



SCOTTISH ON-TRADE MARKET INSIGHT REPORT
XMAS / NEW YEAR 2015
SUMMARY VERSION

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SURVEY METHODOLOGY

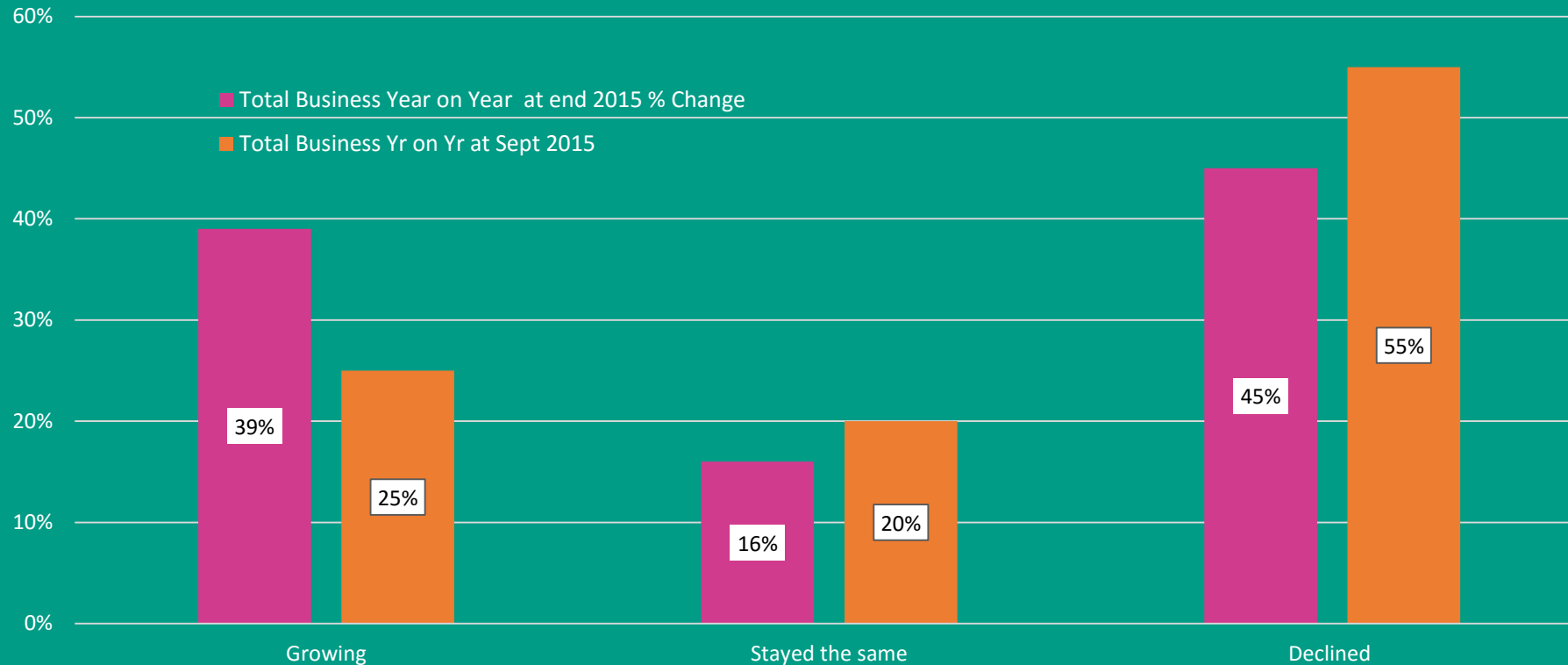
- Scottish On Trade Retail Market Insight Report was conducted in December 2015/ January 2016, via online questionnaire
- All data covers the period Xmas / New Year 2015 unless stated
- Over 600 outlets participated, representing approximately 11% of Scotland's Pubs, Bars, Clubs and other licensed venues.
- Participation was open to all outlets and included owned, managed, leased and tenanted outlets, members and non-members of the SLTA.
- All data is shown as a %, unless stated, and due to rounding percentages may not total 100. The responses are not in any way weighted, all answers were anonymous.
- The detailed survey includes insight on the performance of key categories below, plus economic outlook and macro-economic challenges facing retailers
 - Beer
 - Soft Drinks
 - Spirits
 - Food
 - Craft Beer
 - Room Occupancy
 - Multiple Outlets vs Single Units
 - Rural locations vs City Centre locations

EXECUTIVE SUMMARY

- **Retail Headlines**
 - For the Calendar Year 2015, 39% of businesses reported growth vs 25% showing growth in our summer survey. A further 16% report their business as stable, equating to 55% of businesses reporting the year as either growing or stable
 - Xmas / NY performances are more favourable than total calendar year . 42% of businesses showing year on year Xmas growth (vs 39% for calendar year), a further 23% report the Xmas / NY period as stable, equating to 65% of businesses reporting their business as either growing or stable at Xmas / NY (vs 55% for the calendar year)
- **Food & Room occupancy**
 - 77% of outlets with accommodation, either grew their room occupancy or remained stable over Xmas / NY
- **Tourist / Countryside / Remote Locations**
 - Remote / Countryside Venues have under-performed the market with over 40% showing a decline at Xmas / NY
- **Beer / Wines/ Spirits / Non Alcoholic Beverages**
 - 28% of outlets report their beers as growing with 55% of outlets report Xmas / NY beer sales as growing or stable. Spirits is 34% and 63% - all below market figures
 - The top spirits performance was in city centres, and biggest beer decline in rural / remote locations
- **Macro-Economic Challenges**
 - 50% of respondents have called out increasing sales as their biggest financial challenge – this number varies by location
- **Outlook**
 - 34% of outlets expect to grow in 2016, vs 18% in our summer survey, but, in remote/rural locations only 16% expect to grow in 2016

Total Business Performance in Calendar Year 2015 vs. last year

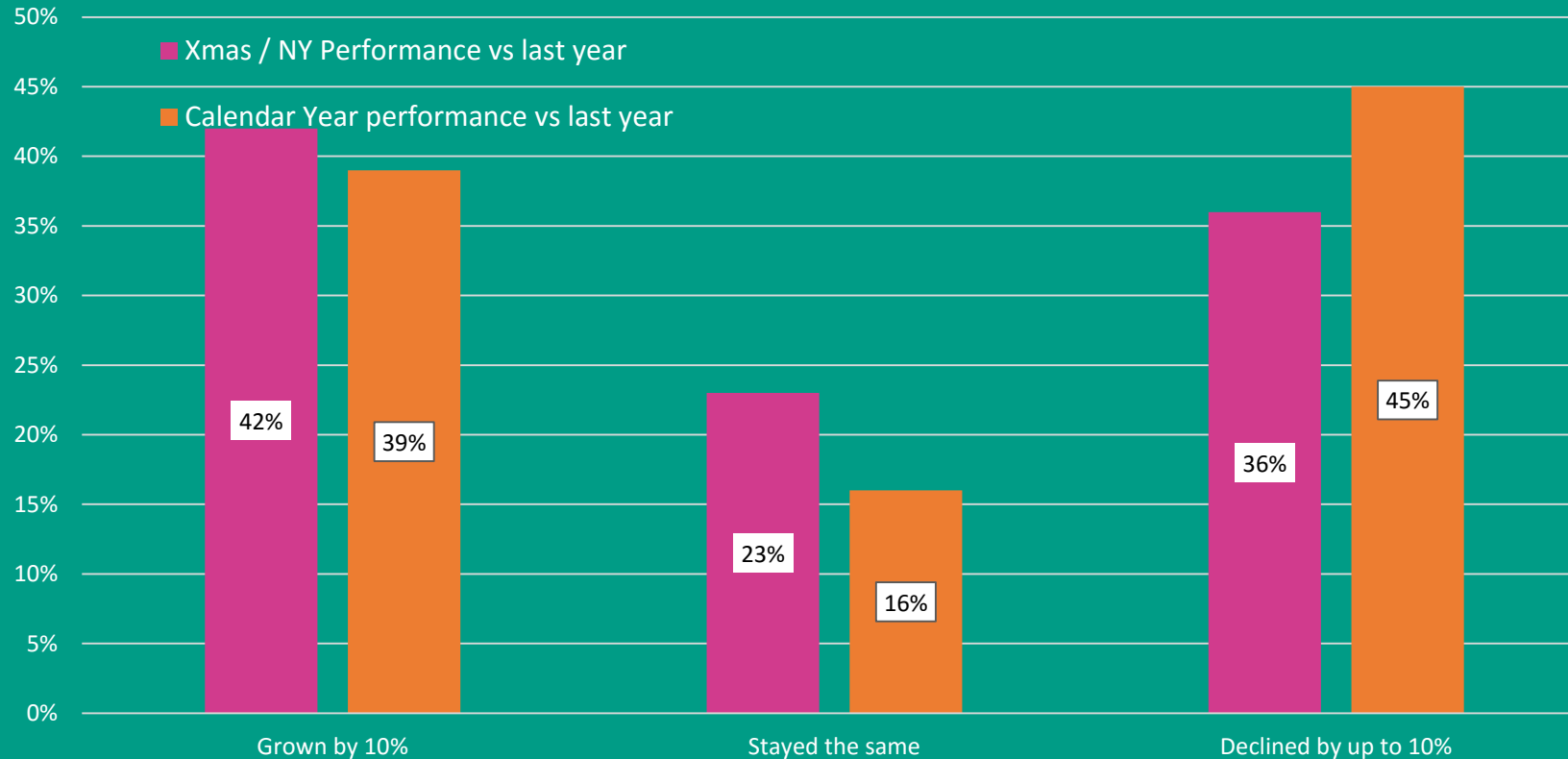
Q: How has your total business performed in calendar year 2015 vs. last year , and compared to equivalent numbers from September survey?



For total calendar year, 39% of businesses show year on year growth at end of 2015 vs 25% in our summer survey

Total Business Performance at Xmas / NY vs. last year

Q: How did your total business perform in the Xmas / NY period vs last year, compared to calendar year performance?

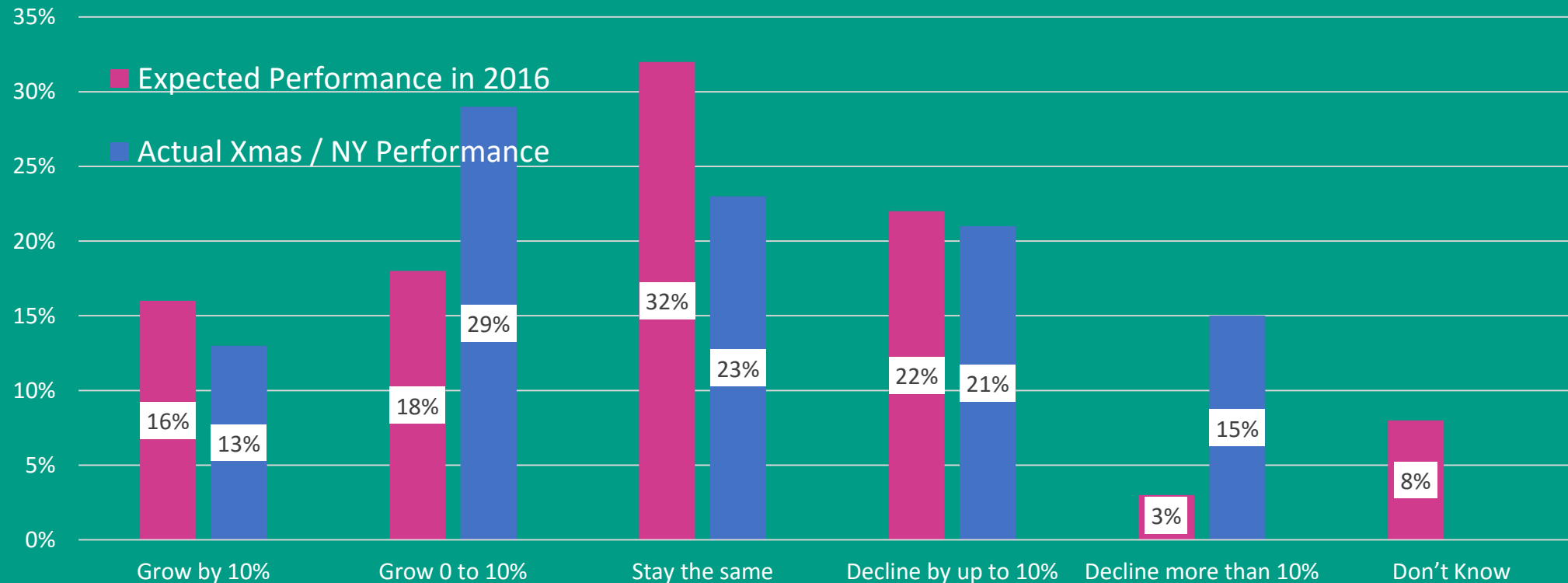


Overall Xmas performances are more favourable than total calendar year with 42% of businesses showing year on year Xmas growth vs 39% for the calendar year

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Retail optimism – how do you expect your business to perform in 2016?

Q: How do you expect your business to perform in 2016?



The long-term outlook is similar to the Xmas / NY performance with 66% of outlets expecting growth or stability vs 65% actual Xmas performance.



SCOTTISH LICENSED TRADE ASSOCIATION

EST.1880

The Scottish Licensed Trade Association has been in existence since 1880, to protect and promote the interests of those working in the licensed trade in Scotland.

Their current membership is 'owner operators', who on average sell 150% more than the average Scottish On Trade outlet. In addition, they have an emerging membership group comprising over 2,000 Personal Licence Holders, and membership incorporates the Scottish Bartenders Network.

They have an ambitious three year strategy to increase their membership to include all those working in the licensed retail trade. They are supported via membership fees, fundraising events, and by brand owners/wholesalers who recognise the importance of a vibrant On Trade in Scotland to the success of their business.

If you would like to find out more about how your business can benefit from supporting the SLTA, please contact us via
Email at theslta@aol.com

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