



Economic Impact

November 2017

Perth

Agenda:

- **Our business**
- **The bigger picture**
- **Challenges ahead**

Cottages 19,000

- In Scotland 2,500

Parks and Lodges 23,000

- In Scotland 2,800

*Scottish
Country
Cottages*



Our business in Scotland...



Cottages

- Bookings 2016 – 17 + 14% increase!

Parks and Lodges

- 8% locations/ 10% bookings!

It's importance to us...



Hot Tubs



Pets

Areas of opportunity...

UK Tourism Industry's International Ranking

- The UK is the **eighth** largest international tourism destination ranked by visitor numbers.
- The first seven destinations are France, USA, Spain, China, Italy, Turkey and Germany.
- The UK is the **fifth** largest international tourism destination ranked by visitor expenditure.
- The first four destinations are USA, China, Spain and France
- The UK accounts for **3.6%** of global international tourism receipts.

The bigger picture...

ASSC Economic Impact Assessment of Short-Term Lettings on the Scottish Economy June 2017

- Carried out between July 2016 and March 2017, the report showed visitors spending:
 - £312.8m per annum in accommodation fees;
 - £118.5m on travel to and from self-catering properties;
 - £66.3m on food and drink in bars, cafes and restaurants;
 - £63.1m in supermarkets during their stay;
 - £45.1m on travel;
 - £27.5m on food and drink in local shops;
 - £24.8m on visitor attractions;
 - £17.1m on outdoor recreation.
- Of the **£723m** spent by those staying in self-catering properties, no less than **£470m** is spent by non-Scottish visitors.

Importance of Scotland...

- Skye islanders call for help with overcrowding after tourism surge

theguardian

- THEY'VE SCOT TO GO Edinburgh is TOO popular with tourists who are turning the city into a 'hollow shell,' experts warn

THE Sun

- Uncertainty over future of Scottish tourism after Brexit

BBC

Challenges...

- **EU Digital Single Market Act:**

EU has held consultations on (1) geo-blocking (i.e., imposing different pricing, transaction terms and general website access across borders) and other geographically-based restrictions and (2) the regulatory environment for platforms, online intermediaries, and cloud computing.

- **EU Accessibility Act:**

Could mandate accessibility standards for private websites.

- **EU Package Travel Directive:**

Passed and with member states for enactment.

- **General Data Protection Regulation (GDPR):**

Coming May 2018.

Europe – still with us...

Thank you!

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