



Bookings compared to last year:

Substantially better or slightly better – 29.1%

About the same – 21.2%

Substantially lower or slightly lower – 17.2%

No response or N/A – 32.2%

Comments:

“About the same, but definitely slower to fill up”.

“February was particularly busy, lots of short breaks”.

“A very slow start to the year. Season did not get off to a start until Easter. Fully booked until end October”.

Bookings for rest of 2016:

Bookings compared to last year:

Substantially better or slightly better – 18.9%

About the same – 26.1%

Substantially lower or slightly lower – 22.5%

No response or N/A – 32.2%

Comments:

“We have lots of people from Europe book a short break in Edinburgh a few months in advance and post-Brexit vote my enquiries from Europe have fallen off the edge of a cliff, with previous German guests actually taking the time to contact me to say why the Brexit vote will affect their choice of where to holiday in the future. I.e not to the UK, although one did comment that the fact that Scotland had voted to stay may be sufficient for him to decide to return to Scotland on holiday.”

“I would love more people from England. I have been doing B & B and self-catering since about 1992 and used to get lots of English visitors. I feel the Scottish Referendum knocked those numbers severely. I still get my regular returners, but lack new business from England”.

Lots of members hoping for last-minute bookings.

Has the guest demographic changed over the last year?

Yes – 20.3%

No – 46.4%

No response – 33.1%



Many comments saying that there are more visitors from abroad, particularly Europe.

"More overseas guests, especially German. Fewer English and Scottish".

"Far more Scots, far fewer English".

"More Europeans since Brexit, more English than last summer following remain in UK vote".

"Less US etc and more worldwide - China, Scandinavia now through Booking dot com".

"More multi-generation families holidaying together".

"Age demographic perhaps a little younger. More Europeans".

Where do majority of guests come from?

Scotland and rest of UK – 61%

Europe – 4.8%

USA, Australia – 1.3%

No response – 30.9%

Comments:

Most saying majority from UK, then Europe, US, Canada, Australia

"Scotland 30%

Rest of UK 55%

EU and Europe 12%

Australia USA 3% ".

"So far it's only a slight majority from the UK, we've had a substantial minority of enquiries and guests from Europe".

"Only just the majority, lots of Europeans, Americans and Australians too".

Has this changed in recent years?

Yes – 14.6%

No – 50.4%

No response – 32.3%

Comments:

"Scotland is still our main source of visitors but more Europeans in recent years".

"More Europeans recently, German and Dutch".



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“English guests have reduced but we have 5 stars and the English are very price driven. They have been replaced by European guest, mainly Germany, Spain, Sweden and Italy, but haven’t had a single enquiry from Europe post-Brexit. My bookings for 2017 are shocking, normally by now I’d be 40% booked for 2017 but only have 1 booking for 7 nights and 3 weekend bookings, not even getting any enquiries. UK enquiries have also dropped massively post-Brexit, don’t know if being 5 star makes it worse for me”.

“No Australians or Americans this year”.

“No US guests”.

“More Europeans, particularly Germans and also Eastern Europeans”.

“Slightly more Europeans recently and fewer English”.

How do you use the database of new and existing guests?

Monthly newsletter – 2.5%

Annual newsletter – 10.3%

Actively send out special offers – 10.3%

I don’t use the database – 65.1%

Other – 16.1%

Comments:

Occasional newsletters

I know I should!

Christmas cards to our regular returners.

Occasional newsletters. Not monthly.

Post our brochure

Quarterly newsletter

Special offers etc

Encourage the returning guest with a special discount

Infrequent emails to past guests

Give returning guests a discount



How would you describe the location of your property?

Rural – 45.5%

Semi-rural - 16.3%

Urban – 5.3%

Semi-urban – 1.3%

No response – 30.9%

Comments:

You're missing a category! How about: Idyllic village location.

Also lots of suggestions for coastal as a category.

Sea & mountains

By the sea

Fishing village

Coastal strip

Does your property have specific planning permission as a holiday rental?

Yes – 34.9%

No – 29.6%

No response – 35.3%

Do you pay Business Rates?

Yes – 47.3%

No – 18.5%

No response – 34.0%

If yes, do you receive rates relief through the Small Business Bonus Scheme?

Partial – 7%



100% - 46.4%

No I don't receive rates relief - 3.9%

No response – 42.4%

Are you prepared to be involved in an anonymous data analysis study of the economic impact of the self-catering sector to the Scottish Economy, which would take the form of a short online survey?

Yes – 45.5%

No – 19.4%

No response – 34.9%

Do you accept pets? If no, is there a particular reason you have chosen not to?

Yes – 42.9%

No - 21.6%

No response – 35.3%

Do you actively market the property as pet-friendly?

Yes – 29.6%

No – 29.6%

No response – 40.7%

Do you charge extra for pets? If yes, how much?

Yes – 29.2%

No – 23.8%

No response – 40.7%

Answers varied.



What opportunities or threats do you perceive in the aftermath of Brexit?

Some of the 129 responses:

I feel we need to reach out as an industry and make sure that Europeans feel welcome in Scotland.

I have no idea how it will help or hurt our business yet.

Return of UK Self Catering FHL rules disallowed by Brussels. This will allow this industry to compete with the rest of Europe who enjoy a longer season than that of the UK where we only have 6 months season to return a profit.

Other opportunities include control of wind farms to meet European emission targets. Wind farms are a significant threat.

Opportunity for more staycations.

Europeans will be less likely to visit.

Opportunities to encourage guests from further Asia etc. China is an emerging market which could be targeted.

Opportunities - if the pound continues to fall at least our European and American visitors have a cash incentive to visit;

Threats - Europeans not feeling very welcome; inability to market as effectively when we are not in Europe.

Opportunity of more stay cations but think that will be short lived. Threat of increase immigration or by visas making travel more expensive but believe Scotland has got a big pulling power so shouldn't be too much of an issue.

Opportunity - depressed pound makes it more affordable for non-UK visitors to come and less affordable for UK visitors to go elsewhere.

Disastrous. Had many German guests contact me to say they won't be back to the UK because of the vote. My overseas and UK enquiries have totally disappeared, 2017 is looking spectacularly bad. Usually we've over 90% occupancy, but enquiries post Brexit have disappeared. Last year for one flat I'd over £50K sales and it's now so bad that we may close.

A lower pound could mean more affordable UK holidays to those from abroad, and also more staycations for UK residents - both opportunities. Threats: More border controls and visa requirements could put some international travellers off.

There are figures about that are showing Europeans less interested in visiting the UK - but it isn't clear whether this affect Scotland as much. We need to find that out and capitalise on it if it is a better story. Certainly our European guests this year have been full of understanding and friendship.



Threats

Anger & frustration from Europeans which has already been expressed from past visitors - German in particular.

Same from England regarding 'Scotland's' desire to stay in Europe, not accepting the vote, call for yet ANOTHER referendum.

Uncertainty in economic climate.

UK visitors may prefer a "staycation". Overseas visitors will be affected by relative currency values, perceived hassle re border controls and fuel prices (due to large distances in the Highlands) but this may not be much different to what it has been before. Industry marketing is likely to change the focus of where they concentrate their effort.

Larger number of UK and EU vacation guests. Smaller number of EU business guests.

Not happy with Brexit for many reasons however at the moment more people may consider stay at home holidays and breaks and it is cheaper for Europeans to visit. Concerns going forward is no staff to work local hotels, cost of fuel + living rising, time wasted on indyref versus smart thinking for Scotland in UK.

Overall I worry about the economy and also the possibility of a second independence referendum. I think either of these could have a detrimental effect on both my business and me personally.

Currency movements initially favourable. Depends if another Scottish referendum which could be bad for business. International security situation also encourages staycations.

I suppose that devaluation of the pound may encourage foreign visitors, but the prospect of Brexit has been a shock, and I think may lead to a polarisation of policies.

Hopefully Scotland still feels safe and welcoming to visitors and business will carry on as usual, who knows?

It will come down to the exchange rate, and could be positive. Of course, if there is further disruption caused by any attempt to call another Scottish independence referendum, I can see tourist numbers dropping, as Scotland becomes perceived as a less welcoming environment.

I do not expect any noticeable change.

Threats - economic destruction if we leave EU. Opportunity - Scottish Independence. There is now no status quo and Scotland will have to choose between two unions. Independence however will ultimately offer enhanced economic stability, and will position Scotland more clearly as a unique destination for tourists.

Visas for Europeans to come here.

Europeans not wishing to come here as we have left EU.



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*Rural development fund ceasing- structural funds and economic development funds.
Ceasing of sharing best practice within Europe via programmes such as Erasmus.
Economic recession in UK.*

Believe there will not be much of a difference in peak seasons as booked up. In low seasons may have more short term bookings.

Has the Living Wage had an impact on your business? If yes, in what way?

Yes – 4%

No - 59.7%

No response – 35.3%

Many comments saying they already pay above the living wage.

All staff now on minimum wage or above and we employ 6-8 housekeeping staff depending on the time of year so staff costs have increased significantly and not able to increase accommodation costs to the same degree.

*We subcontract cleaning and rates allowed for are far in excess of the living wage level.
The impact on bottom line is however significant and together with utility prices makes offering winter breaks less of a proposition.*

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?

I think you do a great job keeping us very informed. As a small number one man band I do find it difficult to take breath and read it all. I'm trying to manage my time better and at least I know you are there if I need help.

We have recently had excellent support from the ASSC in respect of a supporting letter to help gain planning permission.

I think you are doing a fantastic job!

More lobbying about VAT please!

Get Visit Scotland to improve their website re self-catering. Advertise internationally. Explore partnerships with companies such as WestJet (which just started flying to Scotland) and AirTransat.



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These are the main airlines flying non-stop to Scotland to Canada.

Get the rates inquisition moved to a less busy time of year.

Regular updates on digital marketing ideas would be helpful and e.g's of best practice anywhere both individually and people working together ... also - can a section devoted to accommodation providers working with others to create new visitor experiences?

"Carry on"! Bring back the conference to Inverness or Aviemore on occasion. Help set up a "Digital Mentor" system for one-2-one advice and help, that is free or subsidised. Seriously look at the impact of VS marketing etc on the carrying capacity for B&B, self-catering in remote areas: the whole NW coast has to turn away visitors as we are full!

Campaign for non VAT for small tourism related businesses.

Look at group discounts from suppliers Hoseasons get us a 6% discount at bookers how about a group buying scheme for electricity gas lpg.

Think we should try to find out how many of our members are VAT registered as for us the high rate of VAT needs addressed so we can compete on a level playing field with the rest of Europe.

I like ASSC and think you do a fine job!

The ASSC offers good guidance documents and sometimes the forums can be interesting. I also get prompt replies from any emails I send.

You are already doing a great job. Keep up the good work and thank you for all you do.

Much of our business comes via the ASSC and we are happy with that.

Organise or give information on training courses for digital media marketing.

Lobby for a cut in tourism VAT from 20% to more like our European competitors at 8%.

Glasgow planning permission.

Would like a scheme where members can rent properties to each other for barter points.

Do you have any comments about the survey?

No, other than good set of questions.

Scope was nicely wide-ranging and looking forward to the outcomes.

Good idea. But it may be of more value to do it in November at the "end of the season" in time for the conference... to concentrate minds on a full comparison of one year to the next. We are less busy then and have more space to think up items that may be of importance or relevance.

High season doesn't seem like the best timing to get people to respond.



ASSC Barometer Survey August 2016

Self-catering businesses vary greatly and are often a reflection of the different operators and their own personal standards as well as their locations. It is difficult to devise a survey which fits all types but the survey has included most of the main factors. We require a new grass roots national organisation to promote Scotland in place of VS.

All good relevant questions. Look forward to seeing the summary.

Another review scheme - is this needed or should it be a part of QA grading system?

Some questions on the relative benefits of membership would add to the knowledge base - everybody's different. For us it's been inclusion in Embrace Scotland, from which we've had European enquiries and the Supercontrol booking diary.