



SCOTLAND RESIDENT'S VIEW ON TOURISM 2021

A FOCUS ON RESPONSIBLE TOURISM (54 SLIDES)

🔍 Ettrick Bay

KEY SECTIONS

1. General attitudes towards climate change and sustainability (slides 7 to 17)
2. Responsible tourism in Scotland: Overall attitudes (slides 18 to 32)
3. Responsible tourism in Scotland: Accommodation choice (slides 33 to 40)
4. Responsible tourism in Scotland: Travel and transport (slides 41 to 49)

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

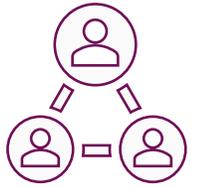
RESEARCH METHODOLOGY

- 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 August fieldwork was undertaken between 3 and 11 August 2021 and focused on responsible tourism
- Respondents were recruited from *Yonder Data Solutions'* consumer panel, and **1,015 respondents** completed the questionnaire



Cromarty Lighthouse, The Black Isle

SAMPLE: WHO WE TALKED TO



- There was a broad spread of **ages** with three in ten aged under 35 (29%), 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). 19% are **Young Independents** (18-35, no kids) whilst 20% 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
- Just over seven in ten have no health conditions/ impairments (71%). 16% identify that they have long term illness (16%), 8% mobility impairments (8%) and 6% partial hearing loss

KEY HEADLINE



Although there is a great deal of agreement amongst the resident population about the importance of tackling climate change and sustainability through a more responsible form of tourism, **for many there appears to be a ‘value-action gap’ when it comes to behavioural change and personal responsibility around holidays**



In terms of domestic holidays, there may be deep-rooted beliefs around accommodation choice and travel options. However, there is some willingness to change around some areas of responsible tourism, notably around food and drink choices, energy consumption and car free days.

There is a greater degree of willingness amongst families and Young Independents than Empty Nesters

1. GENERAL ATTITUDES TOWARDS CLIMATE CHANGE AND SUSTAINABILITY



Strathmore Golf Centre, Perthshire

ALMOST THREE QUARTERS OF SCOTLAND RESIDENTS AGREE THAT CLIMATE CHANGE IS AN IMMEDIATE AND URGENT PROBLEM

How far do you agree: Climate change is



Immediate & urgent problem

An urgent problem especially for:

- Those following special diets (83%)
- Those with health conditions (79%)
- Young Independents (78%)
- Regular visitors to Scotland (77%)

More of a future problem

More of a future problem especially for:

- Families (19%)
- C2Ds (16%)
- Those with no health conditions (15%)
- Those better off since COVID (15%)

Is not really a problem

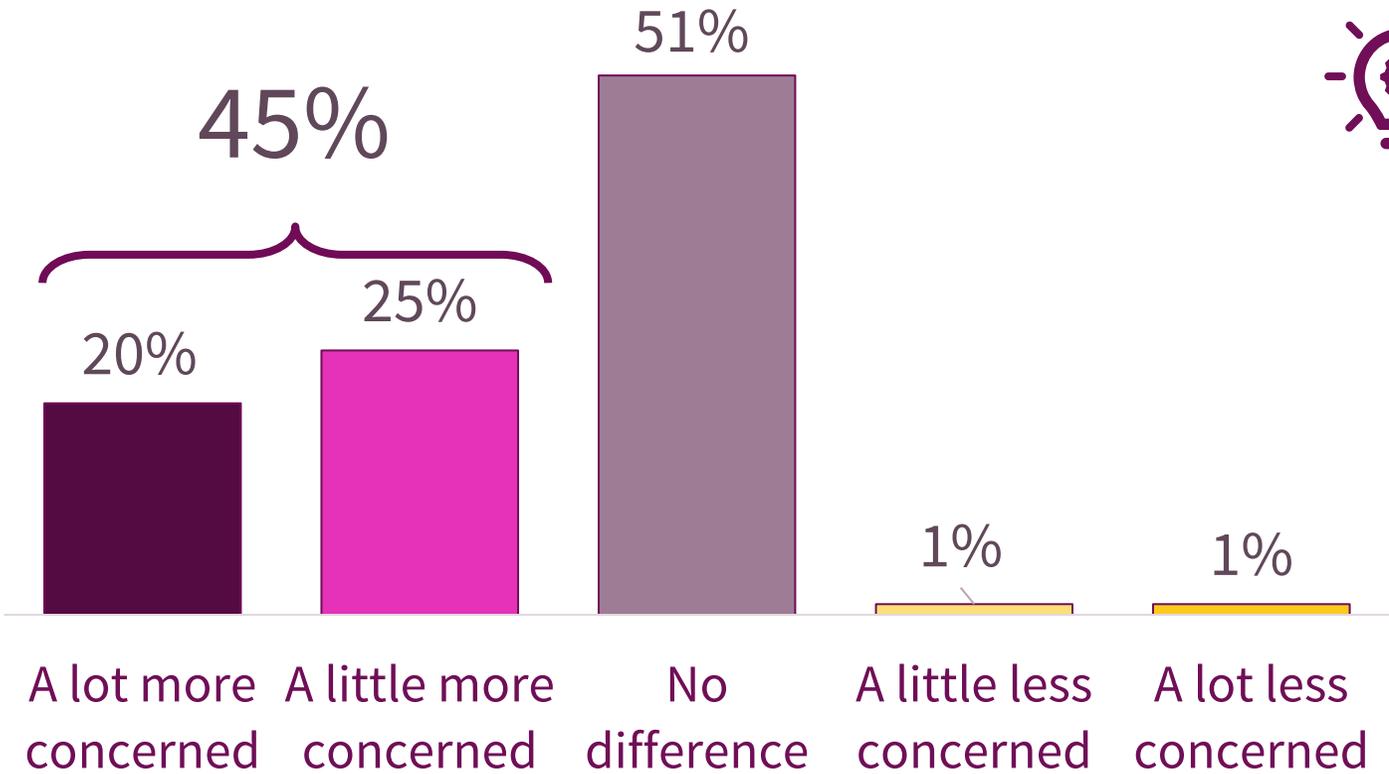
Not really a problem or not convinced it's happening especially for:

- Those aged 65+ (13%)
- Those living in rural areas (12%)
- Empty Nesters (11%)

Still not convinced it's happening

EVIDENCE FROM THIS RESEARCH THAT SOME SCOTLAND RESIDENTS HAVE BECOME MORE CONCERNED ABOUT TACKLING CLIMATE CHANGE SINCE THE COVID PANDEMIC

Impact of COVID on concerns about tackling climate change.....



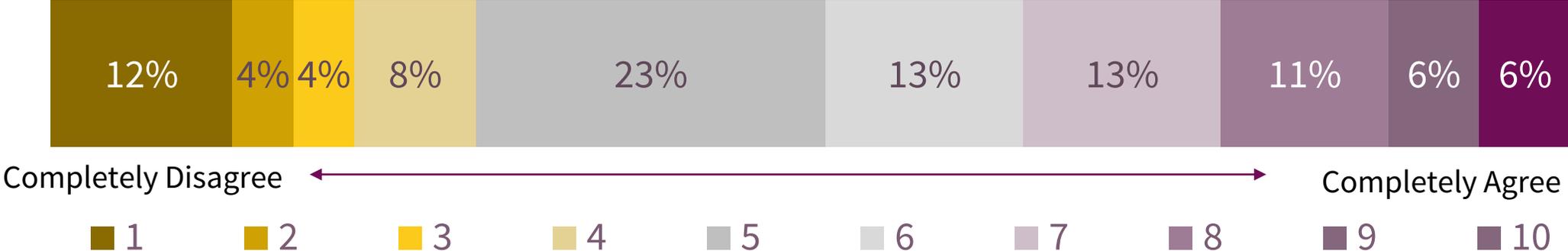
Those more concerned are:

- Aged 18-24 (71%)
- Those with special dietary needs (55%)
- Families (54%)
- Those employed in tourism (53%)
- Those who regularly holiday in Scotland (51%)
- Those negatively impacted financially by COVID (50%)
- Young Independents (49%)

DESPITE THE CLEAR CONCERN FOR CLIMATE CHANGE, ONLY A MINORITY INTEND TRAVELLING MORE SUSTAINABLY IN FUTURE

“The pandemic has made me want to travel more sustainably in the future”

**Top 4 Box
36%**



- Only 36% agree that the pandemic has encouraged them to travel more sustainably in the future based on Top 4 box scores. The mean score is 5.5
- Even amongst those for whom Climate Change is an immediate problem, only 40% strongly agreed. Highest agreement was amongst families (46%)

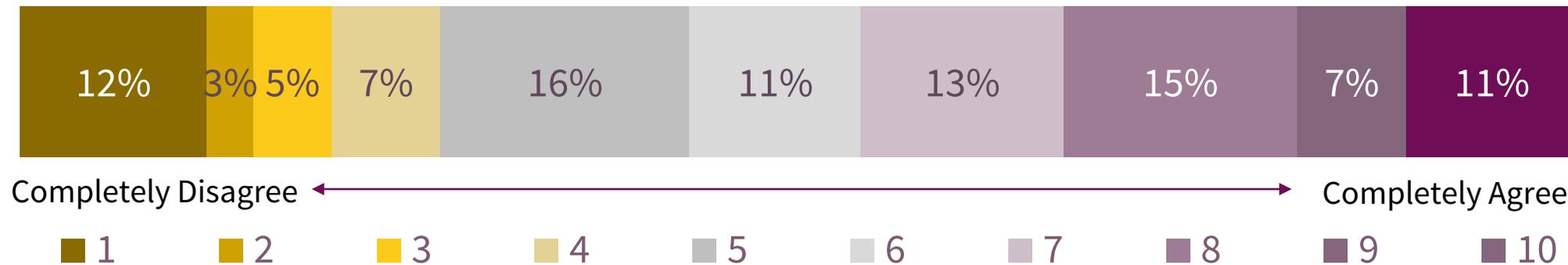


Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers (n=805)

WHILE ALMOST HALF WILL STILL FIND REASONS TO TRAVEL INTERNATIONALLY DESPITE CLIMATE CHANGE CONCERNS

“I will still find reasons to travel internationally despite having concerns about sustainability and climate change ”

Top 4
Box



46%



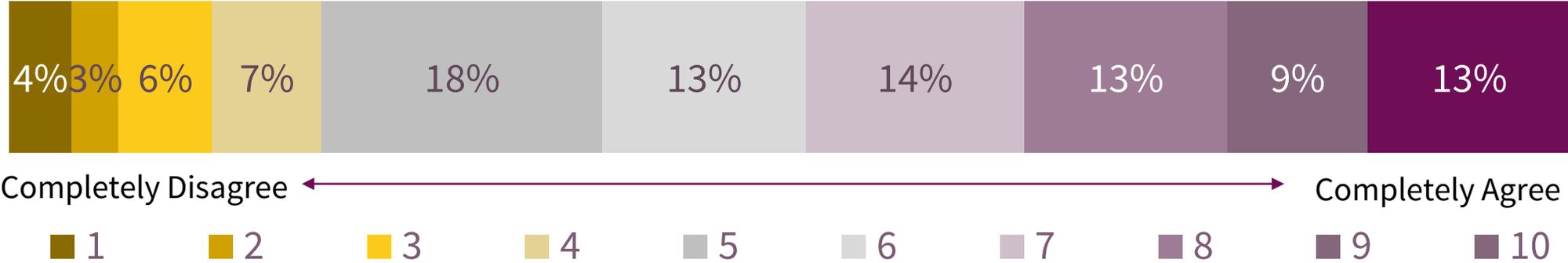
- 46% agree with the statement based on the Top 4 boxes. The mean score was 5.9
- Young Independents were especially likely to find reasons for international travel despite any climate/sustainability concerns (58%)

73% OF SCOTLAND RESIDENTS AGREE THAT THEY TRY TO HAVE A POSITIVE IMPACT ON THE ENVIRONMENT THROUGH THEIR OWN EVERYDAY ACTIONS

- **With a mean score of 7.5 out of 10 in terms of the extent to which the holiday taking population try to have a positive impact on the environment through their everyday actions, the claimed importance of the environment in their consciousness is clear**
- It is more important amongst those who believe climate change is an immediate problem (84% strongly agree they try to have a positive environmental impact everyday) and also by Older Independents (76%)
- It is slightly less important amongst those who believe there are little or no problems with climate change (31%) or that it's a future problem (53%) and amongst Young Independents (71%)

DESPITE CLAIMS OF CONCERN FOR THE ENVIRONMENT IN EVERYDAY ACTIONS, THIS IS LESS OFTEN THE CASE ON HOLIDAY

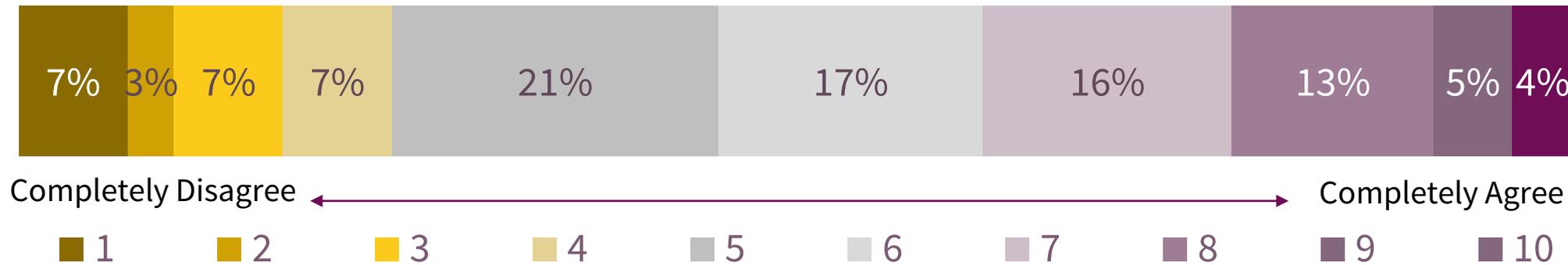
“When I’m on holiday I don’t want to think about sustainability, I want to relax and enjoy myself”



- For many, holidays are seen as an opportunity to forget about sustainability
- Around half of the population don’t want to think about the environment whilst on holiday (49%) based on Top 4 box scores. The mean score was 6.4
- It is much higher amongst those who don’t foresee any problems with climate change (73%), but even amongst those who see it as an immediate problem, as many as 43% agree

38% FEEL THAT MAKING GREEN/SUSTAINABLE CHOICES WHILST ON HOLIDAY IS DIFFICULT

“I find it difficult to make sustainable/green choices when on holiday compared to being at home”



Top 4
Box

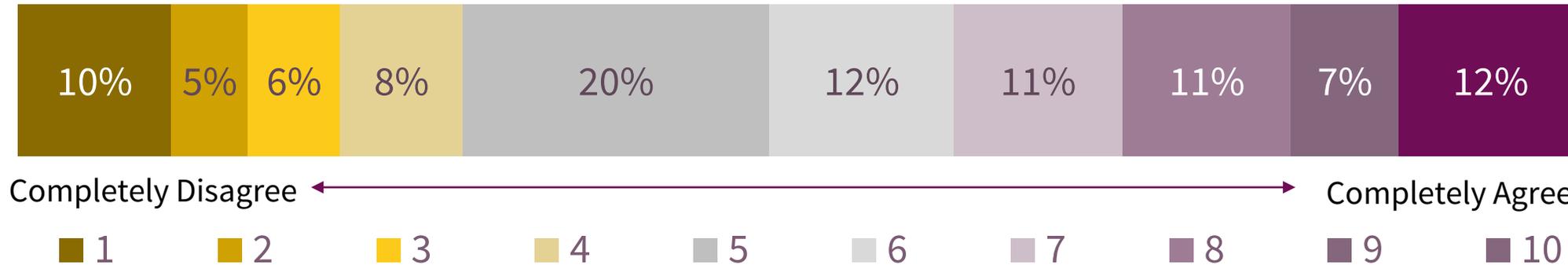
38%



- 38% agree with the statement based on Top 4 boxes. The mean score was 5.7
- Perhaps illustrating the **need for more advice and education on sustainable holidays**, even those who see climate change as an immediate problem struggle to make sustainable or green choices on holiday (41%). This is especially the case among families (46%)

41% AGREE THEY WILL FLY LESS FOR FUTURE HOLIDAY AND BREAKS

“I am determined to fly less for holidays and breaks in the future”



Top 4
Box
41%

- 41% agree with the statement based on Top 4 boxes. The mean score was 5.8
- The concept of flying less on future holidays and breaks splits opinion. It is slightly higher amongst those who see climate change as an immediate concern (46%), but likelihood to fly less is lower amongst Young Independents (39%) even though they have above average likelihood to recognise the issues of climate change

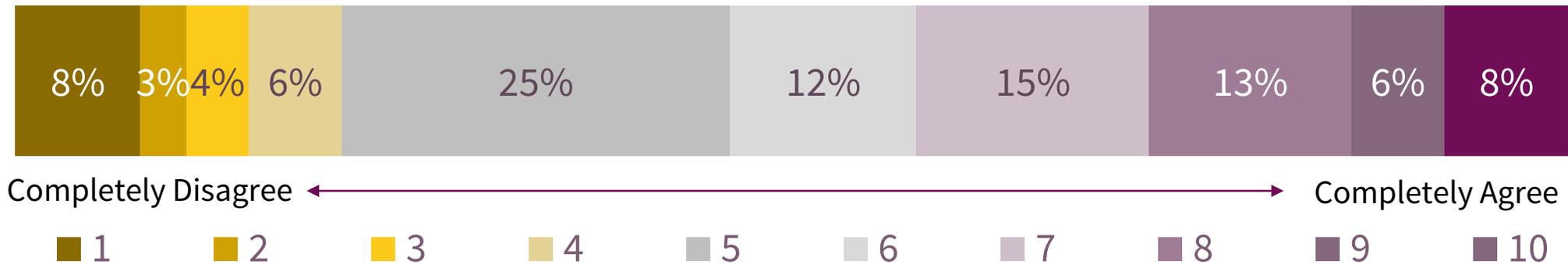


FEWER TRIPS AND MORE TIME AT SINGLE DESTINATIONS ARE MORE LIKELY TO BE CONSIDERED IN THE FUTURE FOR 42%

“In the future, I am likely to take fewer trips and spend more time at a single destination”

Top 4
Box

42%



- 42% agree with the statement based on the Top 4 boxes. The mean score was 5.9
- Families and Young Independents are more likely to consider fewer trips or more time at one destination in the future than average (46% and 47% respectively agreeing). Agreement also tends to increase with recognition of the immediacy of the climate emergency

IN SUMMARY – CLIMATE CHANGE AND SUSTAINABILITY

Attitudes

- 73% see climate change as an immediate and urgent problem. The importance of tackling climate change has been increased for many following the pandemic. 45% are more concerned now than pre-Covid
- 73% agree strongly that they try to have a positive impact on the environment through their everyday actions. This compares to 63% who similarly try to have a positive impact on their local community

Behaviours

- However, whilst the importance of climate change is recognised, there is more limited willingness among many to change future travel behaviours.
- As many as 49% of Scotland's residents are unlikely to think about sustainability when on holiday and 46% will still find reasons to travel internationally despite concerns. This is especially the case among Young Independents despite this group being most aware and sympathetic towards tackling climate change

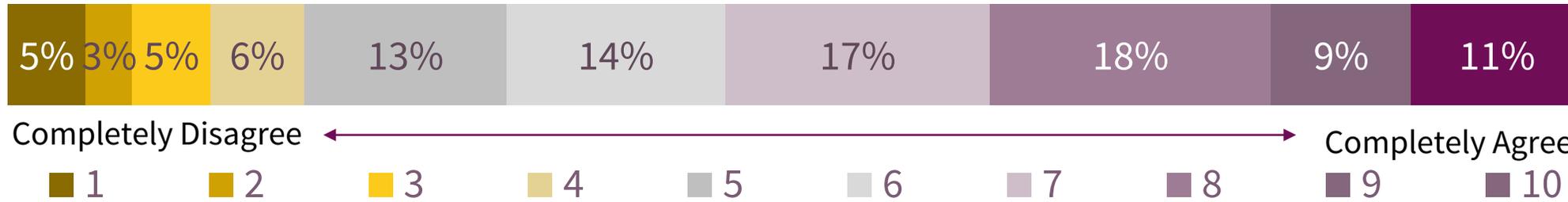
2. RESPONSIBLE TOURISM IN SCOTLAND OVERALL ATTITUDES



Blackstone Clydesdales on Ayr Beach

55% ARE CONCERNED ABOUT THE IMPACT OF TOURISM ON SCOTLAND'S NATURAL ENVIRONMENT

“I am concerned about the impact tourism has on Scotland’s natural environment”



Top 4
Box
55%



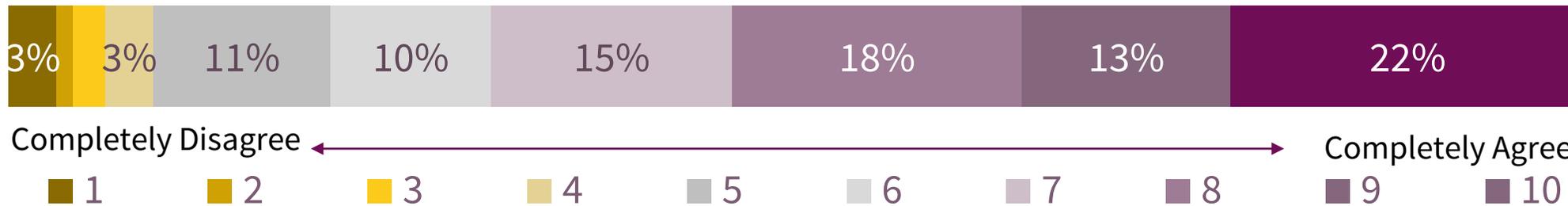
- Amongst those rating their concerns at 7-10, litter, local wildlife threats and overcrowding were the main specific concerns.



BASE: Those who provided a 7+ score out of 10 to rate their concern about the impact of tourism on Scotland’s natural environment (n=450)

68% ARE KEEN TO REDUCE THEIR ENERGY CONSUMPTION ON SCOTTISH HOLIDAYS

“I will reduce my energy consumption whilst on holiday in Scotland (e.g. by turning down heating, turning off lights)”



Top 4
Box
68%



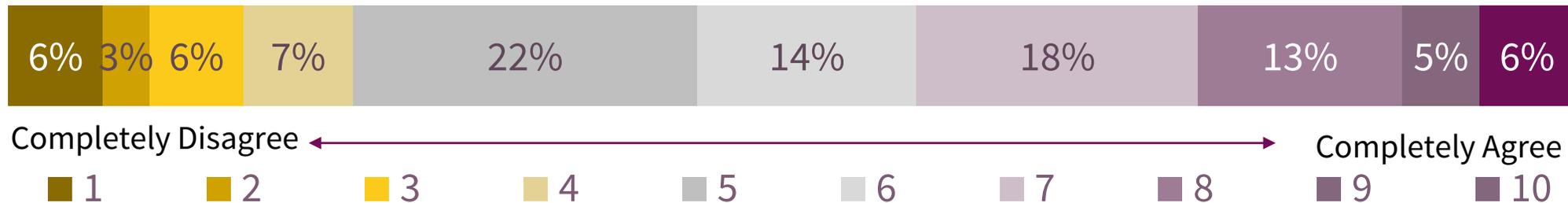
- The mean score was 7.3
- Families in particular were keen to reduce energy consumption on holiday (72%) although there was general support across all life stage groups
- Willingness to do so decreased by the extent to which people believed that climate change was a problem
- Also willingness was higher amongst those living in rural areas (74%) than urban dwellers (67%)

WITH 42% UNSURE HOW TO MAKE THEIR SCOTTISH HOLIDAYS MORE SUSTAINABLE, THE NEED FOR GUIDANCE IS CLEAR

“I am unsure how to make holidaying in Scotland more green/sustainable”

Top 4
Box

42%

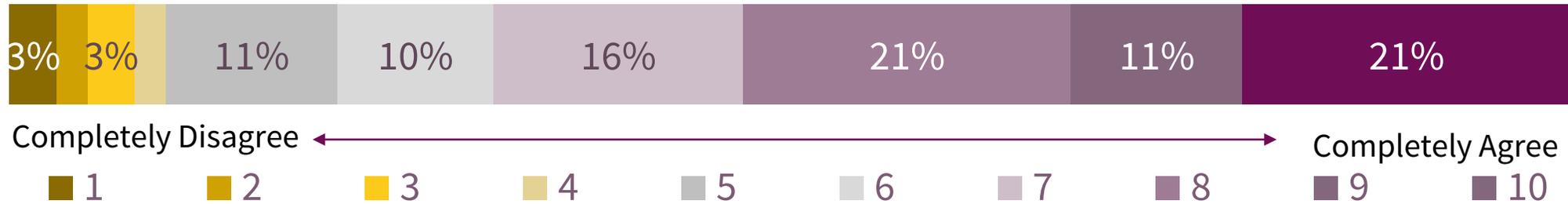


- 42% agree with the statement based on the Top 4 boxes. The mean score is 5.9
- Guidance on how to make their holidays greener or more sustainable is more required amongst Young Independents and Families, half of whom would appreciate this in each case (50% and 49%)

69% WOULD BE WILLING TO HOLIDAY OFF THE BEATEN TRACK

“I would be willing to holiday off the beaten track in Scotland”

Top 4
Box
69%

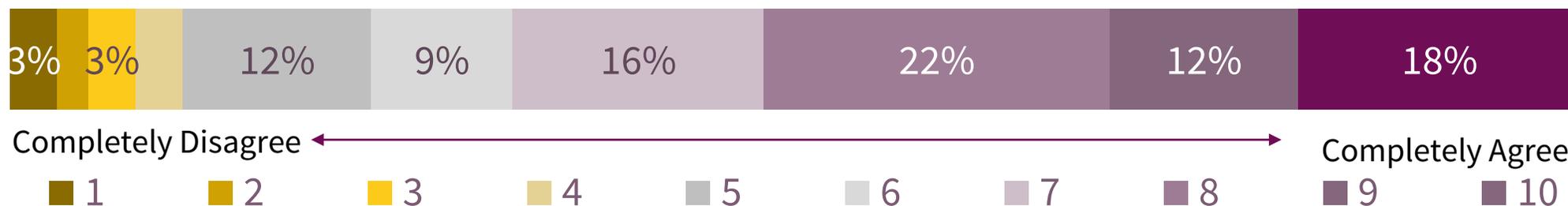


- 69% agreed with the statement based on the Top 4 boxes. The mean score is 7.3
- Willingness to go off the beaten track is high amongst all life stages apart from Empty Nesters. Only 59% of this group would be willing to do so
- Going off the beaten track also increases with belief in the climate emergency, whilst rural dwellers are more willing to do so than urban dwellers (79% and 66% respectively)

AND WITH 68% WILLING TO TRAVEL OFF-SEASON, THE POTENTIAL TO RELEASE PRESSURES ON BUSY TIMES AND EXTEND THE SEASON ARE CLEAR

“I would be willing to travel more in the off-peak season in Scotland ”

Top 4
Box
68%



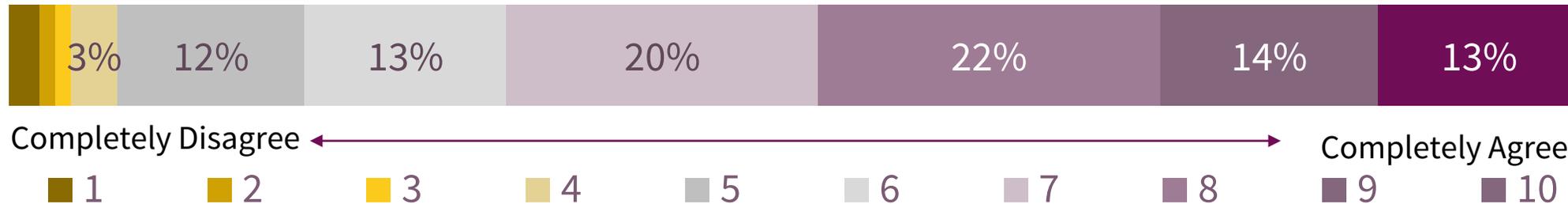
- 68% agree with the statement based on Top 4 boxes. The mean score is 7.2
- Families (66%) and empty nesters (66%) are slightly less willing/able to consider off-season travel than older independents (72%), and again, willingness to do so increases with the extent to which there is a recognition of the climate emergency
- Again, rural dwellers are also more likely to consider off-season travel than urban dwellers (75% vs 67%)
- Off peak is defined in the question as October to March

THERE IS CLEAR EVIDENCE THAT LOCAL COMMUNITIES SHOULD RECEIVE THE ECONOMIC BENEFITS FROM TOURISM

“I want to ensure that the economic benefit of my holiday goes to the communities I visit”

Top 4 Box

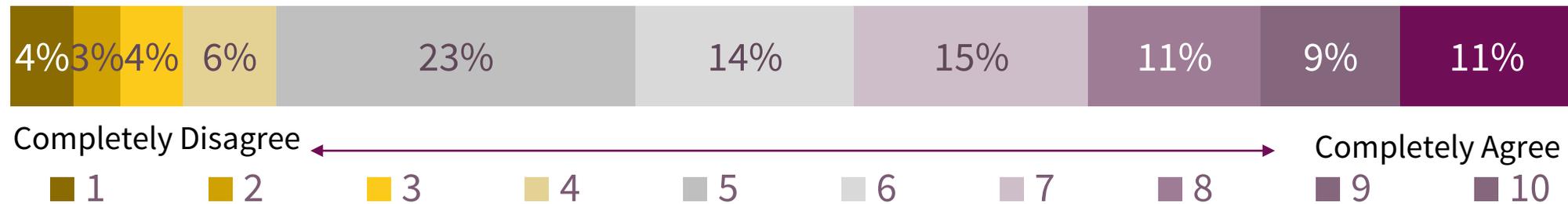
69%



- 69% of Scotland residents agreed with the statement based on Top 4 boxes. The mean score was 7.2
- Empty Nesters and Older Independents were most likely to agree on the need for local communities to benefit from tourism (71% and 70%) and again, agreement increases by the extent of belief in the immediacy of the climate emergency

46% FELT THAT PRIVATE HOMES LET OUT COMMERCIALLY CAN HAVE A DETRIMENTAL IMPACT ON THEIR COMMUNITY BUT THIS IS HIGHER AMONGST EDINBURGH RESIDENTS

“Private homes let out on a commercial basis can often have a detrimental impact on the community in which they operate”



Top 4
Box
46%

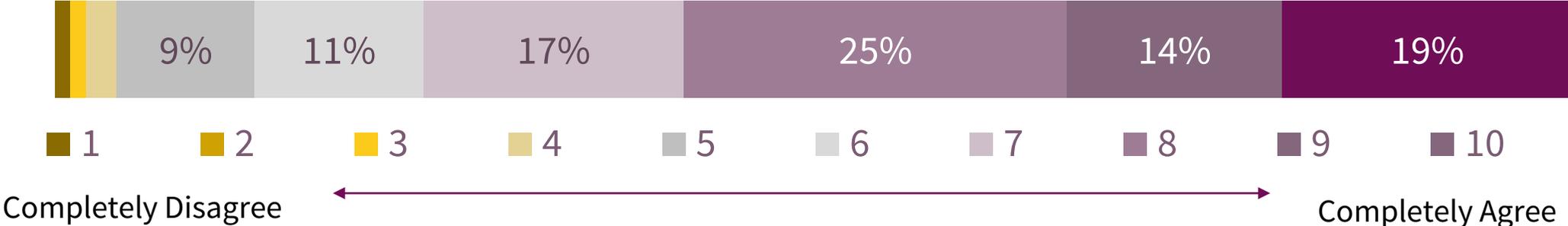


- 46% agreed with the statement based on the Top 4 boxes.
- The mean score was 6.3
- The detrimental effect of renting out private homes commercially was felt to be much the same between urban and rural dwellers. In each case, just under half were in strong agreement (46% and 47% respectively)
- However, Edinburgh residents were much more likely to agree (62%)

75% OF SCOTLAND'S RESIDENTS AGREE THAT THEY WOULD CHOOSE INDEPENDENT LOCAL SHOPS AND CAFES WHEN ON HOLIDAY IN SCOTLAND

“I would choose independent local shops / cafes/ restaurants when on a holiday in Scotland”

Top 4 Box
75%

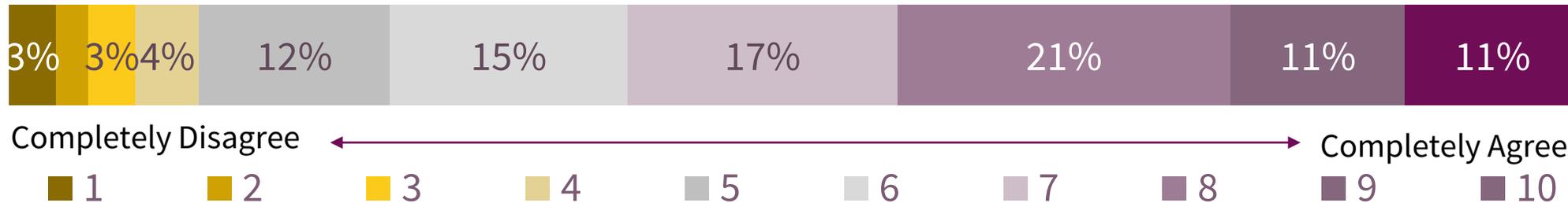


- 75% agree with the statement based on the Top 4 boxes
- The mean score is 7.7
- Older Independents and Empty Nesters are most likely to choose independent local shops, cafes and restaurants on a Scottish holiday (79% and 77%), slightly ahead of families (75%) and Young Independents (69%)

Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers (n=805)

60% ALSO AGREED THAT THEY WOULD SEARCH FOR PLACES TO EAT THAT SOURCE LOCAL FOOD AND DRINK ON A SCOTTISH HOLIDAY

“I would search out places to eat that source local food and drink and choose these on my holiday”



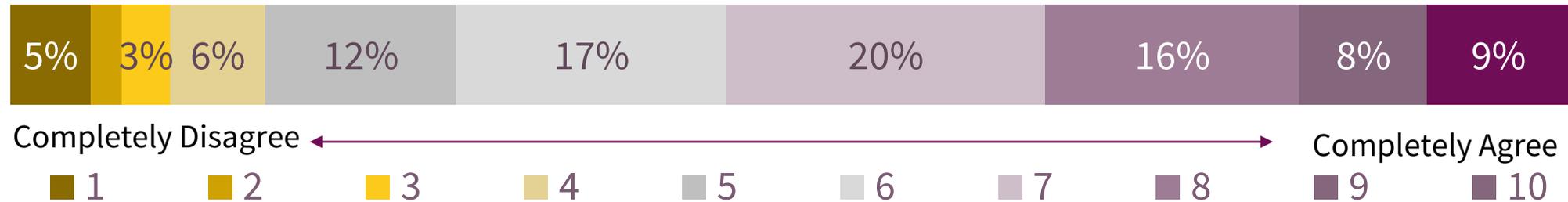
Top 4
Box
60%



- 60% agree with the statement based on Top 4 boxes. The mean score is 6.9
- Families and Older Independents are most likely to seek out places to eat that source local food and drink when they are on holiday in Scotland (65% and 63% respectively)
- It is slightly less important for both Young Independents and Empty Nesters (each 58%)

A SMALLER PROPORTION, 53% WOULD BE WILLING TO PAY MORE FOR LOCALLY SOURCED FOOD AND DRINK

“I would be willing to pay more for locally sourced and produced food and drink” **Top 4 Box**



53%



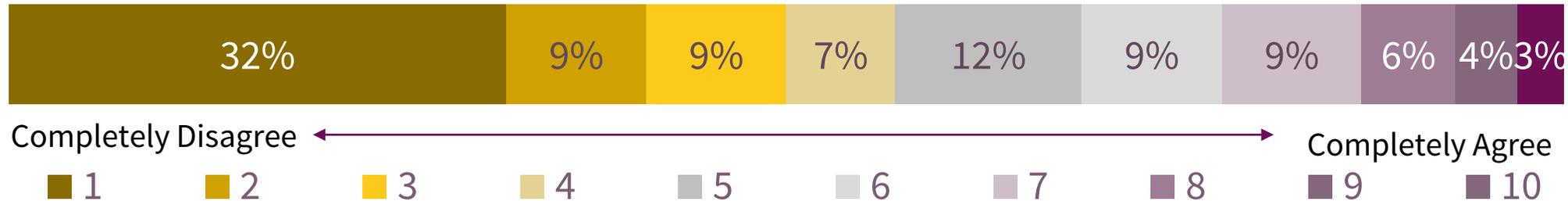
- 53% agree with the statement. The mean score is 6.5
- Despite showing an interest in eating locally sourced food and drink, Empty Nesters are rather less willing to pay more for it (47% compared with 58-59% across the other life stages)

22% OF NON VEGETARIANS/VEGANS WOULD BE WILLING TO CHOOSE THIS TYPE OF FOOD MORE ON A SCOTTISH HOLIDAY

“I would choose vegan or vegetarian options more often when eating out on a Scottish holiday or break”

Top 4 Box

22%



- 22% agreed with this statement based on the Top 4 boxes. The mean score is 4.0
- Amongst non-Vegetarians/Vegans, there is limited willingness to choose such options when eating out on a Scottish holiday
- Families are most willing (33%) followed by Young Independents (27%) whereas only 12% of Empty Nesters show similar levels of willingness to try these options

IMPORTANT ACTIONS FOR BUSINESSES TO TAKE

Top 5 actions Identified by Scotland Residents

Based on Top 4 scores:
score 7+ out of 10 on agreement
scale on level of importance



72%

Commitment to source and buy produce locally



71%

Provide information on local natural and cultural attractions and ways to enjoy them respectfully/responsibly



70%

Commitment to recruit staff from the local area



62%

Commitment to reduce the energy consumption in their business



61%

Commitment to reducing their carbon emissions to help address climate change

Support for each of these business actions was higher amongst those who believed Climate Change was an immediate problem. Families and Young Independents also tended to be more supportive of most of these business actions, whilst support was less strong amongst empty nesters.

ON SCOTTISH HOLIDAYS AND BREAKS, THE MAIN SUSTAINABILITY OPPORTUNITIES RELATE TO LOCAL FOOD AND DRINK, REDUCING ENERGY CONSUMPTION, AND TRAVELLING OFF THE BEATEN TRACK AND OFF-SEASON

	Top 4 Box (Agreement)
Choose independent local shops / cafes / restaurants	76%
Reduce my energy consumption	69%
Willing to holiday off the beaten track	69%
Willing to travel more in the off-peak season	68%
Want economic benefit of my holiday to go to the communities visited	68%
Choose places to eat that source local food and drink	61%
Concerns about the impact tourism has on Scotland's natural environment	55%
Willing to pay more for locally sourced and produced food and drink	54%
Doubts about impact on local communities of private homes let out commercially	46%
Unsure how to make holidaying in Scotland more green / sustainable	43%
Choose vegan or vegetarian options more often when eating out	22%

Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers (n=805)

SUMMARY: RESPONSIBLE TOURISM IN SCOTLAND OVERALL ATTITUDES

- **55% are concerned with the impact of tourism on Scotland's natural environment** with litter (64%), threats to local wildlife (60%) and overcrowding at popular tourist sites (54%) the main concerns
- Encouragingly, **68% will try to reduce their energy consumption whilst on holiday** however there is a clear need for more advice and education on how to make holidays greener or more sustainable with 42% unsure
- Positively, there is a willingness among **69% to go off the beaten track or take holidays in the off-season (68%)**
- In terms of food and drink, **75% would choose independent local shops and cafes** out of preference.
- The top 5 areas where Scotland residents believe that tourism businesses could do more are sourcing local products (72%), providing information to tourists on local natural and cultural attractions (71%), employing staff local to the area (70%), and committing to both reducing energy consumption (62%) and carbon emissions (61%)

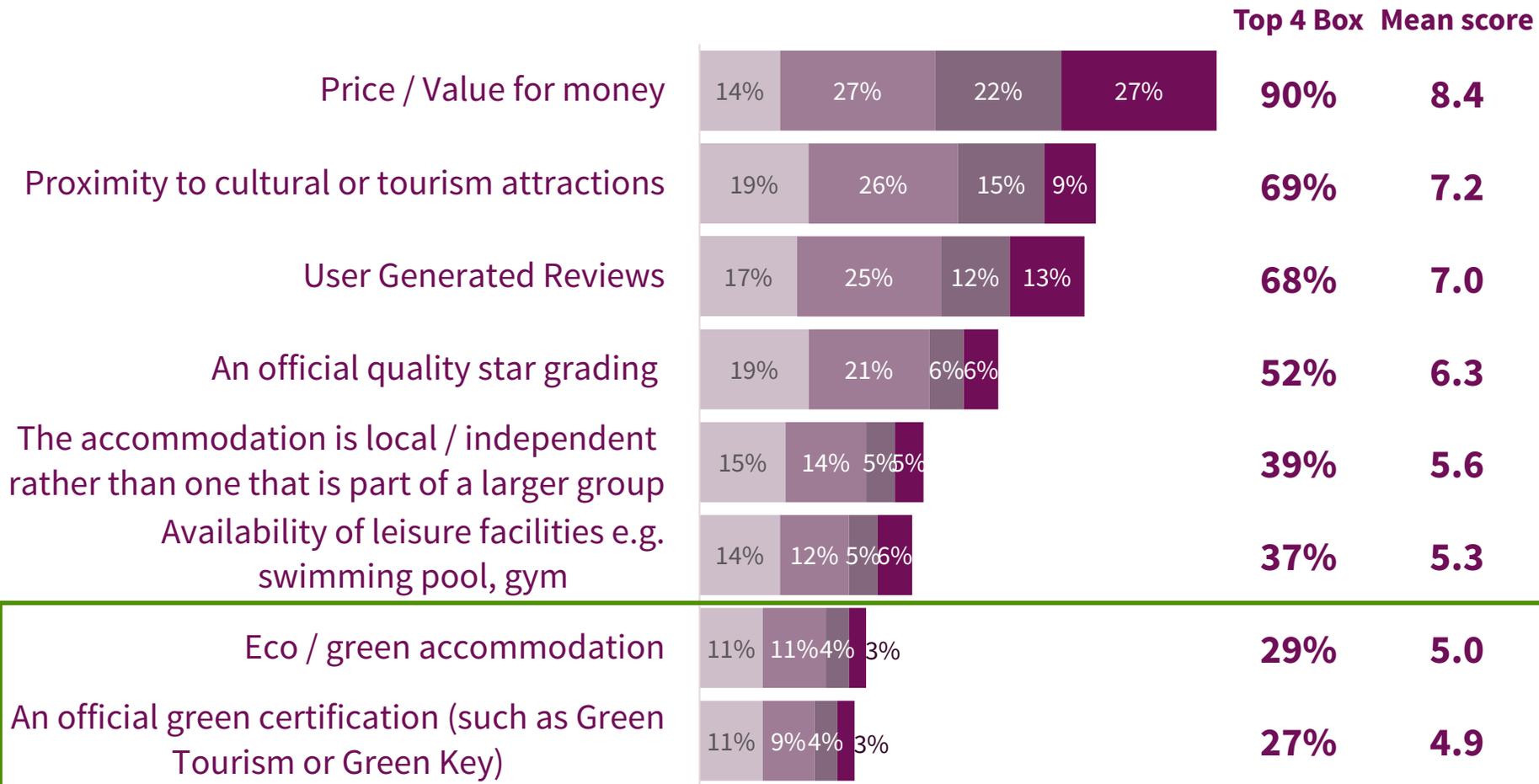
A wide-angle landscape photograph of a Scottish highland valley. In the foreground, a hiker wearing a red jacket and a grey hat is walking away on a dirt path that winds through green grass. The middle ground features a large, calm lake surrounded by rolling green hills. In the background, several large, rugged mountains with rocky peaks rise against a blue sky filled with white and grey clouds. The overall scene is bright and scenic, capturing the natural beauty of the Scottish Highlands.

3. RESPONSIBLE TOURISM IN SCOTLAND

ACCOMMODATION CHOICE

 Stac Pollaidh

IMPORTANT FACTORS WHEN CHOOSING PAID FOR ACCOMMODATION



Level of Importance: (7/10) (8/10) (9/10) (10/10)

Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers and stay in paid for accommodation (n=776)

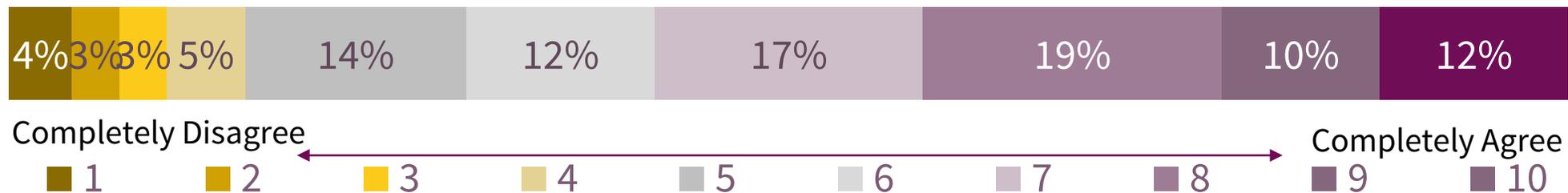
FURTHER ILLUSTRATING THE NEED AND ROLE FOR ADVICE, 58% WOULD BE UNSURE HOW TO IDENTIFY AN ECO-FRIENDLY TOURISM BUSINESS



Top 4
Box

58%

“I would be unsure as to how to identify an eco-friendly tourism business in Scotland”



- 58% agreed with this statement based on the Top 4 boxes. The mean score is 6.7
- The requirement for guidance is clearest amongst families and Young Independents, 66% and 63% respectively would be unsure how to identify an eco-friendly tourism business

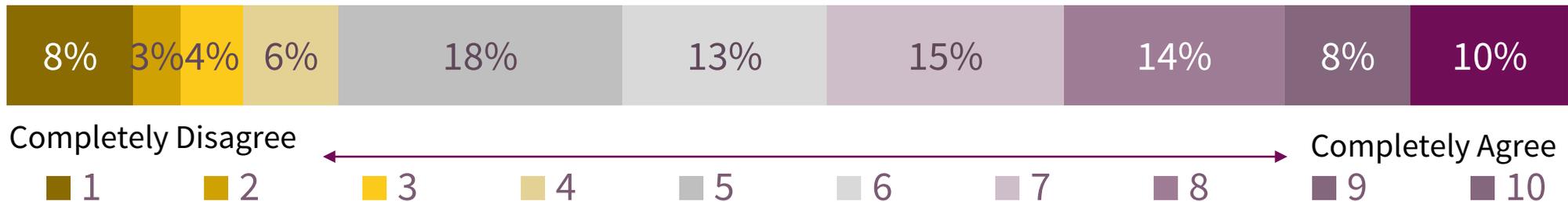
JUST UNDER HALF (47%) WOULD APPRECIATE A CLEAR LABELLING TO INDICATE WHETHER OR NOT A TOURISM BUSINESS WAS GREEN OR ECO-FRIENDLY



“I’d like to see a clear label to say that a tourism business in Scotland is green/eco-friendly”

Top 4 Box

47%

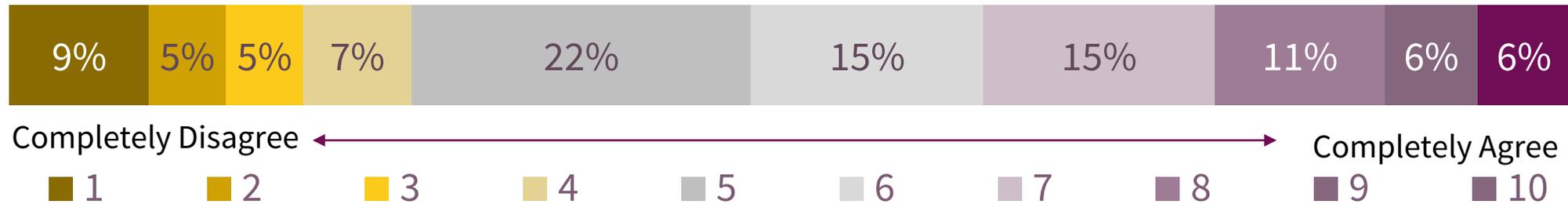


- 47% agreed with this statement based on the Top 4 boxes.
- The mean score is 6.1
- Again, families and Young Independents are most likely to respond to clear labelling that indicates the green credentials of tourism businesses. 58% and 56% agreeing strongly. Only 34% of Empty Nesters feel this strongly about green labelling

THERE REMAINS A MINORITY WHO ARE MORE LIKELY TO CHOOSE ECO-FRIENDLY ACCOMMODATION (38%)



“I am more likely to stay in accommodation in Scotland that is eco-friendly (has implemented sustainability practices)”



Top 4
Box

38%



- 38% agreed with this statement based on the Top 4 boxes. The mean score is 5.6
- Interest in green accommodation varies significantly by life stage. Just under half of Young Independents and Families (46% in each case) would be more likely to choose eco-friendly accommodation. This is significantly ahead of the equivalent proportions of Older Independents (37%) and especially Empty Nesters (28%)

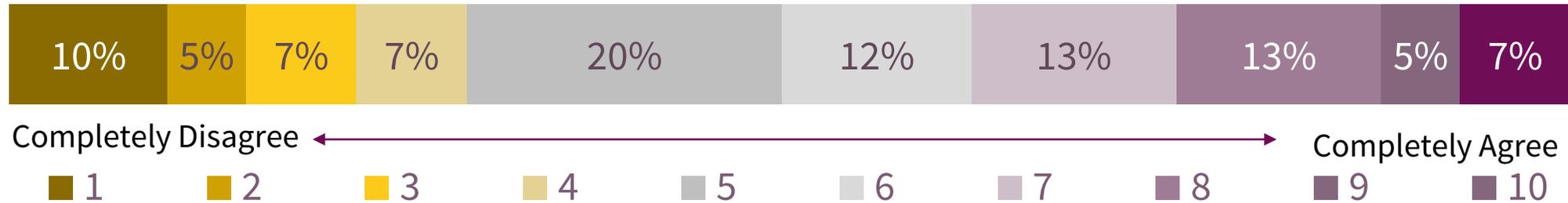
38% WOULD BE KEEN TO SEE A GREEN/ECO-FRIENDLY CERTIFICATION BEFORE BOOKING



Top 4
Box

38%

“I’d like to be able to see if a business has green/eco friendly certification before booking”



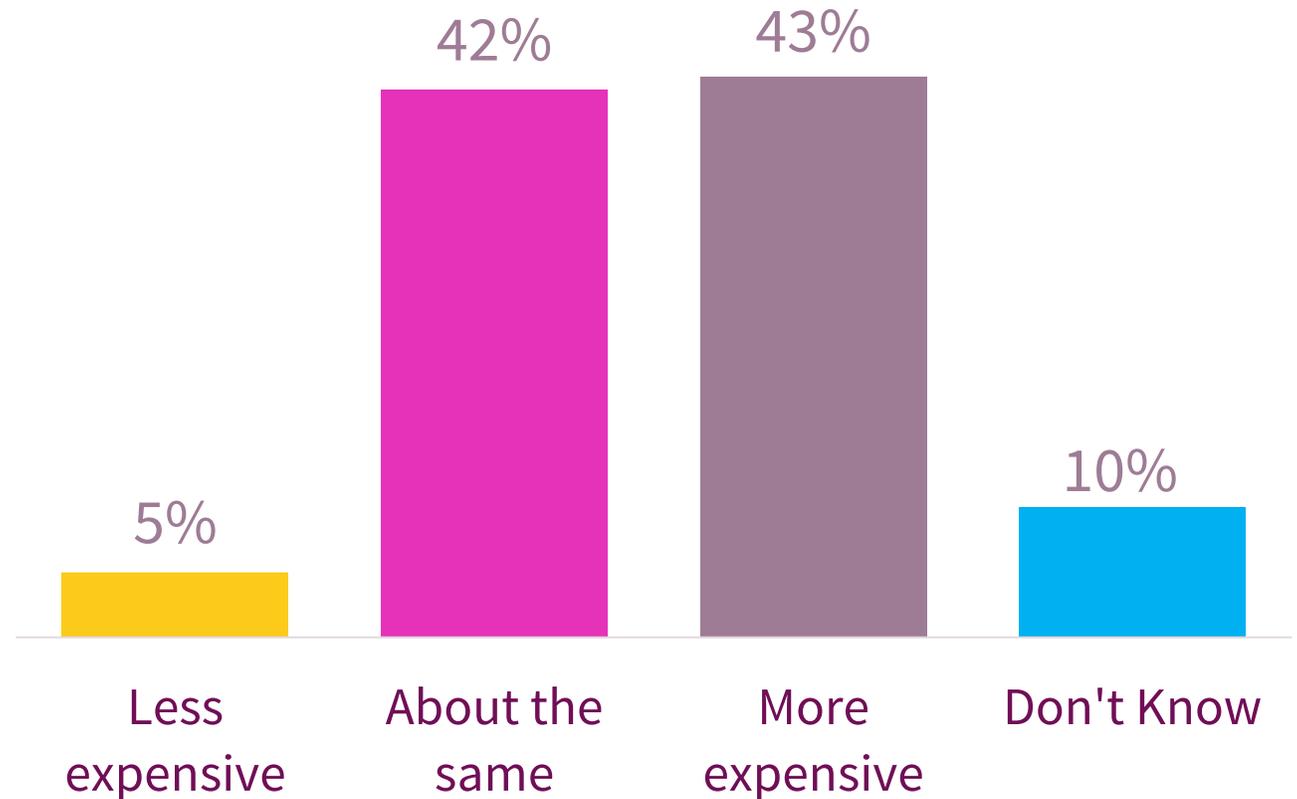
- 38% agreed with the statement based on the Top 4 boxes.
- The mean score is 5.6
- Once again, most receptive to green certification are Families and Young Independents. 51% and 45% respectively would like to see such certification in advance of booking

43% FEEL THAT GREEN ACCOMMODATION WILL BE MORE EXPENSIVE

43% expect accommodation that states it is green/eco-friendly would be more expensive than non-green properties in that particular area of Scotland, a similar proportion believe it would be around the same price (42%) and 5% think it would be less expensive.

Empty Nesters (46%), Older Independents (49%) are more likely to perceive that green accommodation will be more expensive.

Green accommodation cost expectations vs. non-green equivalents



Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers and stay in paid for accommodation (n=776)

SUMMARY: A DESIRABILITY FOR GREEN CREDENTIALS IS QUITE FAR DOWN THE LIST OF FACTORS WHEN CHOOSING HOLIDAY ACCOMMODATION

- Reflecting the real challenge to change consumer behaviour, **a desirability for green credentials is quite far down the list of factors when choosing accommodation**
- Price and value for money is of greatest importance (90% rating it of high importance) followed by proximity to attractions (69%) and user generated reviews (68%)
- Only **29% felt eco/green accommodation was an important factor** to them and **27% felt an official green accreditation scheme was important**
- When prompted more specifically on green issues, there is undoubtedly some underlying interest in green accommodation though what is apparent is the **need for additional guidance to consumers as to how to identify eco-friendly establishments**
- Once again, Young Independents and Families are much more open to choosing accommodation with green credentials than Empty Nesters

An aerial photograph of a wide, sandy beach at sunset. The sun is low on the horizon, casting a warm, golden glow over the scene. The sky is filled with soft, orange and yellow clouds. The beach curves along the coast, with shallow water and sandbars visible. In the distance, there are rolling hills and mountains under the twilight sky.

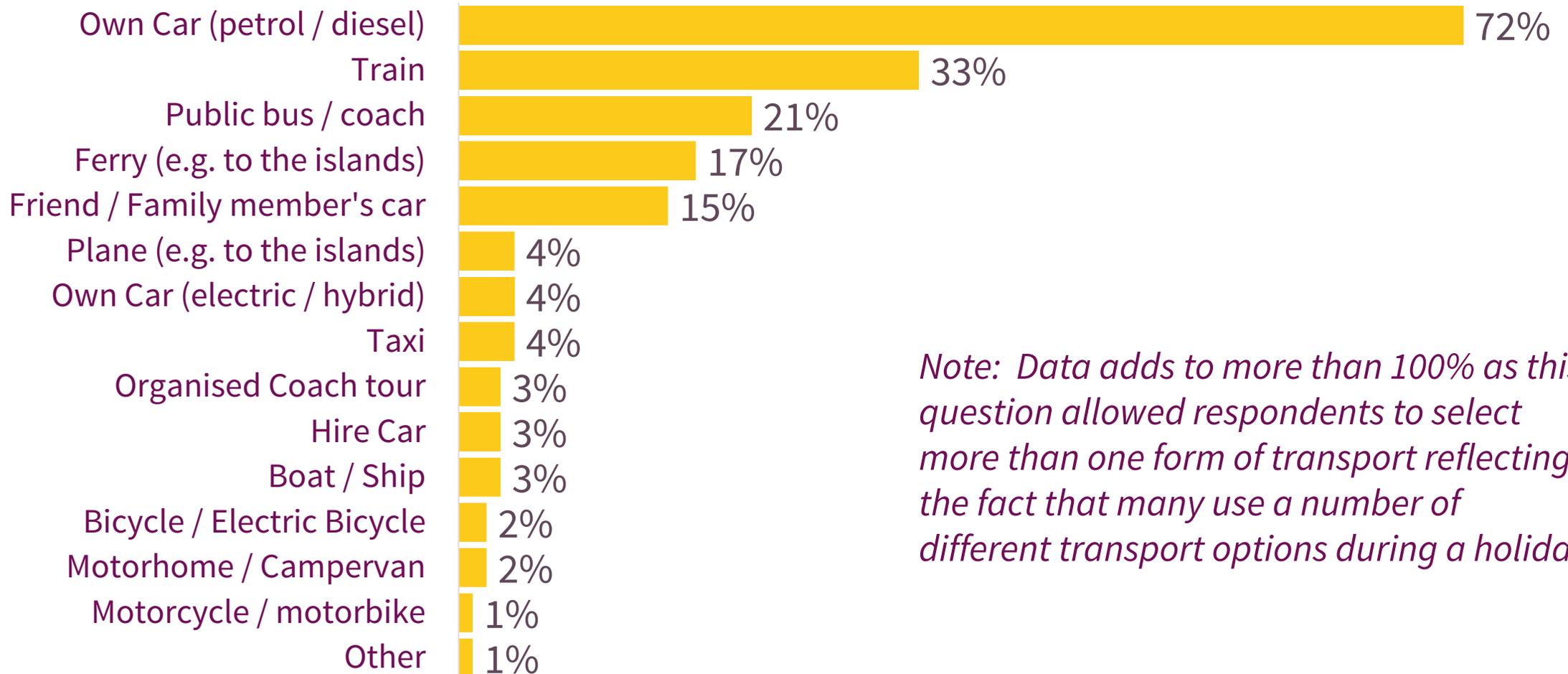
4. RESPONSIBLE TOURISM IN SCOTLAND

TRAVEL & TRANSPORT



The beach at Luskentyre, Harris

ALMOST THREE QUARTERS OF SCOTLAND RESIDENTS ARE MOST LIKELY TO USE THEIR OWN PETROL/DIESEL CAR WHEN TAKING BREAKS AND HOLIDAYS IN SCOTLAND

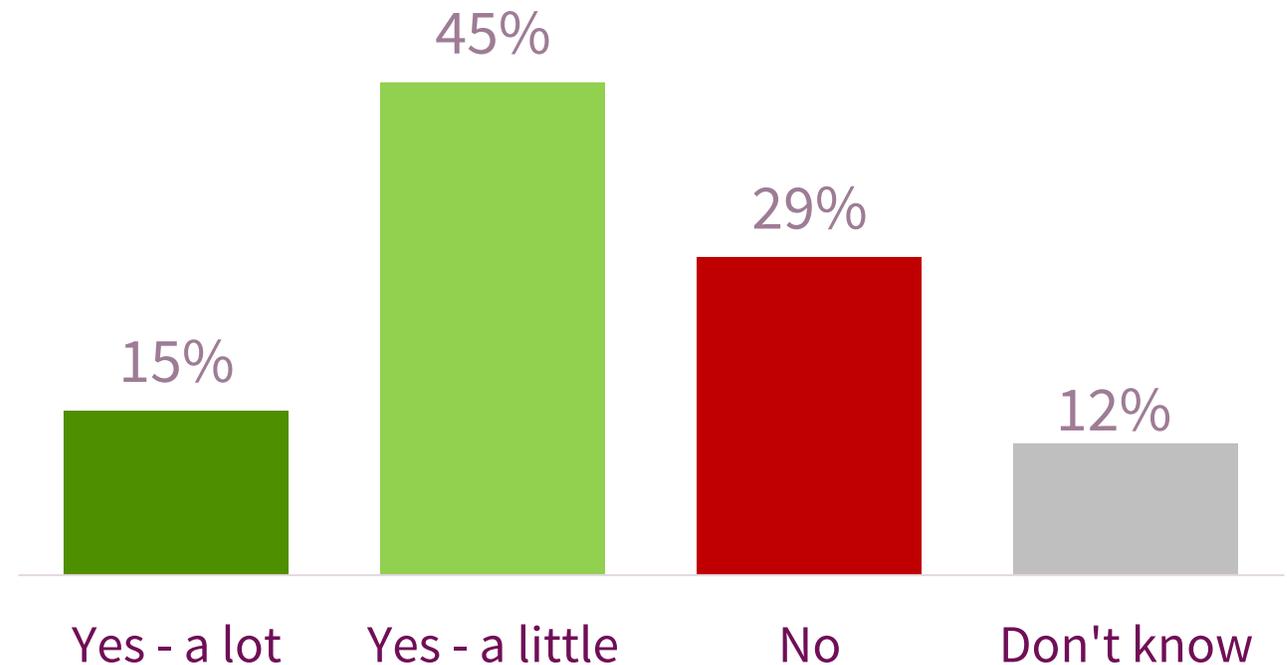


Note: Data adds to more than 100% as this question allowed respondents to select more than one form of transport reflecting the fact that many use a number of different transport options during a holiday

AMONGST PETROL/DIESEL CAR & HIRE CAR USERS, 60% WOULD BE WILLING TO REDUCE THE AMOUNT THEY TRAVEL BY CAR ON HOLIDAY IN SCOTLAND

- **15% would be willing to reduce car travel 'a lot'.** Again, the variation by life stage is clear.
- This proportion was highest amongst Young Independents (23%) and lowest amongst Empty Nesters (10%)
- **45% would be willing to reduce car travel 'a little'**

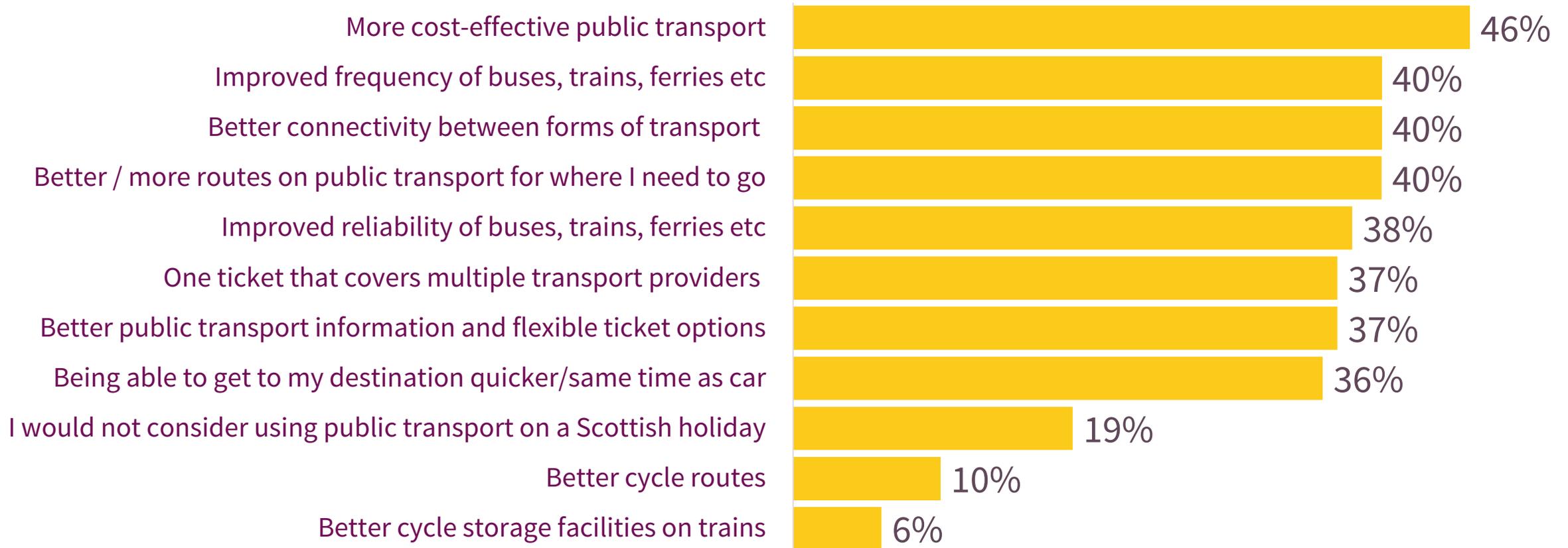
Willingness to reduce the amount of petrol / diesel car travel to reduce carbon emissions when on holiday in Scotland



Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers who travel by car(n=594)

A WHOLE HOST OF FACTORS COULD ENCOURAGE LESS CAR TRAVEL

What would help reduce the amount travelled by car on a Scottish holiday

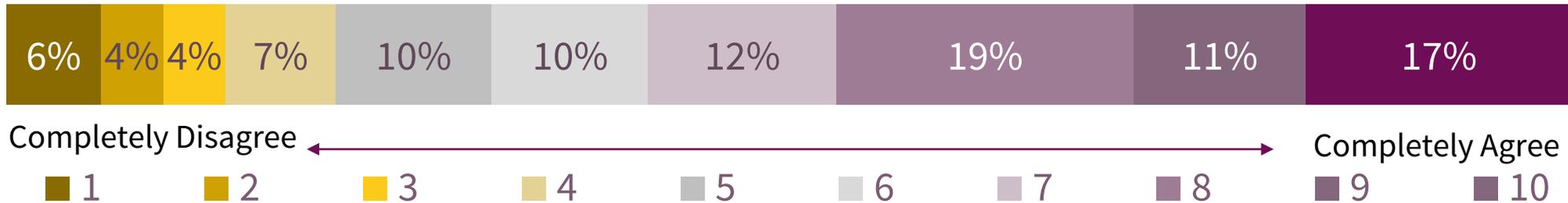


Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers who travel by car (n=594)

59% OF THOSE WHO USE CARS ON SCOTTISH HOLIDAYS ARE WILLING TO CONSIDER CAR FREE DAYS ON THE TRIP



“I would seriously consider car free days when on a holiday in Scotland”



Top 4
Box
59%

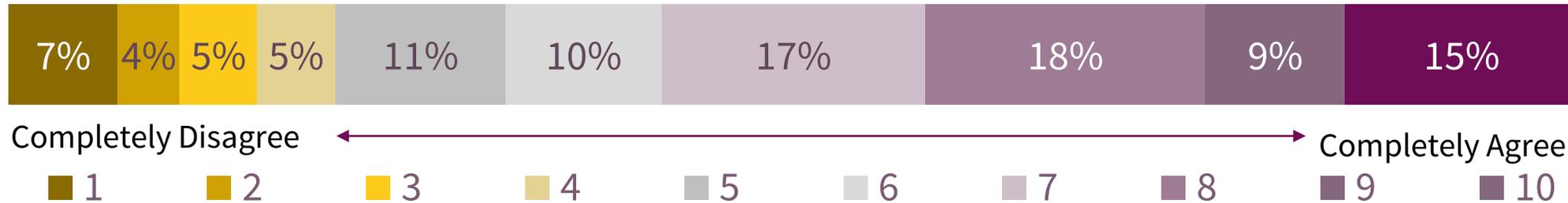


- 59% agree with the statement based on the Top 4 boxes.
- The mean score is 6.7
- Car free days are most appealing for Young Independents (67%) and Families (65%)
- They are less appealing for Empty Nesters (50%)

59% WOULD ALSO SERIOUSLY CONSIDER USING PUBLIC TRANSPORT WHEN THEY WERE AT THEIR SCOTTISH HOLIDAY DESTINATION



“I would seriously consider using public transport to travel once at my destination in Scotland”



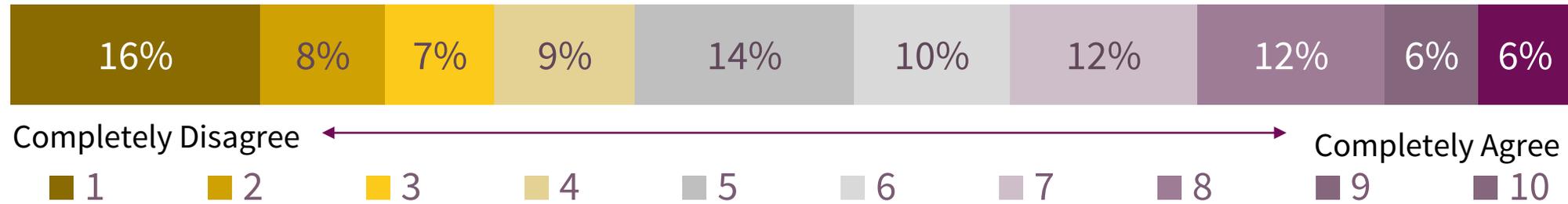
Top 4
Box
59%

- 59% agree with the statement based on the Top 4 boxes. The mean score is 6.5
- Using public transport when at the destination holds greatest appeal to Young Independents, 67% of whom would seriously consider this
- Again, it is least likely to be an option for Empty Nesters (52%)

ONLY 36% WOULD SERIOUSLY CONSIDER PLANNING THEIR WHOLE TRIP AROUND PUBLIC TRANSPORT ROUTES



“I would consider planning my holiday in Scotland based on public transport routes”



Top 4
Box

36%



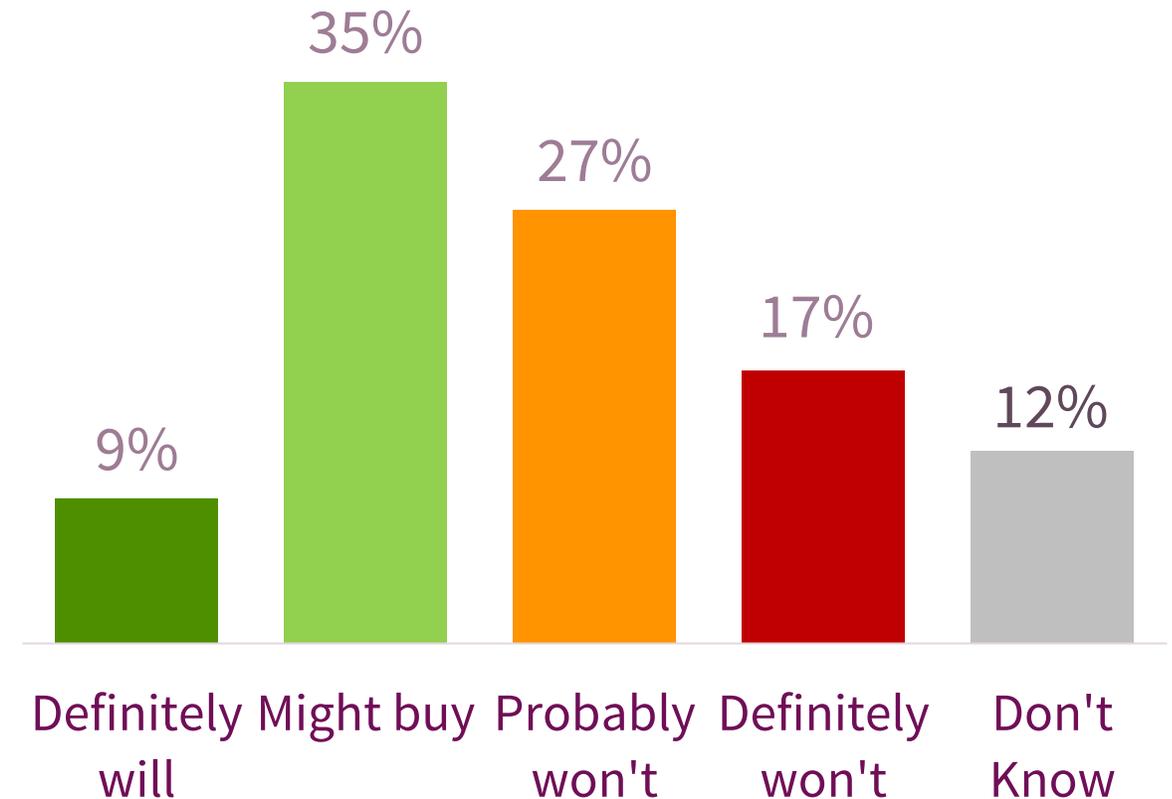
- 36% agree with the statement based on the Top 4 boxes.
- The mean score is 5.1
- Planning the whole trip around public transport routes has very limited appeal across the board
- Though it is a more appealing prospect amongst families (45%) than amongst Empty Nesters (29%)

Base: Those who take Holidays and are regular, occasional or lapsed Scottish holiday takers who travel by car (n=594)

ELECTRIC/HYBRID CARS ARE ON THE PURCHASE RADAR OF 44% OF PETROL/DIESEL CAR OWNERS

- Amongst those who drive petrol or diesel cars and take holidays in Scotland, replacing them with an electric or hybrid model in the next few years is a consideration for some. 9% definitely will whilst 35% might do so
- A similar proportion are unlikely to do so however (44%) with cost being the primary reason
- The proportion willing to consider is highest among Families (51%) and Young Independents (48%) as well as those who see Climate Change as an immediate priority (50%)

Willingness to buy an electric/hybrid car in the next few years



SUMMARY: THE DIFFICULTIES IN DELIVERING A MORE SUSTAINABLE TOURISM PRODUCT IS ILLUSTRATED BY THE CHALLENGE TO CHANGE CONSUMER BEHAVIOURS IN TERMS OF TRANSPORT CHOICES

- Travel and transport is another key element of a Scottish holiday, and again, the difficulty to deliver a more sustainable product is illustrated by the challenge to change consumer behaviours
- Currently, **73% of Scotland residents use their own petrol/diesel car when taking breaks and holidays** in Scotland. Electric/hybrid cars remain very niche for now (4%)
- More encouragingly, **60% of car users would consider reducing the amount of car travel on a Scottish holiday although only 15% would be willing to reduce car travel ‘a lot’**. However for this to happen there are some real challenges: they would want better public transport in terms of frequency, reliability, flexibility inter-connectivity, routes to where they want to go and a need to be able to get there as quickly as in a car
- **59% of car drivers claim that they are open to more car free days or using public transport** on holiday but less so to plan the whole holiday around public transport routes. There is some interest in changing their petrol/diesel cars to electric/hybrid in the next few years however there remain several barriers to purchase – especially price but also fears around sufficient charging points and the range that could be travelled on a charge
- In common with other elements of sustainability, again Young Independents and to a lesser extent Families are more willing to consider greener options such as public transport and car free days than Empty Nesters

IN CONCLUSION



Isle of Kerrera

SUMMARY: HEADLINE ATTITUDES



73% agree that climate change is an immediate and urgent problem



45% feel they are a lot or a little more concerned about tackling climate change since the pandemic



55% agree that they are ‘concerned about the impact tourism has on Scotland’s natural environment’



73% try to have a positive impact on the environment through their own daily action

BEHAVIOURAL CHANGE – OPPORTUNITIES AND BARRIERS

50%+ LEVELS OF AGREEMENT

Consumer statements	Top 4 Box (Agreement)
I would choose independent local shops / cafes / restaurants when on a holiday in Scotland	76%
I will reduce my energy consumption whilst on holiday in Scotland	69%
I would be willing to holiday off the beaten track in Scotland	69%
I would be willing to travel more in the off-peak season (October to March) in Scotland	68%
I want to ensure that the economic benefit of my holiday goes to the communities I visit	68%
I would search out places to eat that source local food and drink and choose these on holiday in Scotland	61%
I would seriously consider car free days when on a holiday in Scotland	58%
I would seriously consider using public transport to travel once at my destination in Scotland	58%
I am concerned about the impact tourism has on Scotland's natural environment	55%
I would be willing to pay more for locally sourced and produced food and drink	54%

BEHAVIOURAL CHANGE – OPPORTUNITIES AND BARRIERS

LESS THAN 50% LEVELS OF AGREEMENT

Consumer statements	Top 4 Box
When I'm on holiday I don't want to think about sustainability, I want to relax and enjoy myself	49%
Private homes let out on a commercial basis can often have a detrimental impact on the community where they operate	46%
I will still find reasons to travel internationally despite having concerns about sustainability and climate change	46%
I am unsure how to make holidaying in Scotland more green / sustainable	43%
In the future, I am likely to take fewer trips and spend more time at a single destination	42%
I am determined to fly less for holidays and breaks in the future	41%
I find it difficult to make sustainable / green choices when on holiday compared to being at home	38%
The pandemic has made me want to travel more sustainably in the future	36%
I would consider planning my holiday in Scotland based on public transport routes	36%
I would choose vegan or vegetarian options more often when eating out on a Scottish holiday or break	22%



Glen Rosa and Goat Fell, Isle of Arran

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