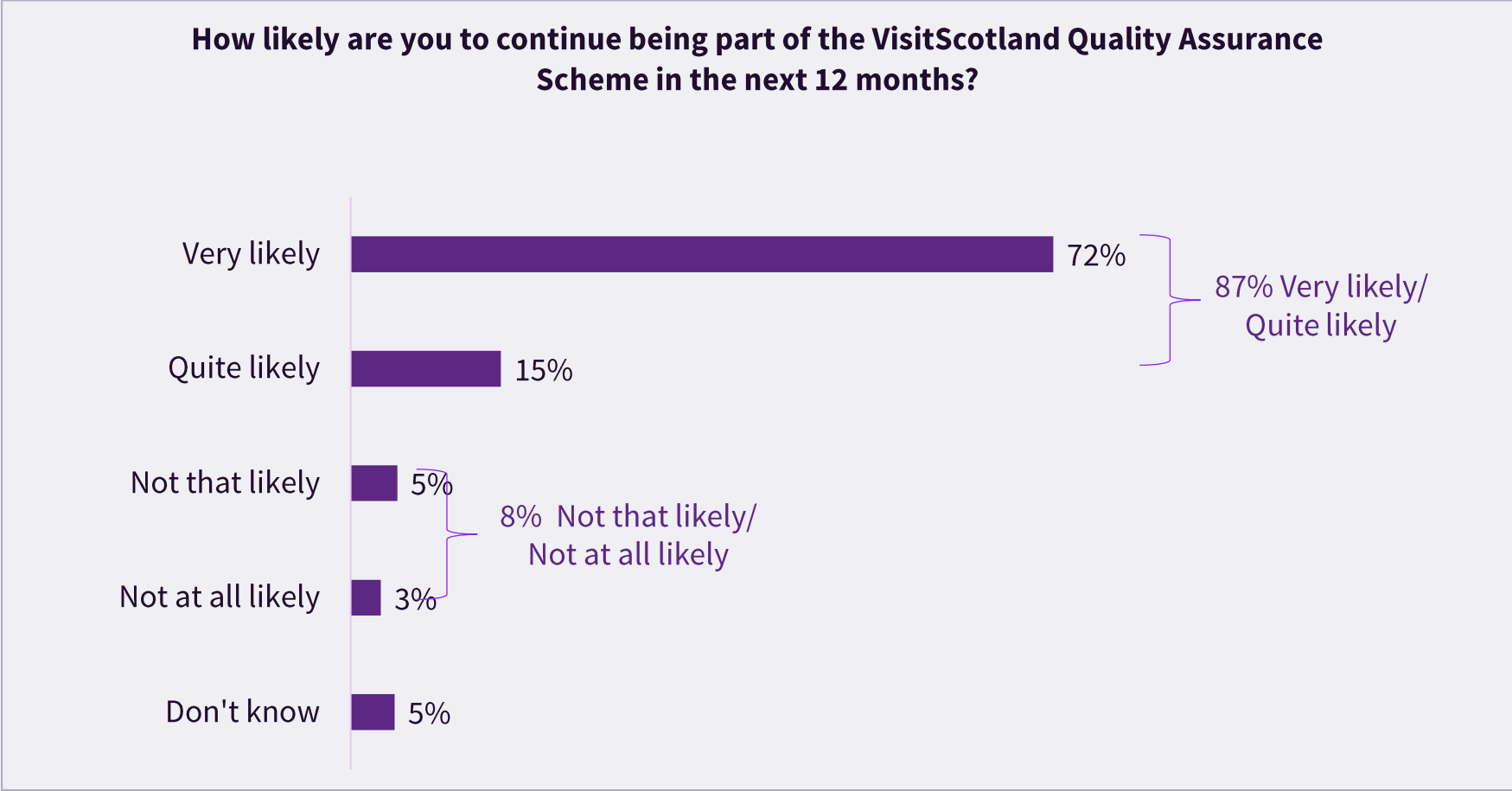
This section gives information on respondents' future intention of being part of the Scheme, areas of advice needed, preferred frequency on grading visits and target Star grading in the future

Participation in Quality Assurance Scheme

- Nearly a quarter of respondents have been part of VisitScotland QA Scheme for less than 2 years (at date of survey September 2023).
- 40% respondents have been participating in the Scheme for over 10 years.

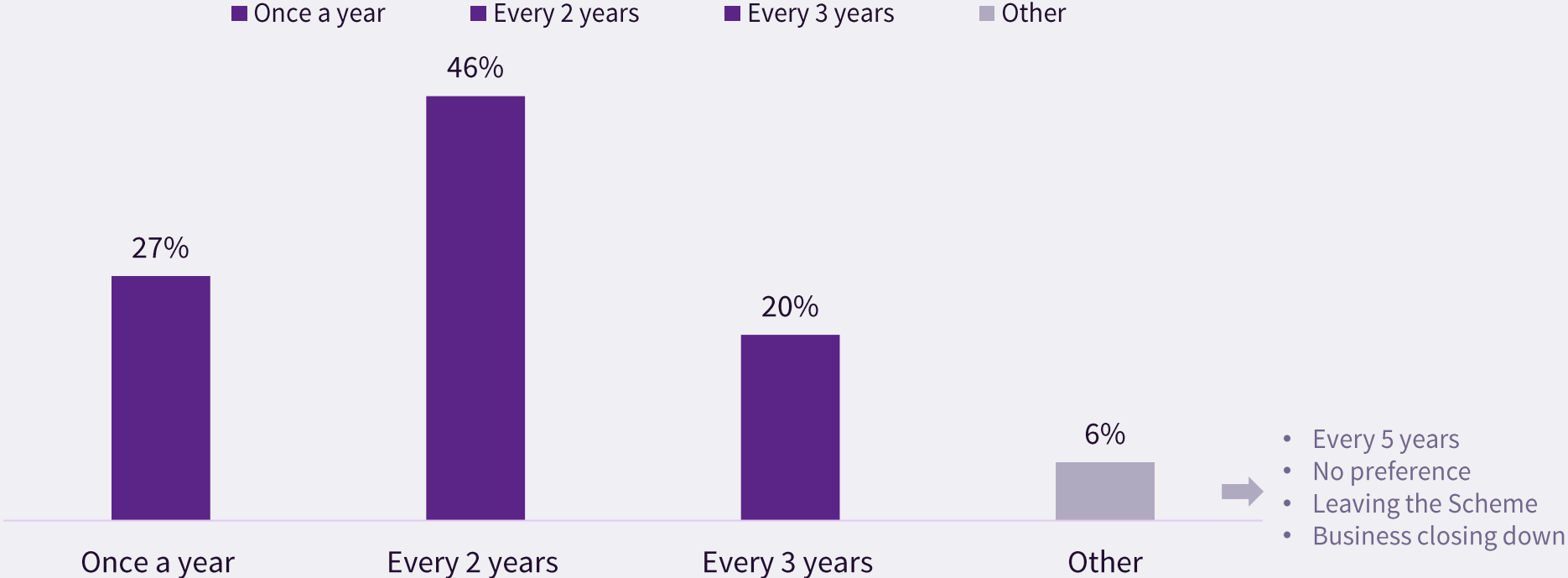


Future intention of being part of the Scheme



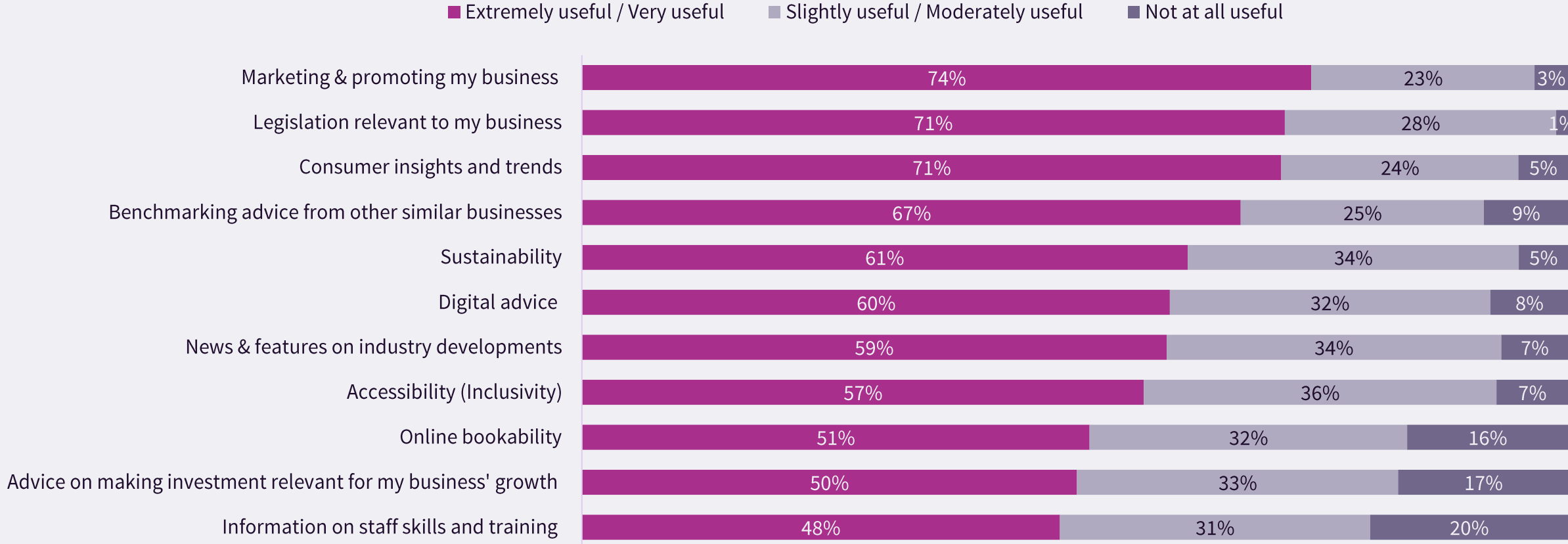
Preferred frequency on grading visits

How often would you prefer a grading visit to your business to take place?



Potential areas of advice of use for the future

Looking forward, what areas of advice from our Quality Assurance Advisors would be most useful to you?



Current Star rating status and future ambition

- Of those that are currently rated as 3 Star, 54% would like to remain as they are, 37% would like to achieve 4 Star in the future and 9% are aiming for 5 Star.
- Amongst those 4 Star businesses, 73% wish to remain as 4 Star, with 27% expressing the desire of achieving 5 Star.
- All current 5 Star businesses are aiming to keep their 5 Star status in the future.

		Star rating I would like to achieve in the near future			
My current Star rating	3 Star	54% 3 Star	➔ 37% 4 Star	9% 5 Star	N=40
	4 Star	-	73% 4 Star	➔ 27% 5 Star	N=103
	5 Star	-	-	➔ 100% 5 Star	N=49

END OF REPORT

Full verbatim comments from respondents are available upon request.

Information on technical data processing approach and any other further enquiries, please get in touch with research@visitscotland.com

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.

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