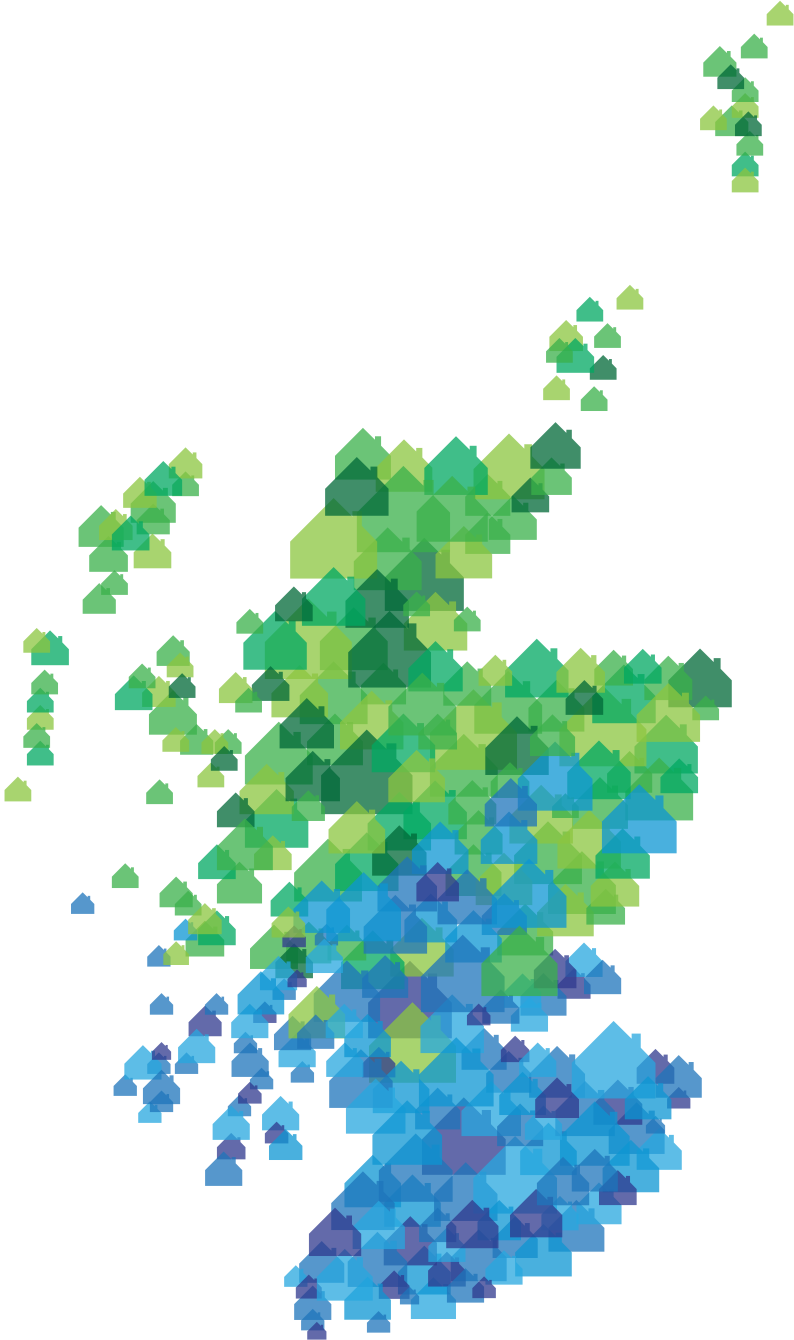


Season to Date Survey

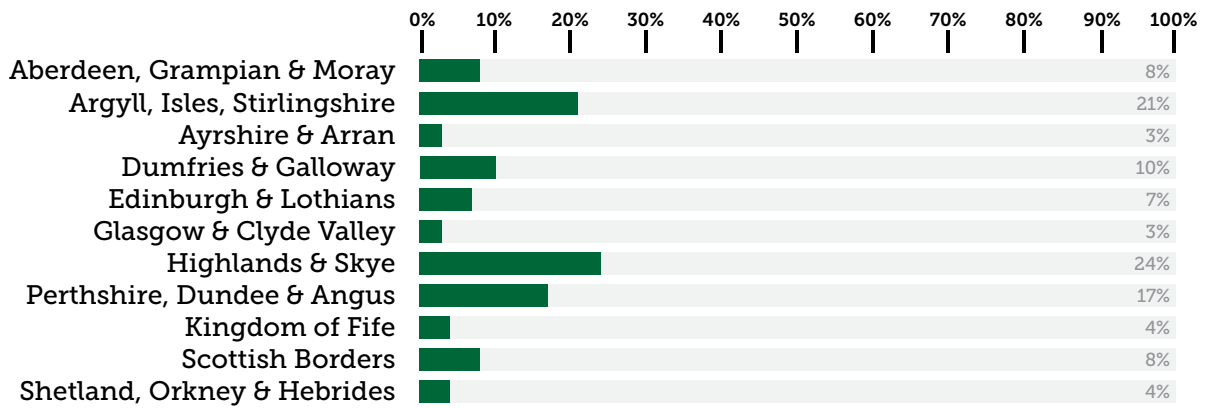
January 2016



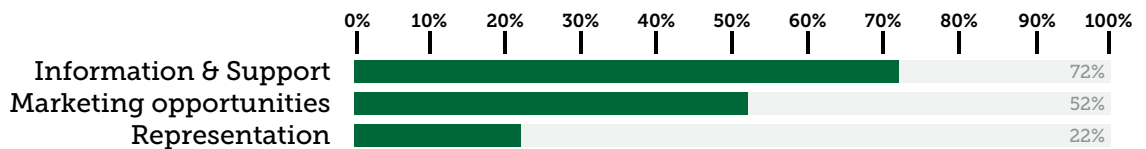
ASSC

Supporting self-catering in Scotland

Membership Spread

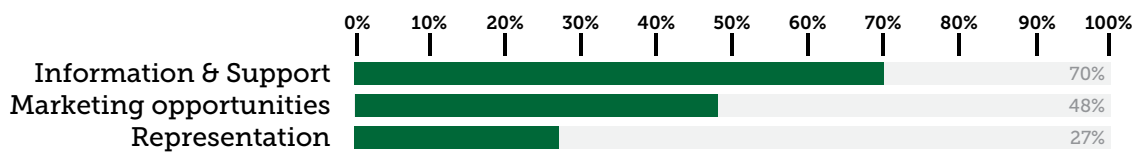


Primary Reason for Joining the ASSC



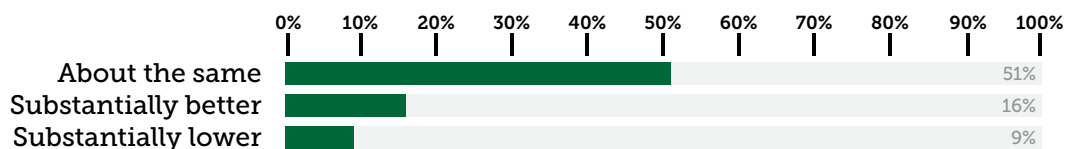
"Apart from the benefit of EmbraceScotland I joined so I can learn about our industry better and hopefully be represented properly to governing bodies etc nation wide and further."

What do you most benefit from being a Member of the ASSC?

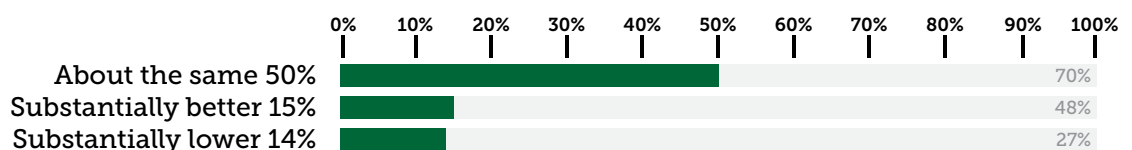


"Initially information and support; now that I have been going for 18 months, it's more the marketing opportunity."

How were bookings from 1st August – 31st December 2015, compared to same time 2014?



How are bookings looking for 2016 compared to 2015?



"As of end January 2015 we had 11 reservations - this year we already have 25 including one for 2017"

Over the next three years, how do you see your business growing?



"We will try to keep up with the increasingly demanding standards that the public require."

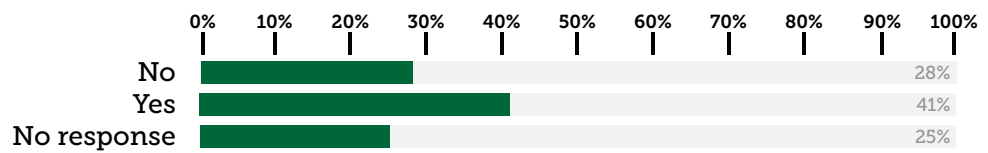
What do you think is the biggest thing acting as a barrier to the growth of your business?

*Lack of Key Attraction **Airbnb** Oil capital negativity
 Connectivity – mobile, internet, transport
 Weather **Local resources: tradesmen, housekeepers, cleaners**
 Internet market place is changing rapidly (OTAs) / OTAs stealing business.
 It is getting harder remain truly independent.
20% VAT Competition Focus by media only on Edinburgh and Glasgow
 Complexity of marketing
 Economic growth of economy in UK
 Lack of financial lending Strength of the pound Politics VAT threshold
 Amount of taxes and red tape Road infrastructure
 Not being comfortable with social media
 Glasgow City Council planning dept
 Removal of higher rate tax deductibility on BTL mortgages and increased stamp duty on BTL properties.
 Local marketing*

What do you consider to be the key to ensuring that 2016 is as good as 2015?

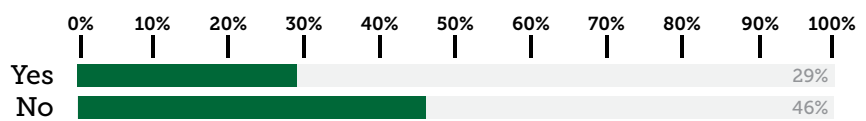
*Marketing in an internet market place that keeps changing rapidly
 The weather **Ensure properties are meeting good standards or improving to meet customer expectations.**
 Spending more time on good quality photographs on website and updating information
 Delivering an excellent quality holiday experience
 Working together and more effective promotion
 Offering a good product at a fair price*

Is there a specific facility or benefit that you are unable to offer which you feel affects your bookings? If so, what is it? e.g. lack of public transport, broadband, too far to walk to a pub/restaurant, lack of hot tub?



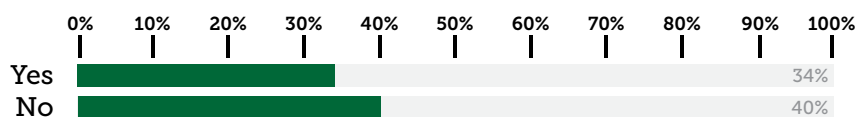
Wifi is a significant complaint
Cost of using Paypal or other means to pay by credit card
Hot tub culture *Lack of public transport*
Proximity to facilities, shops and pubs/restaurants
Lack of fast broadband

Have you signed up to an OTA in the last year?



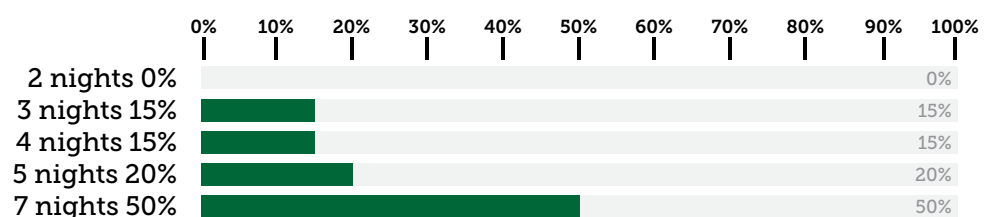
Airbnb - odd requests but not much interest
Most respondents resent the charges / commission *There was a feeling that Airbnb doesn't bring in many bookings*
Booking.com comes out most favorably, bringing the most bookings
TripAdvisor / Holiday Lettings follows this
However, both received negative reviews

Is it more important to be flexible in terms of start days / length of stays since the rise of the OTAs?

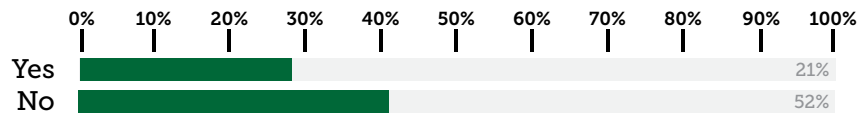


"The need for flexibility has become essential and this has made a greater time commitment and servicing costs. However there has been no need to sell the short break 'cheap'"

Average length of stay

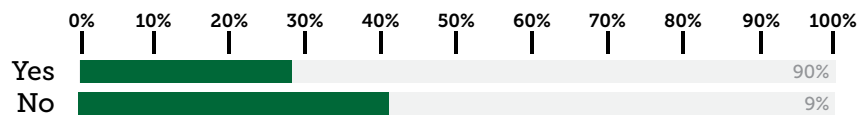


Are you seeing a pattern of change in the type of guests your properties attract?



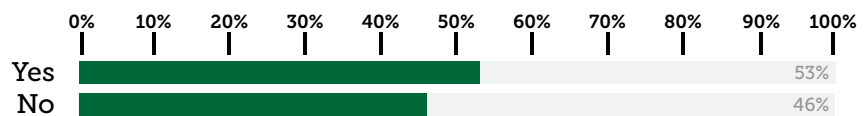
Increase in European / International guests
Increase in business customers
Guests are younger and stay for shorter periods
More couples, fewer families

Is broadband available at your property/properties?



The vast majority use BT
General consensus is that it is too slow
Speeds vary from 2 - 6 mbps

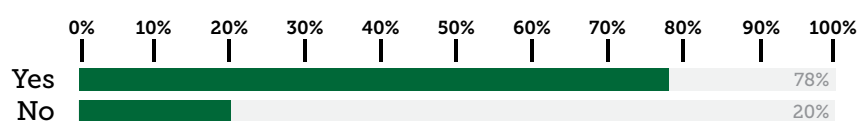
Do you take part in Forum discussions? If the answer is no, why not?



Occasionally and sporadically came out on top.
For some people, it's just not their style to get involved!

"I find the forum very helpful and do involve myself in discussions"

Do you read the Members News on the website?
If the answer is no, why not?



Very informative, excellent thank you
No time

Do you have any comments about the survey?

*Hugely
positive
reviews!*

"Thanks for running it and giving me a kick to get more engaged with ASSC."

Thank you to those who participated*. It is an invaluable survey for the ASSC in terms of assessing how the sector is doing, but also how the ASSC is doing. We are always trying to improve the Association and our support for self-catering in Scotland.

*results generated from the feedback from 112 respondees