
THE SCOTTISH TOURISM ALLIANCE CONFIDENCE SNAP SHOT

Online Survey

111 Responses

(Q2 July-Sept)

SECTOR BREAKDOWN

Sector	Total responses
Accommodation provider - B&B, Caravan/Holiday Park, Hotel, Self-Catering Property	57
Adventure, Recreation, Activity Provider and Tour Operator	6
Food and Drink	4
Travel trade	4
Events and Conferences	5
Visitor Attraction	18
Transport Operator	3
Tourism services	10
Other	4

51% OF RESPONDENTS
WERE FROM THE
ACCOMMODATION
SECTOR.

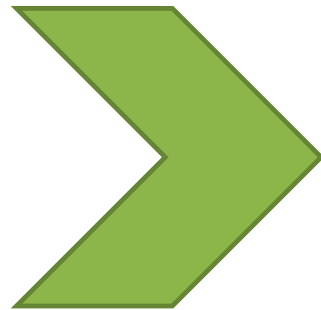
This includes, hotels, caravan &
motorhome sites, camping and B&Bs.

16% WERE FROM
VISITOR ATTRACTIONS

PREDICTED TURNOVER (BETWEEN JULY - SEPTEMBER)



Better
38%



The Same
41%



Worse
21%

- **Accommodation provider** - 68% said they expected their Jul-Sept turning to be either the same or worse
- **Visitor attractions** - 38% said they expected a higher turnover to last year

Turnover expected to grow reasons given

- Slightly higher visitor numbers Venue hire sales are positive
- Glasgow enjoyed its busiest Business Tourism month ever allowing for a significant uplift in income generation
- Raised prices for the season and this is holding
- More visitors
- Marketing via Airbnb has helped fill in any gaps.
- Improvements we have made within our business. More choices. 7 day opening
- A lot more effort on advertising and marketing after a very poor start to the year.
- Low pound driving inbound visitors to Scotland; staycation effect still ongoing; targeting a broader UK market than in previous years
- Better rate management
- Great Weather & increased advertising.
- Seems to be more visitors around
- Visitor number the same but spend slightly up.
- Increase in enquiries and conversations, particularly following the VisitScotland EXPO in April.
- As a Blue Badge Guide I get more requests for Cruiselineer day tours than before
- We are already showing higher advanced bookings.

Turnover expected to remain the same reasons given

- Demand remains strong, and we expect to record an increase in visitor numbers. Changes in visitor behaviour are apparent however, and whilst we expect to record a growth in admission income, this will be offset by a reduced level of on-site (retail) spending.
- We were full last year, this year is the same
- Still fairly difficult trading in licensed sector & BREXIT!
- More rooms to sell but rate lower
- Rising competition in Edinburgh in particular
- Tougher trading conditions, more hotel supply creating more competition.
- Less favourable \$ and Euro exchange rate.
- Limited to the number of guests we can accommodate.
- We are working currently to capacity
- Although rev par is holding up average stay is shorter
- There are less people visiting but they are spending more so it is even with last year
- Not looking to grow the business. Too much uncertainty and not wishing to start on a rollercoaster (as in 2008).

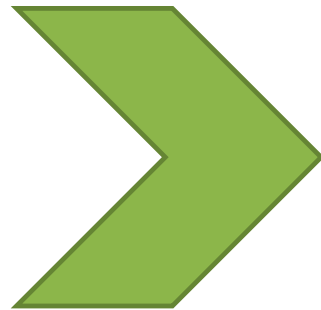
Turnover expected to decrease reasons given

- General trend in the business and increased competition
- Fewer folk around presently
- I'm not sure but less tours?
- Less business in that part of the year
- concerns over financial position
- Weather. Folk staying at home. Scottish tax now higher. Air BnB.
- Bad media publicity for Skye last year and lack of confidence due to Brexit
- Couple of cancellations - due to illness. Fewer foreigners.
- Over capacity from competitors
- A significant drop in footfall
- World cup, competition from OTAs
- Not much worse but our profit margin has been severely squeezed. Our occupancy levels are slightly down, our rates have not gone up since last year but our overheads - specifically our staff bill has gone up significantly.
- Fewer social events - Weddings

EXPECTED BUSINESS PROFITS OVER THE NEXT SIX MONTHS TO:



Increase
28%



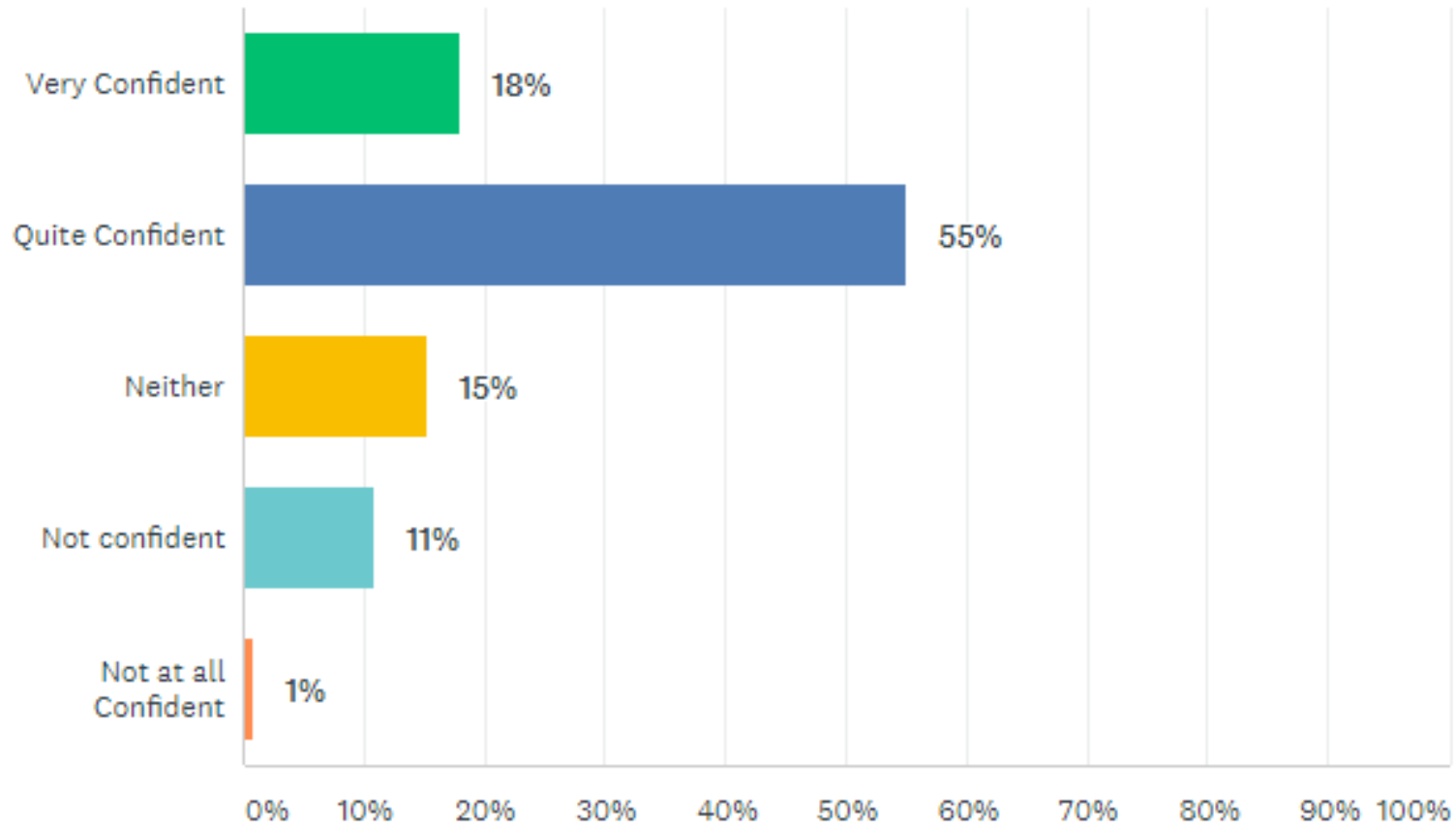
The Same
43%



Worse
29%

- **Accommodation provider**
- 35% said they expected their profits to decrease over the next six months

CONFIDENCE OVER THE NEXT 6 MONTH TRADING PERIOD



FACTORS IMPACTING SUSTAINABILITY AND GROWTH

Scale 1 - No Impact | 10 Significant Impact

Top Ranked Moderate – High Impact

Economic/political uncertainty

Average - 6/10

–

Rising costs of utilities

Average - 6/10

–

Poor online connectivity

Average - 6/10

–

Instability of Sterling /Exchange Rate

Average - 6/10

Moderate Impact

Growth in employment costs (auto-enrolment, National Living Wage etc)

Average - 5/10

–

Difficulties recruiting skilled staff

Average - 5/10

–

Difficulties recruiting or retaining staff from the EU

Average - 4/10