VisitScotland
Net Zero Pathway Benchmark
Scottish Tourism Industry Survey 2021
Summary (16 slides)
Project background and objectives

Background

- The Scottish Government has set an ambitious target 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)

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
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.

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.

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

Base (all): 460
Accommodation providers accounted for almost four fifths of responses

- Non-serviced accommodation: 42%
- Serviced accommodation: 36%
- Attractions and activity providers: 18%
- Other: 4%

Base (all): 460
The sample included businesses from across Scotland, with the largest proportion from the North. Four fifths of businesses were rural based.
The majority of respondents were from small businesses with ten or fewer employees.

- **Sole trader**: 42%
- **2 to 10**: 39%
- **11 to 25**: 10%
- **26 to 50**: 5%
- **More than 50**: 5%

Base (all): 460
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.
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.
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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