SCOTLAND RESIDENTS’ VIEW ON TOURISM 2021

A FOCUS ON THE ROLE OF TOURISM AND COMMUNITY ENGAGEMENT (SUMMARY)
BACKGROUND

• There has been no other time over recent decades when there has been so much disruption to our everyday lives than has been seen during the Coronavirus pandemic. In 2020, when tourism began to re-open in mid-July, the Scots home holiday market was key. International tourism and indeed visits from other parts of the UK were extremely limited, hence the industry maximised its efforts to appeal to the Scots resident market.

• On 23rd February 2021, the First Minister of Scotland outlined a roadmap for recovery from lockdown in March and April 2021. The emergence of new strains of the virus has left the situation uncertain and highly responsive to legislative changes, however initial restrictions for the tourism industry began to be lifted from 26 April 2021 allowing people to engage in activities and the tourism industry in Scotland to re-open for business.

• As these restrictions began to be reduced in 2021, 56 Degree Insight were commissioned by VisitScotland to survey Scotland’s residents and to explore attitudes to various aspects of tourism in Scotland.
RESEARCH METHODOLOGY

• The study focuses on an online survey which is based on a representative sample of Scotland residents. The analysis provides a representative viewpoint of the Scottish adult population.

• A quota sampling approach was followed with targets to ensure representative coverage of the Scottish population aged 18+ on the basis of sex, age, socio-economic grade and region.

• To enable measurement of opinion among sub-segments, a sample size of 1,000 respondents was agreed to obtain robust national data (+/- 3.1%) and a greater ability to undertake sub-analysis.

• The fieldwork for this wave was undertaken between 27th October and 4th November 2021.

• Respondents were recruited from Yonder Data Solutions’ consumer panel, and 1,000 respondents completed the questionnaire.
• The questionnaire order is not reflected in the ordering of this report.
• Respondents did not initially know the subject matter was tourism to ensure an objective view on the scale and importance of different industrial sectors could be obtained.
• The questionnaire then took the respondent through the role of tourism in Scotland at a national, general level, to an understanding of the role of tourism in their own local authority area.
SAMPLE: WHO WE SPOKE TO

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

87% rate tourism as 7-10/10 in terms of importance to the Scottish economy – number one across all industries

94% view the Scottish tourism industry positively

87% agree that tourism helps Scotland develop a positive reputation overseas

77% feel that tourism adds to the vitality of Scotland’s communities
SUMMARY – HEADLINE ATTITUDES TO TOURISM IN LOCAL AREAS

84% agree that locally, tourism supports jobs in food, retail and other sectors

81% think tourism improves the local economy and generates economic growth

51% believe tourism increases local traffic congestion and delays

43% feel that tourism limits parking spaces and increases prices locally – to the detriment of locals
THANK YOU

CONTACT US:

Insight Department, VisitScotland
research@visitscotland.com

www.visitscotland.com
www.visitscotland.org

DISCLAIMER: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omission.