

MARKET RESEARCH
STOUSLIE SNUGS

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Market Research

Market research to support the development of glamping pods at Stouslie Farm, Hawick, TD9 7NX.

Stouslie Farm lies on the heart of the Scottish Borders, just north of the town of Hawick. The region spans a large area and borders England to the south, the North Sea to the east & several other Scottish council district to the west & north.

No surprise then that such a large area holds numerous tourists attractions, which create a significant economic benefit to the area. The area around Hawick in particular has tranquil countryside ideal for relaxing getaways, yet is ideally placed for touring historic towns, the river Teviot, award winning parks and nearby castles and mansions steeped in centuries of Scottish history.

This report will examine whether current accommodation options local to Stouslie Farm and the surrounding area are sufficient to meet tourist demand. It will also look at tourism trends to suggest if a new glamping site in this area is warranted.

Borders Tourist Markets

Between 2016 & 2018, tourism brought an average of £124 million to The Scottish Borders [1]. In the same period, just over 1 million nights were spent in Borders accommodation, which was up 3% from the period of 2015 to 2017 [1].

Day visitors to the borders have increased at an even quicker rate (8%). Both trends are very encouraging for the area, but the higher increase of 'day-trippers' also suggests that the existing variety/supply of accommodation options is not enough to tempt more visitors to stay (and spend) longer in the area.

The following sections will break down the main Borders tourist markets and suggest if they are likely to increase or decrease in tourist demand in future.

Main Tourist Markets

Tourists

Be it domestic or international visitor, tourists & sight seers are the main market for Stouslie Snugs.

Between 2018 & 2019 overnight stays in Scotland increased by 12% up to 26.72 million. This is by far the biggest market of those we shall look at. The impressive growth also lends support to the viability of a glamping site at Stouslie Farm.

Walking

Walking in Scotland is very popular. While most walkers are drawn to Scotland's large mountains, the borders can also offer great walks. The Borders Abbeys Way [3], Southern Upland Way [2], the Cross Border Trail and their ongoing promotions are helping to reinforce this.

Stouslie Farm is close to most popular borders walking routes and in fact, lies less than 0.5miles away from the Borders Abbeys Way Hawick to Selkirk route. The farm is also close to many other local routes including the 'Calaburn and Drinkstone hill route', which follows part of the journey taken by horse-riders in the tour of the marches during Common riding.

The style of proposed accommodation is ideal for walker's needs. Not only will they be able to relax and soak aching joints in the eco-friendly wood fired hot tubs, but they will also not be required to carry bulky tents & sleeping bags.

As Scotland's population is becoming more active, 'driven by the rise in recreational walking' [4], it seems reasonable to expect demand for accommodation from walkers to increase in the years ahead. Particularly as the Scottish Borders Walking Festival [5] continues to grow each year bringing new and seasoned walkers to the region. A glamping site at Stouslie Farm is well placed to meet increased demand from walkers.

Fishing

From April to September, Sea Trout fishing is permitted on the Teviot River. Often, fishing on Borders rivers can be an expensive proposition, with large hotels charging guests for use of their private stretches of river bank & use of their Ghillie.

A glamping site near the Teviot would offer a more economical option for those wishing to fish the river. Even in winter months Grayling fishing is a possible & cheap option.

Castles & Estates

Historic Environment Scotland reported a 5% increase in visitors to their sites in 2018 [6]. Many of these sites are castles & mansions. Hawick is a great starting location to view Bowhill, Abbotsford, & Monteviot houses as well as Floors Castle.

These attractions feature in the map produced to promote 'Big Houses' in the Scottish Borders [7]. This map is available in tourist information centres and online and will aid the continued upward trend of increasing visitor numbers.

Most of the 'Big Houses' host weddings and large receptions. Guests attending such events will likely find Stouslie Snugs high-end glamping to be an enticing accommodation option.

Cycling

In a similar vein to walking, cycling is a popular pastime in the Borders. Innerleithen has a reputation for downhill mountain biking and are investing to maintain/improve this status [12]. There are also several mountain bike trails [13] and road cycling routes in the borders [14], which are close/go through Hawick.

Again, the possibility of suitable accommodation for cyclists that negate the need to carry tents and sleeping bags will be an alluring prospect.

Wellness

Visit Scotland reported in 2019, that the wellness tourism is an increasing market, growing from \$563 billion to \$639 billion globally, between 2015 and 2017 [11]. Eco-pods at Stouslie farm fit nicely into this growing trend.

Not only will guests have the opportunity to connect with nature enjoying walks in the countryside and taking in the spectacular views, time spent in the eco-friendly wood fired hot tub will help to relax muscles, remove pain in joints, relieve stress and promote better sleep all of which can only improve your health and wellness.

The tranquil Teviotdale Valley viewed from a wood fired, chemical free hot-tub is a relaxing prospect.

Golf

The Scottish Borders is a golfer's paradise with internationally renowned courses and magnificent hidden gems where golfers are spending more than £6M on an annual basis [8]. The combination of value for money, stunning countryside, superb courses & uncrowded fairways makes the Borders the ideal choice for golfers. Planning a round or two as part of a short break at Stouslie farm is easily achievable.

Every course has a feature that will remain in your memory forever, whether it is The Stank at Kelso, Everest at Minto, or the panoramic views over the North Sea at Eyemouth. Couple these courses with the golfing jewels of The Roxburghe and Cardrona and it's clear why the Scottish Borders makes a perfect setting for golf.

Stouslie Snugs is only 1hr 30minutes away from both Edinburgh & Newcastle and with Minto and Hawick golf courses on their doorstep it is an ideal base for guests to play in some of the regions' top golf courses. Combine this with Scotland's best-selling golf pass the Freedom of the Fairways offering great value for money, there's no better place to escape from the pressures of modern day life.

Golf is likely not a main market for local accommodation, but certainly a supplementary source of demand.

Events

The Scottish Borders hosts numerous events staged all throughout the year bringing in a steady influx of tourists to the region. Events include the Reviers festival held in March, Rugby 7s tournaments in spring, the Borders Book festival and Common ridings throughout the summer and the Scottish Borders Walking festival in autumn.

Of course, there are many more events, particularly those hosted at the Borders Event Centre where the best of Scottish Agriculture is showcased at the Borders Union show and the Kelso Ram sale.

Each event promotes the region in all its glory be it history, nature, agriculture, sport, literacy or craft. As more tourists come to enjoy both the event and the area there is a greater demand for additional luxury accommodation. Stouslie Snugs is an ideal base for guests to attend each event as it is in a central borders location but also to relax after a long day out.

Food and Drink

The Scottish Borders is home to a host of specialist producers creating a wide variety of products. Farmers markets provide the opportunity to enjoy the highest quality food ranging from hand-made confectionery, traditional cheeses and real ale to organic poultry, wild game and the freshest fish. Each weekend a different Borders town takes a turn to host the market. In addition to the farmers markets guests can enjoy the abundance of local restaurants and cafes.

Stouslie Snugs is fortunate to have the 'Borders Distillery' on its doorstep that offers Whiskey and Gin to its customers in the gift shop and tours of the distillery itself. There are also local breweries to enjoy, if beer is your chosen drink 'Born in the Borders' and 'Tempest Brew Co' are both less than 30 minutes away.

With food and drink being one of the second most popular activities [1] to undertake while visiting the Borders, Stouslie Snugs offers a relaxing and luxurious place to stay once you have spent day enjoying the unique produce the region has to offer.

Tourism Demand Analysis

Demand in the Borders

Tourism in the Borders appears to be reasonably stable in recent years [1]. We expect tourism, and demand for accommodation to grow in the years ahead. This is due to in part to Brexit effect (more on this later), but also due to promotion and funding by the Borders council by way of their action plan [9], as well as the continued growth & influence of the Scottish Borders Tourism Partnership [10].

To apportion the area around Hawick, which includes Stouslie Farm, a rough share of current Border's tourist trade, we can look at population size. The rationale being that as a town grows, the accommodation options/trade should grow proportionally.

The Border's population was 115,000 in the 2018 [9] and Hawick's population is approx. 13,300 [16] or 11.6% of the Border's population.

Of the 1,010,000 overnight stays in Borders accommodation annually [1], we can therefore expect 117,160 (11.6 %) visitors per year to seek lodging near to Hawick & Stouslie Farm (or about 320 per night).

This number does not take into account season fluctuation. However it does suggest a large potential market in the area, which is unlikely to be met by existing accommodation options, especially during peak season.

Glamping Popularity

Each year we witness a cyclical increase in google searches for glamping (as seen below). This trend matches Glampitect's experience of witnessing increasing demand. Interestingly the trend shows increased demand for both peak and off-peak season & shows no sign of decreasing for the time being.

After a search of the surrounding area, there appear to be two glamping options in the area. These are Ruberslaw Safari Tents & Westcote Galmping, which are respectively 5 & 9 miles away from Stouslie Farm by car. Both offer a more basic option than the pods proposed at Stouslie Farm, featuring separate WC facilities and little modern technology. Stouslie snugs will therefore appeal to slightly different clientele, but it is encouraging, to know that there is a proven demand for glamping in the area.



We have seen in other parts of the country that glamping sites are popular even in areas short of tourist attractions, and when close to other glamping options. Glamping has a certain novelty, meaning it is now an attraction in its own right. It also appeals to a wider & separate cross section of the public, so there is little value in trialing a more basic form of camping to prove demand at Stouslie Farm. This can be common practice for fledgling campsites to prevent unwarranted spending on electrical hook-ups & toilet blocks etc. However the existing sites mentioned above provide sufficient evidence of demand for glamping in the area. There are also enough distance & difference between the sites, in terms of style & level of luxury, that a new site at Stouslie Farm could exist, without adversely affecting the others.

Brexit Uncertainty

Historically, uncertain political times have seen UK based tourists favour 'stay-cations' over foreign holidays. This will likely be the same in 2020 and until consumer confidence returns.

This is tempered by the possibility of fewer tourists arriving from the European Market, due to the same uncertainty. However, domestic tourists using accommodation outnumbered international tourists in the borders by a ratio of about 9:1 between 2016 & 2018 [1], so we view this a potential net benefit.

Existing Accommodation near Stouslie Farm

Below are a list of accommodation options in Hawick and the surrounding area.

- Several small guest house / B&Bs – Hawick – approx. £80 / night
- Balcary House Hotel - Hawick - £130 / night
- Mansfield House – Hawick - £100 / night
- Riverside Caravan park – Hawick - £11 / night (tents), £30 /night (touring caravans)
- Auld Cross Keys – Denholm - £100 / night

After searching various websites it is clear that local accommodation options include very few luxury offerings. The vast majority tend towards quaint guest house / B&B style and the Balcary House, while certainly luxury is a very traditional style.

By comparison to the choices above, a high-end glamping site would be a completely different proposition to the current options and likely attract a demographic, who at present are not catered for locally. The pods could expect to command upwards of £100 per night. This higher price point should ensure that there is no detrimental effect on existing local accommodation custom.

Accommodating this new demographic, should also see benefits pass through to the local economy. More willing & able to spend, the new demographic will likely patronise local shops, restaurants & bars, thereby creating a win/win for all involved.

The tourist trade in winter is low in the Borders and across Scotland as a whole for that matter. Despite this, we believe there would still be sufficient demand for glamping pods at Stouslie Farm. This is based upon, the increasing trend of glamping's popularity in winter, year round fishing on the Teviot, the tranquil location that is ideal to attract short break visitors from Edinburgh & Newcastle, and also the proximity to Hawick's shops, restaurants and bars.

Summary

Tourism in the UK and Scottish borders is expected to increase in the years ahead. This should also mean increased demand for tourist attractions and accommodation close to Stouslie Farm. Coupled to the ever increasing demand for glamping, the construction of the proposed glamping site is therefore justifiable.

Should the popularity of glamping continue to increase as expected, new visitors would be drawn to the area, simply by means of offering a high-end glamping accommodation option.

Glamping pods at will also promote and benefit the wider community by attracting more tourists to the borders; contributing to the sustainability of local services, producers, crafters, events and attractions as well as a direct capital investment during construction. Please see the business plan for full details on how Stouslie Snugs will invest in the local economy.

As a whole, we believe a new high-quality accommodation option will be beneficial to this part of the Scottish Borders. We expect it will attract clientele with higher disposable income, more likely to spend larger sums of money in the local area. The additional business generated by the site for the local economy makes this site a fantastic proposition for everyone involved.

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