



SCOTLAND RESIDENTS' VIEW ON TOURISM 2025

A focus on the role of tourism and community engagement

Published June 2025

Research Methodology

- This report has been prepared using survey data commissioned by VisitScotland and conducted by YouGov Plc. The survey was carried out online.
- All figures, unless otherwise stated, are from YouGov Plc. Total sample size was **1,032 adults**. Fieldwork was undertaken between **9th - 13th January 2025**.
- This survey has been conducted using an online interview administered to members of the YouGov Plc Scotland panel who are individuals who have agreed to take part in surveys.
- The figures have been weighted (normally from census data or if not available from industry accepted data) to be representative of all Scotland adults (aged 18+).



Background

- This research was commissioned to gain an up to date understanding of how tourism is perceived in Scotland by its residents.
- Previous research was conducted in 2021 but focused on the effects of the pandemic on tourism in Scotland.
- The research identified how positively or negatively Scotland residents viewed tourism both at a national level but also at a local regional level.
- This report focuses on how Scotland is perceived at a national level.



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.
- As a nationally representative sample, regional analysis is possible where sample size allows. We have grouped local council areas into larger geographies where necessary to allow as much sub-national analysis as possible where this is appropriate. Only figures where the sample size is above 50 are reported.
- We would caution against over interpretation for some of these groupings where tourism is viewed differently between different local authorities. For example, although the Lothians have been grouped because of geography, East Lothian residents often offer different responses to those living in West Lothian and Midlothian
- Views and perceptions of tourism will be influenced by a number of factors. For example, some respondents may have views on tourism based on commuting into Edinburgh or Glasgow as well as from taking their own holidays in Scotland now or previously.
- The questionnaire took the respondent through the role of tourism in Scotland at a national level, through to an understanding of the role of tourism in their own local authority area.



KEY FINDINGS

Views on the tourism industry

- Overall, the tourism industry was viewed positively by respondents. When asked about all sectors across Scotland, 95% of respondents viewed the tourism sector as important to Scotland's economy.
- Respondents noted the key positives of tourism in Scotland as benefitting the hospitality industry and the economy as well as bringing in visitors from outside Scotland.
- Around 9 in 10 respondents either strongly agreed or tended to agree that tourism attracts investment and was beneficial for Scotland's overseas reputation.
- Half of respondents (53%) had concerns about the reduction of affordable housing due to second homes /the holiday rental market . There were also concerns about the environment, with almost half of respondents (48%) disagreeing that tourism protects and enhances the natural environment





Tourism in local areas

- When asked about their local area, 3 in 5 respondents viewed their local area as a tourist destination.
- Of respondents who view their area as a tourist destination, 40% felt the balance of priorities were equal between the needs of local residents and the needs of tourism business.
- Among those who live in a tourist area, tourism was seen as positive for supporting a range of local jobs (88%), creating employment opportunities (83%) and generating economic growth (82%).
- Almost 4 in 5 (78%) respondents either strongly agreed or tended to agree that tourism businesses support local jobs and other local businesses in tourist areas.

Key problems in local areas

- A quarter of respondents (26%) overall viewed lack of toilet facilities as a major problem in their local area. This increased to 36% for respondents who were of retirement age and 45% for residents of Highlands and Islands.
- Residents from the Highlands and Islands felt more strongly about issues such as too many motorhomes in the area (42% viewed this as a major problem), parking in passing places (29% viewed this as a major problem) and irresponsible camping (26% viewed this as a major problem) compared to other areas.
- For a third of respondents (32%) who reside in the City of Edinburgh, overcrowding was viewed as a major problem.

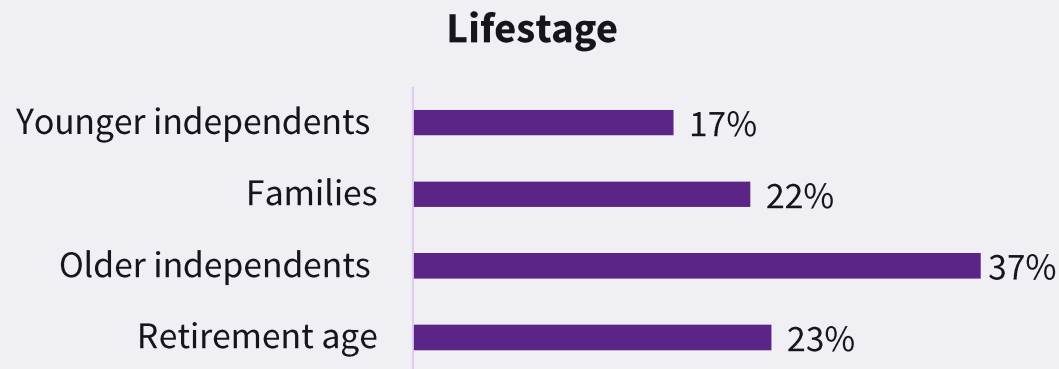
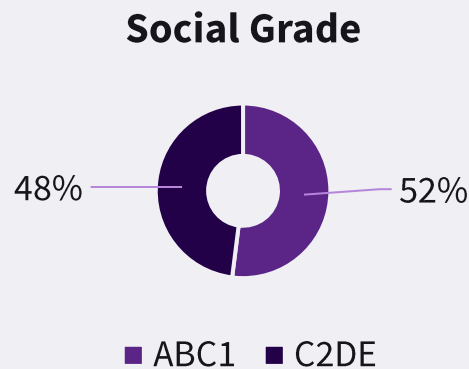
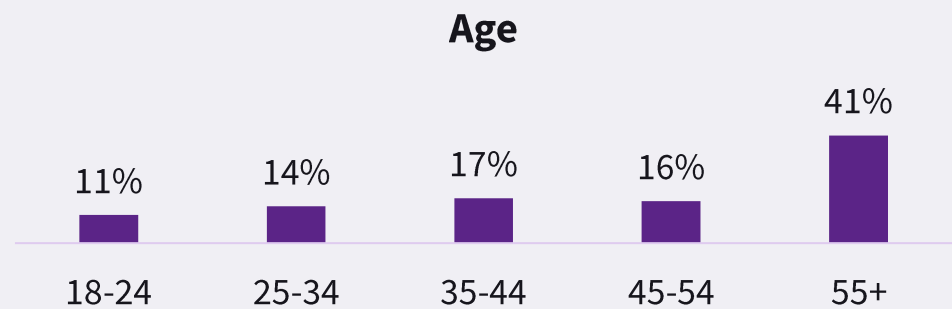
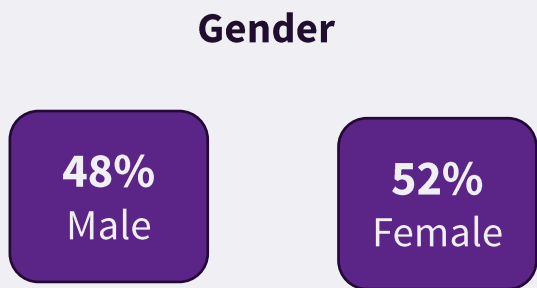




RESPONDENT PROFILE

Respondent Profile: Age and Lifestage

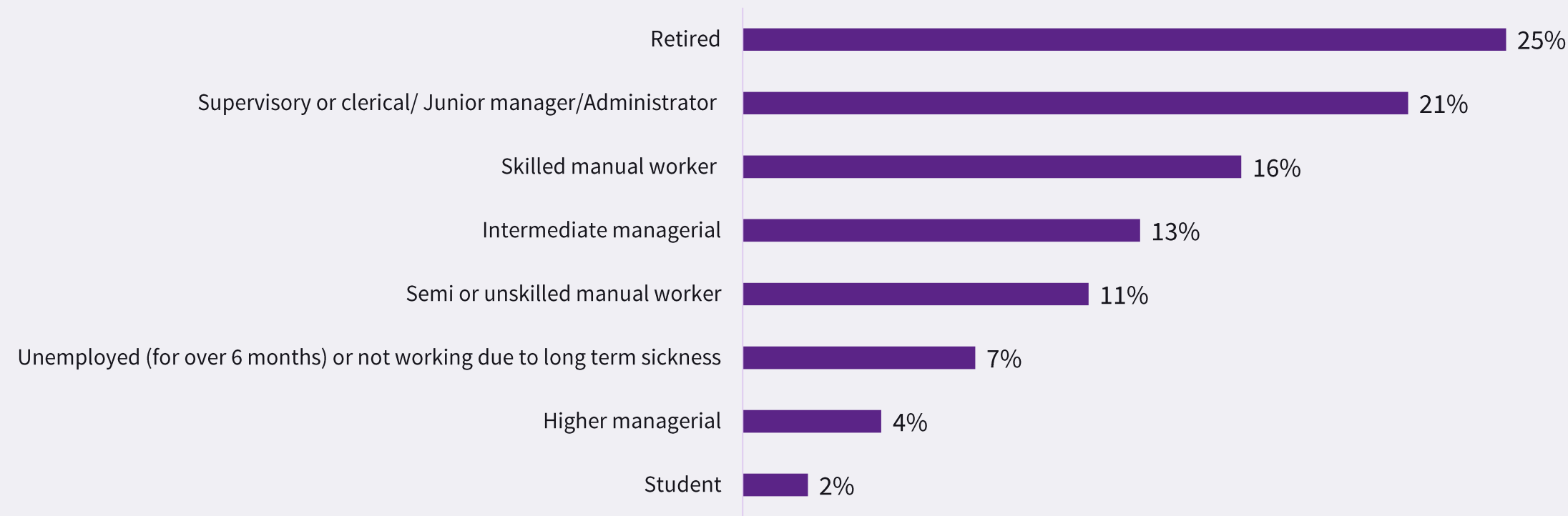
Respondents were from a mixture of backgrounds. Around 2 in 5 respondents were aged 55+ and more than a third (37%) were older independents. Lifestage was calculated using age and presence of children in the household to create the categories of younger independents (18-24 with no children in the household), families (18-64 with children in the household), older independents (35-64 with no children in the household) and retirement age (65+).



Respondent Profile: Occupation

Respondents were from a variety of backgrounds with a quarter (25%) being retirees.

Chief Income Earner Category



Respondent Profile: Area

- 63% of respondents had lived in their current area for more than 10 years.
- A quarter of respondents (26%) described the area where they live as a year-round tourist destination.
- A quarter of respondents (26%) described the area where they live as a seasonal destination (popular at certain times of the year).
- 44% of respondents said they take short breaks or holidays in Scotland once a year.

Base: 1,032 all Scotland adults. PVS_Q20. How long have you lived in your current area?; PVS_Q21. How would you describe the tourism appeal of the area where you live? (Please select the option that best applies); PVS_Q22. Thinking about any previous holidays in Scotland...Which of these statements best describes you? (Please select the option that best applies)

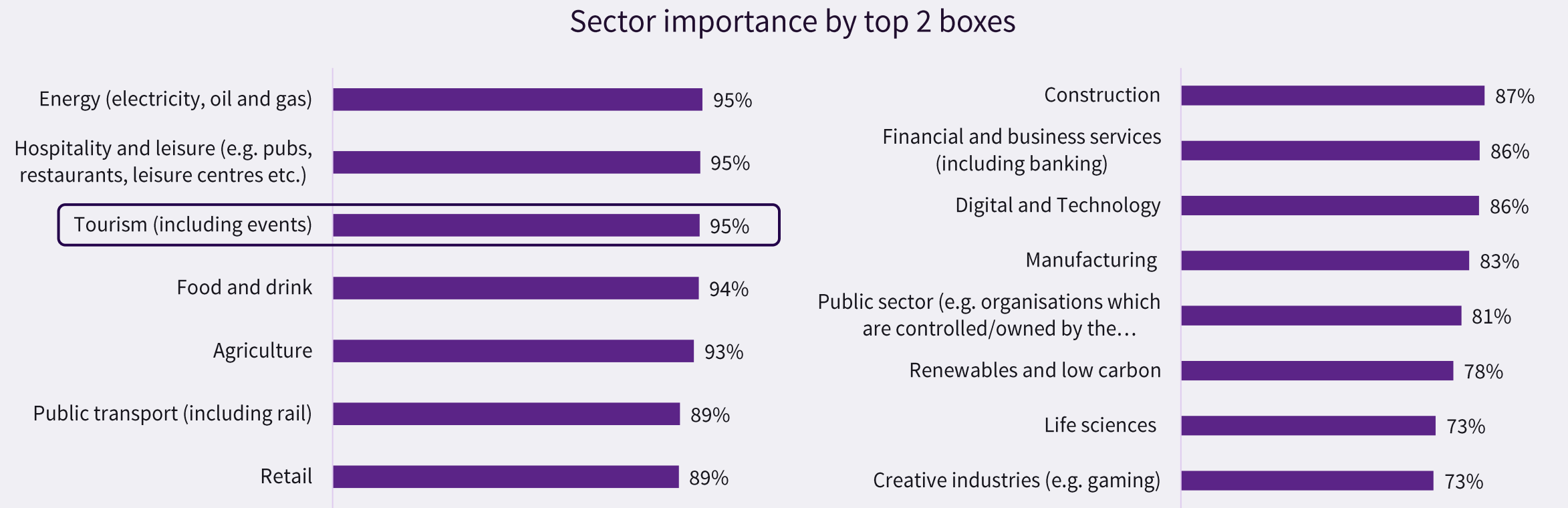


A wide-angle photograph of a coastal scene. In the foreground, two individuals wearing black wetsuits are captured mid-jump from a series of natural rock steps that lead down to the sea. The person on the left is higher up, with their arms outstretched, while the person on the right is lower, closer to the water. The sea is a deep blue-grey color with visible ripples. In the background, a flat, grassy headland extends into the sea under a heavy, overcast sky. A small white structure, possibly a lighthouse or marker, is visible on the horizon of the headland.

PERCEPTIONS OF THE TOURISM INDUSTRY

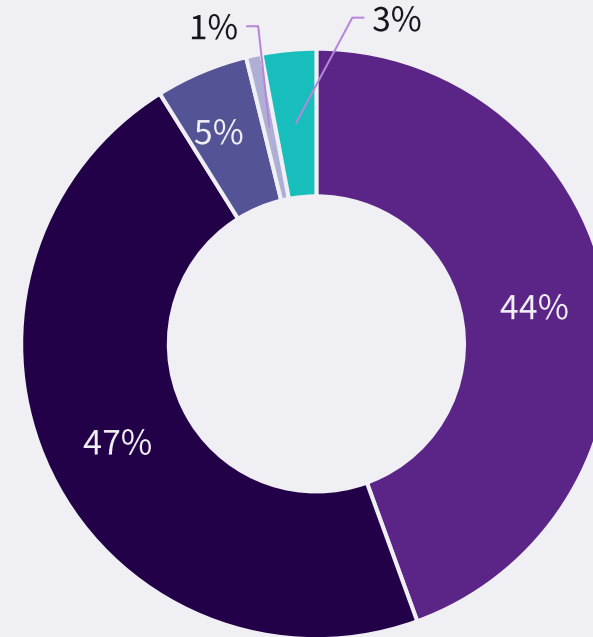
Among Scottish residents, tourism is recognised as one of the most important industries to the Scottish economy

Tourism was ranked as just as important to the economy as the energy and hospitality and leisure sectors



The Scottish tourism industry is viewed positively

Overall, the view of the tourism industry was encouraging, with 91% of respondents viewing the industry positively



- Very positively – it is a force for good, creating economic and social value
- Quite positively – the benefits outweigh the negatives
- Quite negatively – the negatives outweigh the positives
- Very negatively – it does not create notable economic or social value
- Don't know

Positive aspects of tourism in Scotland



The majority of respondents identified tourism as beneficial to the hospitality industry and the economy, including opportunities for employment. Other positives that arise from tourism included showcasing Scotland's beauty and history and bringing visitors from outside of the country.

Amongst those who mentioned a positive aspect to tourism in Scotland, when asked what the most important element of tourism would be to prioritise for improvement, around a third (34%) selected economic benefits.

78% It benefits Scotland's hospitality industry

72% Showcases the beauty of Scotland

76% Economic benefits

72% Employment opportunities

76% Brings in visitors from outside Scotland

63% It showcases Scotland's history



What are the positive aspects of tourism in Scotland (cont)?

62% It enhances Scotland's reputation and influence internationally

61% Showcases Scotland's top locations and attractions

59% Benefits local communities

56% It showcases Scotland's qualities

1% Not applicable – there are not any positive aspects of tourism in Scotland

1% Other



Negative aspects of tourism in Scotland?

More than half of respondents noted the reduction in affordable housing due to second homes/holiday rental market as a negative aspect of tourism in Scotland. Other negative aspects included increased traffic and congestion and increased litter.

As well as being the most commonly identified negative aspect of tourism, around a third (32%) of respondents who listed negative aspects of tourism selected the reduction of affordable housing due to second homes/holiday rental market as a priority area to be addressed.

53% Reduction in affordable housing because of second homes/holiday rental market

40% Damage to the natural environment

47% Increased traffic and congestion

39% Local services and infrastructure can't cope with the influx of visitors

46% Increased litter

38% Disruption to local residents



What are the negative aspects of tourism in Scotland (cont)?

35% Visitors disrespectful/don't behave responsibly

9% Not applicable – I do not think there are any negative aspects of tourism in Scotland

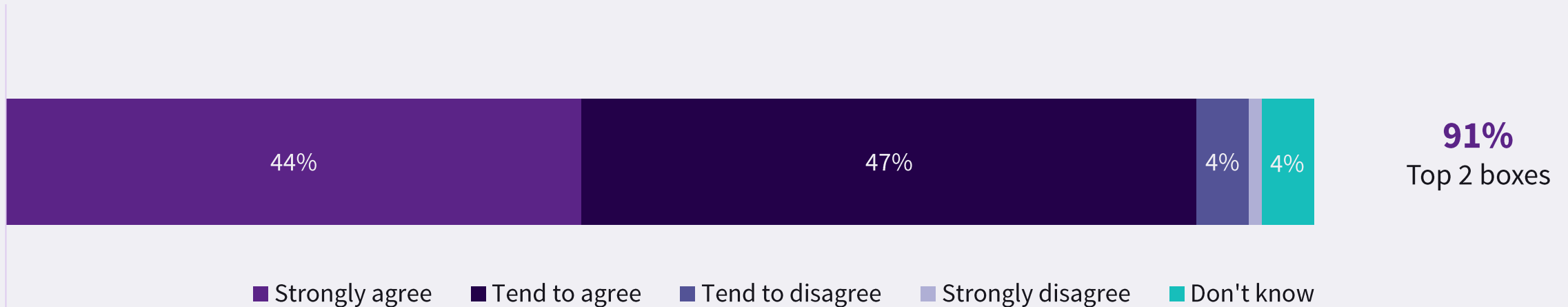
34% Too many people leading to overcrowding

2% Other

26% Negative carbon footprint/impact on climate change

"Tourism brings economic benefits to Scotland as a whole."

Respondents were positive about the economic benefits of tourism, particularly families and residents of Stirling and Forth Valley.



Top 2 boxes by lifestage:

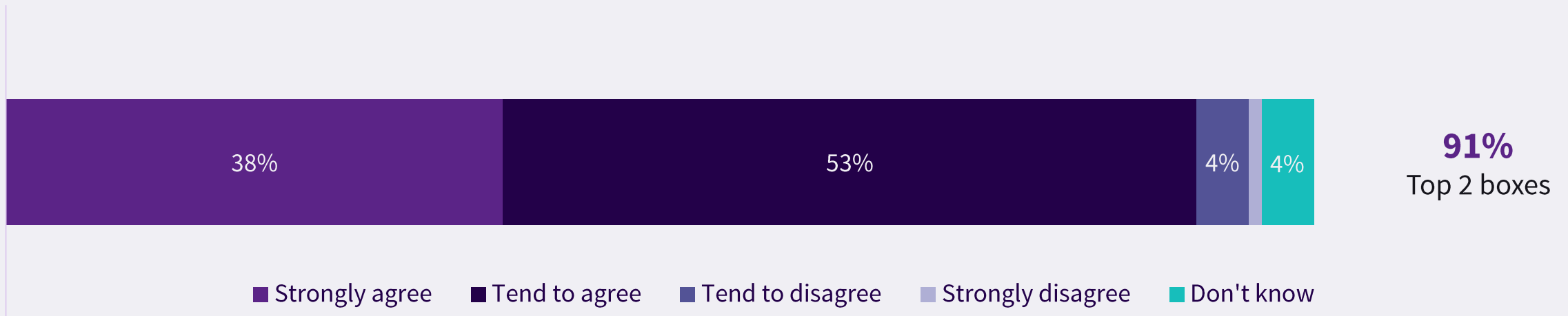
- Families (95%)
- Younger independents (89%)

Top 2 boxes by region:

- Stirling and Forth Valley (98%)
- Lothians (88%)
- Highlands and Islands (86%)

“Tourism attracts investment e.g. visitor attractions, hotels etc”

9 in 10 respondents (91%) either strongly agreed or tended to agree that tourism attracts investment.



Top 2 boxes by lifestage:

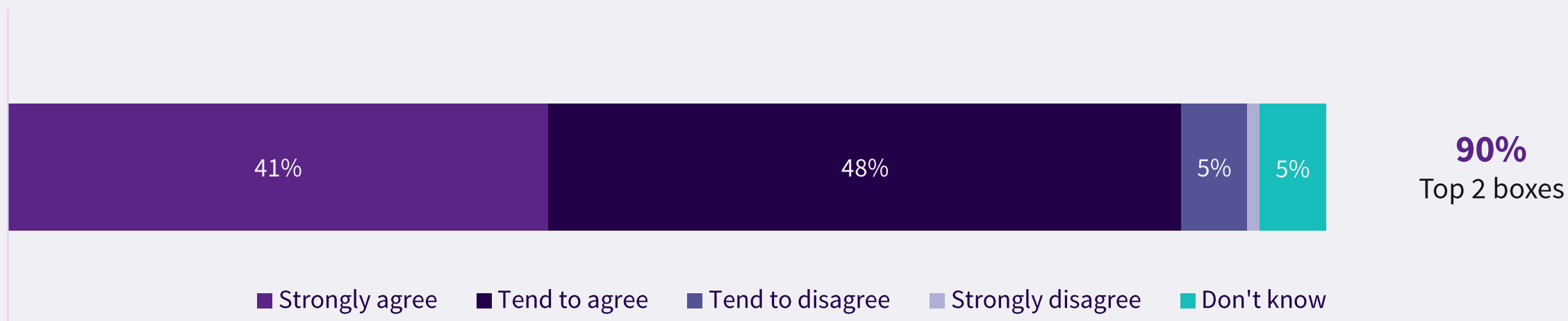
- Retirement age (94%)
- Older independents (87%)

Top 2 boxes by region:

- Stirling and Forth Valley (96%)
- Lothians (89%)
- Highlands and Islands (88%)

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

Around 9 in 10 respondents either strongly agreed or tended to agree that tourism was positive for Scotland’s overseas reputation.



Top 2 boxes by lifestage:

- Families (91%)
- Retirement age (89%)

Top 2 boxes by region:

- Angus and Dundee (94%)
- Stirling and Forth Valley (94%)
- Perth, Kinross and Fife (88%)
- Lothians (83%)

“Tourism protects and enhances Scottish culture”

As well as reputation, 70% of respondents agreed that tourism protects and enhances Scottish culture.



Top 2 boxes by lifestage:

- Families (78%)
- Retirement age (65%)

Top 2 boxes by region:

- Aberdeen and Grampian (79%)
- South of Scotland (67%)
- Highlands and Island (63%)
- City of Edinburgh (57%)

“Tourism helps sustain Scotland's communities”

Overall tourism was viewed to have a positive impact on communities in Scotland, with three quarters of respondents (74%) either strongly agreeing or tending to agree that tourism helps sustain Scotland’s communities.



Top 2 boxes by lifestage:

- Families (82%)
- Younger independents (70%)
- Older independents (69%)
- Retirement age (78%)

Top 2 boxes by region:

- Stirling and Forth Valley (90%)
- South of Scotland (78%)
- Ayrshire (78%)
- Lothians (65%)

“Tourism connects local communities to other cultures”

Just over 3 in 5 respondents either strongly agreed or tended to agree that tourism connects local communities to other cultures. This dropped to below half by those who reside in Highlands and Islands (49% strongly agree or tended to agree).



Top 2 boxes by lifestage:

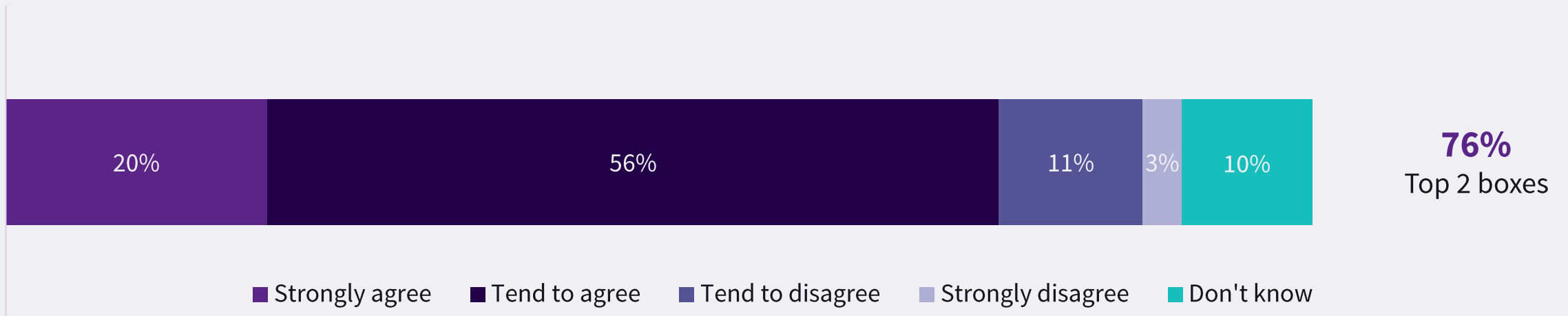
- Younger independents (71%)
- Families (71%)
- Older independents (57%)
- Retirement age (56%)

Top 2 boxes by region:

- Ayrshire (71%)
- South of Scotland (56%)
- Highlands and Islands (49%)
- City of Edinburgh (58%)

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

Just over three quarters of respondents (76%) agreed that tourism helps to protect and conserve Scotland’s built heritage.



Top 2 boxes by lifestage:

- Families (80%)
- Retirement age (73%)

Top 2 boxes by region:

- Ayrshire (84%)
- Lothians (64%)
- Highlands and Islands (62%)

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

Over half of respondents (58%) also agreed with the statement that tourism drives transport infrastructure development. This dropped to less than half for residents of the Highlands and Islands, with more disagreeing than agreeing (47% either strongly disagreed or tended to disagree).



Top 2 boxes by lifestage:

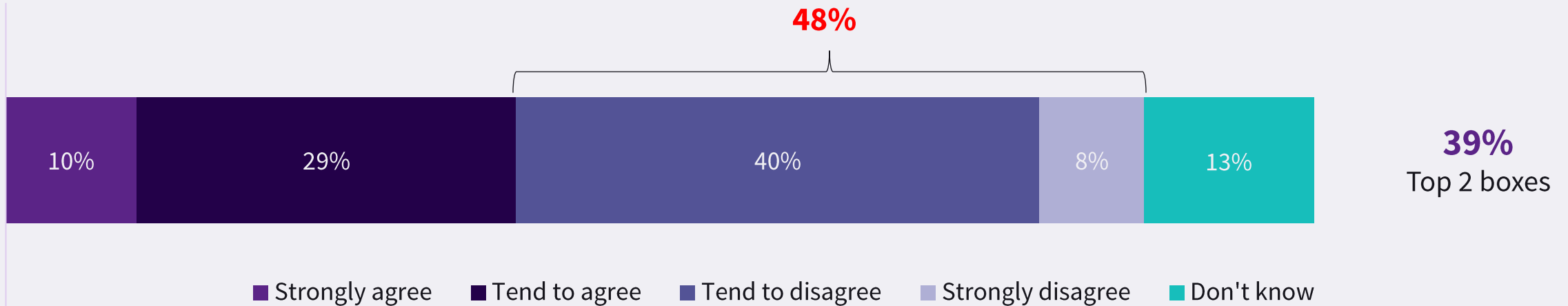
- Families (67%)
- Younger independents (63%)
- Older independents (53%)

Top 2 boxes by region:

- Angus and Dundee (67%)
- Ayrshire (65%)
- Highlands and Islands (43%)

“Tourism protects and enhances the natural environment”

Respondents had a more divisive view on the impact of tourism on the environment. Almost half of respondents either strongly disagreed or tended to disagree with the statement that tourism protects and enhances the natural environment.



Top 2 boxes by lifestage:

- Families (46%)
- Older independents (35%)

Top 2 boxes by region:

- Aberdeen and Grampian (49%)
- Ayrshire (48%)
- Lothians (24%)
- City of Edinburgh (27%)

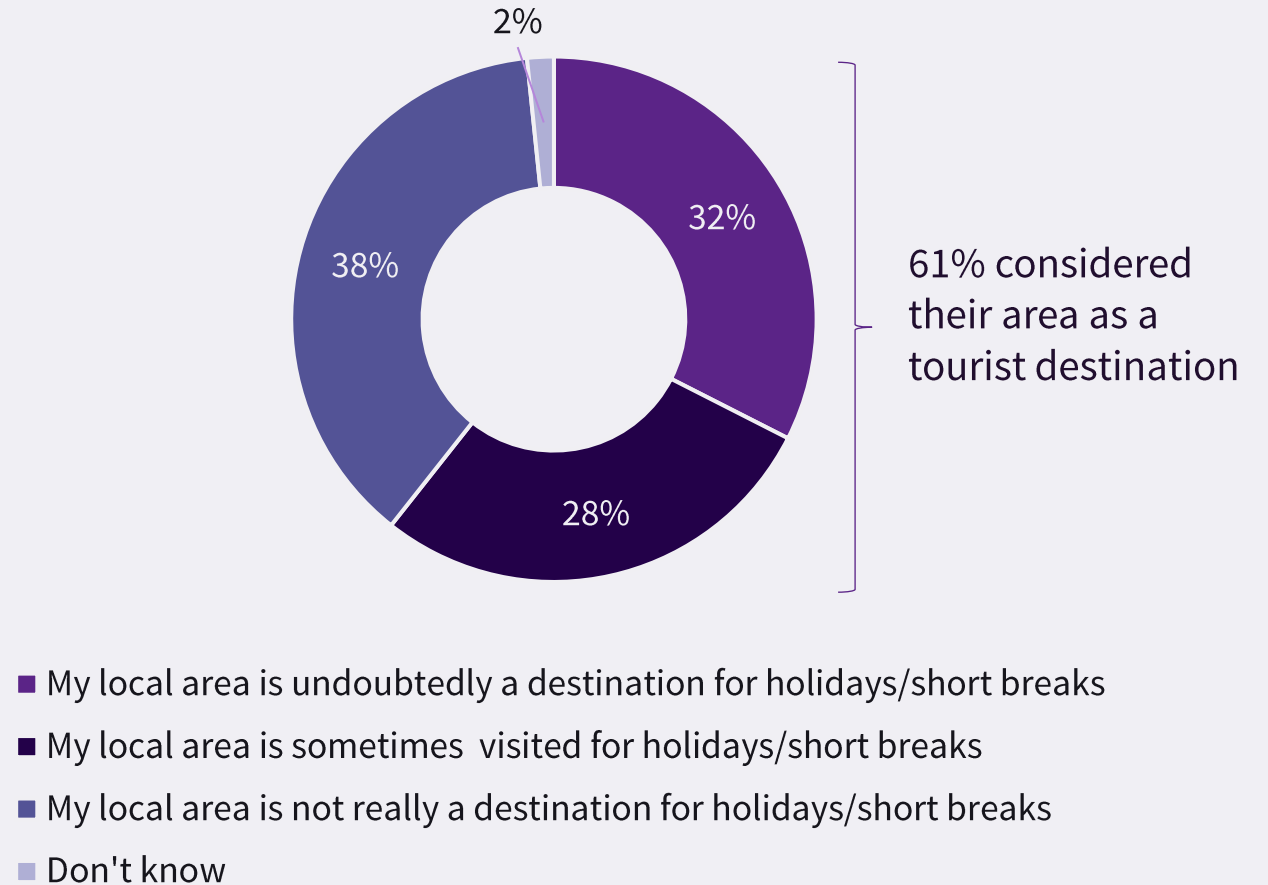
A full-page background image showing a sunset over a body of water. The sun is a bright, glowing orb in the upper center, casting a shimmering path of light across the water's surface. In the foreground, two small, dark silhouettes of people stand on a rocky outcrop, looking out at the sea. The horizon is visible in the distance, with faint outlines of land or mountains under the warm, orange-hued sky.

PERCEPTIONS ON TOURISM IN THE LOCAL AREA

Local Area Tourism

Overall, across the whole of Scotland, around a third of respondents (32%) considered their area as undoubtedly a destination for holidays/short breaks and just over a quarter respondents (28%) considered their local area as somewhere which is sometimes visited for holidays/short breaks.

Local area tourism across Scotland



Base: 1,032 all Scotland adults. PVS_Q6. Thinking about the area where you live...To what extent do you feel that it is an area which people visit for holidays or short breaks? (Please select the option that best applies)

Local area tourism

Regional breakdown

	Area is a tourist destination	Base
Highlands and Islands	96%	86
South of Scotland	87%	57
City of Edinburgh	86%	115
Perth, Kinross and Fife	71%	100
Angus and Dundee	70%	60
Stirling and Forth Valley	61%	67
Ayrshire	60%	56
Aberdeen & Grampian	59%	93
City of Glasgow	56%	119
Lothians	56%	62
Wider Glasgow and Clyde Valley	24%	217

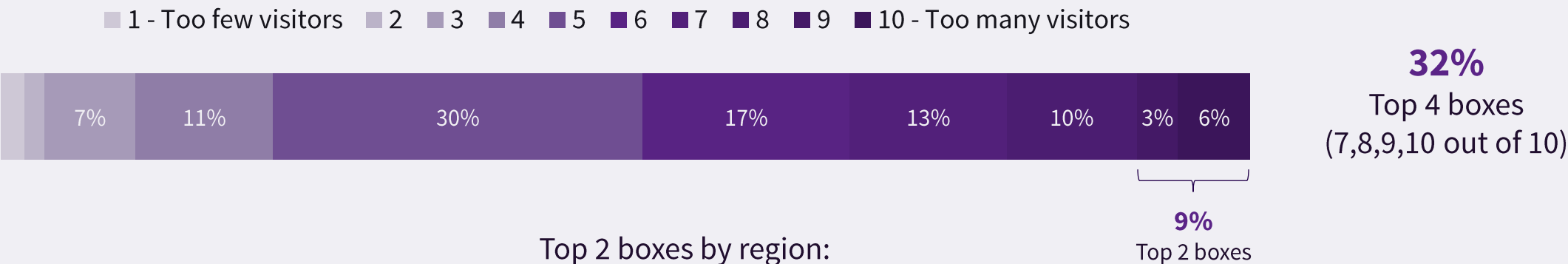
This table highlights those who answered “my local area is undoubtedly a destination for holidays/short breaks” or “my local area is sometimes visited for holidays/short breaks” across each region.

* Highlands & islands Enterprise Regional Definition – includes Argyll & Isles

Visitors to the local area

Of respondents who viewed their area as a tourist destination, almost a third (30%) scored a 5 out of 10 in terms of the number of visitors to their local area, indicating tourism levels are balanced.

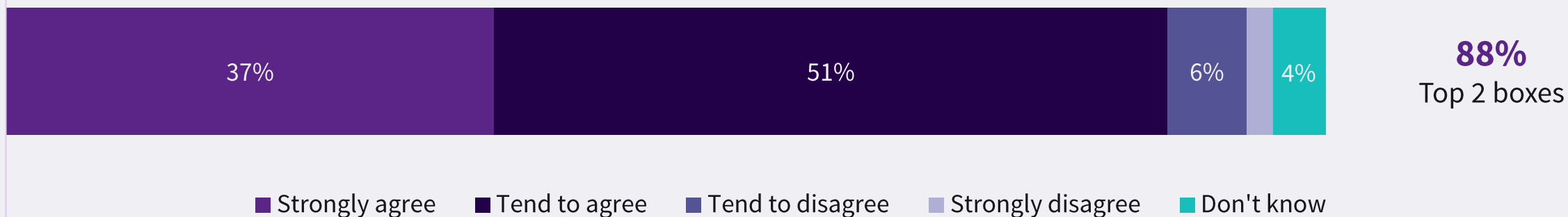
A proportion of respondents suggested the number of visitors was leaning towards too many, with 32% scoring a 7, 8, 9 or 10 out of 10. Around 1 in 10 respondents (9%) felt there were too many visitors to their local area, scoring a 9 or 10 out of 10. Respondents from the City of Edinburgh and Highlands and Islands showed more concern for the number of visitors to their area.



- Top 2 boxes by region:
- City of Edinburgh (23%)
 - Highlands and Islands (17%)
 - City of Glasgow (8%)

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

Tourism was seen as positive for local jobs, with 88% of respondents agreeing that tourism supports a range of jobs such as food, retail and other services.



Top 2 boxes by lifestage:

- Retirement age (93%)
- Families (85%)

Top 2 boxes by region:

- Highlands and Islands (92%)
- Perth, Kinross and Fife (90%)
- Aberdeen and Grampian (88%)
- City of Edinburgh (86%)
- City of Glasgow (86%)

“Tourism creates/ increases local employment opportunities”

More than 4 in 5 respondents (83%) either strongly agreed or tended to agree that tourism had a positive effect on local employment opportunities in their local area.



Top 2 boxes by lifestage:

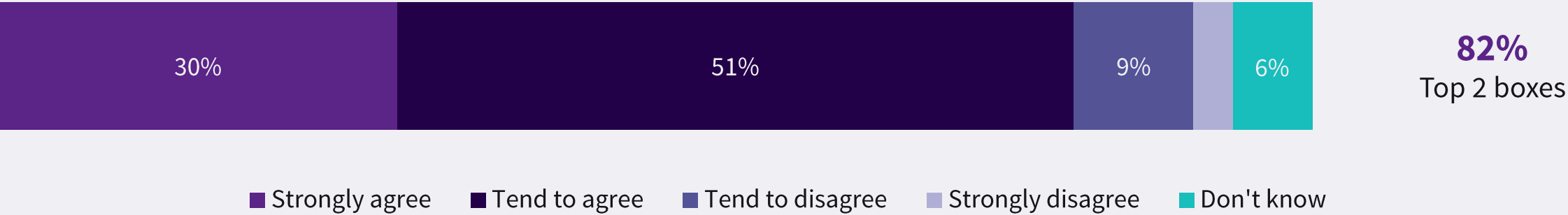
- Older independents (86%)
- Retirement age (85%)
- Younger independents (79%)
- Families (78%)

Top 2 boxes by region:

- City of Edinburgh (89%)
- City of Glasgow (85%)
- Perth, Kinross and Fife (85%)
- Aberdeen and Grampian (83%)
- Highlands and Islands (83%)

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

The economic impact of tourism to local areas was seen as a positive with 82% of respondents either strongly agreeing or tending to agree that tourism improves the local economy and helps generate economic growth in the area. This was particularly true amongst residents in the City of Glasgow, with 94% agreeing with this statement.



Top 2 boxes by lifestage:

- Younger independents (88%)
- Families (82%)
- Retirement age (81%)
- Older independents (79%)

Top 2 boxes by region:

- City of Glasgow (94%)
- Aberdeen and Grampian (88%)
- City of Edinburgh (80%)
- Perth, Kinross and Fife (78%)
- Highlands and Islands (75%)

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

Respondents were positive about the benefits tourism brings to the local area and residents, with almost three quarters of respondents (74%) agreeing that tourism leads to events and activities being held in the local area that residents can enjoy



Top 2 boxes by lifestage:

- Families (80%)
- Younger independents (77%)
- Older independents (71%)
- Retirement age (70%)

Top 2 boxes by region:

- Aberdeen and Grampian (82%)
- City of Glasgow (81%)
- City of Edinburgh (76%)
- Perth, Kinross and Fife (71%)
- Highlands and Islands (63%)

“Tourism provides an opportunity to meet visitors from all over who are spending time in my local area”

Almost three quarters of respondents (72%) either strongly agreed or tended to agree that tourism provides an opportunity to meet visitors from all over the world.



Top 2 boxes by lifestage:

- Families (77%)
- Older independents (70%)
- Retirement age (73%)
- Younger independents (65%)

Top 2 boxes by region:

- Aberdeen and Grampian (77%)
- City of Glasgow (76%)
- City of Edinburgh (72%)
- Highlands and Islands (71%)
- Perth, Kinross and Fife (68%)

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

Respondents viewed tourism positively when it came to sustaining historic building or monuments.



Top 2 boxes by lifestage:

- Families (75%)
- Younger independents (73%)
- Retirement age (71%)
- Older independents (70%)

Top 2 boxes by region:

- Aberdeen and Grampian (86%)
- City of Glasgow (75%)
- City of Edinburgh (74%)
- Perth, Kinross and Fife (67%)
- Highlands and Islands (64%)

“Tourism increases prices for many local services and amenities”

More than half of respondents (56%) agreed with the statement that tourism increases prices for local services and amenities. This increased for respondents who reside in the City of Edinburgh, with 82% either strongly agreeing or tending to agree.



Top 2 boxes by lifestage:

- Younger independents (66%)
- Families (51%)
- Older independents (58%)
- Retirement age (58%)

Top 2 boxes by region:

- City of Edinburgh (82%)
- Highlands and Islands (61%)
- Perth, Kinross and Fife (59%)
- City of Glasgow (53%)
- Aberdeen and Grampian (44%)

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

Almost 3 in 5 respondents (57%) noted that tourism adds to the amount of traffic in their area, which increased for residents of the Highlands and Islands (76%) and City of Edinburgh (73%)



Top 2 boxes by lifestage:

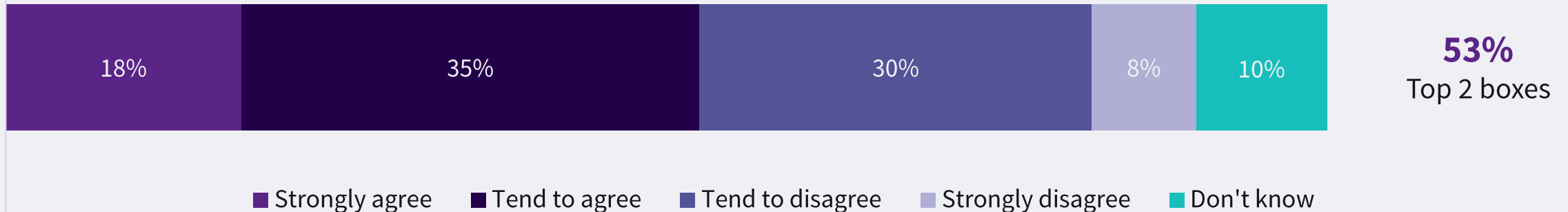
- Younger independents (60%)
- Older independents (57%)
- Retirement age (56%)
- Families (50%)

Top 2 boxes by region:

- Highlands and Islands (76%)
- City of Edinburgh (73%)
- Perth, Kinross and Fife (59%)
- Aberdeen and Grampian (50%)
- City of Glasgow (42%)

“Tourism limits parking spaces available for local people”

More than half of respondents (53%) either strongly agreed or tended to agree that tourism limits parking in their local area. This increased to 69% for residents of Highlands and Islands.



Top 2 boxes by lifestage:

- Younger independents (64%)
- Families (56%)
- Retirement age (51%)
- Older independents (47%)

Top 2 boxes by region:

- Highlands and Islands (69%)
- City of Edinburgh (60%)
- Perth, Kinross and Fife (59%)
- City of Glasgow (50%)
- Aberdeen and Grampian (41%)

Amongst respondents whose area was a tourist destination, 40% felt the balance of priorities between tourism businesses and residents were equal

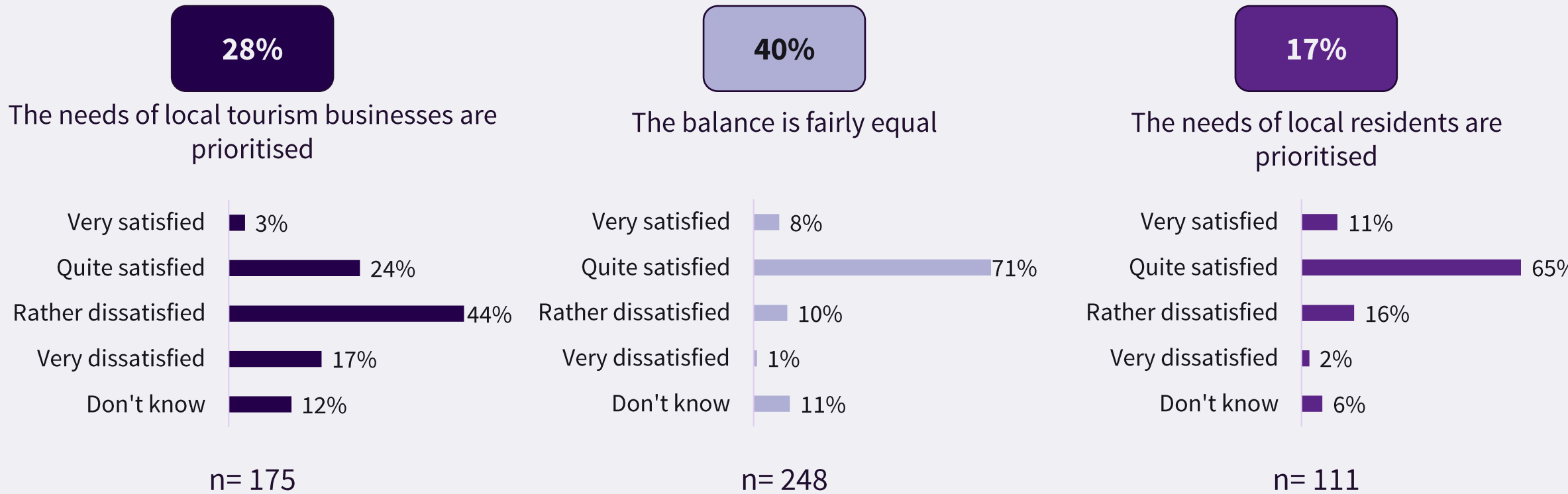
Over a quarter (28%) felt priorities swayed more with local tourism businesses and 18% felt priorities swayed more to local residents.



Base: 626 All Scotland adults whose local area is a tourist destination. PVS_Q10. Thinking about decisions that are made in your area and whether the needs of local residents or tourism businesses are prioritised in your opinion...Which of the statements below most closely describes the situation where you live? (Please select the option that best applies)

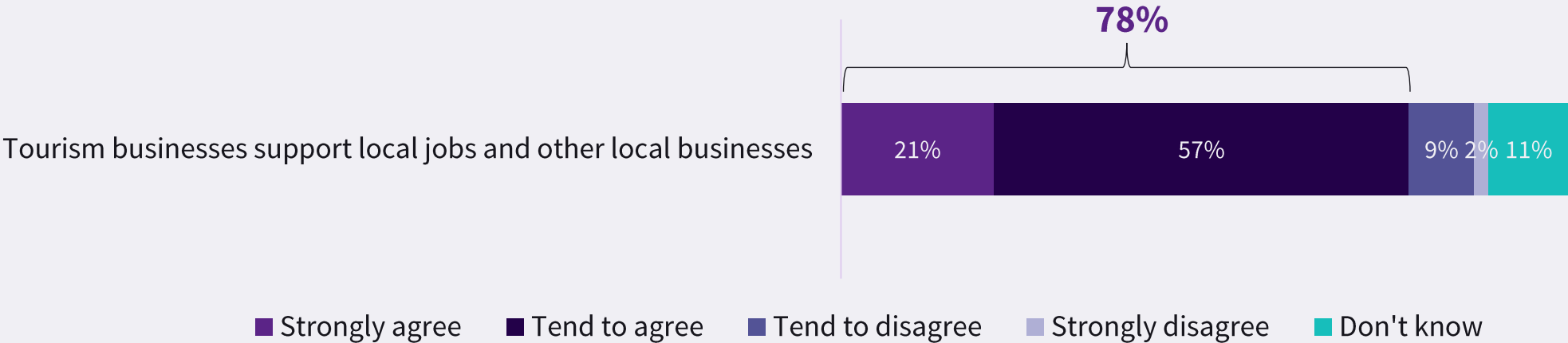
Respondents who view decision making as equal or in favour of residents are more likely to be satisfied with overall decision making

Where the needs of local tourism businesses were felt to be prioritised, respondents were more likely to be dissatisfied with the decisions made in their local area.



Tourism businesses are seen as a positive for the local economy

Almost 4 in 5 respondents (78%) either strongly agreed or tended to agree that tourism businesses support local jobs and other local businesses.



- Top 2 boxes by lifestage:
- Families (79%)
 - Older independents (79%)
 - Retirement age (78%)
 - Younger independents (73%)

- Top 2 boxes by region:
- City of Glasgow (81%)
 - City of Edinburgh (76%)
 - Highlands and Islands (76%)

Two thirds of respondents believe tourism businesses act responsibly in their activities in their local area

For respondents who reside in the City of Glasgow, 73% either strongly agreed or tended to agree that tourism businesses were responsible in their activities.

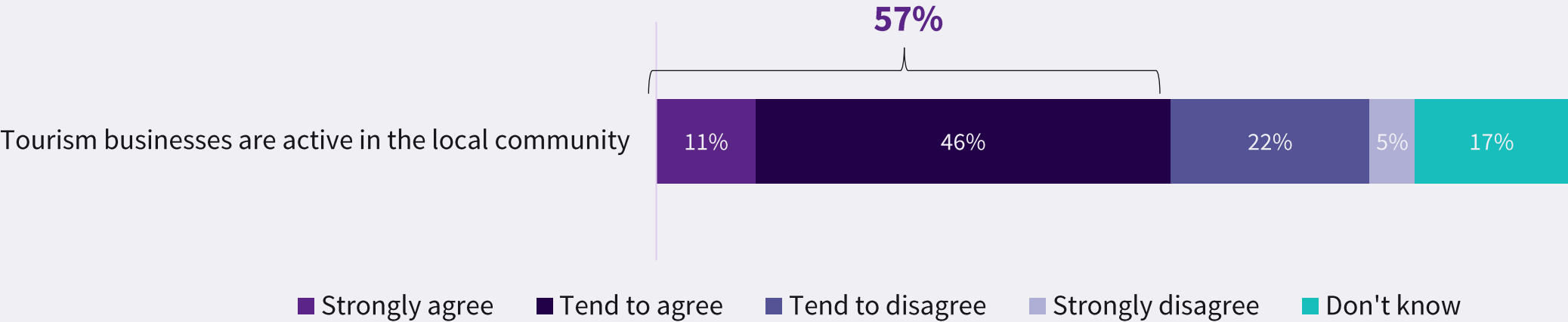


- Top 2 boxes by lifestage:
- Families (69%)
 - Retirement age (67%)
 - Older independents (64%)
 - Younger independents (63%)

- Top 2 boxes by region:
- City of Glasgow (73%)
 - Highlands and Islands (68%)
 - City of Edinburgh (45%)

Almost 3 in 5 respondents think tourism businesses are active in the local community.

This was lower amongst respondents who reside in the City of Edinburgh (39%).

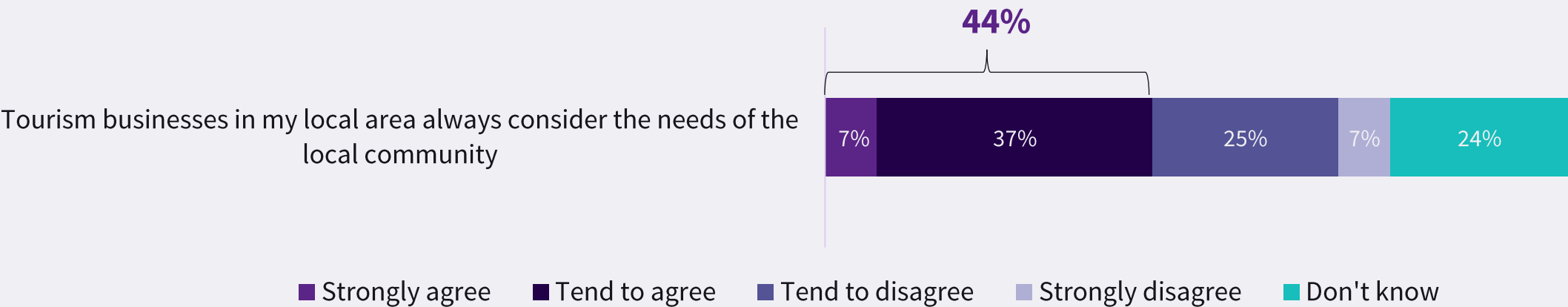


- Top 2 boxes by lifestage:
- Families (63%)
 - Younger independents (56%)
 - Older independents (55%)
 - Retirement age (54%)

- Top 2 boxes by region:
- Highlands and Islands (68%)
 - Aberdeen and Grampian (66%)
 - City of Edinburgh (39%)

Less than half of respondents (44%) believe tourism businesses in their local area always consider the needs of the local community.

More than half of respondents who reside in the city of Edinburgh either strongly disagree or tend to disagree that tourism business consider the needs of the local community (56%).



- Top 2 boxes by lifestage:
- Families (60%)
 - Younger independents (43%)
 - Retirement age (43%)
 - Older independents (37%)

- Top 2 boxes by region (agree):
- Aberdeen and Grampian (61%)
 - Highlands and Islands (43%)
 - City of Edinburgh (26%)

A quarter of verbatim comments suggested tourism businesses provide employment opportunities

When asked about their positive view of tourism businesses, respondents commented on several different themes including employment, economy benefits and supporting local businesses.

Provides employment opportunities
(24% of comments)

Boosts local economy
(16% of comments)

Brings in outside money
(14% of comments)

Supports local businesses
(9% of comments)

Attracts tourists/brings people to the area
(8% of comments)

Benefits locals as well as tourists/balances both local and tourists needs
(8% of comments)

Base 551 All Scotland adults whose local area is a tourist destination. PVS_Q13__coded. In the previous question, you mentioned you have a positive view of tourism businesses in your local area...Could you please explain why you feel this way? (Please type your answer in the box below, giving as much detail as possible)

Residents' positive views on tourism businesses

"We are only a small community which is a popular tourist destination, we do not have major business owners just small businesses in the village who contribute to the local economy by providing jobs which would be otherwise lacking."

"Tourism business bring jobs to students studying in universities in the city, and have pathways for progression."

"Tourism businesses play a crucial role in supporting the local community by providing employment opportunities and generating income, which helps residents make ends meet. By attracting visitors, these businesses stimulate the local economy, encouraging spending at restaurants, shops, and services."

"Tourism allows locals to interact with the global community, we don't see many tourists in my area but we are still able to interact with multiple cultures, races and perspectives which is a great way to enrich a person's personality and views."

"Some of the profits they make has been fed back into the residents of the community and projects that have been outstanding due to budget cuts by the local council."

"Economic benefits; cultural benefits; promotes local historic attractions; positive impact of other cultures."

Residents' mixed views on tourism businesses

"...I think tourism businesses give little thought to local residents. Too few people making too much money from tourism- benefits not widely spread."

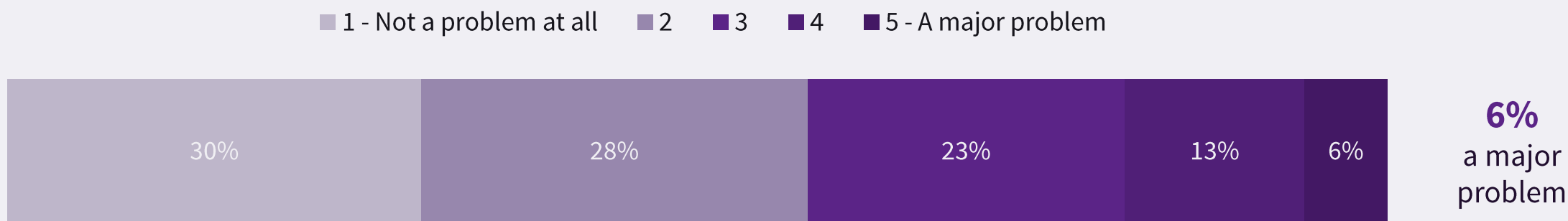
"Since we don't have hoards of tourists, the influx during summer months benefits some local businesses. The major drawback is the lack of housing due to the unregulated formation of so many short term let properties."

"I would say it's a generally positive view. There are lots of amazing tourist attractions near where I live and I appreciate the availability of them, the jobs they create, and I wouldn't say tourists make those inaccessible to local residents. However short term lets are a huge issue where I live, there's a dire shortage of housing as a result and I also find that people staying in short term lets care less about the community they are staying in so can lead to a lot of litter etc."

"I live in Edinburgh, where there are countless tourists. This brings in a lot of money, but they also drive property prices up and locals can't afford to live here any more."

"There is limited local industry (other than the campsite 2 small cafes and B&B's, there's hydro & renewables - these tend to bring in outsiders) In general there is lack of industry in Scotland so as a country we are very dependent on tourism and hospitality. However our area as many others suffer from lack of infrastructure (particularly roads) to deal with number of tourists, caravans and large tour buses which can also cause problems for locals attempting to get to work, hospital etc on our single track roads."

Only 6% of respondents viewed the anti-social behaviour of some visitors as a major problem.



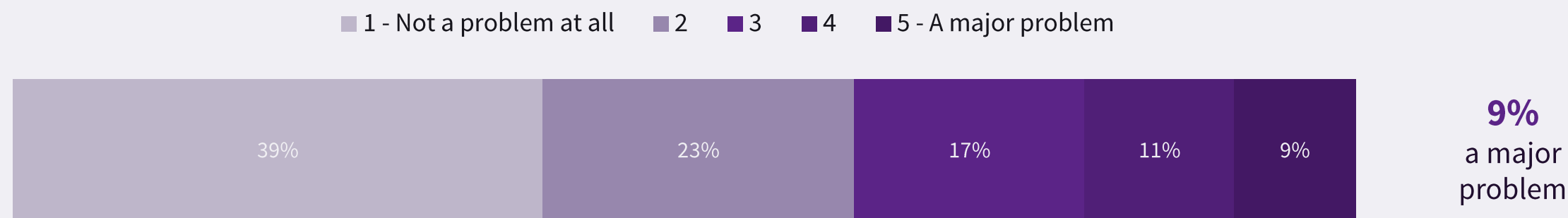
A major problem by lifestage:

- Younger independents (9%)
- Families (7%)
- Older independents (5%)
- Retirement age (5%)

A major problem by location:

- City of Edinburgh (8%)
- Perth, Kinross and Fife (6%)
- Highlands and Islands (6%)
- Aberdeen and Grampian (4%)
- City of Glasgow (4%)

A quarter of respondents who reside in the Highlands and Islands saw irresponsible camping as a major problem.



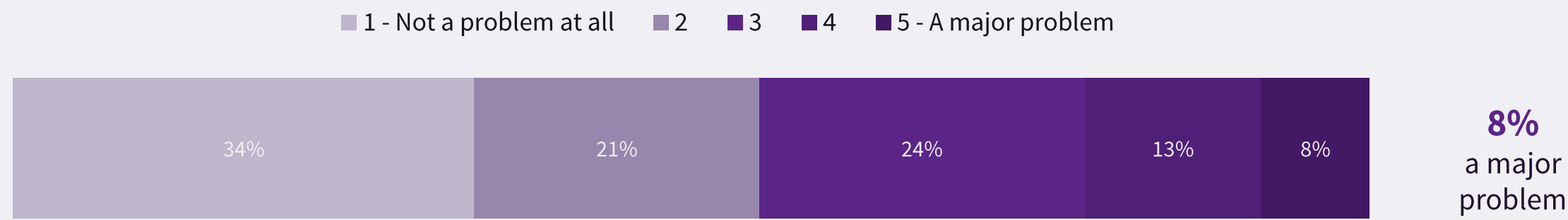
A major problem by lifestage:

- Retirement age (14%)
- Older independents (9%)
- Younger independents (8%)
- Families (6%)

A major problem by location:

- Highlands and Islands (26%)
- Aberdeen and Grampian (9%)
- City of Edinburgh (3%)
- City of Glasgow (3%)

Around 1 in 10 respondents felt visitors not respecting where they walk was a major problem.



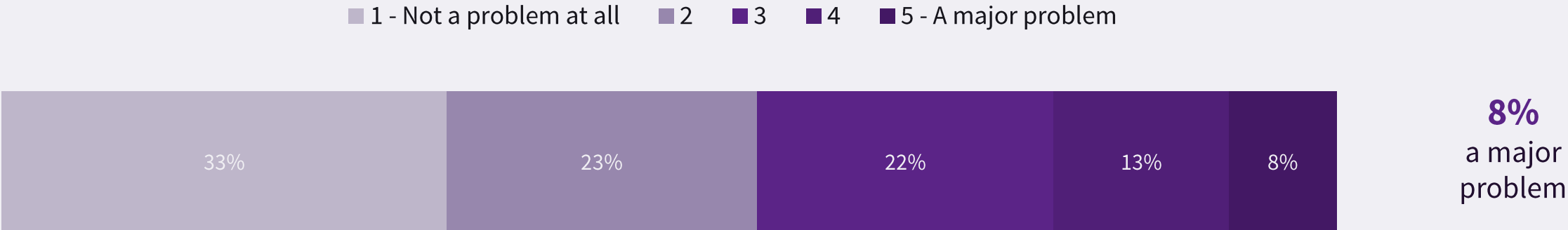
A major problem by lifestage:

- Younger independents (13%)
- Older independents (8%)
- Retirement age (8%)
- Families (4%)

A major problem by location:

- Highlands and Islands (16%)
- City of Edinburgh (10%)
- Aberdeen and Grampian (7%)

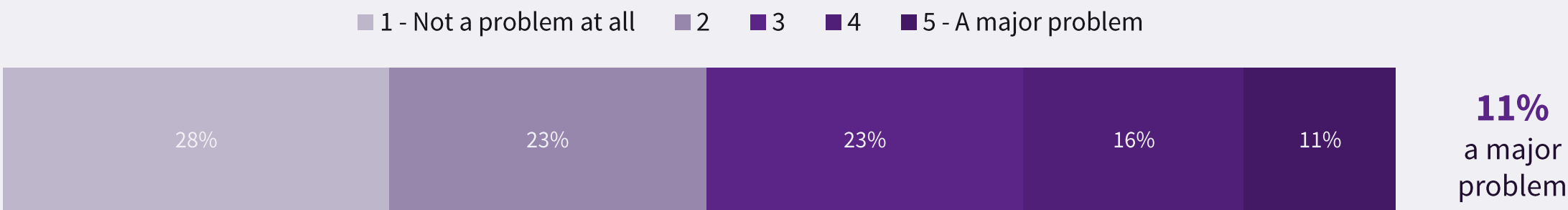
13% of respondents who reside in Aberdeen and Grampian felt lack of control of dogs by visitors was a major problem.



- A major problem by lifestage:*
- Younger independents (9%)
 - Families (9%)
 - Retirement age (8%)
 - Older independents (7%)

- A major problem by location:*
- Aberdeen and Grampian (13%)
 - Highlands and Islands (12%)
 - City of Edinburgh (7%)
 - City of Glasgow (1%)

A quarter of respondents who reside in Highlands and Islands feel unsafe parking is a major problem amongst visitors.



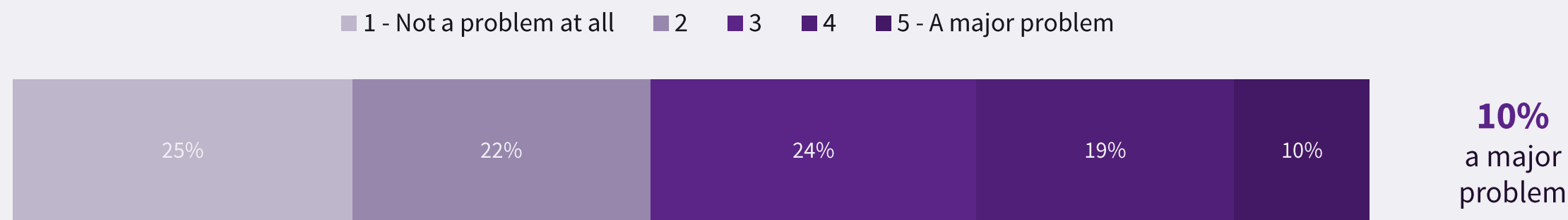
A major problem by lifestage:

- Younger independents (11%)
- Retirement age (13%)
- Older independents (10%)
- Families (8%)

A major problem by location:

- Highlands and Islands (26%)
- Aberdeen and Grampian (10%)
- City of Edinburgh (9%)
- City of Glasgow (3%)

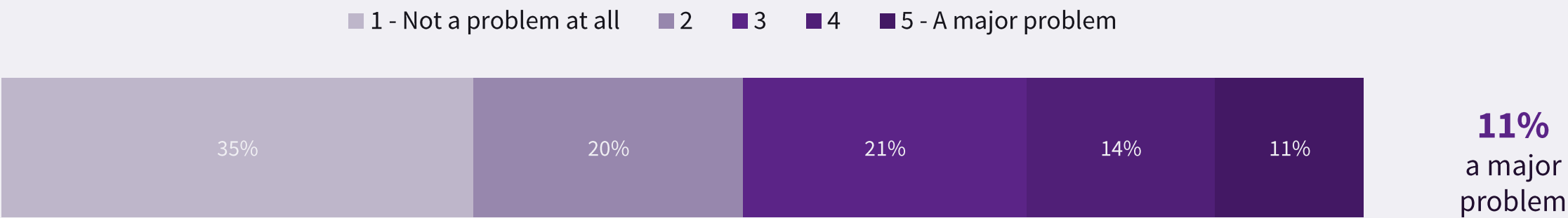
More than a quarter of respondents who reside in Highlands and Islands feel irresponsible driving is a major problem.



- A major problem by location:*
- Highlands and Islands (27%)
 - City of Edinburgh (11%)
 - Aberdeen and Grampian (7%)
 - City of Glasgow (4%)

- A major problem by lifestage:*
- Younger independents (14%)
 - Retirement age (12%)
 - Older independents (9%)
 - Families (7%)

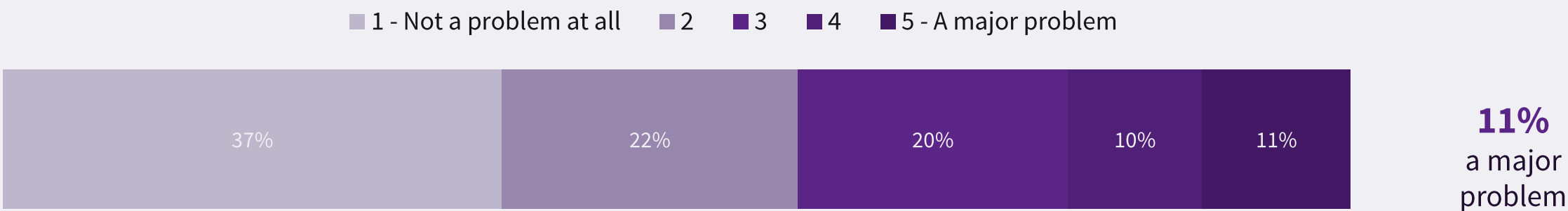
Parking in passing places was seen as a major problem by 29% of respondents from Highlands and Islands.



- A major problem by lifestage:*
- Older independents (13%)
 - Younger independents (12%)
 - Retirement age (10%)
 - Families (5%)

- A major problem by location:*
- Highlands and Islands (29%)
 - Aberdeen and Grampian (11%)
 - City of Edinburgh (4%)
 - City of Glasgow (2%)

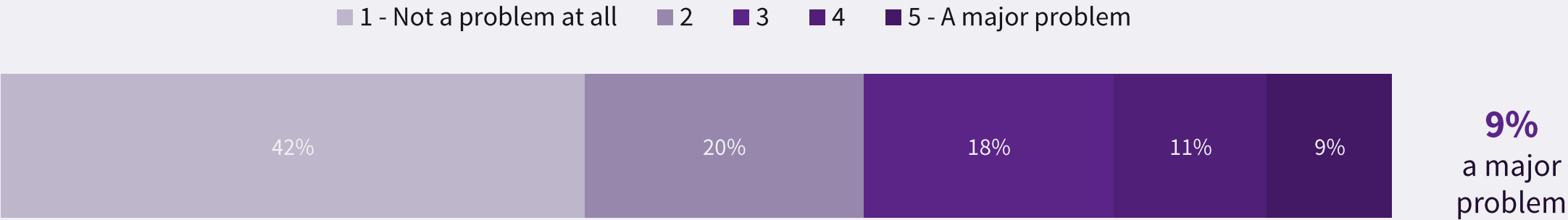
Around 2 in 5 respondents who resided in the Highlands and Islands felt too many motorhomes was a major problem.



- A major problem by lifestage:*
- Retirement age (19%)
 - Younger independents (15%)
 - Older independents (9%)
 - Families (4%)

- A major problem by location:*
- Highlands and Islands (42%)
 - Aberdeen and Grampian (10%)
 - Perth, Kinross and Fife (7%)
 - City of Glasgow (6%)
 - City of Edinburgh (5%)

Almost 1 in 10 respondents viewed irresponsible lighting of fires as a major problem.



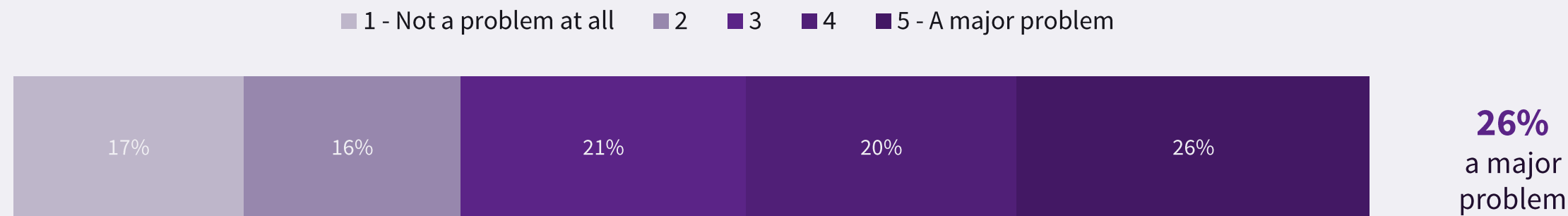
A major problem by lifestage:

- Younger independents (13%)
- Retirement age (10%)
- Families (8%)
- Older independents (7%)

A major problem by location:

- Highlands and Islands (15%)
- City of Edinburgh (10%)
- City of Glasgow (7%)
- Aberdeen and Grampian (7%)

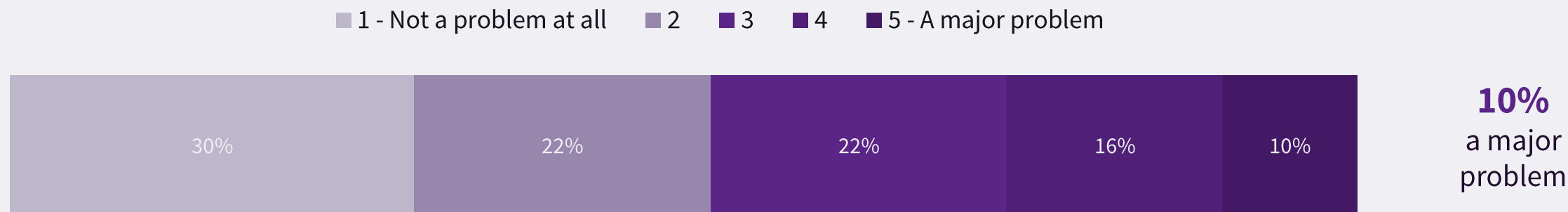
Lack of toilet facilities was viewed as a major problem for a quarter of respondents which increased to 36% for those of retirement age and 45% for residents of Highlands and Islands.



- A major problem by lifestage:*
- Retirement age (36%)
 - Older independents (28%)
 - Younger independents (14%)
 - Families (17%)

- A major problem by location:*
- Highlands and Islands (45%)
 - City of Edinburgh (23%)
 - Perth, Kinross and Fife (23%)
 - City of Glasgow (21%)
 - Aberdeen and Grampian (16%)

Almost a third of respondents who reside in the city of Edinburgh thought crowded streets/overcrowding was a major problem.



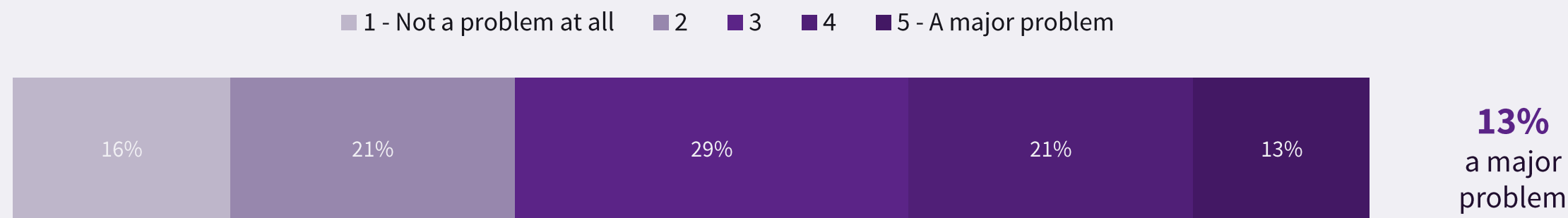
A major problem by lifestage:

- Younger independents (15%)
- Families (9%)
- Older independents (9%)
- Retirement age (9%)

A major problem by location:

- City of Edinburgh (32%)
- Highlands and Islands (8%)
- Aberdeen and Grampian (4%)
- Perth, Kinross and Fife (3%)

Litter was seen as a major problem for 13% of respondents rising to almost a quarter (23%) of Edinburgh residents.



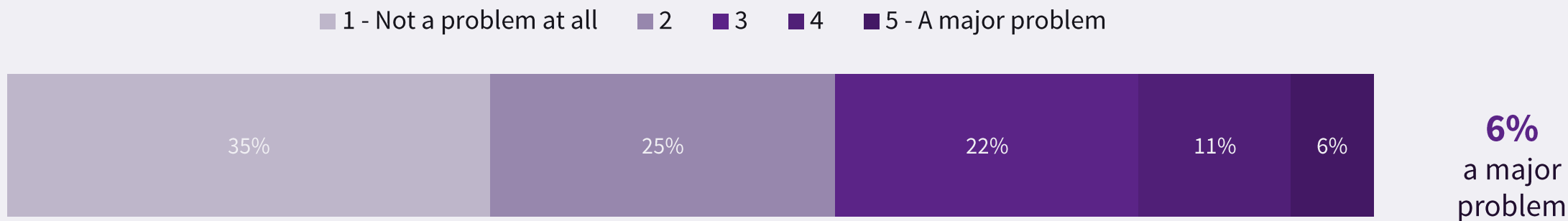
A major problem by lifestage:

- Younger independents (15%)
- Retirement age (14%)
- Older independents (12%)
- Families (11%)

A major problem by location:

- City of Edinburgh (23%)
- Highlands and Islands (17%)
- City of Glasgow (13%)
- Aberdeen and Grampian (10%)

Too much noise due to tourists was seen as a major problem for 11% of respondents who reside in the city of Edinburgh.



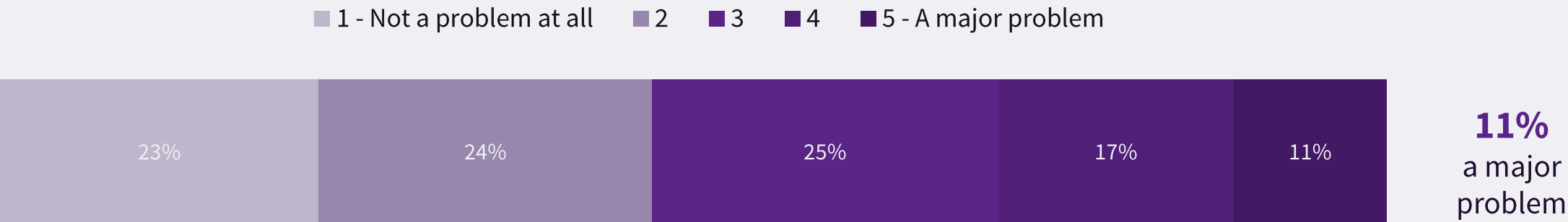
A major problem by lifestage:

- Younger independents (10%)
- Older independents (6%)
- Retirement age (6%)
- Families (5%)

A major problem by location:

- City of Edinburgh (11%)
- Highlands and Islands (6%)
- City of Glasgow (5%)
- Aberdeen and Grampian (4%)

Around 1 in 5 respondents who reside in the Highland and Islands and the City of Edinburgh felt **lack of advance planning/poor preparation affecting local services** was a major problem.



A major problem by lifestage:

- Younger independents (13%)
- Older independents (11%)
- Retirement age (11%)
- Families (7%)

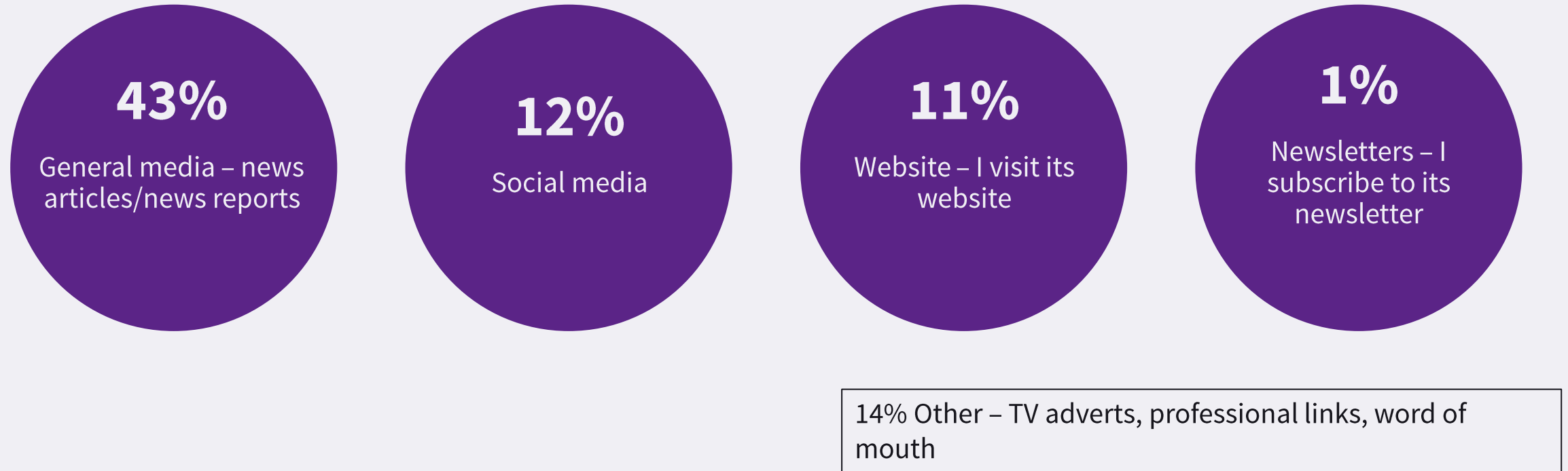
A major problem by location:

- Highlands and Islands (21%)
- City of Edinburgh (18%)
- Perth, Kinross and Fife (7%)
- Aberdeen and Grampian (6%)
- City of Glasgow (4%)

AWARENESS OF VISITSCOTLAND

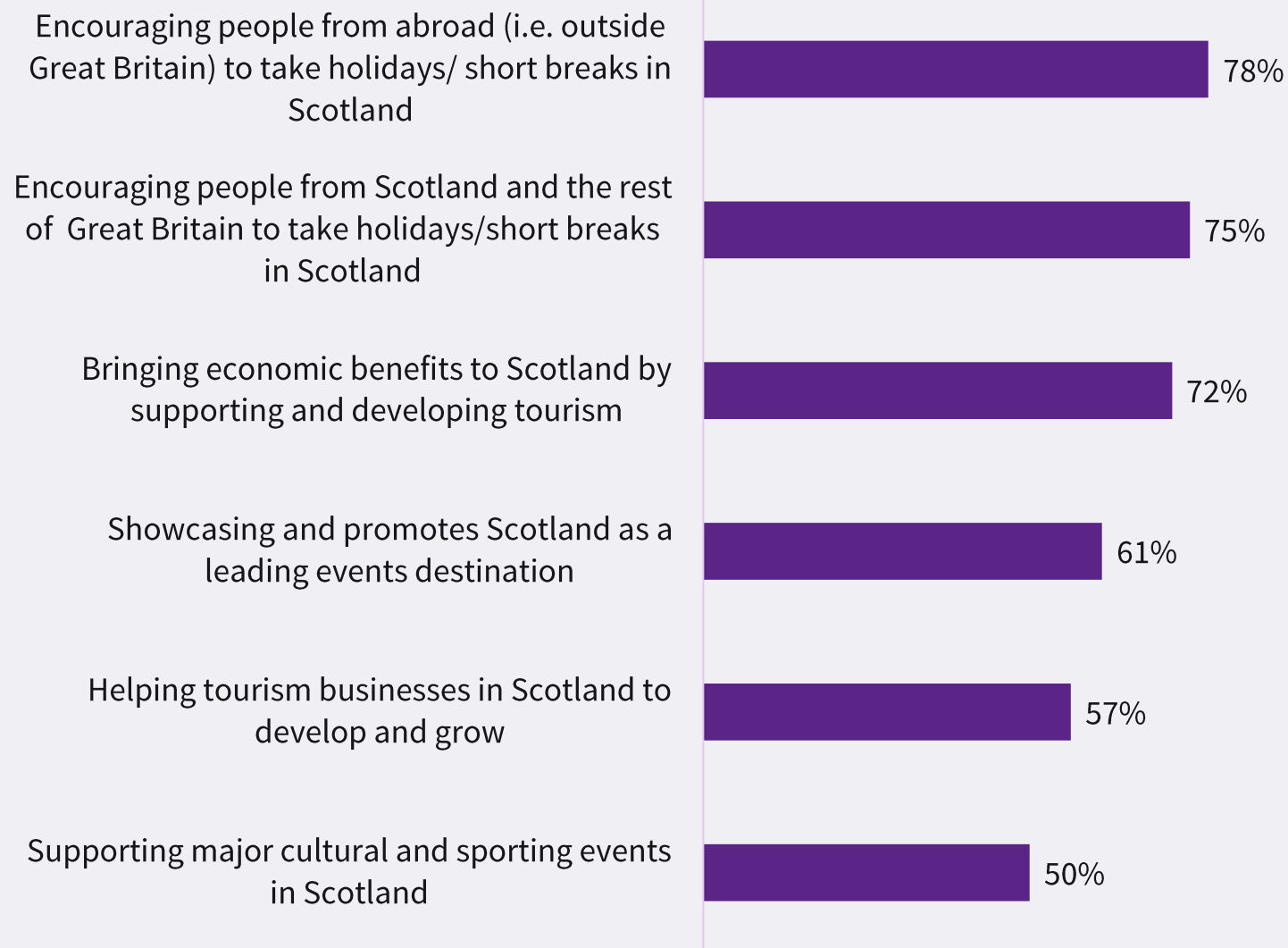
Awareness of VisitScotland is very high, with 90% stating that they had heard of the organisation

Of those who had heard of VisitScotland, 2 in 5 respondents (43%) had first heard through general media. Around 1 in 5 (19%) of respondents did not know where they first heard of VisitScotland.



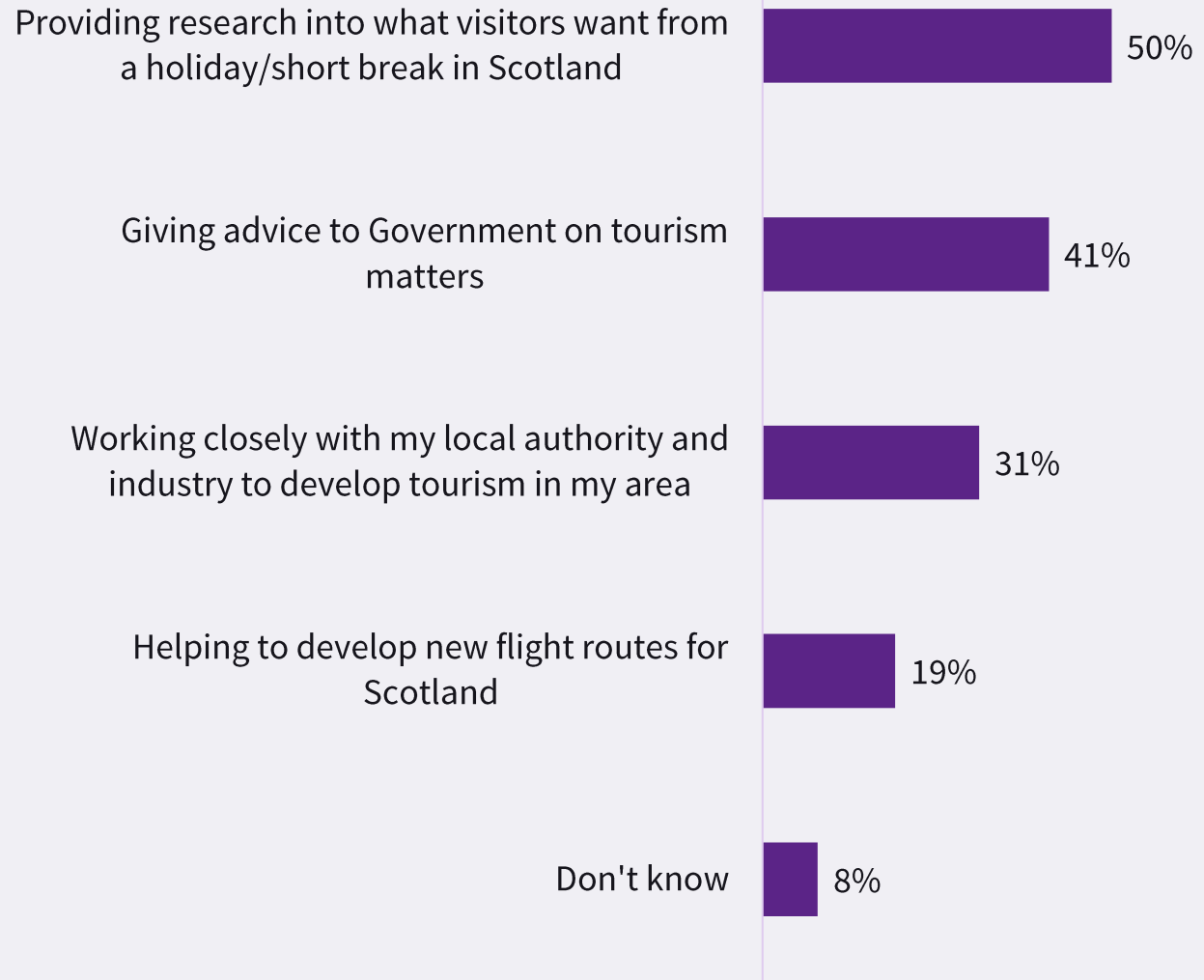
VisitScotland is perceived as undertaking several roles as an organisation

The majority of respondents who were aware of VisitScotland believed our role was to encourage people to take holidays and short breaks, both in terms of international and domestic visitors. We are also seen as an organisation that can bring economic benefits to Scotland through tourism.



Base: 933 All Scotland adults who have heard of VisitScotland. PVS_Q16a. Which, if any, of the following do you think are roles undertaken by VisitScotland? (Please select all that apply.)

VisitScotland is perceived as undertaking several roles as an organisation (cont)



Base: 933 All Scotland adults who have heard of VisitScotland. PVS_Q16a. Which, if any, of the following do you think are roles undertaken by VisitScotland? (Please select all that apply.)

IN SUMMARY.....



Headline attitudes to tourism in Scotland



91% viewed the tourism industry positively.



91% agreed tourism brings economic benefits to Scotland as a whole



91% agreed tourism attracts investment e.g. visitor attractions, hotels etc



90% agreed tourism in Scotland helps us to develop a positive reputation overseas

Headline attitudes to tourism in local areas



88% agreed tourism supports a range of other jobs such as food, retail and other services.



83% agreed tourism creates/ increases local employment opportunities



57% agreed tourism adds to the amount of traffic on the roads and results in congestion and delays



26% believed lack of toilet facilities was a major problem.

Appendix: definition of terms used

Lifestage

Younger independents: aged 18-34 with no children in the household

Families : aged 18-64 with children in household

Older independents: aged 35-64 with no children in the household

Retirement age: aged 65+ and over with no children in the household

Appendix: Definitions: Regional Groupings

- **Aberdeen & Grampian** (sample 93): Aberdeen city, Aberdeenshire, Moray
- **Angus and Dundee** (sample 60): Angus, Dundee city
- **Ayrshire** (sample 56): East Ayrshire, North Ayrshire, South Ayrshire
- **City of Edinburgh** (sample 115)
- **City of Glasgow** (sample 119)
- **Highlands and Islands *** (sample 86): Highlands, Orkney, Shetland, Eilean Siar, Argyll & Isles
- **Lothians** (sample 62): East Lothian, West Lothian, Midlothian
- **Perth, Kinross and Fife** (sample 100): Perth, Kinross, Fife
- **South of Scotland** (sample 57): Scottish Borders, Dumfries and Galloway
- **Stirling and Forth Valley** (sample 67): Stirling city, Clackmannanshire, Falkirk
- **Wider Glasgow and Clyde Valley** (sample 217): East Dunbartonshire, West Dunbartonshire, East Renfrewshire, Renfrewshire, Inverclyde, South Lanarkshire, North Lanarkshire



A large, stylized purple flower graphic is positioned on the left side of the page. It features a central circular element with a five-pointed star-like shape inside, surrounded by several layers of petals and leaves, all rendered in various shades of purple.

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