
THE SCOTTISH TOURISM ALLIANCE CONFIDENCE SNAP SHOT

Online Survey

183 Responses

19 April 2017

SECTOR BREAKDOWN

Sector	Responses
Accommodation provider	97
Visitor Attraction	22
Food and Drink	13
Tourism services	12
Adventure and Recreation	10
Other	10
Travel trade	7
Events and Conferences	4
Tourist Guide	4
Transport Operator	3
Retail	1

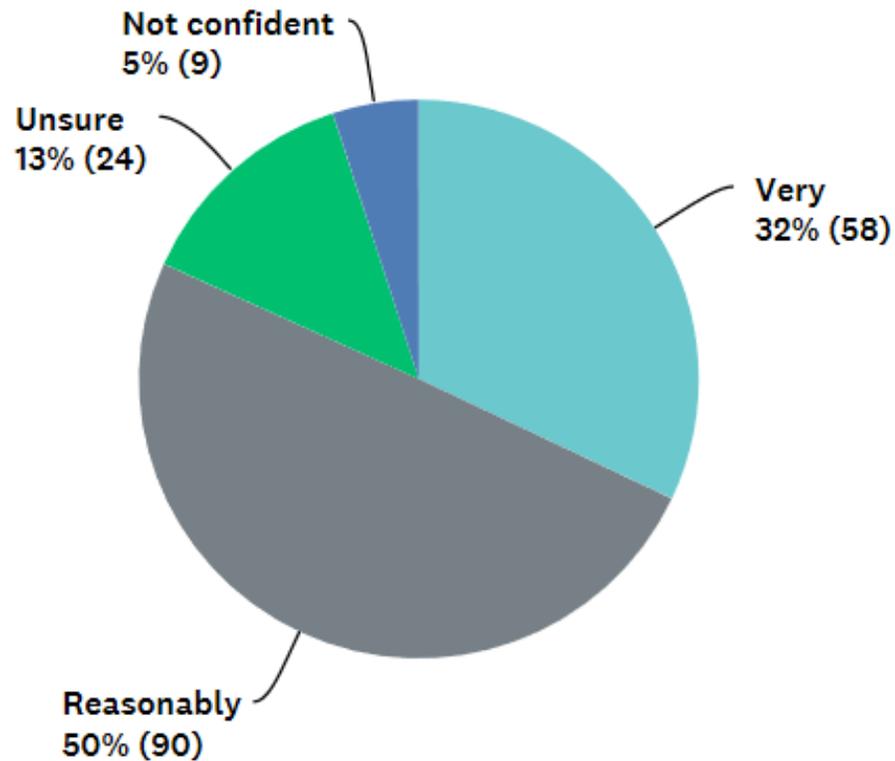
OVER 50% OF
RESPONDENTS
WERE FROM THE
ACCOMMODATION
SECTOR.

This includes, hotels, caravan & motorhome sites, camping and B&Bs.

183 Responses

19 April

CONFIDENCE OVER THE NEXT 6 MONTH TRADING PERIOD



- **Accommodation provider** - 77% said they were either very or reasonably confident
- **Visitor attractions** - 90% said they were either very or reasonably confident
- **Food and Drink** - 91% said they were either very or reasonably confident

“Weak pound makes Scotland attractive for overseas visitors. On the downside it makes Scotland unattractive for overseas staff.”

“We have launched a new product, which has shown there is significant interest in sustainability and businesses wanting to gain a marketing advantage of having a green tourism award.”

“Bookings have picked up from last year, though some people are waiting before booking.”

“Enquiry level is sustained, conversion rate is healthy, and our profile in the marketplace is very positive.”

“We have excellent forward bookings and this year more direct business instead of OTA.”

“World Cup football means a quiet early summer season.”

Reasons given for businesses feeling **reasonably/very confident** over the next 6 month trading period

STRONG
FORWARD
BOOKINGS

WEAK POUND

“Brexit, international relations, ever increasing skills gap, lack of productivity improvements, competitive edge for Scottish tourism in the global arena.”

“While we have a lot of bookings from mainline Europe, the British market seems to be slow. Also air B & B seems to be hurting us. While I do not mind competition they are under the radar operating without proper insurance, fire regulations etc.”

“All looks good so far though the uncertainty about Brexit remains a concern.”

“Less confident due to poor start to season with weather being a factor and early Easter.”

“People perceiving less money in their pockets. Still booking but slower to book.”

“Poor forecasted recruitment. Lack of confidence in sector from school leavers. Lack of investment by government in funding. Cuts and reducing funding in modern apprenticeships.”

Reasons given for
businesses feeling
unsure/not
confident over the
next 6 month
trading period

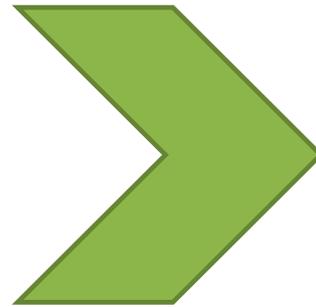
POOR FORWARD
BOOKINGS

BREXIT/ ECONOMIC
FACTORS

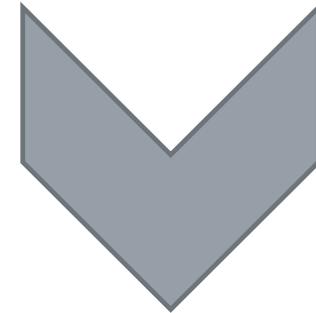
EXPECTED BUSINESS PERFORMANCE BETWEEN (APRIL – JUNE)



Better
43%



The Same
43%



Worse
14%

180 Responses

19 April

“Business in the book far better than last year.”

“We have only been open for four years+ and occupancy continues to rise year on year, with new and return visitors.”

“Having compared the same trading quarter over the two years our stats currently show a drop in occupancy rates, turnover and booking numbers.”

“Lack of staff pool to recruit from, allied to very low footfall due to 'Scotland busiest ever' messages going out, means we will reduce opening hours drastically.
bonus.”

“Reaping rewards for consistently high review ratings and better quality social media marketing.”

“As our turnover increased quite significantly in 2017 over 2016, which was also a good year, will be happy to achieve similar figures, though it is does prove slightly better then that would be a bonus.”

“People have less money to spend on holidays and leisure activities. As a result, they are looking for cheaper short breaks.”

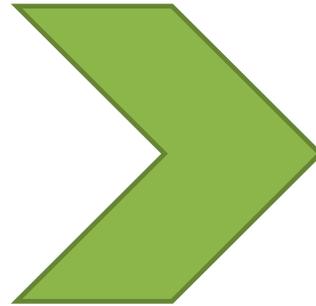
“Brexit has effected the economy, prices on products have gone up, and we feel customers are a bit more sensible with their expenses.”

Quotes on expected business performance between April - June

EXPECTED BUSINESS PERFORMANCE BETWEEN (JULY - SEPTEMBER)



Better
42%



The Same
47%



Worse
11%

180 Responses

19 April

“Good figures continuing to show year on year increases and no reason to assume this will change.”

“Increased range of locally sourced products will create a further point of difference and open up new customer channels.”

“Excellent growth last year and indicators are showing continuing rise through the 2018 season.”

“Already at capacity summer months.”

“Unsure as there are still booking gaps on my calendar for September, so there is uncertainty. But July was booked up earlier than last year.”

“Excellent growth last year and indicators are showing continuing rise through the 2018 season.”

“Excellent growth last year and indicators are showing continuing rise through the 2018 season.”

“I'm increasingly concerned about overtourism and quality of the visitor experience declining. It is high time we start putting measures in place to facilitate a sustainable development rather than purely celebrating increased visitor numbers and increased income. This is not sustainable.”

“Brexit uncertainty will continue to weaken the pound and keep us attractive.”

Quotes around expected business performance July - September