



Scotland's
Viewpoint

TOURISM IN SCOTLAND

IN LIGHT OF THE HOSPITALITY SECTOR STAFFING CRISIS, DOES THE SECTOR HAVE AN IMAGE PROBLEM?

IN LATE OCTOBER WE UNDERTOOK A SURVEY OF THE SCOTTISH POPULATION IN ASSOCIATION WITH EDINBURGH NAPIER UNIVERSITY AND THE ASSOCIATION FOR TOURISM IN HIGHER EDUCATION (ATHE) TO EXPLORE PERCEPTIONS OF THE SCOTTISH TOURISM AND HOSPITALITY INDUSTRY AS A CAREER CHOICE.

TOURISM IN SCOTLAND' LARGELY PROJECTS A POSITIVE IMAGE TO SCOTS...

70% of Scots have positive associations with the largest percentages thinking of beautiful scenery and natural assets, the Highlands and Islands, history and heritage, Edinburgh or the economic benefits of tourism.

"Explore the natural beauty and old buildings Scotland has to offer"
"Tourism is good for local economies"
"History, scenery, midges!, Good food, golf"

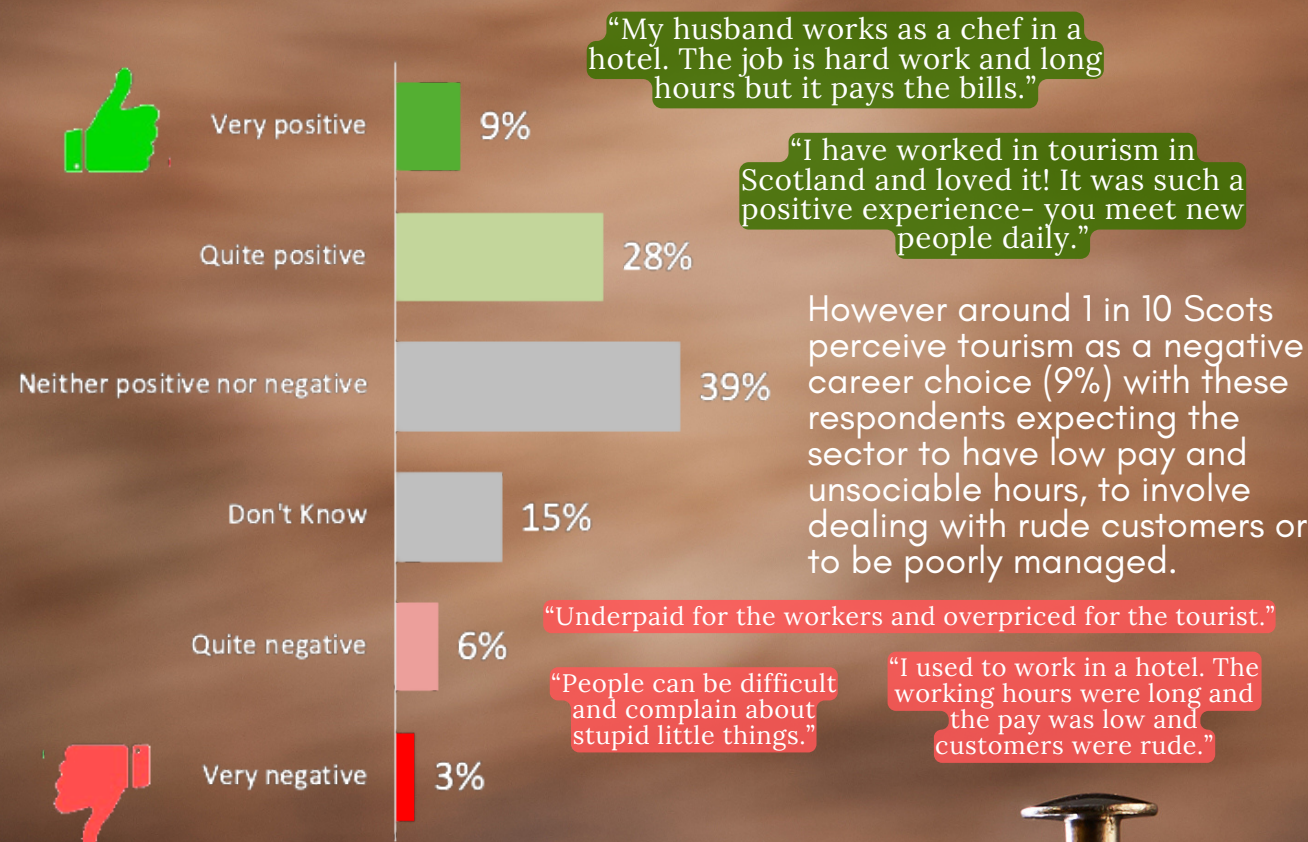
However, **12% have negative associations** including a perceptions of tourism being expensive, destinations being over crowded, poor weather or poor service levels.



MIXED OPINIONS ON WHAT IT WOULD BE LIKE TO WORK IN TOURISM AND HOSPITALITY IN SCOTLAND

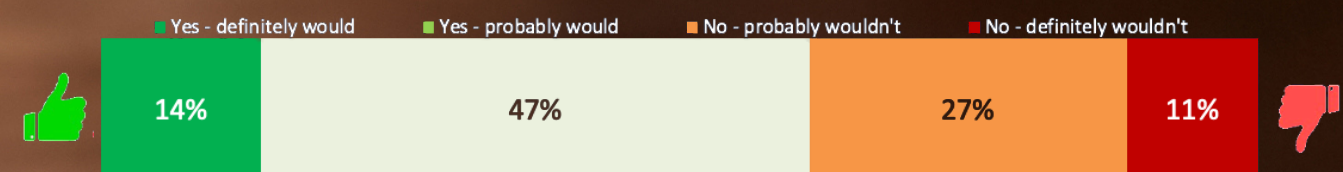
When we asked respondents what they thought it would be like to work in the Scottish tourism industry, opinions were fairly mixed. While just over half of the population don't know or have no strong opinions (54%), around 2 in 5 hold a positive view of working in the sector with 39% rating it as likely to be a positive career choice.

Key reasons for holding this positive view include opportunities to meet and welcome visitors to our country, a pride in Scotland and a perception that a job in tourism would provide good prospects for the future.



A SIGNIFICANT MINORITY WOULD NOT ENCOURAGE A FRIEND OR RELATIVE TO STUDY TOURISM OR HOSPITALITY AT COLLEGE OR UNIVERSITY

We asked respondents if they would encourage a family member or friend to study tourism and hospitality at college or university. 61% of those who expressed an opinion provided a positive response, expecting that they would definitely or probably encourage their family or friends to study tourism. However 39% expect that they would not encourage someone to study tourism or hospitality (11% definitely would not).



Factors influencing opinions are similar to those relating to choosing tourism as a career.

Those with a positive view who would encourage someone to study tourism and hospitality see it as a good career with good prospects, a growing sector, an interesting and varied career and a career which would allow you to help Scotland to grow its economy.

"I think it would be a good career choice for the future because I think tourism will get bigger and bigger in the future."

However, those with a negative view of studying tourism and hospitality associate the sector with low pay, a lack of job security, hard work and unsociable hours. Some also have a view that to work in this sector does not require academic qualifications or that there are better career options to pursue through college or university.

"Better studying worthwhile degrees."

"It is an industry facing many challenges, which are likely to continue in coming years."

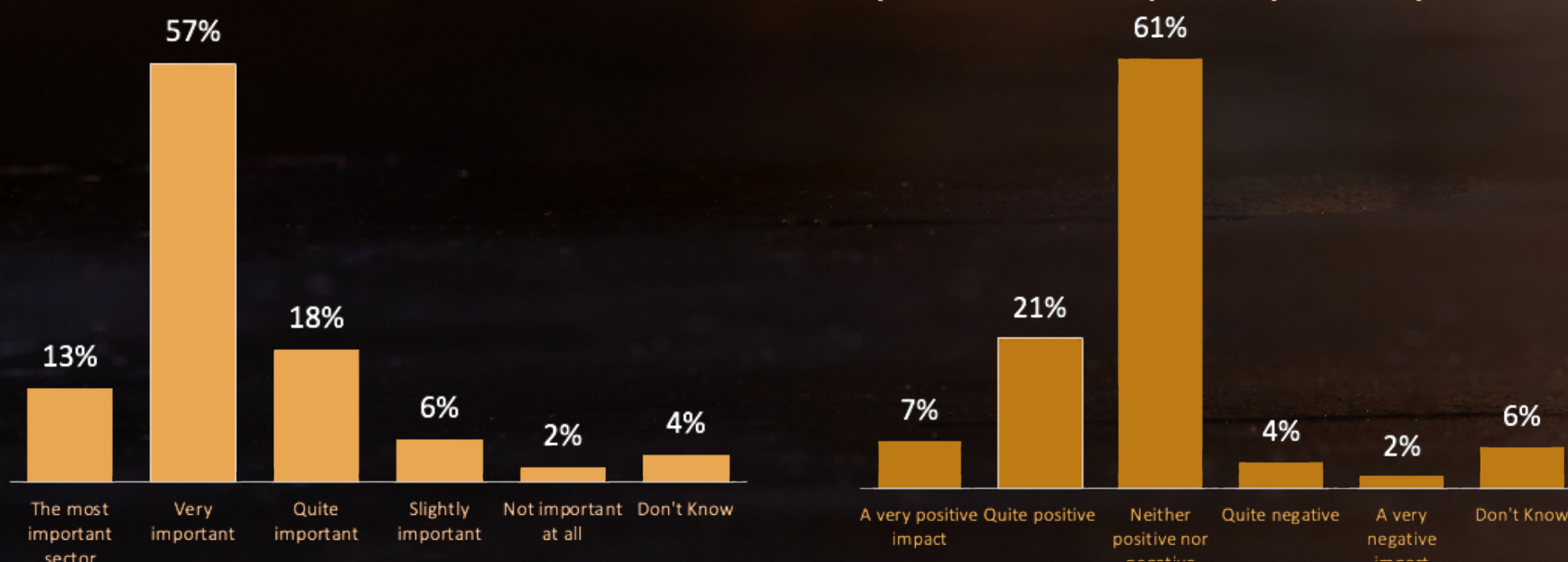
MOST SCOTS SEE THE TOURISM INDUSTRY AS VALUABLE TO SCOTLAND BUT FEWER FEEL THEY RECEIVE PERSONAL BENEFITS

Most Scots perceive tourism as valuable to Scotland, with 13% rating it as 'the most important sector' while 57% rate it as 'very important'. Residents of the Highlands and Islands, Edinburgh and the South of Scotland are the most likely to have this point of view.

On a personal level, while 61% of Scots feel that tourism in Scotland has neither a positive nor negative impact on them and their family, 28% feel that it has a positive impact while 6% see it as having a negative impact.

Perceived importance of tourism industry in Scotland

Impact of tourism on you and your family



A NEED FOR MORE INVESTMENT & PARTNERSHIPS BETWEEN GOVERNMENT, INDUSTRY AND ACADEMIA TO ENHANCE STUDY AND WORK OPPORTUNITIES IN SCOTTISH TOURISM

We showed respondents a list of organisations and asked them to rank them in order by level of responsibility for providing more funding to enhance study and work opportunities in Scottish tourism.

The percentage of respondents providing the top rank ('greatest responsibility') to each organisation is shown below – the results clearly suggest that a partnership approach led by Scottish Government is preferred:

- Scottish Government – 55%
- Scottish Enterprise/ HIE – 16%
- UK Government – 13%
- Tourism businesses – 5%
- Universities and colleges – 4%