



Sectoral Survey into Financial Support & Recovery

Survey 5



Association of
Scotland's Self-Caterers

Supporting self-catering in Scotland

ASSC SECTORAL SURVEY: FINANCIAL SUPPORT & RECOVERY

Introduction

- The Association of Scotland's Self-Caterers (ASSC) is the leading source of knowledge on short-term letting and holiday homes in Scotland. The ASSC conducted a Scotland-wide sectoral survey relating to issues concerning eligibility and access to the various packages of economic support from the Scottish and UK Governments in response to the COVID-19 pandemic. It also sought views regarding the exiting lockdown, the recovery phase and how Covid-19 will impact business going forwards.
- The results offer valuable insights from Scottish self-catering operators in a sector that has been estimated to contribute over £723m each year to the Scottish economy.

Survey Overview

- The ASSC ran a fifth round of their online survey consisting of 15 questions. This was publicised via ASSC newsletters, as well as on the ASSC's social media pages on Twitter and Facebook.
- In 24 hours, the online survey elicited 700 responses from self-caterers in Scotland, from both ASSC members and non-ASSC members alike, in 30/32 of Scotland's local authorities. 349 were from members of the ASSC and 351 responses were from non-members. The survey closed at 1pm on 4th June.

Summary

It is hoped that the survey results will continue to inform discussion regarding the support required for self-catering operators, as well as what changes are necessary to protect livelihoods in what has been a key component part of our tourism offering for a generation. Results will also help to inform an industry led discussion into coming out of the lockdown and the commencing the Restart and Recover phase.

Some of the key findings include:

i. Financial Support

- There appears to be some progress on business support grant payments – 64% of respondents had their application approved (up from 37% in the last survey).
- However, there are still problems in the system and legitimate businesses are losing out. There remains an inconsistency of approach between local authorities and evidencing 140 days occupancy is particularly impacting those in rural areas.
- Even when applications have been approved, many self-caterers have endured lengthy waits – approximately 70% have had to wait two weeks or more. There are others who have not applied at all because they do not believe that they qualify for any of the financial support schemes.
- Just under half of self-caterers (42%) feel that the Scottish Government have been 'poor' or 'very poor' in financially supporting their business. Just 28% deemed them 'good' or 'excellent'.

ii. Financial Recovery

- Looking ahead, **75% of respondents were supportive of self-catering reopening in Phase 2 of the lockdown routemap if travel restrictions were eased and robust cleaning guidance provided.**
- **71% said they would be ready to reopen in Phase 2** subject to Scottish Government approval and the provision of cleaning guidelines.
- **However, 59% of self-caterers are concerned about community negativity towards their business, while a similar number (56%) are concerned about consumer confidence.**
- Given both community and consumer concerns, **there was near unanimity (94%) that the Scottish Government should provide clear and effective messaging in terms of re-opening the tourist sector to assuage community concerns.** Self-caterers also believe that VisitScotland and local authorities have a role in this communication process.
- **Just under half of operators (49%) are still feeling pessimistic about the future of their business,** a slight improvement on the previous survey which may reflect improvements in grant payments and discussions about reopening. This was also replicated in terms of operator feelings about their business over the next 6-12 months.

Q 1 Where is your business based?

Local Authority	Number of Respondents
Aberdeen City	4
Aberdeenshire	22
Angus	11
Argyll & Bute	83
Clackmannanshire	1
Dumfries & Galloway	36
Dundee City	2
East Ayrshire	1
East Dunbartonshire	2
East Lothian	5
East Renfrewshire	0
Edinburgh City	55
Eilean Siar	26
Falkirk	2
Fife	37
Glasgow City	5

Local Authority	Number of Respondents
Highland	208
Inverclyde	0
Midlothian	3
Moray	21
North Ayrshire	38
North Lanarkshire	2
Orkney	23
Perth & Kinross	58
Renfrewshire	1
Scottish Borders	29
Shetland	2
South Ayrshire	9
South Lanarkshire	7
Stirling	25
West Dunbartonshire	2
West Lothian	2

* Some respondents have properties across a range of local authority areas

Q 2 have you applied for any of the covid-19 support schemes?

£10,000 grant	509	72.21%
£25,000 grant	21	3%
Creative, Tourism & Hospitality Hardship Fund	58	8.29%
Pivotal Enterprise Resilience Fund	29	4.14%
Newly Self-Employed Hardship Fund	3	0.43%
No, not yet, but I will be applying	22	12.71%
No, I do not qualify	89	12.71%
I am not sure - I am confused about the eligibility criteria and whether I will be able to qualify for a grant	26	3.71%
Other	42	6%

Issues/concerns raised about the application process:

"Cannot meet Scot Gov arbitrary threshold of 140days. Almost impossible in rural areas away from the 'honeypot' areas."

"Self-catering part of farming partnership business, so not more than third of income."

"I have applied for the £10k grant but I am not sure about the financial condition and whether I will qualify for a grant. The condition is rather vague as it says "for example, one third or more..." I meet the lettings condition i.e. 140 nights or more in the financial year 2019/2020."

"We were unsuccessful with the hardship fund so now preparing to apply for the £10K grant even though we don't fit all the criteria (we have only been trading since Dec 2019) The advice given on the phone was to apply and when we get turned down we will have the opportunity to appeal and then we can explain our circumstances."

"I am retired with a pension- not a massive one but I think it precludes me from applying."

"I do not believe I qualify for self-employment or self-catering as I can't provide evidence that the turnover or profits constitutes more than 50% of my total income."

"I have applied for multiple property grant of £ 7500 since our Completion Certificate states "5 No. Dwellings" but have been told I am not eligible since these have been entered as ONE entity on the Valuation Roll although the Ayrshire Valuation Joint Board concedes that ""There will, of course, be instances of self-catering properties being entered separately in the Valuation Roll, for example, where properties are held on separate titles or dispersed over a fairly wide area or situated on opposite sides of a public road or on different floors of a multi-storey building etc." So where the Planning Authority recognises that in total we have 5 dwellings in addition to our home on site plus HMRC would accept that we have 6 dwelling on site for the purposes of Land and Buildings Transaction Tax were we to sell our property the same authority will not accept our eligibility for multiple properties solely due to the entry on the Valuation Roll as one entity. Other estates where their properties are more widely dispersed than ours and entered as individual properties on the Valuation Roll seems neither fair nor equitable and places their business at an unfair advantage over our in respect of access to the multiple property grant."

"We have 3 self-catering properties in the same location but have been rejected for the grants for properties 2 & 3 because they are in the same location. Friends on the island with properties in separate locations have been able to get the supplementary property grant but we can't."

"It has been too prescriptive and inflexible."

Q 3 What is the current status of your grant application with your local authority?

Approved	448	64.00%
Outstanding	60	8.57%
Rejected	60	8.57%
N/A	132	18.86%

Q 4 How long (approximately) did it take for your application approval?

1 week	91	16.43%
2 weeks	142	25.63%
3 weeks	101	18.23%
4 weeks	65	11.73%
5 weeks	46	8.30%
6 weeks plus	36	6.50%
Application not yet approved	73	13.18%

Q 5 If your application for financial support has been rejected, on what grounds?

It is evident that there remains an inconsistency of approach across local authorities and that evidencing over 140 nights occupancy is impacting on the ability to secure financial support, especially in rural and island communities.

You cannot evidence one third or more of earnings	20	8.85%
You cannot evidence occupancy over 140 nights	14	6.19%
You have already received a grant for a different business under different business names	0	0.00%
You only have one rateable value	29	12.83%
Other	127	56.19%

Examples:

"Our self-catering property income does not equal 1/3rd of total earnings for the Company."

"Our bookings were under 140 days due to the nature of our self-catered property which is rented to groups of 18 for weekend breaks."

"They want it to be a third of my husband's and my income. How could a one-bedroom holiday cottage in the outer isles of Orkney in its first year of trading provide more than a third of our joint income? Everyone knows people in the isles have a portfolio of work. It might not be more than a third but it's a big chunk of it and we can't manage without it. I was depending on the 10K to pay off some of the credit card debt incurred from setting up the cottage last year."

"Glasgow City Council class holiday lets as second homes and not business, therefore it was rejected because we do not pay business rates but council tax. I have proof of income, holiday home insurance, open 365 days for business. "

"One rateable value however it covers 4 properties."

"I pay council tax on the property as I live in part of it - I was advised by my accountant I was exempt from business rates for the self-catering business but failed to realise I had to register and apply for the exemption. I was rejected for the 10k grant, but offered £5k by the creative, tourism & hospitality hardship fund. I have not yet accepted the £5k as I have appealed the 10k rejection."

"Nights occupied vary from 112 to 175! Depends on yearly trade."

"We received the 10K for one cottage but are not eligible for the top up 7.5K for our other 3 cottages."

"I could evidence one third or more of earnings but during 2019/20 season, I only had 123 occupied nights in our cottage."

Q 6 How has this rejection and the eligibility criteria affected your business?

Our survey identified huge uncertainty and some desperate situations for small business owners not benefitting from any support at all.

Examples:

"It's tough as we have kept staff on as self-employed."

"Unable to maintain our Category I listed holiday home. Have used up all funds and depend on high season rates to cover repairs, maintenance and carry the low season. Material damage being caused."

"The grant money would have been necessary for our business to survive the economic crisis."

"Starting to worry about ongoing expenditure with zero income..."

"We have no income. This was our only source of income. We do not qualify for any other financial help and have had to rely on family handouts of food for survival."

"It means we can barely afford to pay the monthly interest on the credit card, we certainly can't pay off any of the debt. We had 15 weeks booked for this year in February and were obviously going to use a big chunk of that to pay off some of the debt."

"I've not been approved or rejected but without approval, I am having to get financial help from family and mount up debt on my credit card."

Case Study

After a very long winter, with very little income since Sept 2019, We invested the small deposits we had into maintaining and preparing 2 properties and grounds for Season 2020 guests following Winter storm damage. We are very worried about survival and covering fixed costs and overheads without further debt which we have no confidence of servicing any time soon. There will be no staycation boom in an island location dependent on public transport travel restrictions reduced capacity ferries and an extremely hostile environment locally towards visitors/holiday accommodation.

Eilean Siar

Q 7 If you do not think you qualify for the financial support schemes - Why?

I cannot evidence occupancy of over 140 nights	52	13.79%
I cannot evidence that receipts represent a primary source (for example, one third or more) of earnings	70	18.57%
I do not have a business bank account	50	13.26%
My rateable value is over £51k	8	2.12%
I cannot apply for multiple properties as I only have one rateable value	33	8.75%
Other	63	16.71%
N/A	140	37.14%

Case Study

"The proportion of income threshold barrier which is grossly unfair. No proportion of income tests for other sectors of tourism. It will be interesting to see what criteria applies to the new B&B scheme just announced. We have proper business accounts/audited/a business bank account/40 weeks of bookings on average every year yet we don't qualify for support which is very unfair."

Highland

Q 8 Are you ineligible for the Self-Employment Income Support Scheme (SEISS) because you are a Furnished Holiday Let?

Yes, I am ineligible	318	64.24%
I have benefited from SEISS	82	16.57%

Examples:

"Disgusted at not been treated as self-employed like every other business due to outdated and inaccurate beliefs. Pure prejudice. "

"I wrote to my MP about the exclusion of FHLs on the taxation technicality but received no response."

"FHLs are presumed to be primarily investment, and not treated as trade, but a property in Uist is definitely not a property investment - we have never expected a return on capital investment (we'd be fools to), we invested to create an opportunity to earn our income from hard work, creativity, skill and providing good service. We are suffering a catastrophic drop in revenue, with £10k only covering mostly fixed outgoings, and all because of an outmoded and inflexible policy of HMRC."

Q9 How would you rate the Scottish Government's response to Covid-19 in financially supporting your business through this crisis so far?

Very Poor	133	19%
Poor	161	23%
Adequate	163	23%
Good	123	17.5%
Excellent	75	11%
I have no opinion	45	6.5%

The majority of respondents 42%, feel that the Scottish Government has been poor or very poor in response to financially supporting their business through the Covid-19 Crisis. 23% felt the support has been adequate and 28.5% considered support to be good or excellent.

Examples:

“Appalling doesn’t go far enough to express the strength of feeling of discrimination and lack of respect and devaluation of our biz we have worked extremely hard for, by the Scottish Government. It’s been soul destroying and the treatment of our sector by this Government will never be forgotten.”

“I think the fact that there were so many delays to self-catering having access to support was a huge failure. I appreciate that they want to regulate self-catering especially in areas like Edinburgh with the large number of Airbnb rooms to let however many self-catering businesses in Scotland have been running for 10 years or longer as a main business and not a secondary income stream. I think the delay in trying to get this sector up and running for the beginning of July given that there are more cases in care homes than in the community is a poor reflection on how the Scottish government feel for the industry despite how much money it brings to the economy”

“As a self-catering property we have not been included in the rateable grant, we fall outside of the self-employment as it is not our primary source of income and yet we have cancelled all our bookings for April, May, June & July giving refunds where applicable to all of our customers whilst receiving no income or support or any clear communication of when we may be able to open.”

“The criteria does not cover all eventualities and we have slipped through the net due to the way our business is set up.”

“They have helped a lot of people but unfortunately for me I have to say very poor as a young business owner it puts me at huge risk of going out of business.”

“Grant schemes are far too slow. Support is too low - our rateable value is £17K so just under the limit for double the grant. Self-catering is a major part of our business and brings hundreds of tourists to this remote part of Scotland with a fragile economy. I think the Scottish Government think that Cottage owners are rich - they are NOT - all our savings have been spent on this form of diversification from Agriculture and we are not being supported.”

“My holiday cottages are put together in one rateable value so my 20 properties only qualify for a single £25k grant. If they had been rated separately, I would have qualified for £150,000 which would have been more helpful to compensate for the £300,000 of lost income we are suffering. the parity across businesses has been very poor. for clubs and any business paying business rates to be able to apply for £10K with no need to provide any evidence of income, accounts or loss versus the hoops that tourism businesses have had to jump through is ridiculous.”

“They are getting better but I feel that we have had to fight too hard to get what we are entitled to. And they still aren't matching other areas of the UK with this bizarre 75% limit on second and more properties

- where does that figure come from and why is it not the full 100% that England and Wales are able to apply for?"

"In terms of access, the initial exclusion of self-catering was obviously very poor. To have to personally lobby my MSP for financial support was a shame on the SG. The application assessment by my LA was efficient and timely, for which I am grateful. Nonetheless I had to apply for UC because of the combined access and assessment delay. In terms of the value of the grant, 10k is adequate at best as it does not cover the seasonal income loss yet is intended to cover the full financial year, and the exclusion of my self-employed earnings from the SEISS on a technicality adds insult to injury."

"In 'war time' support should be equal, fair and nationwide, not differentiated effectively by postcode. We may look to the Scottish Government to guide us politically in 'normal' times, but ultimately, we are governed by Westminster, wither we like it or not, and therefor the financial support should be the same UK wide. The Scottish Government are doing a far better job than Westminster at protecting us all through the easing of restrictions and for that I am grateful, but I feel that they should have put far more pressure on the Treasury regarding the financial package coming to support Scotland. They needed way more money to enable them to support all of us in exactly the same manner as in England, but they did not fight hard enough for it, so they had to make their limited funds stretch, this I understand, but equally I feel let down by them in this regard."

"While I am very relieved to have received the grant, the whole process was stressful and worrying. The application process was needlessly bureaucratic as it should be straightforward to identify a genuine business."

"Unfortunately we feel we have to rate it as 'very poor' at this time as over 7 weeks have passed since the application was submitted and the only responses we have had to date are the requests for evidence of nights occupied and whether or not the income was a primary source of income. We responded to these requests immediately but as of today have not heard any outcome. This has led to a lot of uncertainty and lack of clarity for us as to the best way forward."

Q10 The Scottish Government's four-phase route map for easing lockdown places self-catering in Phase 3 alongside hotels and B&Bs in terms of re-opening. Pubs and restaurants who can cater outdoors can open in Phase 2 if using those outdoor spaces with social distancing measures and increased hygiene routines.

If travel restrictions are eased, and cleaning guidance provided, would you be supportive of self-catering opening in Phase 2 if the Scottish Government announced it was okay to do so?

75%	(524)	Yes
13%	(90)	No
12%	(86)	Not sure

The majority of respondents support self-catering to open in Phase 2. Concern remains for the opening of the islands and welcoming tourists with restrictions and social distancing measures on ferries. There is concern that if the opening of tourism businesses is left too late in the season then businesses will not have the opportunity to recover and endure a long winter season. Clear messaging and support from Scottish Government is highlighted by many as the key to successful opening.

Examples:

"Self-catering lends itself to being able to open earlier. My own small business could function perfectly well with minimum contact. I'm in rural Perthshire, people can easily visit here and follow the same safety guidelines as the local community"

“Not in this location. The venom directed towards holiday homeowners is appalling and the flames have been fanned by many SNP politicians who need to now repair the damage they have done to our industry in rural and island areas.”

“Lumping self-catering accommodation in with Hotels and B&Bs is not appropriate and shows lack of understanding of the sector.”

“With clear guidance I can follow, I can re-open and start creating income to survive and feed my family. Self-catering accommodation is a good way of limiting risk but getting the economy moving.”

“we manage all aspects of the properties ourselves, but need not interact with guests at all, and can provide assistance to guests so they do not need to go to supermarket, or use public transport, for example.”

“Absolutely, this is essential otherwise we will miss the season”

“I would be very supportive of it, just not 100% sure it would work in my community, but nice to have the choice and it might work better in some areas. I am worried to be at the 'front' of opening, and government would need to step up and make it clear it is supported not just tolerated.”

“We have to get communities onside. Currently 2 streams of thought: the R number is very very low outside hospitals and care homes, so it is safe to open up the economy faster than we currently are; but communities have been terrified by the daily messages of doom and don't want visitors yet. There is a balance somewhere.”

Q11 Subject to approval from the Scottish Government and having the recognised cleaning guidelines in place, will you be in a position to open in Phase 2?

Many of the comments received are keen to see endorsed cleaning protocols which are currently awaited from Scottish Government, additionally many operators, cleaners and cleaning companies are concerned about processes, additional expense and timeframes for additional cleaning.

498 (71%) believe they would be in a position to reopen

41 (6%) do not believe they could

161 (23%) are not sure

Examples:

“The sooner this is confirmed the better so we can prepare for a restart of 2020 in a professional manner.”

“we should be allowed to open - the reality for rural location self-catering is that guests can bring all that they need and will have very little impact on the surrounding area. If no C-19 symptoms they should be allowed to return to Scotland we cannot close indefinitely and the local people need the support especially in terms of income from working on and around the self-catering units - OPEN for PHASE 2 PLEASE.”

“Our housekeeper has expressed concern about coming in to do a change-over in terms of her own health. I wouldn't want to put pressure on our housekeeper who has been working for our family for 11 years, but we could always use a cleaning company.”

“Clearly, I will need to be in a position to adhere to the cleaning guidelines and I will need the full support of my cleaning contractors and laundry service to do so. Neither company is fully operational at present.”

“I still need clarification, even when opening in phase 3 of the social distancing of members from multiple households in the one property. One of my properties is small and more often than not only holds

members from one household, so that is less of an issue, although it has a fully wooden interior, so I'm hopeful that the cleaning policy would take that into account. The other property sleeps 12 in 6 double bedrooms, and more often than not, people from separate households will be sharing a bedroom and bathrooms. So, I'd need further guidance on that re phase 3 opening and even more info if we were to open in phase 2."

"capacity on our ferry, which covers four islands, will be reduced due to social distancing to circa 30 passengers, making it unlikely many self-catering guests will be able to travel. Number of self-catering beds between all four islands is approx. 150 to 200."

"Obviously depends on what has to be done in preparation, and whether or not my cleaning company can cope i.e. will they have all the equipment and also the time available? Also, if they put up their price, will it even be viable to continue? Accommodation prices may have to rise and the Scottish Government/VisitScotland/ASSC etc I hope will promulgate the reason to visitors that it is to provide them with a safe environment away from home."

Q12 Are you concerned about consumer confidence?

56% (389) respondents are concerned about consumer confidence.

29% (203) are not concerned

15% (108) are not sure

"I think Scotland is out of step with the rest of the world especially other parts of the UK and Europe which are now much more relaxed about travel and tourism. There is a general acceptance that while all risk cannot be eliminated, better to allow some normality through summer before winter hits. Scotland is being too risk averse in this respect and could end up losing consumer confidence if they chose to remain closed until beginning of Autumn when a second peak more seasonally likely. I do think though that consumers are creatures of habit and because Scotland is closed as an option whereas other places are not, then Scotland may well lose loyal consumers for the future as they forge different paths to holiday solutions and Scotland is forgotten."

"There is a lot of fear mongering going on. A well cleaned holiday cottage with sanitised surfaces & cross contamination precautions should be safe. However, I think that the publicity surrounding hospitals and such means that the public may be happy with nothing less than a full team of industrial cleaners with hazmat suits on - that is not possible."

"There seems to be a feeling in the air of local people not wanting to welcome non-locals into the area. Television and press articles seem to agree with this and we think this will put visitors off coming to the area. In general the feedback we're getting from potential guests and return visitors, is that self-catering accommodation will be the safest type of holiday to take in the near future, especially detached properties Government needs to send a loud and clear message that visitors are welcome in rural Scotland reflecting the importance of tourism. In some areas there are loud voices against opening up to tourism, even with guidelines in place. This needs proper scrutiny as many not involved in the tourism sector were not supportive of tourism in these areas even before the crisis and would be quite happy not to see tourism restart in their area. A real form of nimbyism. Many others involved in tourism in these areas are just keeping their heads down to avoid social media bullying etc. This loud unfriendly noise is also putting off potential future visitors. Hence need for clear and strong messaging from Govt that opening up with guidelines in place is safe for communities and visitors."

"Most of my guests are long standing guests who have been coming to our cottages for over 8 years. Some for as long as 15 years."

“We have many active enquiries who would like to book subject to government restrictions being lifted. Potential guests who have been subject to lockdown are desperate to be able to holiday and have voiced more confidence in the self-catering sector than booking hotels where they will interface with strangers.”

“We all need support and encouragement from government to support local businesses to recover similar to the support received for the NHS in the depth of the crisis. Staycations, staying locally and spending money on local produce. Gold standard criteria and reassurance on cleaning procedure will also be super helpful.”

“I am concerned that potential tourists will not have disposable income. The foreign travellers who make up the bulk of my guests won't come before the end of the season in October. Locals are hostile to tourism despite so many of us other locals, relying on it for an income. They are clearly quite comfortable on their 80% furlough where they don't worry about paying their bills.”

Q13 What do you consider would boost consumer confidence?

Suggestions for boosting consumer confidence included:

- A more dynamic approach to communication from Scottish Government incorporating a clear communication strategy – less talk more action.
- Reassurance from Scottish Government to transform negatives and apprehension to ‘positive attitudes’ and messaging towards tourism
- More Honesty, Integrity and Transparency is required from Scottish Government
- Clear and thorough guidelines for cleaning protocols and messaging promoting ‘clean and safe’
- An end to scaremongering by some MSPs, Local Authorities and the Media
- A clear and detailed roadmap, estimated dates for re-opening
- Track and trace and testing in place
- A need to promote winter activities

Examples:

“LETS OPEN FOR BUSINESS - we must open, so many businesses are falling away lets stop the closures and huge rise in unemployment before its too late”

“Proper guidelines and cleaning regimes in place. Reassurance that remote properties are safe. Reassurance that areas welcome visitors. Clear and strong messaging from Scottish Gov on the above.”

“Clearer risk guidance for travellers. Mandatory use of face masks in public places. Reduction in 2 metre rule to 1.5 or 1.”

“A definite date as to when we can re-open so consumers can plan their holidays, and putting in place a 'Safe Tourism Charter' rolled out over Scotland to reassure guests on a full range of Covid-19 issues.”

“Stop scaring people and let us open in a sensible way”

“Confidence that the sector is embracing the guidelines and potentially operating a sector wide quality guarantee”

“Relaxation of distancing measures and reopening of hospitality indoors as well as out. SG lead messaging that we are open for business.”

“Scottish Government to stop scaremongering and take a more holistic view of risk. They need to look at morbidity rather than just mortality. Morbidity impact is massive and this needs to be considered.”

“Proper code of practice and protocol which is made publicly available and clarity about opening. My booked summer customers are hanging on just waiting to hear what is happening - they don't really want to cancel

A much more positive attitude from the Scottish Government towards easing the lockdown more quickly and emphasising the benefits of this.”

“Clear advice backed by science that it is safe to travel. The harms of lockdown continuing in terms of mental health, economic recession etc are also worth communicating.”

“The UK working together, it's insane we are all working differently without any discussion; the media and government using positive language as to date it is beyond dire and acknowledging that the majority of us public do in fact have common sense.”

Q14 Are you concerned about community negativity towards opening your business?

59% of respondents are concerned.

There is much anxiety being felt within local communities and many people wanting to see an evidenced based approach to the recovery process with clear messaging about safety, eradicating negative press / comments on social media and promoting positive messaging in advance of lockdown being lifted for tourism.

Examples:

“There seems to be a feeling in the air of local people not wanting to welcome non locals into the area. Television and press articles seem to agree with this and we think this will put visitors off coming to the area. In general, the feedback we're getting from potential guests and return visitors, is that self-catering accommodation will be the safest type of holiday to take in the near future, especially detached properties.”

“Lots of negative comments appear on local social media pages largely because of fear. There are few cases in the area and nobody wants to see additional cases. Political leaders need to convince population that measures are logical and secure.”

“This has been one of the nasty side effects of `Covid 19 , people fail to realise that without tourist visitors our area would be stuffed and if we don't open soon there will be a permanent reduction in economic viability - but if you are a scared person who doesn't have a tourist related job you just don't see it - and the Scottish Governments pronouncements just feed this rural nimby mentality.”

“Absolutely. And rightly so, some businesses behave irresponsibly and we are keen to avoid being perceived as being in this category. Our focus has to be community wellbeing.”

“Everyone's in the same boat, balancing risk with economy. As long as guidelines are good and the industry can be shown to be following them, people will probably be accepting.”

“Many retirees and others have got used to having no visitors around and like the idea of having visitor free zones. Some unsavoury social media posts and anti-tourism groups now set up. Of course, not helped by some ill thought out tweets/comments by local politicians playing to the 'gallery'. Need to build a consistent set of safe for visitors /safe for locals messages as part of a well-coordinated national campaign. impressed by some of the messaging and visitor and community safety measures elsewhere”

“A high proportion of our visitors have friends and family locally and come to visit them so they are not perceived as 'outsiders'. We are also physically surprisingly remote so visitors can be as socially distant as they want...”

“Negativity is everywhere if you focus on it. People love to travel and get good deals. However, it will be good if media do not report only bad examples. Every industry has bad apples. However, with the government's plans for licensing next year, perhaps we would see more professional approach in the sector.”

“Local spar now has a sign on the door saying only locals will be served. What defines local? They are the only post office for 35 miles and are 14 miles from us. Not even sure this is legal as they cannot force people to provide ID. I find this incredibly offensive and wrong as it is open to all kinds of prejudice, imagine what a visitor would think? There needs to be some clear and strong guidance given to community leaders to help the people in rural areas that are so feared of the risk of the virus that they no longer have a reasonable balance in their approach to life and risk.”

“Aviemore forums have been a stew of anger, ignorance, suspicion, assumptions and nastiness since this began. It has created a real divide between the pious and the 'greedy second-home owners' that we are all called (despite not being one, and holiday accommodation being our full time job, and being shut throughout and so on and so on). Stirred up by politicians. No-one cares as much if anyone gets coronavirus in Glasgow, but god forbid any Highlander or worse still anyone on Special Skye is affected. This isn't cold-hearted, it is in fact a reflection of how cynical the politicians have been at throwing tourism under the bus to catch votes.”

“There's been a lot of negative press so that hasn't helped. Plus, people like Ian Blackford tweeting negative unfriendly messages”

Q15 What do you think is required to re-assure communities that tourism is safe?

There are clear concerns about community backlash on tourism, many commented that a clear messaging from Scottish Government is the only way to diffuse anxiety within communities. Concerns were raised by many about scaremongering and the 'stay at home' message being instilled throughout lockdown.

Examples:

“Well, it will never be completely safe, will it. But life is a risk and we will all just have to take the risk while mitigating it as much as possible.”

“Am afraid the fear/paranoia is now so ingrained in sectors of the community that some will never consider tourism safe again.”

“Less of the scare tactics that have been used by government and the media - they need to change the rhetoric.”

“I think communities will soon come round to this themselves as they see a huge source of their income lost if tourists do not return.”

“Emphasising the enhanced cleanliness carried out and the possibility to holiday whilst social distancing. A lot of self-catering holiday let's are isolated from other people.”

“CLEAR GUIDELINES FOR BUSINESSES TO FOLLOW - NOT CLEAR AT THE MOMENT”

“Difficult to say. In truth, only a reassurance that Covid has been conquered by medical science would suffice. But that plainly isn't going to happen any time soon. We are going to have to learn to live with this for some time and the medium-term future will consist of managing the risk and accommodating the fear. I think financially the Scottish and UK govts have both been surprisingly supportive so far. But the reality is that the Highlands in particular are economically far too reliant on tourism; support will end and

we'll all have to swallow our misgivings and go back to some version of what we were doing before. The extent to which that reduces life to a never-ending round of Russian roulette, only time will tell."

Q16 Who do you think this messaging should come from?

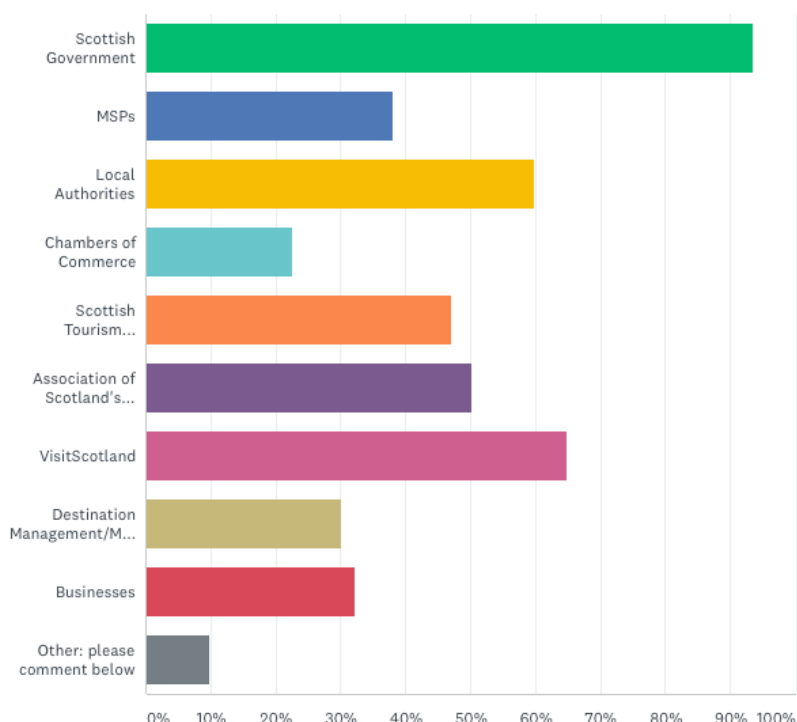
There was a resounding consensus that Scottish Government should be responsible for messaging but respondents feel that clear and effective messaging should be circulated on a united front with one clear message

94% (655) respondents feel that messaging should come from Scottish Government

65% (454) think that messaging should also come from VisitScotland

60% (419) feel Local Authorities should also be responsible for messaging

50% (352) also feel that ASSC should provide messaging to this sector



Examples:

"For tourists to come they need to feel safe and the message has firmly been stay at home, so how does that narrative change to support and enhance tourism?"

"Govt needs to give a clear message that tourism is back in action, MSPs need to consolidate the message, industry needs to champion responsible reopening, messaging of respect and balance, 'we're open and you're welcome' messaging and the businesses need to provide information, communication and connection with community at hyper-local level."

"Everyone -but we need a common toolkit of messaging and materials to draw from plus a national TV campaign funded by the SG which the minister for Tourism has already suggested will be needed as part of the mix. Should be a major emphasis at LA and community council level too as messages might be better received from these sources as seen to be more independent than tourism bodies. DMO cover across Scotland very patchy so don't agree with the VS view in a webinar that this task should fall to them alone."

"We all need to do our bit to get a positive message out. Less focus from the media of isolated poor actions and stirring fear on social media would help."

"Everyone! Just like the Stay at Home message. We need a Support Scottish Business or some such!"

Q 17 How are you feeling right now about your business?

There is still concern and pessimism about business at the moment. There is still uncertainty about the duration of lockdown, no detail around the recovery plan, and increasing anxiety for individual businesses.

49% of respondents still feel pessimistic, less than April which was 61% but still significant.

	April Survey 4		May Survey 5	
Very optimistic	12	2%	19	3%
Somewhat optimistic	94	14%	135	19%
Neutral	162	23%	201	29%
Somewhat pessimistic	274	40%	253	36%
Very pessimistic	145	21%	92	13%

Examples:

"Never felt so undervalued, demoralised and abused online. Disgusted by the media comments from our politicians. My family just cannot live like this. Our T&Cs were there to protect our livelihood. Feel totally let down by Scottish Gov and completely vulnerable. Legislation is required to protect our income/small biz otherwise we will all required to find a more secure livelihood in order to feed our families."

"Without a grant to cover the ongoing overheads as others have had we may not survive the next few months"

"We feel under enormous pressure and cannot see an end in sight. The Scottish Government must give a guideline on dates for reopening so that we have something to work towards. At the moment, we are in the dark"

*"Think this season is all but lost. The SG appear to have no sense of the importance of balancing economic recovery against safety. The dreadful messaging appearing on social media with the "We're shut F**K Off" (re)tweet is very harmful as well as shameful. Feel very angry about the way our businesses are being treated. Disappointed by lack of support/urgency shown by VS too"*

"The biggest threats are the restrictions on capacity of flights and ferries that in effect will have a stranglehold on the island economy, and prove extremely socially divisive. If distancing isn't eased, or services increased, a lot of businesses will fold, and the economy thrown back 20 years. No exaggeration."

"If we get a date to open, things may look up, but we have a lot of overseas visitors booked for July and August, and whether we are allowed to open may not make any difference if they are not allowed to travel. If they have to cancel, they will also want either their money back or a chance to defer their booking, which is not particularly helpful as the original booking is totally lost. We could however have an increase in UK bookings which will be really good, but we shall have to be able to do same day changeovers, as having to have a 24 or 48 hours break between bookings will make our booking system a nightmare."

"Our summer season is quickly dwindling away before our very eyes, then winter months are very difficult because of lots ferry cancellations due to weather conditions"

"Disastrous for our cash flow."

“Staff are furloughed making it difficult for reduced staff to build back the business. We will be going into the quieter months when restrictions lift having missed the peak of the season. Money won't be coming into the business through the winter when staff the income support dries up. It will be hard to cope through the quieter months with no work and no income.”

“Financially, this is a very worrying time. Ethically, we cannot open and encourage tourism when this may cost lives. Until baseline testing is in place in the islands to gauge the reality of infection levels here, which there does not seem plans in place to introduce, i cannot see how this will be resolved in the near future.”

“I'm on the verge of going out of business. I am clinging to the hope of receiving this support grant from the government to survive. It's not about not having guests since March, It's also the poor summer season that we will have (no festival, no specified date on when tourism would be allowed, therefore people cannot make plans), and the extremely poor winter ahead, with all the uncertainties of a second wave of Covid-19”

Q 18 How are you feeling about your business for the next 6 to 12 months?

Once again like previous surveys, the longer-term outlook is perceived as pessimistic by 48.75% of respondents however this has decreased compared to 69% of respondents in April.

	April Survey 4		May Survey 5	
Very optimistic	12	2%	30	4.25%
Somewhat optimistic	87	12%	165	23.5%
Neutral	116	17%	164	23.5%
Somewhat pessimistic	288	42%	241	34.5%
Very pessimistic	184	27%	100	14.25%

Examples:

“Realistically, it is going to be a very uncertain time”

“We won't make up what we've lost and there will be extra expense in cleaning etc just when people expect bargain prices. If we do not open up this year, we have a long winter to manage before seeing revenue streams resume in 2021.”

“Unless we get the summer holidays it's going to be a case of three winters. My income for next year is already going to be lower as bookings have been carried over and deposits transferred from March to June.”

“I feel as though this summer season will be lost and it will be hard to attract visitors over the winter months so it will be a long time before I can expect income from the business.”

“I don't know how I feel, I try not to think too much about it. I worry a lot about how we are going into the winter with no income over the summer to see us through to next spring. It is the feeling of Not being able to change the situation, however hard we try to make everything good and obviously adhere to guidelines, we are completely at the mercy of, not only a deadly virus but also political decisions that may be detrimental to our livelihood and ultimately can destroy our lives, both health wise and economically. Also, like many self-catering private businesses, our home is tied up in our business, so if the business folds, so does our ability to keep living in our home.”

“Tourism will only recover if VERY positive messages are communicated by all - there is a fear that is already becoming a reality that the newsfeeds will turn their focus to Brexit and Covid19 will become forgotten, and therefore there will be little talk of tourism and assistance / support for it's recovery until

1000's of jobs are lost and hospitality businesses remain closed until next year, if they ever re-open. Self-catering holidaymakers enjoy visiting restaurants, cafes and take-ways during their holidays and if these businesses are not open then there will be a reluctance for people to visit. It'll be just like being at home but with a change of scenery."

"I think once we reopen there will be a boom in bookings. Just disappointed that Insurance Companies have been so absent throughout all this. Also hoping the cleaning regime makes it viable to open with many bookings already in place at a fixed price. So difficult to impose a corona virus cleaning surcharge despite additional costs that will impact us inevitably."

"It has no beginning and end as we don't know how long this will go on for. It could go on a lot longer than imagined and the only way I would get up to neutral or somewhat optimistic on that scale would be if the SEISS and grants had been handled better and I felt a proper safety net. Without grants or a clear start back date we cannot see a future. We will end up homeless as our business is our home. Without local planning backing any diversification we cannot adapt to changes in tourism."

"Until the rural areas open up and the Govt are optimistic about the tourist sector and the local economy recognises the impact of the tourist economy, very difficult to see how income through to next April will give reason for optimism with ongoing monthly costs."