



# ASSC Barometer



**Survey Name:** September 2017 Barometer Survey

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How long have you  
been self-catering for?

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109 Response(s)    The average number of years is 26 based on all 109 responses.

\* Region where your property(ies) is/are located.

Answer	0%	100%	Number of Response(s)	Response Ratio
Aberdeen, Grampian & Moray			9	7.5 %
Argyll, Isles, Stirlingshire			18	15.1 %
Ayrshire & Arran			5	4.2 %
Dumfries & Galloway			5	4.2 %
Edinburgh & Lothians			12	10.0 %
Glasgow & Clyde Valley			2	1.6 %
Highlands & Skye			35	29.4 %
Perthshire, Dundee & Angus			23	19.3 %
Kingdom of Fife			3	2.5 %
Scottish Borders			7	5.8 %
Shetland, Orkney & Hebrides			3	2.5 %
<b>Totals</b>			<b>119</b>	<b>100%</b>

\* In overall terms, how would you describe your 2017 season?

Answer	0%	100%	Number of Response(s)	Response Ratio
much better than 2016			9	7.1 %
better than 2016			39	30.9 %
about the same as 2016			45	35.7 %
worse than 2016			13	10.3 %
much worse than 2016			1	<1 %
not applicable - I set up as a new business in 2017			12	9.5 %
No Response(s)			7	5.5 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**\*How**

was your turnover in 2017 compared to 2016?

Answer	0%	100%	Number of Response(s)	Response Ratio
up			51	40.4 %
down			14	11.1 %
similar			43	34.1 %
business closed			0	0.0 %
business established			11	8.7 %
No Response(s)			7	5.5 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**\*What**

was the percentage increase / decrease?

Answer	0%	100%	Number of Response(s)	Response Ratio
0-5%			31	24.6 %
6-10%			27	21.4 %
11-15%			17	13.4 %
16% and above			13	10.3 %
not applicable			27	21.4 %
No Response(s)			11	8.7 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**\*How**

were your guest numbers in 2017 compared to 2016?

Answer	0%	100%	Number of Response(s)	Response Ratio
up			47	37.3 %
down			15	11.9 %
similar			41	32.5 %
business closed			0	0.0 %
business established			3	2.3 %
non applicable			9	7.1 %
No Response(s)			11	8.7 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**\*What**  
was the percentage increase / decrease?

Answer	0%	100%	Number of Response(s)	Response Ratio
0-5%			35	27.7 %
6-10%			22	17.4 %
11-15%			10	7.9 %
16% and above			15	11.9 %
non applicable			33	26.1 %
No Response(s)			11	8.7 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**What**  
were the main barriers to growth / obstacles to success in 2017?

84 Response(s) There was a wide range of responses but several factors cropped up more than once including Brexit, the weather, VAT, Broadband and AirBnB.

**\*How**  
confident do you feel about the performance of your business in the next:

1 = Very optimistic, 2 = Quite optimistic, 3 = Neutral, 4 = Not very optimistic, 5 = Not optimistic at all

Answer	1	2	3	4	5	Number of Response(s)	Rating Score*
3 months						111	2.6
12 months						111	2.2
24 months						111	2.3

\*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

**\* Compared**

to last year, how are your bookings looking for the next six months?

Answer	0%	100%	Number of Response(s)	Response Ratio
substantially better			6	4.7 %
slightly better			26	20.6 %
about the same			45	35.7 %
slightly lower			18	14.2 %
substantially better			3	2.3 %
not applicable			14	11.1 %
No Response(s)			14	11.1 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

Do you provide any of the following 'services' (free or paid for) to your self-catering customers (tick all that apply)?

Answer	0%	100%	Number of Response(s)	Response Ratio
Daily newspapers			5	6.3 %
Magazines or books			44	55.6 %
Provisioning service - either advance or whilst at the property			26	32.9 %
Catering - either pre-cooked meals for the customer to reheat or a professional caterer arranged and booked by you for the customer.			17	21.5 %
Pet sitting or walking			9	11.3 %
Baby sitting or listening			7	8.8 %
Transfers from airport/station/bus			10	12.6 %
Other			9	11.3 %
<b>Totals</b>			<b>79</b>	<b>100%</b>

Has **\* your guest demographic changed in the last year in terms of age, group size, or nationality?**

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			35	27.7 %
No			77	61.1 %
No Response(s)			14	11.1 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

If the answer is yes, in what way?

42 Response(s)

Most members reported an increase in overseas visitors with larger groups travelling from long haul destinations.

**\*Where**

do the majority of your guests come from, in terms of percentage share?

Answer	0%	100%	Number of Response(s)	Response Ratio
local (within 1 hour)			4	3.1 %
other Scotland			30	23.8 %
England, Wales & NI			57	45.2 %
near neighbours (Europe)			17	13.4 %
distant cousins (USA, Australia)			2	1.5 %
emerging markets (China)			0	0.0 %
No Response(s)			16	12.6 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**\*Do you use any of the online platforms which work within the collaborative/sharing economy?**

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			58	46.0 %
No			52	41.2 %
No Response(s)			16	12.6 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

If Yes, please let us know which ones (use the comment box to add any that we have not listed) and let us know how long you have been using any of these online platforms?

Answer	0%	100%	Number of Response(s)	Response Ratio
AirBnB			38	59.3 %
Homeaway			26	40.6 %
Tripping			2	3.1 %
less than 6 months			5	7.8 %
less than 1 year			7	10.9 %
less than 2 years			11	17.1 %
Other			23	35.9 %
<b>Totals</b>			<b>64</b>	<b>100%</b>

Many members use Tripadvisor Holiday Rentals. It is clear that there is also some confusion regarding the 'sharing' economy and those platforms which are simply websites on which you pay for a listing.

\* Are you aware of the requirement for an Energy Performance Certificate for your self-catering property?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			42	33.3 %
No			66	52.3 %
No Response(s)			18	14.2 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

\* Do you have one?

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			27	21.4 %
No			81	64.2 %
No Response(s)			18	14.2 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

Do you charge separately for

\* electricity? (We believe an 'all inclusive' rental will help our case as we fight to win back Energy Performance Certificate exemption for self-catering and create a level playing field with the hotel and B&B sector.)

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			15	11.9 %
No			94	74.6 %
No Response(s)			17	13.4 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**\*Business Rates:** Please select yes or no for the following questions and use the comment box to give any further information.

1 = Yes, 2 = No

Answer	1	2	Number of Response(s)	Rating Score*
Do you pay Business Rates?			107	1.6
Have you applied for the Rates Relief cap on your 2017 Rateable Value?			107	1.7
Do you know how to apply for the Transitional Rates Relief Cap?			107	1.7
Has your business been eligible for the Small Business Bonus Scheme until now?			107	1.2
Is your business now outwith the Small Business Bonus Scheme?			107	1.9
Do you plan to appeal - the deadlines for appeals is the 30th September.			107	1.9
Are you planning to appeal yourself?			107	1.9
Are you aware of the ASSC offer from Graham & Sibbald who can handle your appeal for you?			107	1.7

\*The Rating Score is the weighted average calculated by dividing the sum of all weighted ratings by the number of total responses.

**\*Did you read the ASSC Economic Impact Assessment of Short-Term Lettings on the Scottish Economy?**

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			55	43.6 %
No			54	42.8 %
No Response(s)			17	13.4 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

If yes - did you over or under value our sector (we asked members to guesstimate the economic value of the self-catering industry in Scotland in our last barometer).

Answer	0%	100%	Number of Response(s)	Response Ratio
Under valued			45	35.7 %
Over valued			8	6.3 %
Top marks - got it about right!			17	13.4 %
No Response(s)			56	44.4 %
<b>Totals</b>			<b>126</b>	<b>100%</b>



**\*Are you in favour of a tourism tax in any form?**

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			20	15.8 %
No			84	66.6 %
No Response(s)			22	17.4 %
<b>Totals</b>			<b>126</b>	<b>100%</b>

**Have you used the Year of History, Heritage and Archaeology in your marketing/social media etc?**

Answer	0%	100%	Number of Response(s)	Response Ratio
Yes			11	10.5 %
No			93	89.4 %
<b>Totals</b>			<b>104</b>	<b>100%</b>

**\*Are there any topics you would like to bring up associated with the self-catering sector?**

102 Response(s) We have been asked to look at 'website security', credit cards, business finance and calendar availability.

Is there anything that you think the ASSC can do to help your business, other than what we are actively doing at present, or anything else that you think that the ASSC can do to help support self-catering in Scotland?

46 Response(s) Delighted to report that our members are generally very pleased and supportive of our efforts: Here are a few comments from the responses -  
 "Keep on as present, and thanks for the help."  
 "You are doing a great job. Many thanks."  
 "I am getting regular traffic from Embrace (in my top 10 referrers) and some bookings. It is a significant part of my membership."  
 Unfortunately it is beyond our ability to 'oppose Brexit' or 'improve broadband' but we do feed survey results in full to the Scottish Tourism Alliance and they are very aware of the challenges posed by both issues.