The Professional Association of Self-Caterers UK (PASC)/ The Association of Scotland's Self-Caterers (ASSC)

Coronavirus (COVID-19) Business Impact Survey for the Self Catering Sector 2020

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Supporting self-catering in Scotland

Final Report

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Snapshot summary

- This report contains a summary of the findings from the PASC/ASSC Coronavirus (COVID-19) Business Impact Survey for the Self Catering Sector 2020 undertaken by The South West Research Company Ltd. during August and September 2020.

- The total impact on the economy during the January to July 2020 period as a result of self catering related tourism business turnover lost and subsequent supply chain spend associated with this lost turnover was approximately £2.3 billion. Approximately £645 million of this turnover was lost in the self catering accommodation sector, approximately £1 billion visitor spend in other sectors from those that would have been staying in self catering accommodation and approximately £589 supply chain spend on the purchase of local goods and services which would have been associated with this amount of turnover.

- 39% of businesses had received cancellations from their customers as a result of the new Rule of 6. A further 43% of businesses had received cancellations and deferrals.

- The approximate average value per business of bookings cancelled as a result of the new Rule of 6 was £15,000 and £10,000 per business for deferred bookings.

- 47% of businesses said they had not accessed any of the UK business support schemes. 19% had accessed the VAT reduction of 5%, 18% had taken out a Bounce Back Loan and 14% had accessed the Coronavirus Job Retention Scheme (CJRS) - Furlough scheme. 12% of businesses in each case had taken a loan holiday and/or accessed Self Employed Income Support. 14% of businesses had accessed other business support including a Small Business Rates grant.

- 73% of businesses had accessed the Visit England 'We're Good to Go‘ scheme in preparation for Covid-secure reopening, 18% had accessed the AA 'Covid Confidence‘ and 6% the Quality in Tourism 'Safe, Clean and Legal‘ schemes.

Snapshot summary

- Businesses were asked how they managed their guests’ bookings during lockdown. 45% of guests were refunded whilst 42% had deferred their bookings.

- The total estimated cost of re-opening in order to comply with the government endorsed cleaning protocols amounted to £1,809 on average per business.

- 50% of businesses said they were blocking days between bookings for additional cleaning.

- Businesses estimated that the average number of additional hours per week that Covid-19 cleaning takes is 8.79 hours.

- 26% of businesses responding to the survey had taken on additional staff (FTE or part-time) to assist with the government endorsed cleaning protocols and reopening guidelines.

- 82% of businesses have re-opened and are operating at 76-100% capacity.

- When asked to select their top 5 priorities (from a predefined list) which they would like to see become available to help their business survive and grow over the next 12 months the results were as follows:

  - Priority 1: Repeat of the Small Business Grant scheme (67%)
  - Priority 2: New Discretionary Grant for those who haven't benefited from any previous support (35%)
  - Priority 3: Extension to the 5% VAT reduction (30%)
  - Priority 4: Extension to the business rates holiday (29%)
  - Priority 5: Extension to Self Employed Income Support (20%)

Sample summary

- This report contains a summary of the findings from the PASC/ASSC Coronavirus (COVID-19) Business Impact Survey for the Self Catering Sector 2020 undertaken by The South West Research Company Ltd. during August and September 2020.

- A total of 1,501 self catering businesses responded by the closing date of 14th September 2020.

- 39% of businesses responding to the survey were based in England, 54% in Scotland and 7% in Wales.

- 59% of businesses were based in a rural location.

- 48% of businesses had just one self catering unit and 34% had two units.

- 61% of English businesses had a rateable value of under £15k, as did 76% of Scottish businesses. 74% of Welsh businesses had a rateable value of under £12k.

- National tourism survey data and reports have been used to model the financial impacts in this report.

Key findings

- 3% of all businesses remain closed despite the lifting of lockdown restrictions for tourism and hospitality businesses on the 4th July In England, 14th July in Scotland and 25th July in Wales.

- 32% of all closed businesses said they remained so due to the cost implications of re-opening whilst 24% were not confident of reopening while the pandemic is still ongoing. 14% said they felt local community pressure against tourism resuming and 5% said they themselves/or a family member was shielding. 65% gave an 'other' reason for remaining closed.

- 82% of businesses have re-opened and are operating at 76-100% capacity including 7% operating at 76-95% capacity and 75% at 96-100% capacity. 15% of businesses are now open but operating at 75% capacity or less including 7% operating at 51-75% capacity, 5% at 26-50% capacity and 3% at 1-25% capacity.

- 88% of businesses reported a decrease in their business turnover for the period January to July 2020 compared with the same period in 2019.

- The average percentage change in turnover for the January to July 2020 period for all businesses was -54%.

- For the January to July 2020 period it is estimated that approximately £1.7 billion of anticipated self catering related tourism business turnover has been lost due to the Covid-19 pandemic. £645 million of this turnover was lost in the self catering accommodation sector and £1 billion visitor spend in other sectors from those that would have been staying in self catering accommodation.

- An estimated supply chain spend of approximately £589 million would be associated with this amount of turnover. However, tourism businesses will still have had some overheads during this period that they would still have had to cover. If 75% of the supply chain spend did not occur the additional lost tourism spend in Great Britain would have been £442 million, at 50% it would have been an additional £295 million lost or at 25% it would have been an additional loss of £147 million.

Key findings

- 63% of businesses said their unit occupancy between 3rd July and 21st August 2020 had been 76% or more including 19% between 76-90% and 44% between 91-100%. The average unit occupancy rate estimated for the period was 72% for all businesses.

- 61% of businesses employed less than 1 full time member of staff.

- 26% of businesses responding to the survey had taken on additional staff (FTE or part-time) to assist with the government endorsed cleaning protocols and reopening guidelines.

- Businesses were asked how the numbers of part-time staff that they have hired this August changed compared with August 2019. The average number of part-time staff hired in August 2020 was 3.05 compared with 2.76 in August 2019. When asked how many hours these staff worked in total per week during August 2020 the average was 29.64 hours – a slight increase compared with 24.11 hours during August 2019. The average hours worked per week per employee was 9.71 in August 2020 compared with 8.74 in August 2019.

- 50% of businesses said they were blocking days between bookings for additional cleaning including 31% of businesses who said they were doing so consistently (12% for 1 day, 5% for 2 days, 10% for 3 days and 4% for more than 3 days between each booking) and 19% who said they were doing so occasionally, but not between every booking. 49% of businesses said they were not blocking days between bookings for additional cleaning.

- 66% of businesses said they manage the cleaning of their self catering properties themselves. 46% of businesses who said they didn't manage the cleaning of their units themselves said they employed an agency to clean for them. Businesses estimated that the average number of additional hours per week that Covid-19 cleaning takes is 8.79 hours.

- 69% of businesses said their cleaning costs had increased by between approximately 1-40% following re-opening including 13% between 1-10%, 29% between 11-20% and 27% between 21-40%. The estimated average percentage change in their cleaning costs (amongst those with increased costs only) was 31% for all businesses.

Key findings

- The highest estimated re-opening costs were for Bedding at an average of £361 per business, followed by Equipment & Technology (£336 per business), Cleaning materials & chemicals (£311 per business), Bedding protection (£299 per business) and PPE (£179 per business). Businesses estimated that they had incurred, on average, £323 on Other items in order to comply with re-opening protocols.

- The total estimated cost of re-opening in order to comply with the government endorsed cleaning protocols amounted to £1,809 on average per business.

- 87% of businesses said they would be investing £10k or less in their business over the winter period 2020/21, an increase of 10% compared with a usual winter period (77%). 9% said they would be investing £11-25k, a decrease of 10% compared with a usual winter period (19%). At 4%, the proportion of businesses making higher levels of investment for 2020/21 (£26k or more) remains relatively stable compared to a usual winter period.

- 47% of businesses said they had not accessed any of the UK business support schemes. 19% had accessed the VAT reduction of 5%, 18% had taken out a Bounce Back Loan and 14% had accessed the Coronavirus Job Retention Scheme (CJRS) - Furlough scheme. 12% of businesses in each case had taken a loan holiday and/or accessed Self Employed Income Support. 14% of businesses had accessed other business support including a Small Business Rates grant.

- 73% of businesses had accessed the Visit England 'We're Good to Go‘ scheme in preparation for Covid-secure reopening, 18% had accessed the AA 'Covid Confidence‘ and 6% the Quality in Tourism 'Safe, Clean and Legal‘ schemes.

- Businesses were asked how they managed their guests’ bookings during lockdown. 45% of guests were refunded whilst 42% had deferred their bookings. 6% of guests were credited for their bookings whilst 3% were not refunded. 4% of guests did something else.

- 12% of businesses said their business had suffered from Credit Card Chargebacks.

Key findings

- The largest proportion of businesses, 35%, said they were feeling somewhat optimistic about their business right now whilst 12% were feeling very optimistic. 21% were feeling somewhat pessimistic and 8% very pessimistic.

- 34% of businesses were feeling somewhat optimistic about their business for the next 6-12 months whilst 9% were feeling very optimistic. 26% were feeling somewhat pessimistic and 8% very pessimistic.

- When asked to select their top 5 priorities (from a predefined list) which they would like to see become available to help their business survive and grow over the next 12 months the results were as follows:

    - Priority 1: Repeat of the Small Business Grant scheme (67%)
    - Priority 2: New Discretionary Grant for those who haven't benefited from any previous support (35%)
    - Priority 3: Extension to the 5% VAT reduction (30%)
    - Priority 4: Extension to the business rates holiday (29%)
    - Priority 5: Extension to Self Employed Income Support (20%)

- When asked how important a national domestic marketing campaign is to their business success, 68% of businesses said it was ‘very important’ (41%) or ‘important’ (27%) to the success of their business.

- Businesses were asked whether their business had or would be likely to be directly affected by the new Rule of 6 (or equivalent) which came into effect on 14th September 2020. 65% of businesses said there were or would be directly affected by the new ruling.

- 39% of businesses had received cancellations from their customers as a result of the new Rule of 6. A further 43% of businesses had received both cancellations and deferrals.

- 17% of businesses said, as yet, they had not had any customers cancelling or deferring as a result of the new ruling.

Key findings

- The average numbers of bookings cancelled per business as a result of the new Rule of 6 was 7.92 with an average value per business of £15,276.

- The average numbers of bookings deferred per business as a result of the new Rule of 6 was 4.72 with an average value per business of £10,015.

- Those businesses who said they had been or would be likely to be directly affected by the new Rule of 6 (65%) were asked what proportion of their anticipated business turnover for the October to December 2020 and January to March 2021 periods they estimate might be at risk if the new ruling continues for a prolonged period of time. 53% of businesses estimated that 51% or more of their turnover for the October - December 2020 period might be at risk if the new ruling remains in place for a prolonged period of time (including 21% estimating 91-100% of their turnover for this period was at risk).

- The same proportion of businesses (53%) also estimated that 51% or more of their turnover for the January to March 2020 period might also be at risk if the new ruling continued for a prolonged period of time (including 22% estimating 91-100% of their turnover for this period was at risk).

Sample profile by country - Location

	ENGLAND	SCOTLAND	WALES
Total sample size (% of total sample): 1501 total responses	592 (39%)	810 (54%)	99 (7%)
North West	8%		
North East	5%		
Yorkshire	11%		
West Midlands	8%		
East Midlands	9%		
South East	8%		
South West	**46%**		
East of England	6%		
London	-		
Aberdeen and Grampian		7%	
Argyll, Isles, Stirlingshire		12%	
Ayrshire & Arran		4%	
Dumfries & Galloway		6%	
Edinburgh & Lothians		8%	
Glasgow & Clyde Valley		3%	
Highlands & Skye		**33%**	
Perthshire, Dundee & Angus		10%	
Kingdom of Fife		4%	
Scottish Borders		6%	
Shetland, Orkney & Hebrides		7%	
North Wales			**49%**
South Wales			29%
Mid Wales			21%

Sample profile by country – Business characteristics

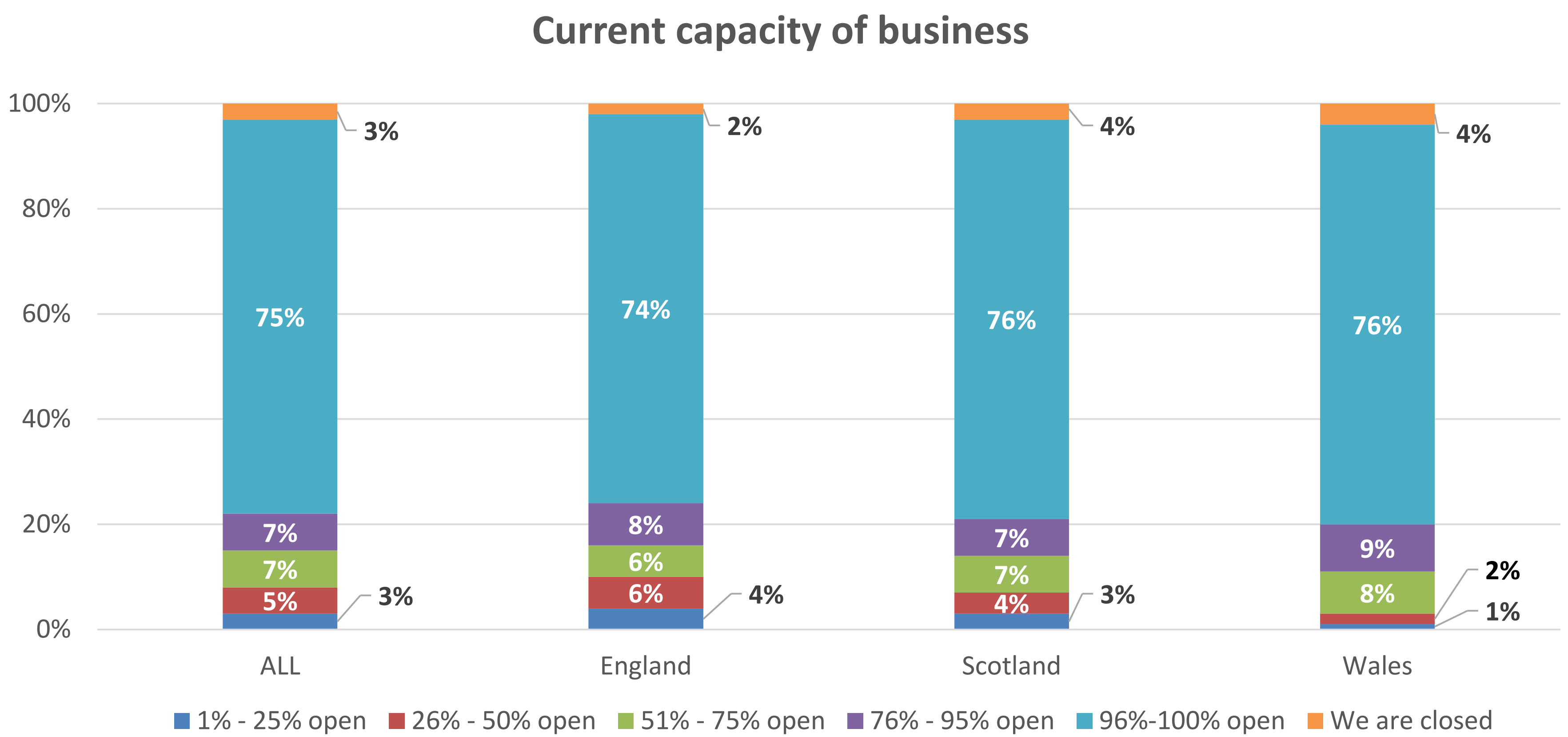
	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Business location:				
Urban	**10%**	6%	15%	2%
Semi-rural	**19%**	21%	17%	22%
Rural	**59%**	**68%**	**52%**	**62%**
Island	**12%**	5%	16%	14%
Business size:				
1 unit	**48%**	**43%**	**51%**	**46%**
2 units	**34%**	33%	34%	39%
5-9 units	**12%**	15%	10%	10%
10+ units	**6%**	9%	5%	4%
Guests accommodated across all properties:				
1-6	**41%**	**33%**	**47%**	**40%**
7-11	**18%**	16%	20%	10%
12-29	**28%**	**33%**	24%	32%
30-49	**7%**	9%	5%	11%
50+	**6%**	9%	5%	6%
Additional facilities provided:				
Hot tub	**15%**	23%	10%	19%
Swimming pool	**7%**	15%	2%	7%
Games room	**17%**	27%	9%	18%
Indoor play area	**5%**	9%	2%	5%
Outdoor play area	**19%**	23%	14%	27%
Electric vehicle charging point	**9%**	13%	6%	7%
None of the above	**58%**	**45%**	**68%**	**47%**
Other	**14%**	18%	11%	16%

Sample profile by country – Rates and council tax

	ENGLAND	SCOTLAND	WALES
Council tax or Non Domestic Rates – English businesses:			
Non-Domestic Rates with a Rateable value of under £15,000	**61%**		
Non-Domestic Rates with a Rateable value of between £15,001 and £51,000	21%		
Non-Domestic Rates with a Rateable value of £51,001 or over	4%		
Council Tax	14%		
Council tax or Non Domestic Rates – Scottish businesses:			
Non-Domestic Rates with a Rateable value of under £15,000		**76%**	
Non-Domestic Rates with a Rateable value of between £15,001 and £18,000		7%	
Non-Domestic Rates with a Rateable value of between £18,001 and £51,000		5%	
Non-Domestic Rates with a Rateable value of £51,001 or over		2%	
Council Tax		10%	
Council tax or Non Domestic Rates – Welsh businesses:			
Non-Domestic Rates with a Rateable value of under £12,000			**74%**
Non-Domestic Rates with a Rateable value of between £12,001 and £51,000			13%
Non-Domestic Rates with a Rateable value of £51,001 or over			2%
Council Tax			11%

- 76% of Scottish businesses benefitted from the Small Business Bonus Scheme available in the country.

Key results – Current capacity by country



- 3% of all businesses remain closed despite the lifting of lockdown restrictions for tourism and hospitality businesses on the 4th July In England, 14th July in Scotland and 25th July in Wales. 82% of businesses have re-opened and are operating at 76-100% capacity including 7% operating at 76-95% capacity and 75% at 96-100% capacity. 15% of businesses are now open but operating at 75% capacity or less including 7% operating at 51-75% capacity, 5% at 26-50% capacity and 3% at 1-25% capacity.

- There is little variation in the results according to country.

Key results – Feedback on current capacity (Sample of all businesses)

Plenty of demand for self catering accommodation.

Can take up to 4 families normally only able to accept 3 currently. Also needing to close between bookings to allow sufficient staff time to undertake all hygiene measures needed.

We are running at full capacity although due to cleaning protocols we are leaving 72hrs between bookings.

Both cottages 100% full until Nov and then again May and June 2021.

August has been good but September onwards very quiet.

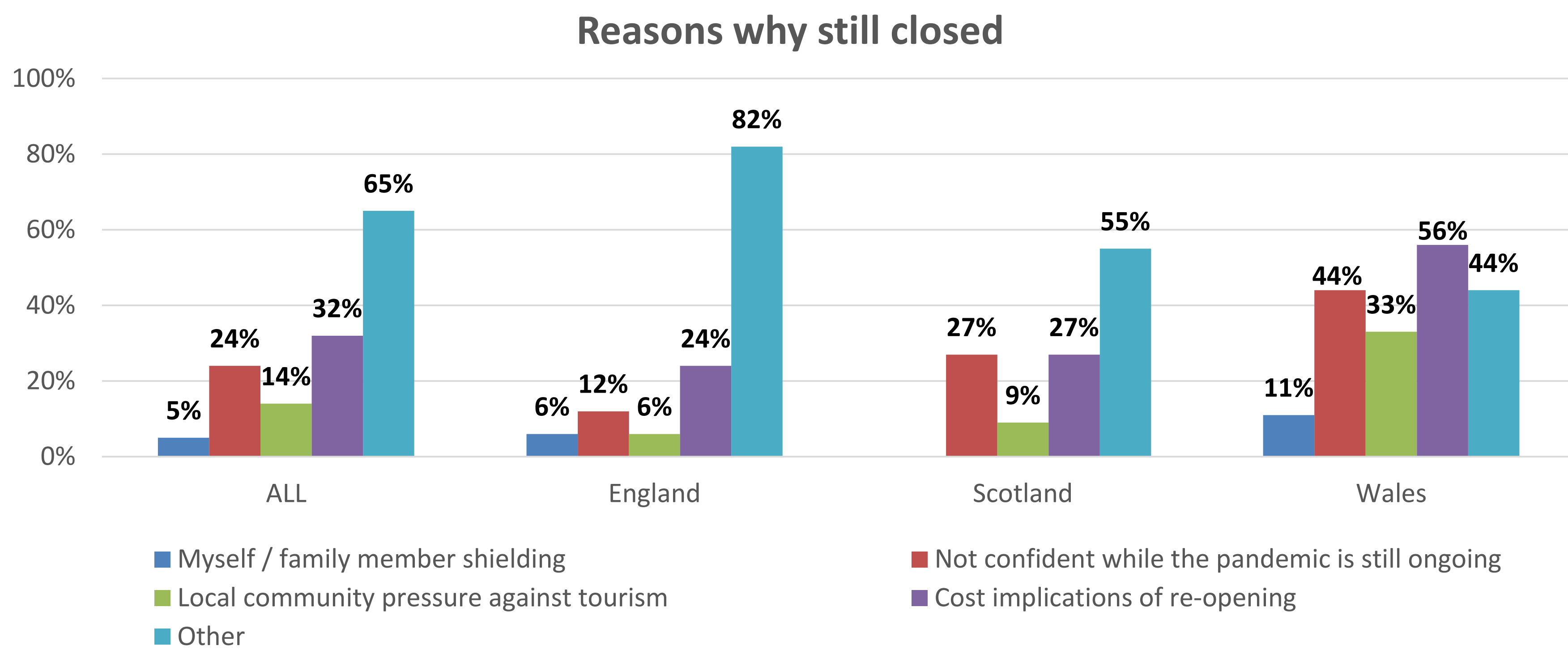
We have had a fantastic time after lockdown. Our houses are full of very positive people - all British rediscovering their own country. It is all very positive.

Leaving gaps between stays so occupancy less than 100%.

We are open fully and have received many new bookings both for this year and 2021.

We cannot open to maximum capacity due to the extra time needed to clean and sanitise but we have minimised the impact by staggering check in days.

Key results – Reasons why still closed by country



- The 3% of all businesses which remained closed were asked why this was the case.
- 32% of all closed businesses said they remained so due to the cost implications of re-opening whilst 24% were not confident of reopening while the pandemic is still ongoing. 14% said they felt local community pressure against tourism resuming and 5% said they themselves/or a family member was shielding.
- 65% gave an ‘other’ reason for remaining closed and a sample of these are shown overleaf.
- The results by country are shown in the chart above.

Key results – Feedback on reasons why remain closed (Sample of closed businesses)

As we are continuously having to give refunds there is really no point in taking bookings at the moment.

We are classed as a hostel so shared bathrooms, kitchen and dormitory bedrooms (4 beds).

Enquiries have stopped dead.

Legal consequences of regional lock-down.

Family member using the premises while rented accommodation is undergoing refurbishment which has been delayed by Covid.

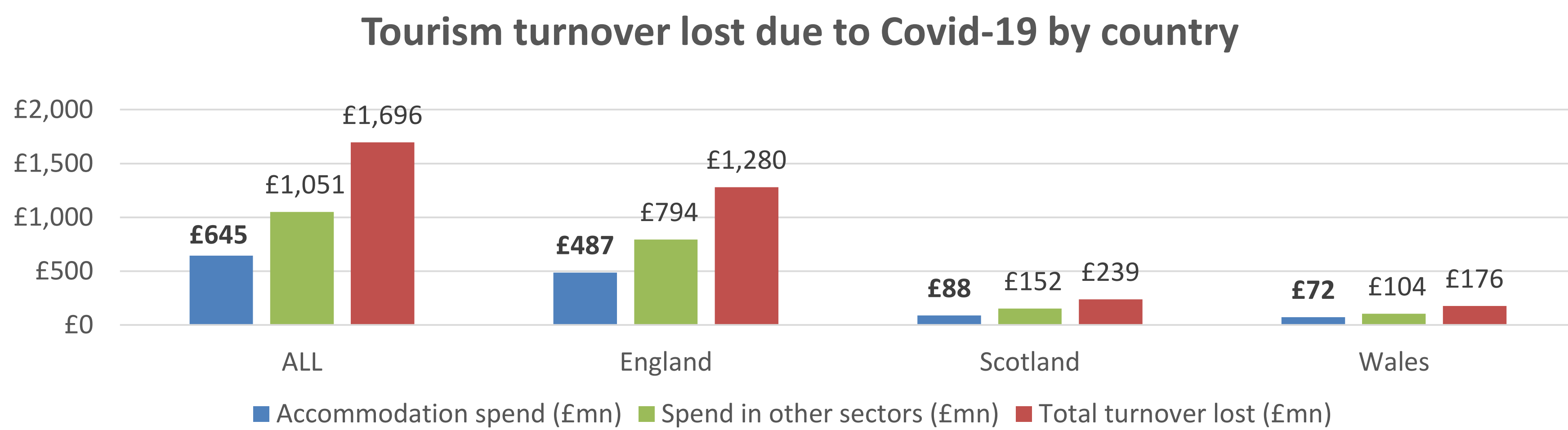
My business doesn't meet the criteria for opening as we cater for large groups so against the law otherwise we would be operational as normal.

My cleaner effectively 'let me go'. Did not come back with cleaning protocol and increased cost of cleaning.

No guests therefore we are shut. Not viable to keep open for 4 guests

Simply because there is no business.

Key results – Economic impacts by country



% change in turnover -54%

% change in turnover -47%

% change in turnover -60%

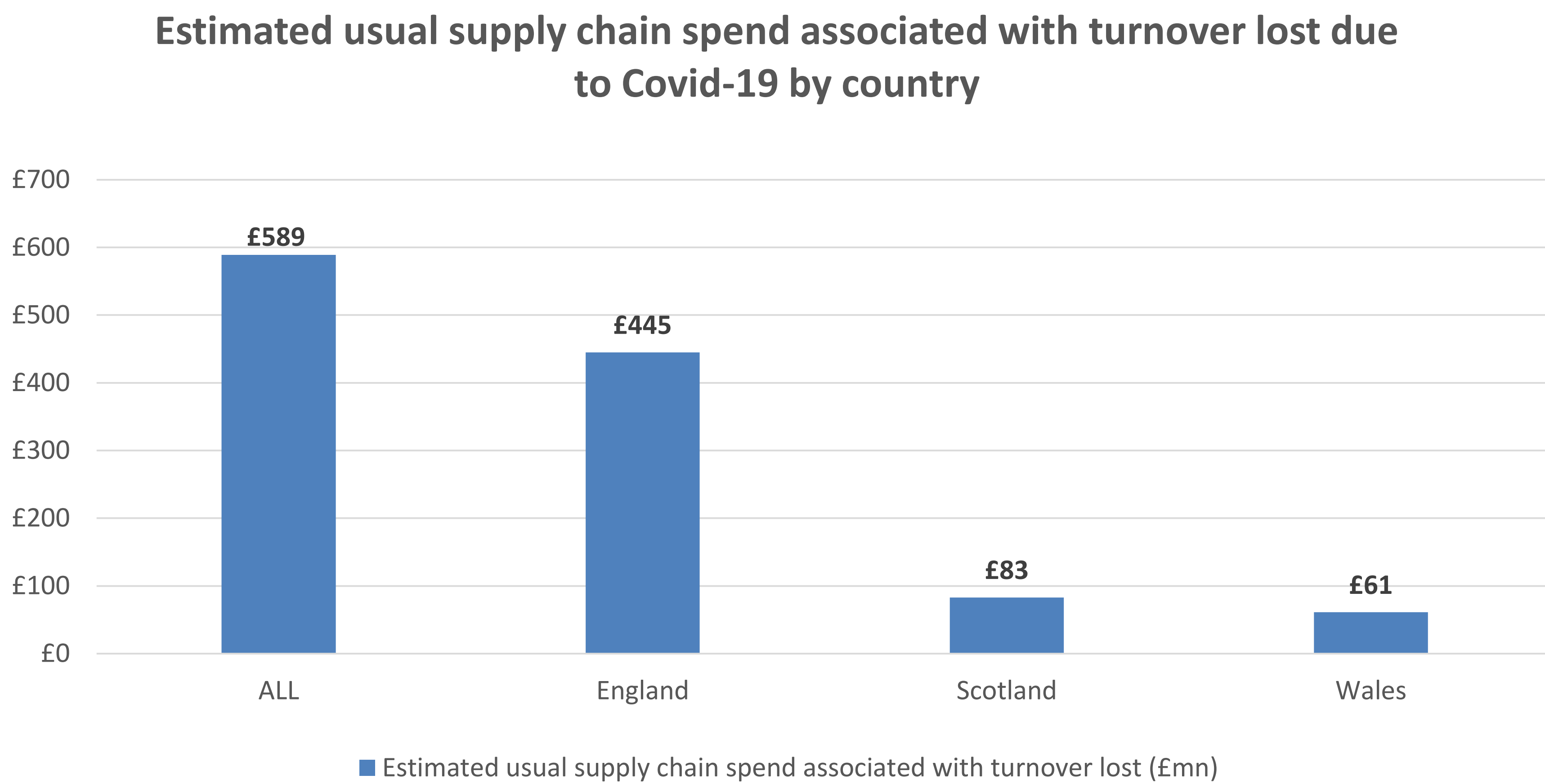
% change in turnover -54%

- 88% of businesses reported a decrease in their business turnover for the period January to July 2020 compared with the same period in 2019 including 85% of English businesses, 91% of Scottish businesses and 88% of Welsh businesses. The average percentage change in turnover for the January to July 2020 period for all businesses was -54%.

- For the January to July 2020 period it is estimated that approximately £1.7 billion of self catering related tourism business turnover has been lost due to the Covid-19 pandemic. £645 million of this turnover was lost in the self catering accommodation sector and £1 billion visitor spend in other sectors from those that would have been staying in self catering accommodation.

- Approximately £1.3 million of anticipated self catering related business turnover has been lost in England during the January to July 2020 period (-47% change in turnover), £239 million in Scotland (-60% change in turnover) and £176 million in Wales (-54% change in turnover).

Key results – Economic impacts by country



- In addition, it is estimated that approximately £589 million would have been the usual amount of supply chain spend associated with this amount of turnover on the purchase of local goods and services.
- Approximately £445 million of this supply chain spend would have occurred in England, £83 million in Scotland and £61 million in Wales.

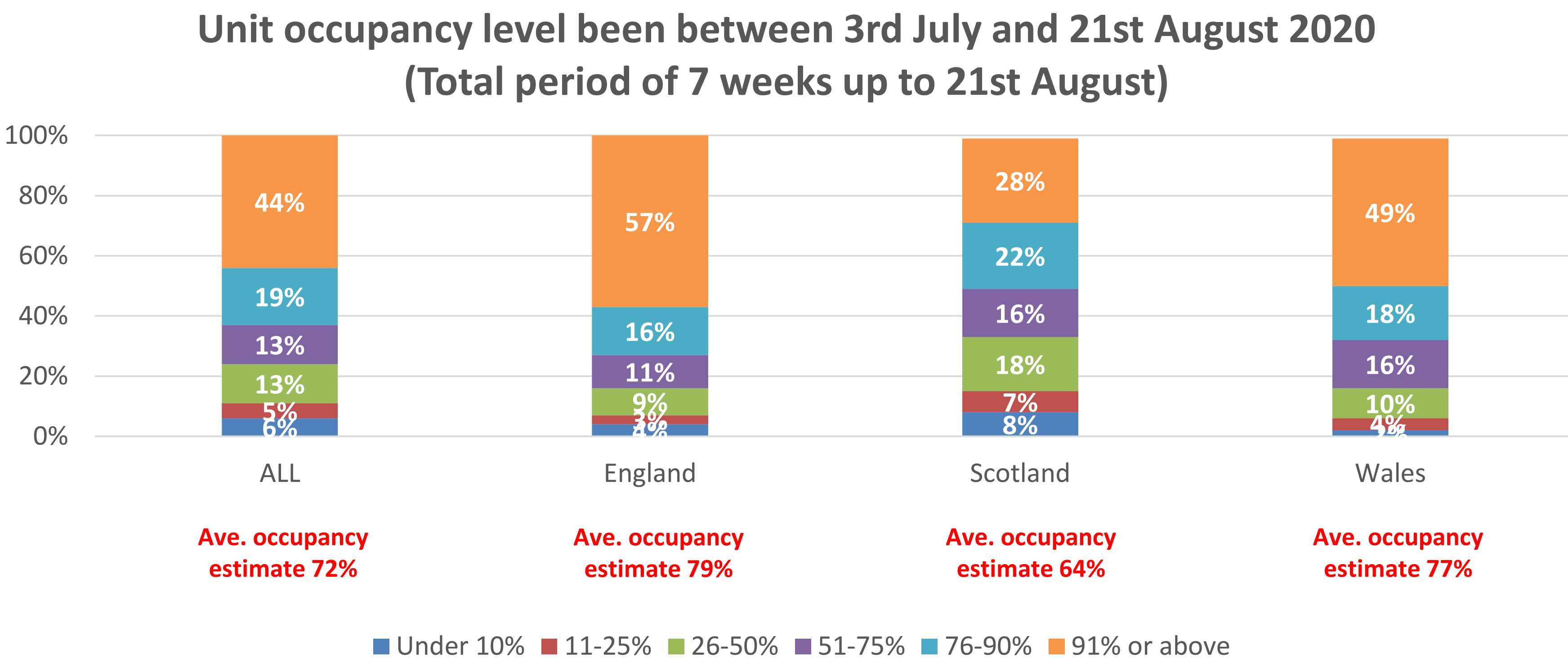
Key results – Economic impacts by country

- However, tourism businesses will still have had some overheads during this period that they would still have had to cover. If 75% of the supply chain spend did not occur the additional lost tourism spend in Great Britain would have been £442 million, at 50% it would have been an additional £295 million lost or at 25% it would have been an additional loss of £147 million.

- The results by country are shown in the table below for scenarios of 75%, 50% and 25% of supply chain spend not occurring.

	Estimated usual supply chain spend associated with turnover lost (£mn)	Scenario 1 – 75% did not occur (£mn)	Scenario 2 – 50% did not occur (£mn)	Scenario 3 – 25% did not occur (£mn)
All	**£589**	£442	£295	£147
England	**£445**	£334	£222	£111
Scotland	**£83**	£62	£42	£21
Wales	**£61**	£46	£31	£15

Key results – Unit occupancy by country



- 63% of businesses said their unit occupancy between 3rd July and 21st August 2020 (total period of 7 weeks) had been 76% or more including 19% between 76-90% and 44% between 91-100%. 13% of businesses in each case said their unit occupancy level during this period was between 51-75% or between 26-50% and 5% between 11-25%. 6% said their unit occupancy level during this period was under 10%.

- 73% of English businesses said their unit occupancy during the 7 week period had been 76% or more compared with 67% of Welsh businesses and 50% of Scottish businesses.

- The average unit occupancy rates estimated for the period were 72% for all businesses, 79% in England, 64% in Scotland and 77% in Wales.

Key results – Employment impacts by country

- 61% of businesses employed less than 1 full time member of staff.
- 47% of English businesses employed 1 or more full-time members of staff compared with 31% and 40% of Scottish and Welsh businesses respectively.

How many Full Time Employees (FTE's) does your business employ?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Less than 1	**61%**	**54%**	**68%**	**60%**
1-5	36%	42%	30%	37%
6-10	2%	3%	1%	1%
11-20	1%	1%	0%	2%
21-40	0%	1%	0%	0%
Over 40	0%	0%	0%	0%

- 26% of businesses responding to the survey had taken on additional staff (FTE or part-time) to assist with the government endorsed cleaning protocols and reopening guidelines.
- A higher proportion of English businesses had taken on additional staff (34%) compared with those in Scotland and Wales (18% and 27% respectively).

Have you taken on any additional staff (FTE or part-time) to assist with the government endorsed cleaning protocols and reopening guidelines?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Yes	**26%**	34%	18%	27%
No	**74%**	**66%**	**82%**	**73%**

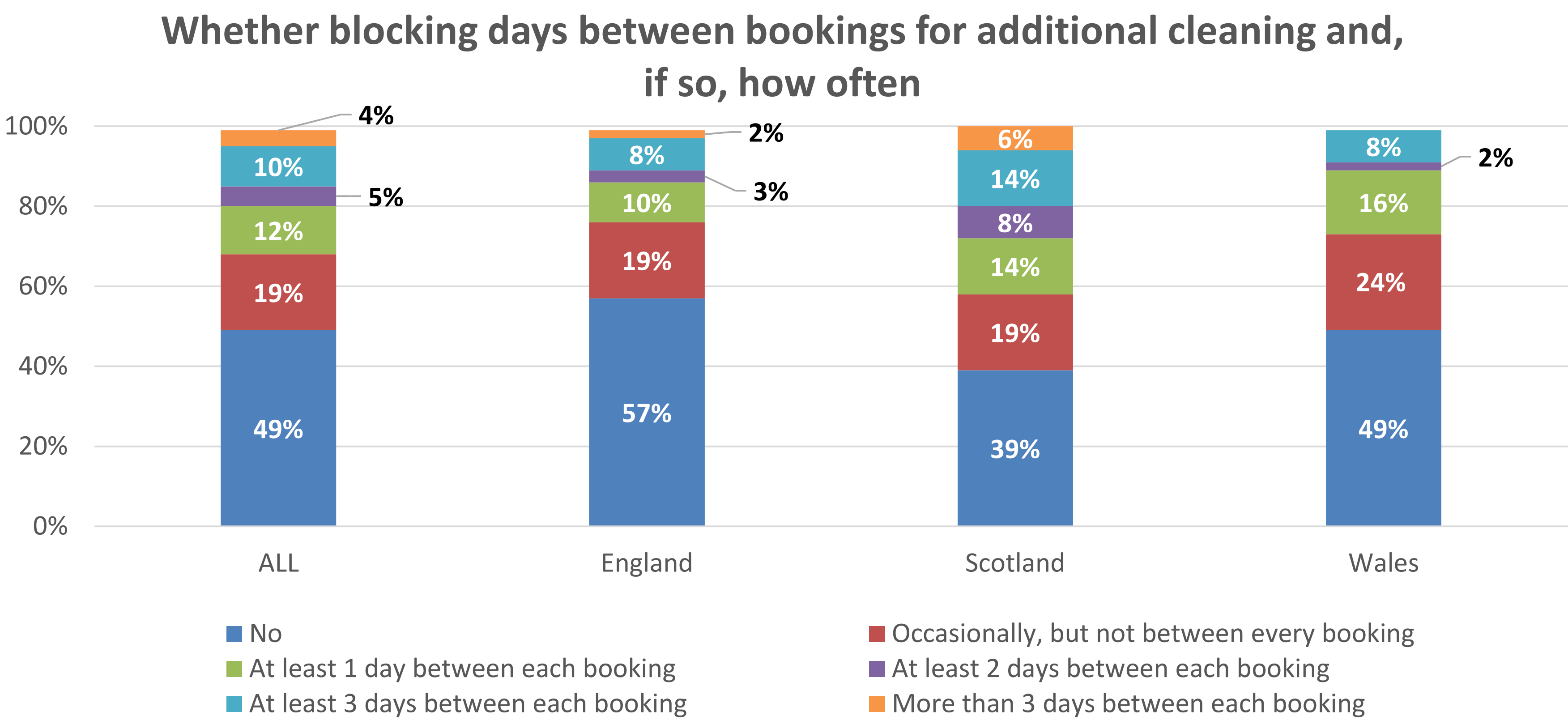
Key results – Employment impacts by country

- Businesses were asked how the numbers of part-time staff that they have hired this August changed compared with August 2019. The average number of part-time staff hired in August 2020 was 3.05 compared with 2.76 in August 2019. When asked how many hours these staff worked in total per week during August 2020 the average was 29.64 hours – a slight increase compared with 24.11 hours during August 2019. The average hours worked per week per employee was 9.71 in August 2020 compared with 8.74 in August 2019.

- Scottish businesses employed the least number of part-time staff on average during 2020 (1.99, compared with 1.92 during 2019) and for the lowest number of hours (20.59 hours compared with 17.86 during 2019). English businesses employed the highest number of part-time staff on average (3.83 compared with 3.42 during 2019), whilst Welsh businesses employed their part-time staff for the highest number of hours (39.88 on average compared with 29.03 hours during 2019).

How have the numbers of part-time staff that you have employed this August changed compared with August 2019?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Number of part time staff employed during August 2020 (including cleaning, gardening, maintenance)	**3.05**	3.83	1.99	3.43
How many hours did they work in total per week during August 2020	**29.64**	35.20	20.59	39.88
Ave. hours worked per week per employee 2020	**9.71**	9.19	10.30	11.63
Number of part time staff employed during August 2019 (including cleaning, gardening, maintenance)	**2.76**	3.42	1.92	2.66
How many hours did they work in total per week during August 2019	**24.11**	28.19	17.86	29.03
Ave. hours worked per week per employee 2019	**8.74**	8.24	9.32	10.93

Key results – Blocking days for additional cleaning by country



- 49% of businesses said they were not blocking days between bookings for additional cleaning.
- 31% of businesses said they were consistently blocking days between bookings including 12% doing so for 1 day, 5% for 2 days, 10% for 3 days and 4% for more than 3 days between each booking. 19% said they were doing so occasionally, but not between every booking.
- 42% of Scottish businesses said they were consistently blocking days between bookings compared with 23% of English businesses and 26% of Welsh businesses.

Key results – Cleaning management by country

- 66% of businesses said they manage the cleaning of their self catering properties themselves. 70% of English businesses said they manage the cleaning themselves compared with 64% and 55% of Scottish and Welsh businesses respectively.

Do you manage the cleaning yourself?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Yes	**66%**	**70%**	**64%**	**55%**
No	34%	30%	36%	45%

- 46% of businesses who said they didn't manage the cleaning of their units themselves said they employed an agency to clean for them. A higher proportion of businesses based in England and Wales said they employed a cleaning agency (50% in each case) compared with those in Scotland (43%).

Do you employ an agency to clean for you? (Those businesses not managing the cleaning themselves)	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Yes	**46%**	**50%**	43%	**50%**
No	**54%**	**50%**	**57%**	**50%**

- Businesses estimated that the average number of additional hours per week that Covid-19 cleaning takes is 8.79 hours. The average estimate was highest amongst English businesses (9.32 hours) compared with 8.16 hours and 8.76 hours amongst those based in Scotland and Wales respectively.

How many additional hours per week does Covid-19 cleaning take?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Ave. no of hours	**8.79**	9.32	8.16	8.76

Key results – Cleaning costs by country

- 69% of businesses said their cleaning costs had increased by between approximately 1-40% following re-opening including 13% between 1-10%, 29% between 11-20% and 27% between 21-40%.
- 25% of businesses said their cleaning costs had increased by approximately 41% or more following re-opening including 14% between 41-60%, 5% between 61-80% and 6% between 81-100%.
- Just 5% of businesses said their cleaning costs had not changed since re-opening.
- The estimated average percentage change in their cleaning costs (amongst those with increased costs only) was 31% for all businesses, 32% for those in England, 30% for those in Scotland and 33% for those in Wales.

By approximately what percentage have your cleaning costs increased following re-opening, if at all?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
No change	5%	5%	5%	2%
1-10%	13%	12%	15%	10%
11-20%	29%	30%	29%	24%
21-40%	27%	26%	27%	35%
41-60%	14%	14%	14%	16%
61-80%	5%	7%	3%	8%
81-100%	6%	6%	7%	4%
Estimated average % change in costs (those increased only)	**31%**	32%	30%	33%

Key results – Estimated re-opening costs by country

- Businesses were asked what the estimated cost (in pounds £) was to their business of re-opening in order to comply with government endorsed cleaning protocols in terms of; Cleaning materials & chemicals, Equipment & technology, Bedding, Bedding protection, PPE and other costs. The average estimated re-opening costs for each of these categories is shown below for all businesses by country for those who reported an increase in their cleaning costs .

What was the estimated cost (in pounds £) to your business of re-opening in order to comply with government endorsed cleaning protocols in terms of the following…….?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Cleaning materials & chemicals	**£311**	£358	£251	£335
Equipment & technology	**£336**	£381	£308	£199
Bedding	**£361**	£430	£288	£296
Bedding protection	**£299**	£374	£211	£283
PPE	**£179**	£224	£133	£133
Other	**£323**	£361	£305	£176
Total costs	**£1,809**	£2,127	£1,496	£1,421

- The highest estimated re-opening costs were for Bedding at an average of £361 per business, followed by Equipment & Technology (£336 per business), Cleaning materials & chemicals (£311 per business), Bedding protection (£299 per business) and PPE (£179 per business). Businesses estimated that they had incurred, on average, £323 on Other items in order to comply with re-opening protocols.

- The total estimated cost of re-opening in order to comply with the government endorsed cleaning protocols amounted to £1,809 on average per business.

- The total estimated cost by English businesses to re-open, at £2,127, was higher than Scottish and Welsh businesses (£1,496 and £1,421 respectively on average per business).

Key results – Investment levels by country

- Businesses were asked to indicate how much they usually invest in their business over the winter period and how much they were likely to invest over the winter period in 2020/21.

- 87% of businesses said they would be investing £10k or less in their business over the winter period 2020/21, an increase of 10% compared with a usual winter period (77%). 9% said they would be investing £11-25k, a decrease of 10% compared with a usual winter period (19%).

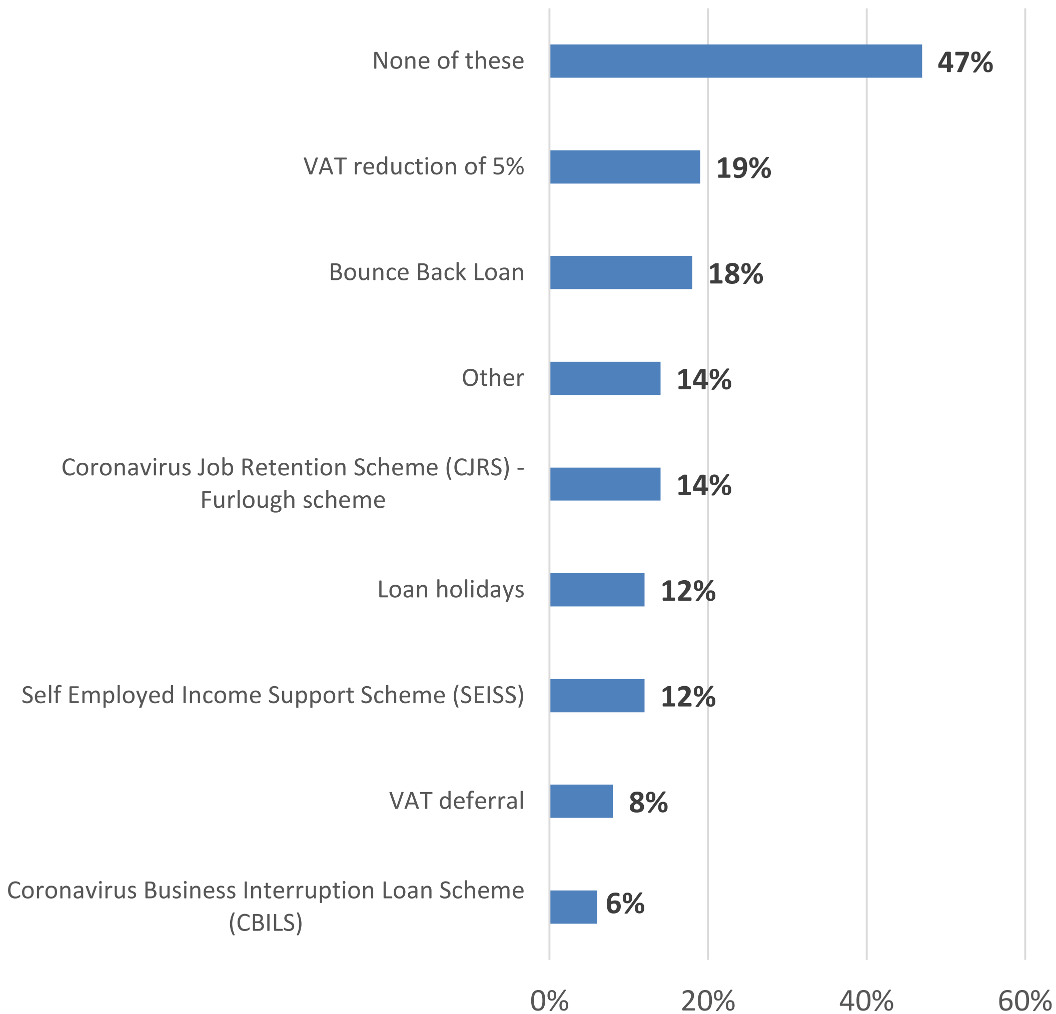
- At 4%, the proportion of businesses making higher levels of investment for 2020/21 (£26k or more) remains relatively stable compared to a usual winter period.

- As the results in the table below illustrate, there was little variation in these results according to the country where the businesses were located.

Usual investment levels during the winter period and anticipated during winter 2020/21	ALL BUSINESSES		ENGLAND		SCOTLAND		WALES	
	Usual	Anticipated 2020/21	Usual	Anticipated 2020/21	Usual	Anticipated 2020/21	Usual	Anticipated 2020/21
£10k or less	**77%**	**87%**	**70%**	**85%**	**84%**	**89%**	**70%**	**90%**
£11 to 25k	**19%**	**9%**	24%	11%	13%	7%	26%	9%
£26 to 50k	**3%**	**2%**	4%	2%	2%	2%	4%	-
Over £51k	**1%**	**2%**	2%	2%	1%	1%	-	1%

Key results – UK business support

Business support schemes accessed during the pandemic



- 47% of businesses said they had not accessed any of the UK business support schemes.
- 19% had accessed the VAT reduction of 5%, 18% had taken out a Bounce Back Loan and 14% had accessed the Coronavirus Job Retention Scheme (CJRS) - Furlough scheme.
- 12% of businesses in each case had taken a loan holiday and/or accessed Self Employed Income Support. 8% had deferred their VAT payments.
- Only 6% of businesses had accessed the Coronavirus Business Interruption Loan Scheme (CBILS).
- 14% of businesses had accessed other business support including a small business rates grant.
- The results by country are shown in the table overleaf.

Key results – UK business support by country

- The UK-wide business support schemes accessed by country are shown in the table below.
- The largest proportions of businesses across each of the countries said they had not accessed any of the UK business support schemes (41%, 52% and 39% of English, Scottish and Welsh businesses respectively).
- The next largest proportions of English and Scottish businesses had accessed the VAT reduction of 5% (26% and 15% respectively) and/or had taken out a Bounce Back Loan (23% and 15% respectively). 22% of Welsh businesses had accessed other business support and 21% a Bounce Back Loan.

	ENGLAND	SCOTLAND	WALES
Coronavirus Job Retention Scheme (CJRS) - Furlough scheme	19%	11%	17%
Coronavirus Business Interruption Loan Scheme (CBILS)	7%	5%	6%
Self Employed Income Support Scheme (SEISS)	13%	11%	13%
Bounce Back Loan	**23%**	**15%**	**21%**
VAT deferral	11%	6%	12%
VAT reduction of 5%	**26%**	**15%**	17%
Loan holidays	13%	11%	14%
None of these	**41%**	**52%**	**39%**
Other	15%	12%	**22%**

Key results – Country-specific business support

- The country-specific business support accessed by businesses from each country is shown in the table below.

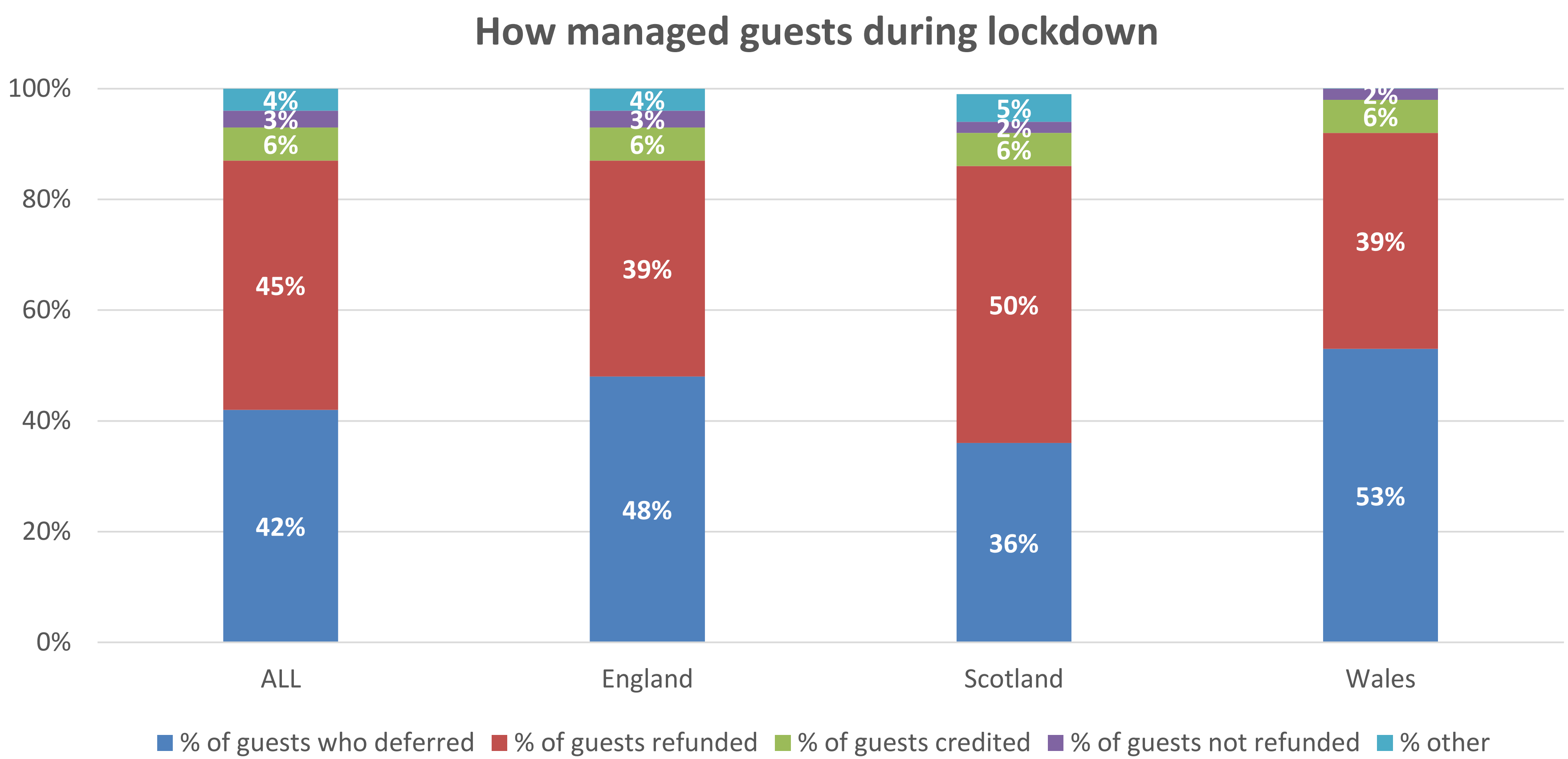
	ENGLAND	SCOTLAND	WALES
Small Business Grant (£10k)	**56%**	n/a	n/a
Hospitality and Leisure Grants (£10k/£25k)	**26%**	n/a	n/a
Local Authority Discretionary Grant	7%	n/a	n/a
Small Business Support Fund (£10k)	n/a	**64%**	**70%**
Retail, Hospitality and Leisure Grant Fund (£25k)	n/a	2%	8%
ASSC / VisitScotland Coronavirus (Covid-19) Support Scheme for Self-Catering Businesses (£1m)	n/a	4%	n/a
Creative, Tourism & Hospitality Hardship Fund	n/a	2%	n/a
Pivotal Enterprise Resilience Fund	n/a	-	n/a
Newly Self-Employed Hardship Fund	n/a	1%	n/a
Discretionary Assistance Fund	n/a	n/a	n/a
Economic Resilience Fund	n/a	n/a	4%
None of these	15%	**28%**	**17%**
Other	1%	3%	7%

Key results – Business schemes by country

- 73% of businesses had accessed the Visit England 'We're Good to Go' scheme in preparation for Covid-secure reopening, 18% had accessed the AA 'Covid Confidence' and 6% the Quality in Tourism 'Safe, Clean and Legal' schemes.
- 19% of businesses said they had not accessed any of the business schemes, whilst 10% had accessed another scheme including an Airbnb scheme, ASSC guidelines, Landlords Little Helper and Safer Stays.
- Uptake in the Visit England 'We're Good to Go' scheme was considerably higher amongst Welsh businesses (84%) than English and Scottish businesses (74% and 71% respectively).
- 32% of English businesses took part in the AA 'Covid Confidence' scheme compared with just 6% of Scottish businesses and 24% of Welsh businesses.

Have you accessed any of the following schemes in preparation for Covid-secure reopening?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Visit England 'We're Good to Go'	**73%**	**74%**	**71%**	**84%**
AA 'Covid Confidence'	**18%**	32%	6%	24%
Quality in Tourism 'Safe, Clean and Legal'	**6%**	8%	5%	7%
None of these	**19%**	18%	21%	10%
Other	**10%**	8%	12%	-

Key results – Guest management during lockdown by country



- Businesses were asked how they managed their guests' bookings during lockdown. 45% of guests were refunded whilst 42% had deferred their bookings. 6% of guests were credited for their bookings whilst 3% were not refunded. 4% of guests did something else.

- A much lower proportion of Scottish guests (36%) deferred their bookings compared with English and Welsh guests (48% ad 53% respectively) whilst, in contrast, 50% of Scottish guests were refunded compared with 39% in each case of English and Welsh guests.

Key results – Guest management during lockdown by country

- Businesses were asked what was the approximate value (in pounds £) of the guests' bookings that they were unable to fulfil. The average values calculated by category and country and shown below.

What was the approximate value (in pounds £) of the guests' bookings that you were unable to fulfil?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Ave. value per business of guests' bookings who deferred	**£15,782**	£21,145	£11,169	£14,842
Ave. value per business of guests' bookings who were refunded	**£12,195**	£14,323	£10,805	£10,120
Ave. value per business of guests' bookings who were credited	**£9,803**	£12,880	£7,696	34,565
Ave. value per business of guests' bookings who were not refunded	**£7,773**	£13,279	£3,439	£2,402

- 12% of businesses said their business had suffered from Credit Card Chargebacks. There was little variation in the results according to the country where the business was based.

Has your business suffered from Credit Card Chargebacks?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Yes	**12%**	15%	10%	10%
No	**50%**	52%	48%	57%
Not applicable to my business	**39%**	34%	43%	33%

Key results – Feedback on guest management during lockdown (Sample of all businesses)

A few wanted to book for next year but still had a refund.

A lot of our guests had insurance and even though their insurance companies first response was to get a refund from us, we encouraged them to persevere and go back to their insurance company.

A very difficult period for management to deal with at times very unhelpful people.

Airbnb cancelled and refunded all guests booked by them (80% of bookings).
We refunded guests booked privately and via our site.

All bookings were refunded as per the booking platform requirements.

All future bookings cancelled and all were given a hassle-free complete refund.

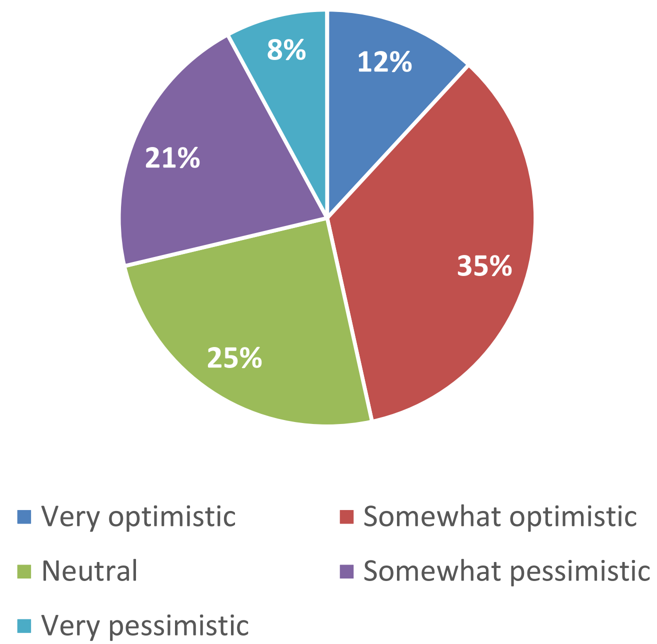
All guests who booked direct were offered a voucher for the deposit. Nearly all have now rebooked. AirBnb customers all get full refund from AirBnb. We got a percentage of the AirBnb fee.

Allowed guests to cancel or postpone. Their choice.

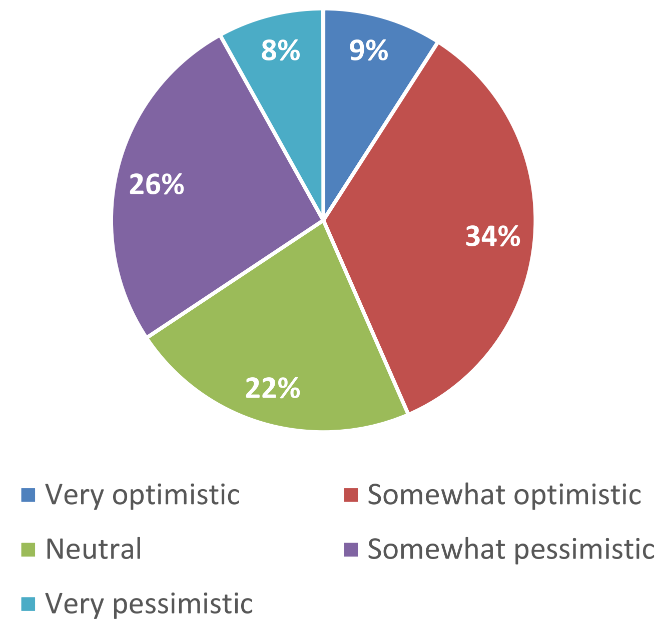
Asked quests if they had holiday insurance. The 5% were going to claim off their insurance.

Key results – Business optimism

How are you feeling about your business right now?



How are you feeling about your business for the next 6-12 months?



- Businesses were asked how they were feeling about their business right now. The largest proportion, 35%, were somewhat optimistic whilst 12% were feeling very optimistic. 21% were feeling somewhat pessimistic and 8% very pessimistic.

- Businesses were then asked how they were feeling about their business for the next 6-12 months. The largest proportion, 34%, were again feeling somewhat optimistic whilst 9% were very optimistic. 26% were feeling somewhat pessimistic and 8% very pessimistic. The results by country are shown overleaf.

Key results – Business optimism by country

- The largest proportion of businesses from each country were somewhat optimistic about their business right now and for the next 6-12 months.

How are you feeling about your business right now?	ENGLAND	SCOTLAND	WALES
Very optimistic	12%	11%	14%
Somewhat optimistic	**37%**	**33%**	**32%**
Neutral	26%	25%	23%
Somewhat pessimistic	19%	22%	22%
Very pessimistic	7%	8%	8%

How are you feeling about your business for the next 6-12 months?	ENGLAND	SCOTLAND	WALES
Very optimistic	10%	8%	12%
Somewhat optimistic	**35%**	**33%**	**36%**
Neutral	22%	23%	20%
Somewhat pessimistic	26%	27%	23%
Very pessimistic	8%	9%	8%

Key results – Feedback on how they feel about their business (Sample of all businesses)

2020 is a right off.
Concerned about the secondary impact of recession/Brexit and travel restrictions on 2021.

Almost booked for 2021 already.

Almost full in all 3 cottages from April to August 2021

Although revenue is looking healthy for the balance of the year, costs have gone up significantly, guests are more demanding (and seem to be causing more damage) and therefore profit is negligible.

As long as there are no more stupid shut downs or ludicrous ever changing guidance we will be fine.

Because of the deferred bookings, I am anxious that the full financial impact of Covid-19 is going to be felt much more severely next year than it was this year.

Bookings are good until the end of November which is excellent. Depending on the Covid-19 situation, we may have more staycation bookings over the next few months.

Bookings are very strong and people seem keen to book self catering in the UK, hopefully they will like it and want to come back after this is all over.

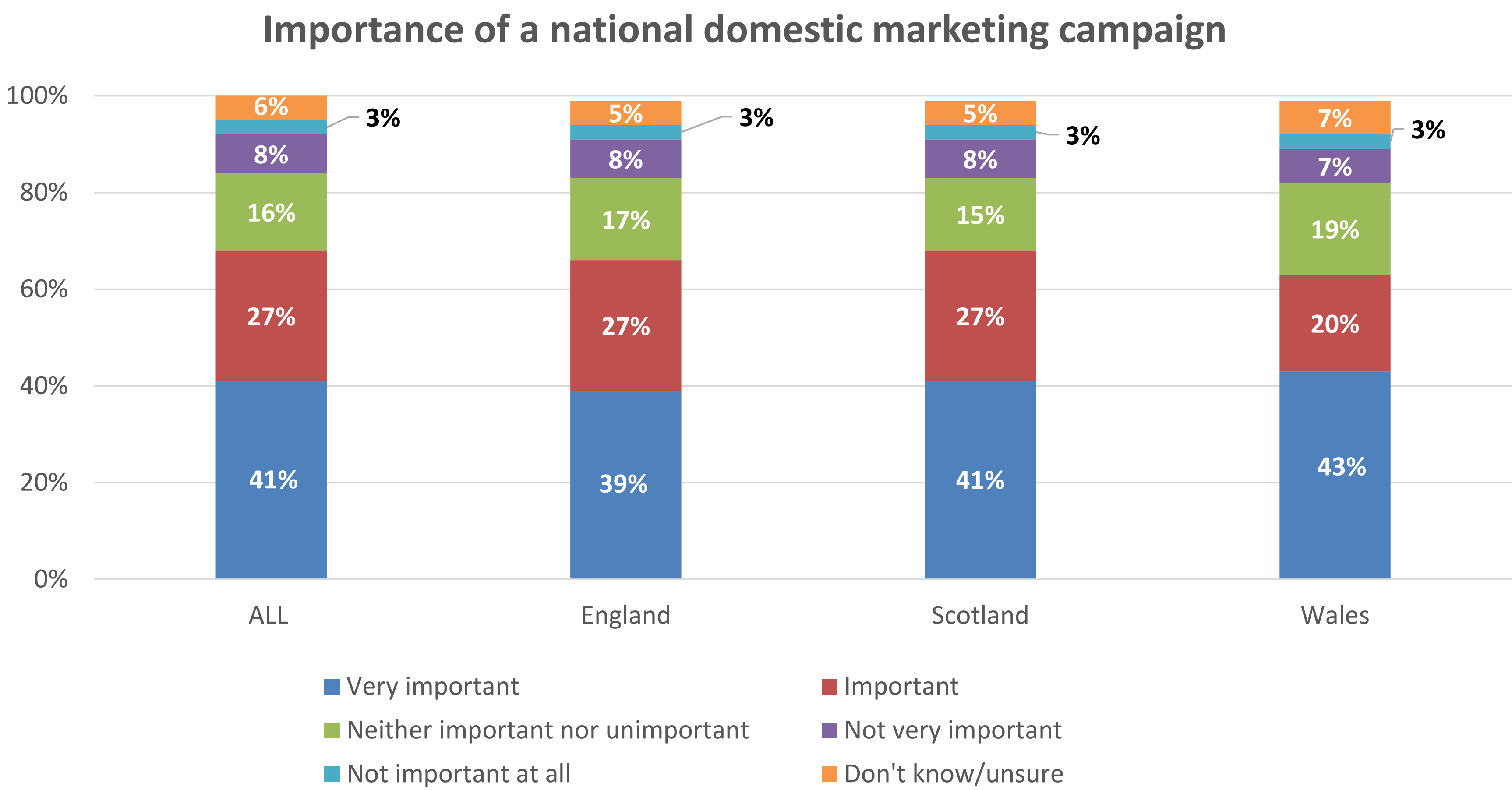
Bookings are looking really good especially over the winter when we are usually quieter.

Key results – Top 5 priorities for survival & growth by country

- When asked to select their top 5 priorities (from a predefined list) which they would like to see become available to help their business survive and grow over the next 12 months the results were as follows:
  - Priority 1: Repeat of the Small Business Grant scheme (67%)
  - Priority 2: New Discretionary Grant for those who haven't benefited from any previous support (35%)
  - Priority 3: Extension to the 5% VAT reduction (30%)
  - Priority 4: Extension to the business rates holiday (29%)
  - Priority 5: Extension to Self Employed Income Support (20%)
- The results by country are shown in the table below and are broadly similar in terms of priorities.

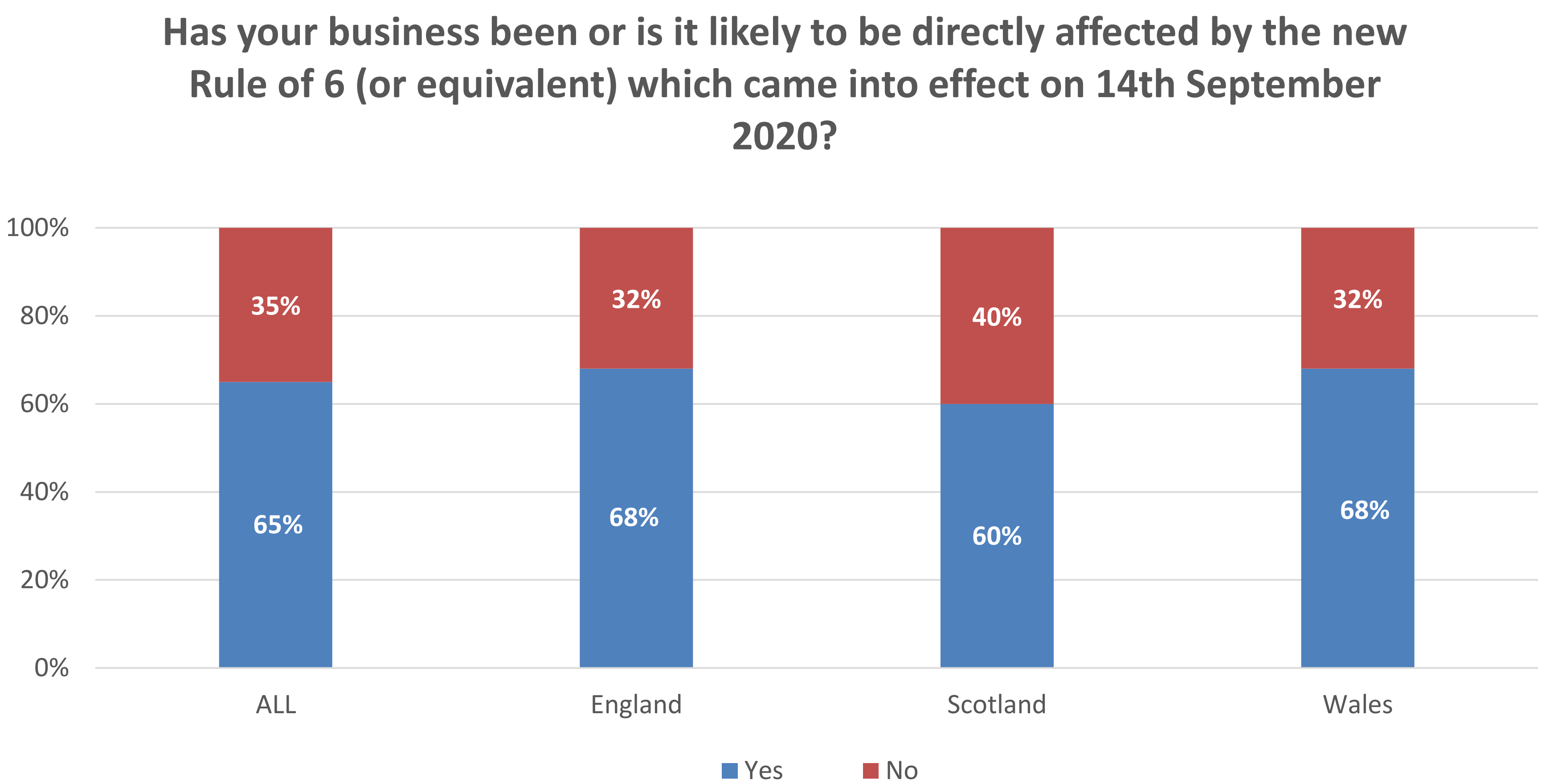
Please select your TOP 5 PRIORITIES from the list below which you would like to see become available to help your business survive and grow over the next 12 months?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Small Business Grant Scheme repeated	**67%**	**67%**	**67%**	**69%**
New Discretionary Grant for those who haven't benefited from any previous support	**35%**	**32%**	**36%**	**39%**
VAT reduction to 5% extension	**30%**	**35%**	**26%**	**31%**
Business rates holiday extension	**29%**	**41%**	**19%**	**42%**
Self Employed Income Support extension	**20%**	18%	**21%**	**19%**
Other	20%	18%	20%	23%
Bounce Back Loans extension	17%	**21%**	15%	18%
Loan holidays extension	12%	11%	13%	10%
Coronavirus Job Retention Scheme (CJRS) - Furlough scheme extension	12%	11%	12%	16%

Key results – National domestic marketing importance by country



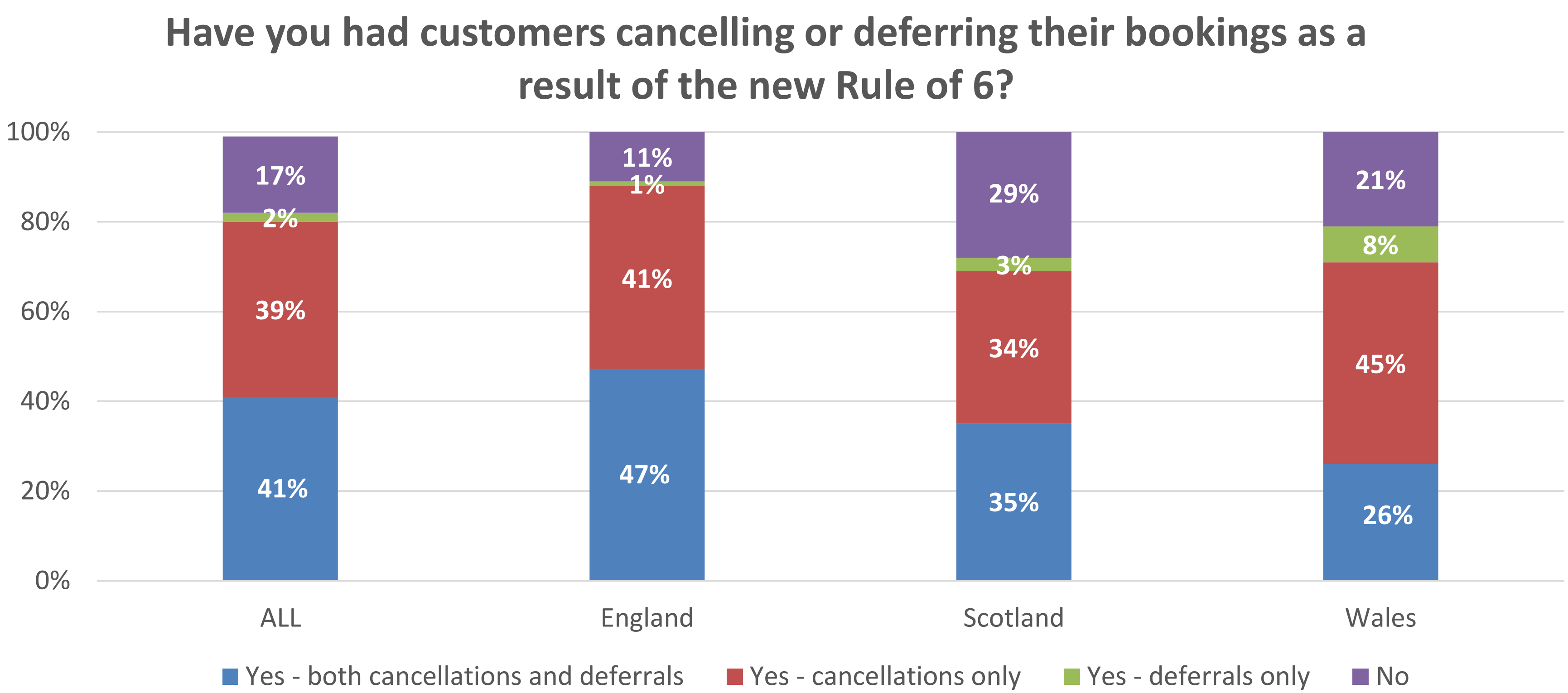
- When asked how important a national domestic marketing campaign is to their business success, 68% of businesses said it was 'very important' (41%) or 'important' (27%) to the success of their business.
- 66% of English businesses, 68% of Scottish businesses and 63% of Welsh businesses said it was 'very important' or 'important' to the success of their business.

Key results – New Rule of 6 by country



- Businesses were asked whether their business has been or is likely to be directly affected by the new Rule of 6 (or equivalent) which came into effect on 14th September 2020.
- 65% of businesses said they had or would be directly affected by the new ruling including 68% of businesses in each case in England and Wales and 60% in Scotland.

Key results – Current impacts by country



- Those businesses who said they had been or would be likely to be directly affected by the new Rule of 6 (65%) were asked whether they have had customers cancelling or deferring their bookings as a result of the new ruling.

- 41% of businesses said they had received both cancellations and deferrals from their customers. A further 41% had received cancellations only (39%) or deferrals only (2%). 17% of businesses said, as yet, they had not had any customers cancelling or deferring as a result of the new Rule of 6.

- England had the highest proportion of businesses receiving cancellations or deferrals from their customers (89%) compared with 79% of businesses in Wales and 71% in Scotland.

Key results – Cancellations/deferrals by country

- Businesses who had received cancellations and/or deferrals from their customers as a result of the new Rule of 6 were asked to estimate approximately how many bookings they have had cancelled and/or deferred and what their total approximate value was. The results by country are shown in the tables below.

Approximately how many bookings have you had cancelled as a result of the new Rule of 6 and what is the approximate value (in pounds £) of these cancelled bookings?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Ave. number of bookings cancelled per business	**7.92**	9.04	5.58	5.62
Approx. average value per business of total bookings cancelled	**£15,276**	£18,522	£8,636	£8,054

Approximately how many bookings have you had deferred as a result of the new Rule of 6 and what is the approximate value (in pounds £) of these deferred bookings?	ALL BUSINESSES	ENGLAND	SCOTLAND	WALES
Ave. number of bookings deferred per business	**4.72**	5.34	3.57	3.17
Approx. average value per business of total bookings deferred	**£10,015**	£12,564	£5,105	£4,358

- The average numbers of bookings cancelled per business as a result of the new Rule of 6 was 7.92 with an average value per business of £15,276.   The average numbers of bookings deferred per business as a result of the new Rule of 6 was 4.72 with an average value per business of £10,015.

- The number of bookings cancelled or deferred (and their associated value) was higher amongst English businesses than those based in Scotland and Wales.

Key results – Business at risk by country

- Those businesses who said they had been or would be likely to be directly affected by the new Rule of 6 (65%) were asked what proportion of their anticipated business turnover for the October to December 2020 and January to March 2021 periods they estimate might be at risk if the new ruling continues for a prolonged period of time.

- 53% of businesses estimated that 51% or more of their turnover for the October - December 2020 period might be at risk if the new ruling remains in place for a prolonged period of time (including 21% estimating 91-100% of their turnover for this period was at risk). The same proportion of businesses (53%) also estimated that 51% or more of their turnover for the January to March 2020 period might also be at risk if the new ruling continued for a prolonged period of time (including 22% estimating 91-100% of their turnover for this period was at risk).

What proportion of your anticipated business turnover for the following periods do you estimate might be at risk if the new '6 person' rule continues for a prolonged period of time?	ALL BUSINESSES		ENGLAND		SCOTLAND		WALES	
	Oct-Dec 2020	Jan-Mar 2021	Oct-Dec 2020	Jan-Mar 2021	Oct-Dec 2020	Jan-Mar 2021	Oct-Dec 2020	Jan-Mar 2021
None	7%	10%	5%	8%	10%	13%	3%	6%
Between 1-10%	8%	9%	6%	6%	14%	15%	5%	6%
Between 10-20%	8%	7%	6%	6%	10%	9%	8%	6%
Between 21-30%	9%	8%	9%	8%	12%	9%	3%	-
Between 31-40%	7%	6%	7%	6%	7%	5%	-	3%
Between 41-50%	8%	8%	7%	9%	7%	5%	13%	6%
Between 51-60%	8%	8%	9%	8%	7%	6%	5%	10%
Between 61-70%	7%	8%	8%	8%	5%	5%	13%	16%
Between 71-80%	8%	6%	7%	6%	7%	5%	16%	10%
Between 81-90%	9%	9%	9%	11%	9%	7%	13%	6%
Between 91-100%	21%	22%	26%	23%	13%	19%	21%	29%

Key results – Feedback on Rule of 6 (Sample of all businesses)

As our house sleeps 8 usually including children the new Rule of 6 is a major factor affecting bookings.

Children should be exempt.

Children under 13 not being included in Rule of 6 would not increase risk but would allow some bookings to go ahead. All of our properties are larger.

A totally arbitrary figure with no science behind it - just hoping a few guests will choose to ignore it otherwise will have no income at all for the foreseeable future.

Due to the new Rule of 6 it does not warrant our 20 guest holiday home staying open. All but one group (due December) have cancelled and we've refunded all the other cancelled parties.

Government should put review dates for changes so we can cancel guests and try to re book with less guests (to cover costs). Breaking the Rule of 6 should be the responsibility of the guest and not owner unless obvious.

Guests still look for ways around it by trying to book cottages together. We hope to recoup some business by making the property smaller and locking some of the bedrooms. Our cleaning costs however, will remain much the same as will our overheads.

I can see the reasons for the Rule of 6 but there is a danger of it continuing indefinitely if the government doesn't see self catering as a sector to be supported/protected.

I think it both sensible and essential and I would rather be open and applying that rule than not open at all, which is what will happen if the UK population and governments do not respect the need for social distancing.

Key results – Other feedback (Sample of all businesses)

A big thank you to PASC to all the help they provided in guiding their members to open up on 4th July - Hooray for common sense!

A domestic marketing campaign needed specifically for urban self catering.

All tourism sectors continue to suffer financially and for those newly started there was no help.

National marketing campaigns should promote direct booking to provide alternative to OTAs.

Awesome work from PASC UK throughout all of this.

Consistent approaches across all regions of the UK would be helpful!

Extra cleaning and in depth sanitising protocols are exhausting but necessary yet many guests do not even question how the cottage is prepared for them.

For 20 years we have enjoyed providing accommodation for the tourist industry only to lose our B&B business due to Covid-19. We are now pinning all our hopes on the one self-catering unit we have to remain solvent and need all the help we can get to avoid becoming another casualty completely.

I believe PASC is doing a great job. Too many of our MPs etc. are passing the buck. Local Government has made it very difficult to claim grants.

The Professional Association of Self-Caterers UK (PASC)/ The Association of Scotland's Self-Caterers (ASSC)

Coronavirus (COVID-19) Business Impact Survey for the Self Catering Sector 2020

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