Key Notes & Actions

1. Introduction
   - Karen Christie, National Tourism Strategy Manager and STERG Coordinator, STA, chaired the meeting in place of Rob Dickson who was on annual leave.

2. Sector Feedback and Comments

Wild Scotland, Doug McAdam
- Summer bookings continue to look good.
- Marketing support for members is key, particularly for autumn / winter season.
- Ability to recruit the right staff continues to be a real challenge.
- An update on the Wild Scotland / Sail Scotland Outdoor Strategy was provided:
  Rob Mackinnon has now finished his input which has been excellent and Wild Scotland and Sail Scotland are now finalising the strategy and next steps. Rough timeline and actions as follows.

July
- In July WS and SS will finalise a shareable version of the final Strategy document the copy and design of which is now in progress.
- This final doc will be shared with WS & SS Boards, the project steering group, Industry Leadership Group, Industry Reference Group to seek final focussed comments, particularly around:
  - Case studies
  - Partner suggestions
  - Action Ideas
- Current case studies will also be finalised.
- Also discussing how best to share the project Consumer Research alongside the Strategy.
- Discussions needed with SG / JF on potential for PR “soft launch” of strategy for Aug.

August
- Collate feedback from key groups and finalise strategy document design etc and case studies.
- Facility for sharing of Strategy & Consumer Research to be set up (e.g., Webpages with signup & download)
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- If agreed, we will execute a PR Launch do the Strategy.
- Off the back of the PR launch, seek input from industry and members of SS and WS, with managed ‘forms’ approach, again seeking feedback around:
  - Case studies
  - Partner suggestions
  - Action Ideas

**Sept**

Plan Action Planning conference for Oct / Nov.
- Sector discussions about funding delivery of action plan and associated work
- Form Steering Group to champion delivery of action plan

**Oct / Nov**

- Potential conference to formally launch strategy to industry (Ministerial attendance?)
- Breakout groups to develop action areas with industry input and ownership
- Form 1-3 year action plan

GM, ASVA highlighted that Scotland’s Tourism Industry conference will take place on 9th & 10th November and that there may be an opportunity for Wild Scotland / Sail Scotland to take advantage of that noting that the content for the conference is currently being discussed.

**Scottish Tourist Guides Association, Kenneth Bramham**

- Bookings remain healthy.
- Visitor spend remains strong.
- There are noticeably more European visitors than earlier in the year when North American visitors were more prominent.
- Bookings (and forward bookings) from the cruise sector are very good.
- Walking tours are doing very well.
- New guides are reporting full diaries.
- There is some evidence of guides having to cancel tours due to COVID however these tours are being passed to other guides. No evidence to suggest that tours are not being fulfilled.
- KB highlighted the following observations from recent experiences:
  - Large attractions are really struggling for staff and are issuing apologies in advance to customers.
  - Hotels are also suffering from staff shortages and apologising for long queues at buffets, lack of waiting staff and the frequency of linen / towel changes etc.
  - Some visitors are complaining about high prices in restaurants.
- VisitScotland have recently been in touch with the STGA to discuss ongoing / future support needs for the sector.

**Association of Scottish Visitor Attractions, Gordon Morrison**

- ASVA have published their most recent visitor data to the end of May. Overall, the picture continues to be mixed with May visitor numbers not as strong as April. Key highlights include:
  - May 2022 visitor numbers were -c.33% vs May 2019.
  - May YTD 2022 visitor numbers were -c.32% vs May YTD 2019
  - May was the worse month in a while for outdoor visitor attractions – this was due to the weather. (Wettest May in seven years.) Gardens -c.20% and Outdoor nature attractions -c.37%, this is in line with Museums & Galleries, Distilleries and other Historical properties.
- June data is currently being collated. Data would suggest that June is looking better than May. It was noted that although businesses are remaining relatively positive the numbers being reported are not spectacular and the sector is not yet in full recovery.
Scottish Tourism Emergency Response Group (STERG)

- GM highlighted that although visitor numbers are reasonably healthy and the average spend by visitors is very good in most attractions, the key issue being faced is that all the money being generated is being swallowed up by the cost of doing business. There is significant concern now about the off season and what that could look like - there is not enough money being made just now to build up the reserves which are needed to see the sector through the winter. It was noted that this must be raised with STERG.

Hostelling Scotland, Margo Paterson
- June 2022 +4% vs budget. It was noted that May was not as good as expected.
- July and August are looking positive.
- The high volume of last minute and same day bookings continue.
- The sector is not in full recovery. Escalating costs are an ongoing concern particularly utility costs where contracts are being renewed. The winter months are a real worry – a strong July and August (and August) is essential.
- Recruitment remains a challenge particularly getting the right people. Vacancies have vastly reduced however there remains gaps in key areas. European colleagues are greatly missed, pre-pandemic 60% of colleagues were European and 40% UK. Seasonal workers are key to the sector and there is no current mechanism from Westminster which will allow these workers to return.

Scottish Hostels, Dominique Drewe-Martin
- Inconsistent picture across the sector. Some are predicting record levels of income for the year (note - not profit), others are much quieter than normal and predicting c. 70% of the pre-COVID annual income.
- DDM reported May was a positive month, +20% average pre-COVID income. June +2% average pre-Covid income and July is forecast to be on a par with the average pre-Covid income. August is looking extremely quiet but optimistic that this will pick up with last minute bookings. September onwards also remains quiet (season usually ends mid-September).
- Marketing activity focused on September and October to try and extend the season would be very helpful.
- Hostels and guests are reporting that Skye is quieter than normal which is unusual. The reason behind this is unknown, is it visitors avoiding the area as they think it will be too busy or are visitors deciding not to travel too far due to fuel costs.
- International visitors across the sector varies enormously. Some areas are getting far fewer international visitors, others are getting three times as many – there is no apparent pattern.
- Dormitory beds remain popular however there are still cautious visitors who prefer private rooms.
- Some cancellations coming through due to COVID. Some cancellations being received due to flights being cancelled / travel disruption.

Association of Scotland’s Self-Caterers, Fiona Campbell
- FC provided a sector update in advance of the call. The update will be circulated to the group with the meeting minutes and circulated to STERG in advance of their call on 13th July.

3. Meeting Close
- KC advised that recruitment for 4 new STA Board members is now live. Further information can be found by clicking the link below.
  
  STA Board Recruitment

- KC thanked everyone for joining the call and for their contributions. KC confirmed that the information and insights provided would be shared with STERG at the meeting later that morning.
Next Meeting
The next meeting is scheduled for Wednesday 27\textsuperscript{th} July, 9.00am-9.30am.