

STERG industry survey results webinar

27 January 2021

Survey results

- **Question:** With approximately 3000 replies, what was the potential reply across Scotland?
- **Question:** I wondered if you considered weighting any of the responses based on either staff numbers or turnover of respondents; particularly those where job losses and/or turnover loss was asked about?

Answer: Weighting the data is something we did consider as we were aware the survey had a heavy response level from smaller businesses and from certain sectors. In fact, for most research (especially consumer research) we always weight the data set. However, as there is no compulsory registration system in Scotland for tourism businesses (and a lot of tourism businesses are not even VAT registered), it's difficult to identify what the actual 'population' is to use as a weighting factor for the survey results.

Question: Did the survey look at ongoing costs? Not surprising to see hotels being hit hardest with revenue, but what about who is hit hardest by ongoing costs?

Answer: We only asked businesses about their future outlook but did not ask specifically about future costs. However, it's an area that we would consider adding in any future surveys.

Question: Why were Local Authority websites not included in your sources of information question? In East Lothian many businesses used ELC info services.

Answer: We couldn't give every single source as an option, but we did have another option, so if anyone used any other source that was not on the list they selected 'other' and had the opportunity to type in what source they used.

Question: The results appear to suggest that a major concern in the sector is that government does not yet understand the scale and scope of the problems, or the nature of the support required for Scottish tourism to survive. Is this actually the case, or just a perception based on fear?

Answer:

To highlight and relay the concerns the industry has to Scottish Government; VisitScotland, the Scottish Tourism Alliance and other industry bodies are regularly in direct contact with the Cabinet Secretary and senior representatives to raise the issues faced across the tourism sector.

Senior representatives from Scottish Government are part of STERG. The Cabinet Secretary also has regular dialogue with the Scottish Tourism Alliance and its members. For example, all the funding which has recently been announced for industry has come from recommendations made

by the STERG taskforce. This survey provides valuable data that can, and has, been used to raise the issues facing the industry directly to Scottish Government.

Regional and sector specific

Question: Will a sector specific version of the survey results be made available?

Answer: Yes, a sector/regional dashboard is currently being prepared where results can be analysed by those sectors/regions where we have large enough samples sizes and individual businesses cannot be identified. The sample size for attractions will enable you to look at the results for the sector.

Role of STERG and VisitScotland

Question: Will VisitScotland be able to lobby the Scottish Government about their plans to inflict new licensing demands on both self-catering and B&Bs through the local council?

Answer:

We are aware of concerns expressed by the sector in relation to the Scottish Government's proposed changes to short term lets regulation. We are feeding back these views through our responses to consultation, calls for evidence and during our regular communication with Scottish Government including the Cabinet Secretary.

Question: Is VisitScotland working with Govt and other organisations who send out key/essential workers to highlight hotel & other availability? Key workers have been a key source of business in the absence of tourists.

Answer: Yes, we are. We have a direct link to the area of Government which deals with key workers and have made them aware of such availability.

Question: Significant risk that businesses/ communities won't be ready to welcome visitors back or will take time to re-open. Will STERG be developing a national database so that visitors can find out what businesses, activities, communities are open and able to welcome visitors - and how will this be communicated?

Answer: We already have a national database of businesses which work with VisitScotland on VisitScotland.com. Once the industry can open again, a list of places open and welcoming visitors will be highlighted online.

Question: Has this research been shared with Scottish Government or UK Government?

Answer: Yes, as Scottish Government are a member of STERG they automatically receive a copy of this as part of our weekly STERG meetings.

Short term lets and self-catering

Question:

- A question regarding the impending Short Term Let Licencing (STL) should be included in future surveys as this will have a significant impact on B&B's over and above the impact of COVID-19. Does STERG have a view on this?
- What about the proposed short term lets licencing which will put many of us out of business, what is STERG doing about this?

Answer: STERG would be happy to include this in a future survey. STERG has, and continues to, lobby Scottish Government on this through weekly meetings with Government, and in direct meetings with Tourism Secretary, Fergus Ewing.

Question: Being a Golf Photographer providing a photography service to all inbound golfers and non-golfers does anybody think there will be a difference in say 3 months? This restrictiveness will have detrimental effect within the golf and tourism sector. To allow to reschedule for even 2022 there has to be support from the government. What sector would I fall into?

Answer:

Unfortunately, it seems that restrictions on inbound visitors to Scotland will remain in place for some time, although no-one knows exactly how long for. However, none of the funds we're administering would cover a photography business. We recommend getting in touch with Creative Scotland to see what support is available for the creative industries.

Question: Can grants be claimed for self-catering accommodation which I own and let out all year for holidays when I have other paid employment?

Answer: Yes. We're still waiting for the final details to be published by Scottish Government and once they're available we will publish the details on the news section of VisitScotland.org.

Access to funding

Question:

- Why are B&Bs paying council tax being covered in upcoming funds but not self-caterers paying council tax?
- Self-caterers are really important to tourism industry but there are no grants for those paying council tax. Any help with that coming up? Currently it will just be for B&B's.

Answer:

For specific advice on self-catering, we recommend you get in touch directly with the ASSC. Please get in touch with Fiona Campbell by emailing fiona@assc.co.uk.

Question: We missed out on funding previously for our seasonal Land Train Business in St Andrews due primarily because we don't have a premise with a rateable value. Will the up-and-coming new funding stream for outdoor tourism or the Visitor Attraction Fund accommodate us please?

Answer: The criteria for the Visitor Attraction Fund has not yet been released. Once it is, keep a look out on the [news section of VisitScotland.org](https://www.visitScotland.org/news) as it will be published here as soon as guidance, and later the application process, is published.

Question: The latest funding packages are great, but it seems the criteria doesn't consider smaller businesses who haven't been able to access other funding streams. For example, the Inbound Tour Operators Fund wasn't applicable for small operators who offer day tours. It seems that the criteria are set up to support the larger tour operators. Could STERG please help in offering more support to smaller operators?

Answer:

We have been asked by Scottish Government to deliver a fund specifically to cover this sector. We've commenced discussions with the appropriate industry bodies to develop the guidance and criteria for the fund. Currently the funds available is very limited at £800,000 however we're continuing to emphasise the need to Scottish Government for this figure to be increased. We expect the fund to launch during late February / early March, and details will be published on VisitScotland.org once finalised.

Question: The Scottish Marine & Outdoor Tourism Fund was announced today. In your presentation, it shows that 76% of Attractions & Tours have received no financial support during this time. I run Walking Tours in Scotland which operates city-based walking tours. We don't have premises and have therefore been ineligible for funding up until this point. Will there ever be any support for urban-based tourism companies without premises?

Answer: We have been asked by Scottish Government to deliver a fund specifically to cover the domestic tours sector. We've commenced discussions with the appropriate industry bodies to develop the guidance and criteria for the fund. We expect the fund to launch during late February / early March and once finalised, the details will be published on VisitScotland.org.

Miscellaneous

Question: Brexit has exacerbated staffing issues in hospitality industry (EU nationals going home/excluded). What short-term measures can be taken to help businesses recruit staff in order to reopen?

Answer: Our corporate website, VisitScotland.org, has a comprehensive section covering Brexit and has advice and guidance for businesses, including a section covering the impact of the ending of freedom of movement. Take a look at [our Brexit support page on VisitScotland.org](https://www.visitScotland.org/brexit).

The STERG COVID-19 national action plan identifies protecting and supporting the tourism workforce as a key priority. The development of this will help to address business challenges in the round - including those brought by the UK's exit from the EU. Looking beyond immediate support, such as the job retention scheme, the plan recognises it is important there are mechanisms in place to retain and upskill talent. [Further details about ongoing activity are available in the national action plan.](#)

There are several initiatives to connect employers with prospective staff, these include:

- UK Government's [Kickstart scheme](#), which will pay 6 months of 25 hours/week at national minimum wage for 16-24 year olds
- [CareerScope](#), helping to connect individuals from the hospitality, leisure and tourism industries to find work, support and development opportunities

For businesses wishing to understand the new UK Points Based System for immigration, [TalentScotland](#) are running several webinars and tutorials starting on 9 February.

Question: With international travel likely to be significantly reduced, is there anything we can learn from Australia/ New Zealand where they've had a summer season mainly based on domestic tourism?

Answer: We regularly monitor campaigns in competitor destinations and are aware of the Australia/New Zealand domestic marketing programmes. Given the current restrictions on international travel, our plan is to drive recovery from the UK market, targeting the consumer segments that show the highest likelihood to travel domestically during 2021. However, we don't yet know when we can launch a domestic campaign due to current restrictions. We'll consider those areas and sectors of Scotland which will drive regional spread and support responsible travel. We'll also aim to reassure, inspire and support conversion to actual bookings. For example, focusing on key themes such as responsible tourism, the Good to Go scheme to provide reassurance, and supporting the continuation of the Year of Coasts and Waters.

Partnerships remain key to our recovery, and we're working closely with regional DMOs and national partners, UK tourism partners and possibly non-tourism partners to extend reach and message of Scotland.

Question: Disappointing that much of this data is outdated, it would be hugely valuable if STERG could do another survey to get update on stats and find a way to report via quicker timescales so that SG and STERG, STA, VisitScotland and the tourism industry can react to support our tourism businesses (those that need it and are desperate) most urgently.

Answer: The survey closed on 7 December and it does take a few days to clean, sort and interpret the resulting data to ensure the picture we portray is as robust and accurate as possible. [We published a top-level summary and analysis of results](#) on VisitScotland.org the following week whilst more detailed analysis at a regional and sectoral level was conducted post the festive period. This included additional time required to conduct a more detailed analysis of the numeric information (e.g. losses, occupancy data) submitted by respondents.