



ASSC SECTORAL SURVEY: THE IMPACT OF COVID RESTRICTIONS IN GLASGOW AND MORAY

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 has conducted a series of Scotland-wide sectoral surveys relating to issues concerning 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 flash survey was publicised via a ASSC newsletter, as well as on the ASSC's social media pages.
- The online survey elicited 143 responses from both ASSC members and non-ASSC members over 24 hours on 17th May 2021.
- 104 Members of the ASSC (73% of respondents) took part, with another 39 (27%) non-member self-catering operators.
- It is hoped that the survey results will continue to inform discussion regarding the ongoing 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.

Key Findings:

- Respondents to the survey were largely from rural areas: Highland, Moray, Fife and Argyll & Bute and Perth & Kinross with the largest number of responses.
- 65% of businesses outwith Glasgow have been impacted by Glasgow being kept in Level 3, with 42% of businesses outwith Moray having been impacted by Moray being kept in Level 3.
- The average value of cancelled bookings as a result of guests from Moray or Glasgow not being allowed to travel over the next 7 days was £1,545.75.
- The average value of cancelled bookings if restrictions are extended to 14 days in Glasgow will be £2,855.15, and £2,073.43 in Moray.
- This illustrates the significant impact of localised restrictions and the associated travel bans on self-catering businesses throughout Scotland.
- Self-catering relies on advance bookings, with restrictions announced at short notice rendering it virtually impossible to re-fill the booking.

Q 1 Where is your business based?

Local Authority	Number of Respondents
Aberdeen City	0
Aberdeenshire	7
Angus	2
Argyll & Bute	11
Clackmannanshire	0
Dumfries & Galloway	5
Dundee City	0
East Ayrshire	0
East Dunbartonshire	1
East Lothian	1
East Renfrewshire	0
Edinburgh City	6
Eilean Siar	3
Falkirk	0
Fife	13
Glasgow City	2

Local Authority	Number of Respondents
Highland	35
Inverclyde	0
Midlothian	0
Moray	19
North Ayrshire	7
North Lanarkshire	1
Orkney	2
Perth & Kinross	12
Renfrewshire	1
Scottish Borders	8
Shetland	0
South Ayrshire	0
South Lanarkshire	0
Stirling	6
West Dunbartonshire	1
West Lothian	2

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

Q2 If you live outwith Glasgow, has your business been impacted by the ongoing restrictions in Glasgow?

Yes	65	45.45%
No	78	54.55%

Q3 If you live outwith Moray, has your business been impacted by the ongoing restrictions in Moray?

Yes	42	29.37%
No	101	70.63%

Q4 What is the value of cancelled bookings as a result of guests from Moray or Glasgow not being allowed to travel over the next 7 days?

The value of cancelled bookings was £102,020. The average value was £1545.75.

Q5 What would the value of cancelled bookings be if the restrictions are extended to 14 days in Glasgow?

The value of cancelled bookings was £174,164. The average value was £2,855.15.

Q 6 What would the value of cancelled bookings be if the restrictions are extended to 14 days in Moray?

The value of cancelled bookings was £80,864. The average value was £2,073.43.