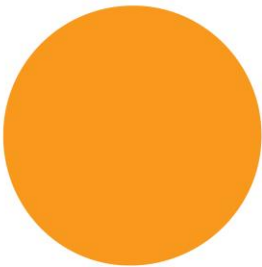


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**SWINSIDE TOWNFOOT FEASIBILITY
STUDY**

Prepared for
Vicki and Peter Hedley

November 2021

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1. PROJECT BACKGROUND

Swinside Townfoot Farm is set in a stunning location in the small hamlet near Oxnam in the Scottish Borders. Vicki Hedley has successfully operated a catering business from the farm but would now like to be more involved with the running of the farm business. To ensure the future success of the business, Vicki has made the decision to cease the catering business.

Peter and Vicki have identified a location on the farm where they would like to locate a custom-built architectural self-catering property. The site in question is on a hill above the farm with panoramic 360-degree views looking south to England and the Cheviots and also north towards the Scottish Borders, with Ruberslaw and the Eildons easily identifiable plus on a sunny day you can see as far as Carter Bar and Soutra, so in essence, taking in the whole of the Borderlands. The proposed property would have its own access and be totally private and given its location, would be off grid. Vicki and Peter are keen to use green building techniques, technology and practices to make it as environmentally responsible as possible. The couple have researched the market and know that properties like these that have been designed by an architect with luxury in mind, whilst also being green and that are in a beautiful location, are highly sought after. In addition, literally on the doorstep you have Dere Street for walking, great cycling or mountain biking and very close by is Beirhope Alpacas, as well as having easy access to all that the Scottish Borders has to offer.

Bright Light Marketing are tourism experts, the team all worked for VisitScotland, Edinburgh Tourist Board and the Scottish Borders Tourist Board. Bright Light Marketing was set up in 2007 and one of our areas of expertise is producing feasibility studies which have successfully allowed businesses to seek planning permission, achieve bank and project funding and to start a new business venture with recommendations on key customers and how to market the property.

To write this Feasibility Study, Bright Light Marketing has carried out comprehensive desk research including analysis of the national tourism strategies, current self-catering intelligence from Mintel and the Association of Scottish Self-Caterers and other relevant research. As well as conducting a comprehensive Competitor Audit, looking at this type of property across the UK as well as within the local market in the Scottish Borders.

2. KEY FINDINGS FROM THE RESEARCH

Bright Light Marketing have carried out comprehensive research, as summarised in appendix 1. Outlined below are the key trends that relate to Swinside Townfoot:

RESEARCH

Bright Light Marketing studied current research on the tourism market in the UK and Scotland and future trends for the next few years post Covid-19. This included Mintel Holiday Property 2021 as well as the latest Association of Scotland's Self-Caterers report on the impact of self-catering on the Scottish tourism economy which was also published this year.

The research showed that some of the tourism trends that were there before Covid are still there, but due to the impact of the pandemic on people's lives they are now more relevant than ever. The key research trends that are relevant to the property are:

1. Unique properties in a beautiful location
2. Green is King
3. Staycations
4. New opportunities for the South
5. The Scottish Borders has the capacity for more self-catering
6. Wellness
7. Local Food and Drink
8. New ways of working - the Workcation

Taking a closer look at these:

2.1 UNIQUE PROPERTIES IN A BEAUTIFUL LOCATION

The evidence from both the research and the competitor audit is indisputable. Consumers are looking for properties that are uniquely designed and set in a stunning location and that these properties can charge a premium and are more likely once established to have higher occupancy and have a year-round product and not a seasonal one.

The VisitScotland Scottish Accommodation Occupancy Survey shows this clearly. 5 Star plus self-catering properties have an annual occupancy in 2019 of 55% and those that charge £800 plus of 58%. In our experience as tourism experts, properties like the one which is being proposed at Swinside Townfoot, will have occupancy levels which are far higher than this and we show this in the competitor section using examples.

Mintel's 2021 Holiday Rental Property research includes a section where it highlights "Quirky properties and premium stays have strong prospects". To quote further:

"Some 35% of customers would be more likely to book an "unusual" property. Some 30% of potential guests would prefer a luxury/5-star property. The downturn in overseas luxury holiday travel is likely to have brought more premium spenders into the domestic rental property market. More affluent consumers have been able to save money during the pandemic and will be prepared to splash out on premium breaks, including property rentals, as the Covid-19 crisis recedes."

- ❖ **Customer demand for bespoke properties in a stunning location which allows operators to charge a premium and enjoy high occupancy levels.**

2.2 GREEN IS KING

Consumers were concerned about the environment and their carbon footprint before Covid 19. This has increased during lockdown when the roads were quieter, the skies were clearer, and the sound of birdsong and wildlife could be enjoyed during this quieter period, with people being able to take time to enjoy nature. It made us realise if we hadn't before, about the impact that we have on the planet. So, a genuine desire and appreciation of being more environmentally friendly increased. Do we want to go back to the way things were before? With Glasgow hosting COP 26, this has also placed green and the environment firmly in the news and in the media and firmly in the minds of consumers.

Tourism trends have been showing for some considerable time that tourism accommodation that has a focus on being green and having green credentials are more likely to be chosen by consumers than those that do not. However, like many trends that were there before the pandemic, they have increased and are now even more important than ever.

This consumer trend is shown in the 2020 Mintel Report below:

Mintel Domestic Tourism Post Covid December 2020

Impact of human activity on climate change is fuelling demand for greener travel

“Reducing carbon emissions and recycling waste remain the most mentioned issues that UK travellers think travel companies should prioritise. However, 47% of UK travellers have not noticed travel companies making an effort to be sustainable. Travel companies should communicate the steps they have taken to protect the environment as well as guiding consumers by highlighting greener options in the planning and booking process.”

Mintel's 2021 Holiday Rental Property report highlights that some operators are responding to this trend.

Green credentials

- 88% had low energy lighting
- 76% recycling facilities including composting
- 44% renewable energy source
- 24% ability to reduce carbon footprint
- 23% a green tourism accreditation

But as the 2021 Mintel quote above shows tourism businesses not only need to be green, they need to communicate this as a major asset about why consumers should choose that property.

- ❖ **Consumers are looking at their carbon footprint and want to continue to do so on holiday.**

2.3 STAYCATIONS

A staycation effect was predicted post Brexit which would mirror what happened during the 2008/9 economic recession. However, Covid 19 has increased the length of staycations considerably.

Mintel's Holiday Rental Property Report highlights this staycation effect with a prediction that we could be seeing a domestic staycation effect till 2026. This would provide existing and new tourism accommodation with a great opportunity to ensure that they benefit from this and that they give such a great experience that even when the likes of the Millennial market return to going abroad, they continue to also have at least one domestic holiday throughout the year. In addition, the Over 55's market research shows that this group is reticent to return to overseas holidays. The Mintel Report in December 2020 on Tourism Post Covid said:

“Over the longer term, over 55s are an important driver for growth in the domestic market. Although currently the older population are hesitant about booking holidays in the short term, over the longer term this segment should be an important driver of growth of the domestic travel market. The number of over 50's in the UK is expected to grow by 5.5% in the period 2020-2025, while the number of people aged under 50 is expected to only grow by 0.2% according to ONS projections.

The over 55 traveller is more likely to holiday in the UK, the segment accounted for 36% of domestic holiday volume in 2019, according to GBTS figures, versus 29% of overseas travel (the segment accounts for 31% of the UK population according to ONS). It's overall share of the domestic holiday night market was 42% and its share of domestic market expenditure reached 40% in 2019. As older consumers tend to take longer holidays compared to younger consumers (particularly over 65s), this makes them an interesting group to target over the longer term.”

So overall the next few years are likely to see a staycation effect giving the opportunity to target the main demographic markets and ensure that Families and Millennials will still include a domestic holiday annually. But equally that the Empty Nester market is targeted as they will not only stay as a couple but will also take grandchildren with them too. Finally, those who are watching their carbon footprint carefully are also far more likely to stick to domestic holidays.

- ❖ **There is likely to be a staycation effect for the next few years and that all demographic markets will stay in the UK for at least one holiday per year, providing a huge opportunity for the UK tourism industry.**

2.4 NEW OPPORTUNITIES FOR THE SOUTH OF SCOTLAND

Some of this point is included in the research in the appendixes but much of it is from our tourism industry knowledge.

Firstly, another Covid 19 trend is the growth of rural breaks as shown for example in the 2021 Mintel Holiday Rental Property report:

“Airbnb sees flights to the countryside

Airbnb has around 6 million active global accommodation listings. Its core product is city accommodation. However, during Covid 19 rural stays have grown significantly as a proportion of overall bookings. Within the UK they accounted for almost half (48%) of booking nights for June-August 2021 (as at May 2021). This compares with 23% in summer 2019.”

This is also shown in the 2020 Mintel report on Domestic Tourism post Covid:

“Popularity of Scotland

Scotland was the second most visited domestic holiday destination in 2019, surpassing the North West of England. Scotland saw the volume of British holidaymakers increase by 31% between 2016 and 2019. Future growth rates for Scotland are expected to remain above the market average due to the higher appeal of rural escapes.

Consumers increased interest in outdoor activities and open natural spaces present the opportunity for Scotland to increase its focus on activity holidays. The younger generation can be enticed by offering adventurous activities that allow them to escape their everyday lives and to keep physically active”.

“Prior to Covid growth was predominantly urban

However, Covid 19 has boosted interest in rural/countryside-based holidays while the appeal of populated areas has declined amid health concerns. Relatively high interest in cultural/historical sightseeing holidays in the UK provides opportunities to combine nature-based holidays with culture.”

Pre Covid, there were areas of Scotland that were tourism hotspots particularly in the main season such Skye, the North Coast 500 and Edinburgh. Post Lockdown, popular rural areas have seen high numbers returning, in some cases causing issues with litter and evidence of irresponsible behavior resulting in both VisitScotland nationally and local destination companies and communities to promote responsible tourism campaigns.

Before Covid 19, VisitScotland research was showing that lesser well-known areas had an opportunity as not everyone wants to visit busier areas. At the same time discussions were underway with the two South of Scotland destination companies to merge and promote the area as the South. Government attention had also turned to the South of Scotland too, giving VisitScotland substantial money to promote the South of Scotland in the UK and overseas.

Of course, 2020 saw the decimation of tourism across Scotland then in some more popular parts of Scotland as mentioned above irresponsible visitor behaviour. In the South, the new South of Scotland destination Alliance (SSDA) was set up with a five-year investment of £2.7 million from the also new South of Scotland Enterprise (SOSE). VisitScotland also resumed their marketing campaign for the South and both agencies have run high profile TV advertising campaigns in 2021 exclusively for the South of Scotland, a first for the area. So, the marketing of the South of Scotland as an entity is far high profile than ever before.

Pre Covid there were some consumers who wanted to seek less well-known areas of Scotland and enjoy the space and also have the chance to be different and to enjoy less well-known areas of Scotland. This consumer sentiment has increased since. Consumers want space and areas to themselves and the chance to relax. This has resulted in more interest in the South and it has also resulted in a substantial increase in consumers wanting to stay in self-catering. So, it is giving huge opportunities for the South of Scotland in the domestic market.

This though is not just confined to the domestic market, there is also interest in the overseas market. Bright Light Marketing also (for other clients) carry out Travel Trade marketing to key overseas markets. As a result, we attend travel trade exhibitions including the VisitScotland Expo exhibition. When we first attended this in 2019 knowledge of the South was limited.

However, in the past two years awareness of the South of Scotland has increased as well as actual interest to include the region within itineraries. Speaking to key overseas markets it is apparent when safe and legal to do so that they want to return to Scotland and the South is something that they would consider.

- ❖ **The South of Scotland has the marketing investment currently to promote it as a destination, at the same time as when there is increased interest in the South from both the domestic and overseas markets.**

2.5 THE SCOTTISH BORDERS HAS THE CAPACITY FOR MORE SELF-CATERING

The Association of Scotland's Self-Caterers report in 2021 of the economic impact of the self-catering to the Scottish economy showed that the Scottish Borders has 792 self-catering properties, representing just 5% of the Scottish total.

The report clearly showed how much the self-catering sector brings to Scotland and Scottish tourism as the quote below shows:

“Economic Impact of Self-Catering Sector to the Scottish Economy has shown that in 2019 the 17,794 traditional self-catering properties across Scotland not only generated £672million in economic activity but encouraged visitors to spend £867million, thereby benefiting other related businesses in tourism and hospitality.”

This is the 2019 impact and obviously 2020 will be much lower but it is likely that 2021 will be significantly higher, with the renewed interest in self-catering post Covid and with this sector being the first to show increased growth.

This is backed up by the booking agency Sykes who published an overview of their booking data for 2021. This showed that bookings for cottages were 22% up for the summer period in 2021 and currently up 46% for the autumn and winter period. The Scottish Borders was number three in the top places to visit in Scotland for 2021 after the Highlands at number one and Dumfries and Galloway at number two (this point also reiterates the new interest in the South of Scotland in the previous point). Dumfries and Galloway have 1,386 self-catering properties.

The report finishes with identifying the top five investment hot spots for holiday homes in Scotland.

1. Ayrshire
2. Fife
3. Scottish Borders (particularly two-bedroom properties)
4. Highlands and Islands
5. Dumfries and Galloway

- ❖ **This identifies that we have a staycation boom and an accompanying boom in self-catering and clear evidence of the economic benefit it brings to Scotland. There is interest in the Scottish Borders but we have less property stock so there is room for new entrants to the market and that finally, as the previous point stated, an interest in staying in the South of Scotland.**

2.6 WELLNESS

Wellness and the benefits to your mental health for having a holiday was identified as a trend by VisitScotland in 2018.

“From dwindling short term memory, to creating anxiety, consumers are now more informed about the impact social media, smartphone technology, and digital marketing practices have on our mental health, as well as our online identities. Whilst this technology is extremely beneficial to both consumers and tourism stakeholders, it is widely recognised that smart phone usage should be used more efficiently. This has led to a rise in interest in a variety of well-being tourism activities, particularly faith and spiritual recreations.”

The same 2018 report also identified the concept of ‘Cooie in’ as an ideal way of fitting into this wellness trend and promoting Scotland in winter.

“Who needs hygge when you can have Cosagach? 2016 saw a boom in the trend of hygge a Danish word with no direct English translation. Hygge would be described as a type of cosiness and comfort that engages a feeling of contentment or wellbeing.

In 2015, over 4 million domestic tourists mentioned relaxing as an activity that they undertook when in Scotland. With tranquil seascapes, vast open spaces and many warm and welcoming pubs, Scotland is a perfect place for your wellbeing, so perfect in fact that a word of Scottish origin has been dedicated to that feeling of being snug, sheltered, or cosy - Cosagach.

In a world where everything from mobile connections to shopping deliveries are constantly vying to get quicker, there is a growing phenomenon for slowing down and taking care of wellbeing. Whilst Scotland has an array of outdoor activities and visitor attractions, it also has plenty of breath-taking views to enjoy from the comfort of your accommodation or a local pub or restaurant.

Scotland is a country where Cosagach can be achieved in all seasons, but it is winter when it comes into its own. It’s no secret that Scotland can, at times, have rather harsh and ferocious weather. In the winter when the storms rage and the waves crash against the rocks, there is nothing more satisfying than being curled up in front of the fire, book and toddy in hand, listening to the weather outside.”

Move on to 2021 and the concept of wellness has substantially grown as a consumer trend as we recover from the effects of lockdown but also question if we really want to go back to the normal that we had before. This is highlighted in the 2021 Mintel Report on short breaks:

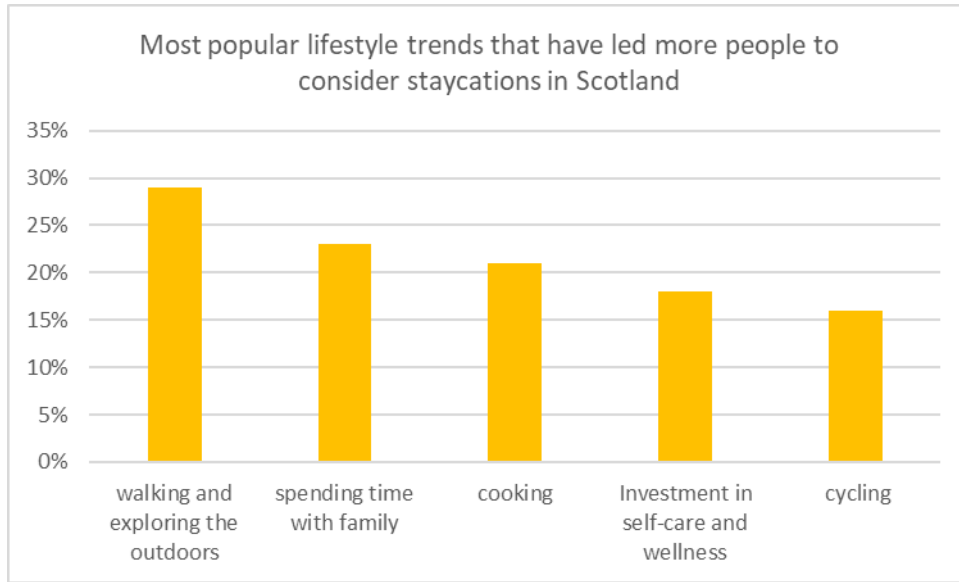
“Opportunity to develop itineraries with a focus on both physical and mental wellness activities

47% of those who are interested in a physical activity break, such as walking or golf, show an interest in improving health while on a short break, such as through yoga and wellness activities. 17% of those who plan to take a short break in the future say they would prefer to spend time on improving their mental health during a short break. The

Mintel Trend Total Wellbeing describes how consumers are increasingly health conscious and taking a more holistic approach to their wellbeing.

Meanwhile, 31% of wellness travellers were motivated to go on holiday to improve their health/wellness to gain an authentic cultural experience, making it the second most cited reason behind improving emotional/mental wellbeing. Destinations can capitalise on this by promoting their unique and traditional wellness practices.”

Wellness is also identified in the Sykes report:



- ❖ **Self-catering properties that offer this have a huge opportunity not just to get first time visitors but for visitors to return again and again and tell others about the benefits that a stay gave them.**

2.7 LOCAL FOOD AND DRINK

Like many of these key trends they were trends pre Covid but interest in them by consumers has increased. This is very much the case with food and drink. It is also worth bearing in mind that 35% of domestic tourism spend is on food, drink, and retail.

VisitScotland research shows that:

“65% of people in the UK say they have a new found appreciation of their communities and local shops since the onset of Covid 19 (Mastercard). There is an increased interest in supporting small, local, and green businesses coupled with a desire to share these purchases and experiences via social media. Visitors will expect on demand, local, authentic, customizable and easily accessed food, drink and produce.”

- ❖ **VisitScotland recommends that accommodation providers promote local food and drink in their welcome hampers and food packages and also provide information to their visitors about where to access the best local food and drink as well as highlighting the best local restaurants.**

2.8 NEW WAYS OF WORKING - WORKCATION

This again is a trend identified by VisitScotland and this one is a new trend resulting due to more flexible working conditions.

“One new opportunity arising from more flexible working is the mobility this offers individuals to travel whilst working - a “workcation”. Individuals are being enabled to make decisions about working environments based on their own personal circumstances and as such can choose to work from less traditional settings.

- *53% of visitors to Scotland in 2020 were motivated by a desire “to get away from it all and have a change of environment”*
- *30% of employees in Scotland feel their work impacts negatively on their mental health.*

Individuals will expect to flex more easily between work and leisure time, even in non-traditional work settings, and be enabled to do so by the businesses they interact with.

Winter working: Winter workers can experience the uniquely Scottish feeling of “Coorie in” by cosying up after a working day, sampling some Scottish hospitality or weather watching from their chosen accommodation. Workcations offer destinations the opportunity to attract visitors all year round, outside of the traditional holiday season.”

- ❖ **New flexible ways of working give consumers the opportunity to work while in another part of the country and gives accommodation providers an opportunity to extend the season and have longer length stays in the winter period.**

3. KEY OUTCOMES OF THE COMPETITOR AUDIT

Bright Light Marketing carried out a comprehensive competitor audit which is summarised in appendix 2. Outlined below are the key trends that relate to Swinside Townfoot:

1. Unique and luxury buildings
2. Eco credentials
3. Agencies
4. Quality website and good quality photography
5. Social media and marketing communications

Looking at each of these in turn:

3.1 UNIQUE AND LUXURY BUILDINGS

It is evident across Scotland that unique architecturally designed buildings result in the operator being able to charge a premium price and enjoy high occupancy rates.

Examples include Sealoch House and Stonehouses in Ullapool, two separate operators who both have stunning properties in great locations. Both have extended their portfolio with another property each. Both are charging a premium and both have high occupancy figures.

- ❖ **Unique and luxury buildings with interiors to match allow you to charge a premium and have high occupancy levels.**

3.2 ECO CREDENTIALS

The majority of the properties in the competitor audit are dedicated to being green and promote that as a key selling point.

Examples include Brockloch in Dumfries and Galloway whose two properties are off-grid, and they clearly show their eco credentials on their website. Coilabus Ecoluxury Lodges on Islay have a separate section on their website for their eco credentials. Croft 103 in Durness talk passionately about their commitment to being 'green'.

- ❖ **Eco is a consumer demand and the top end self-catering who are passionate about being green use this as a key selling point.**

3.3 AGENCIES AND LISTING WEBSITES

The majority of the properties use upmarket agencies like Sawdays and Cool Stays, and listing websites such as Best Scottish Cottages. These agencies and websites assist in growing the business when first established and give the business credibility as well of course giving them promotion through their high-profile website and also access to the national media who will feature the property.

Most of the examples in the competitor audit use agencies and showcase these on their website, for example The Net Store in Applecross. Some of these properties we have been looking at for several years and it is interesting that the ones which maybe started with four or five agencies have now focused on the main two or three who are presumably working best for them.

- ❖ **The majority of these high-end properties use agencies and listing websites for the marketing and the credibility they give to the business.**

3.4 QUALITY WEBSITE AND GOOD PHOTOGRAPHY

It stands to reason if you are selling a high-end property your major selling tool should convey this so a high-quality website is essential. As is high quality photography and video's that convey the visitor experience of the interior and exterior and also the wider destination.

Examples of this are Hart Barn in the Lake District, their website conveys a luxury experience but also the passion the owners have for the destination. Stonehouses in Ullapool stands out with excellent photography which really make you want to visit.

However, many of them although they have a beautiful website some reviews and press articles are out of date which may result in consumers thinking they are not on top of activity and may choose another property with current reviews and articles.

- ❖ **High quality properties need an attractive website with quality photography and videos showcasing the experience and this must be kept up to date.**

3.5 SOCIAL MEDIA AND MARKETING COMMUNICATIONS

The majority of the properties are on social media and also pro-actively promote their properties from blogs on the website to Press and PR.

Examples include Wild Hart Barn's Facebook page and Sealoch House in Ullapool who promoted the new build well as well as frequent updates about the destination.

However, like the websites many of the properties start out using social media and marketing and presumably as they get busier building up repeat customers and word of mouth business they fail to update as frequently. As marketing professionals, we would say you always need to promote to new customers and remind existing, even if you are in the lucky position of benefitting from high repeat business. But if you no longer want to use social media delete the account rather than allowing potential customers to look at your social media pages and question if you are still in business.

- ❖ **A strong social media presence is key as is ongoing marketing communications.**

4. VIABILITY

There are seven key reasons that we believe that this will be successful:

Looking at the 7 key viable reasons in more detail:

1. Location and wellness
2. High end properties
3. All year round
4. Green credentials
5. Staycation boom
6. South of Scotland
7. Experienced in running a business

Looking at each of these in turn:

4.1 LOCATION AND WELLNESS

The proposed site for the Swinside Townfoot property is in a stunning and unique Borderlands location with amazing views across to both England and Scotland. The location alone will sell it as consumers will see themselves sitting looking out at it and would be happy to do so in any season.

In addition, this sort of view reflects the wellness benefits that the research identifies. But there is much more you can access by cycling, walking and mountain biking from the doorstep including Dere Street, also Beirhope Alpacas is very close by appealing to both the Millennial and Family markets in particular.

- ❖ **The location is unique with its 360-degree views of both countries. It will be sought after for this alone, but the view and the location also will give visitors the wellness factor that is identified in the research.**

4.2 HIGH END PROPERTIES

This will be an architecturally designed building set into the hillside with stunning views and internally tapping into consumer needs for the top end of the market.

The research and the competitor audit clearly show that high end properties like this are very successful resulting in being able to charge a premium and high occupancy rates all year round.

In addition, the Scottish Borders as identified in the ASSC report shows that the region have a tiny percentage of self-catering properties in the Scottish Borders at only 5%. The Sykes report for 2021 identifies that the Scottish Borders is a popular location for bookings ranked number three and then goes on to identify it as a key place to invest in a self-catering property.

- ❖ **High end properties can charge a premium and enjoy high occupancy. There is demand for self-catering in the Scottish Borders and we have less properties than other parts of the country.**

4.3 ALL YEAR ROUND

The research and competitor audit again clearly show that high end properties enjoy almost full occupancy after a few years in business and to stay in the property visitors will visit all year round. The research also shows that properties like this really fit into the 'coorie in' trend for the winter. Millennials and Empty Nesters will particularly visit at this time of year and there is also the opportunity to tap into the workcation market which would result in longer stays over this period.

Bright Light Marketing strongly believe that this is a property that will have high occupancy levels all year round which will not only benefit this business but the local economy.

❖ **All Year-Round Business benefitting not only this business but also the local economy.**

4.4 GREEN CREDENTIALS

By nature of its location the property will be off-grid and as a family living in a stunning location, they want to sustain this for the next generation and the one after that so are fully committed to running the property as an eco-property. So, for example the hot tub will be powered by logs from the farm as will the stove inside.

Bright Light Marketing in the next section on recommendations advise that as well as committing to sustainable living this eco property should be promoted as such. As both the competitor audit and the research clearly show that environmental issues are high in the mind and people want to do their part and want to know a business they buy from is also playing their part.

This property will sell on its green credentials and also for the space and the nature and wildlife on its doorstep.

❖ **An eco-property committed to being green and to promote these credentials with space, nature and wildlife on its doorstep.**

4.5 STAYCATION BOOM

As outlined in the research the UK is currently experiencing a staycation boom which Mintel now predicts will last till 2026. This gives existing and new properties a huge opportunity to appeal to all demographic groups and showcase what they have to offer to ensure a committed customer base and that when overseas holidays return that they still take holidays in the UK.

Again, as the research shows the Scottish Borders was number three in Sykes bookings for 2021 but we only have 5% of self-catering stock in Scotland and Sykes went on to identify the Scottish Borders as a hot spot to set up a self-catering business.

❖ **Staycation boom till 2026 which a property like this will benefit from in an area which has few properties like this in a beautiful location and less properties than other areas.**

4.6 SOUTH OF SCOTLAND

There was more interest in less well-known areas pre Covid and the South of Scotland was benefitting from Scottish Government investment in marketing in the South via VisitScotland and in addition both area tourism partnerships were merging with one brand and a marketing campaign.

Post Covid there is a far greater interest in less well-known areas as people want space and to discover places that others do not know about and there is clear evidence from the likes of Sykes bookings that this has resulted in increased visits. The Travel Trade are also showing far greater interest in the South of Scotland. Plus, we now have a dedicated tourism agency the South of Scotland Destination Alliance (SSDA) with a marketing budget of £2.7 million. VisitScotland also has the continued investment to market the South and both agencies have very actively marketed the South in 2021.

- ❖ **There will be more business to the South and there will be demand for high quality properties particularly in a unique location like this one.**

4.7 EXPERIENCED IN RUNNING A BUSINESS

Vicki has very successfully run a catering business with a focus on weddings so knows the importance of a high-end product, quality presentation and the importance of customer service. In addition, this gives her a unique knowledge of local food and produce that she can use in this business for welcome packs and hampers but also to tell guests about the best places to go for local food and drink.

- ❖ **Experienced in running a successful catering business and will take these valuable skills into this self-catering business.**

5. KEY CUSTOMERS

AGE PROFILE

Millennials - Aged 20 to 34

Families - Aged 30 to 55

Empty Nesters - Aged 55 plus

MILLENNIAL MARKET

Key Statistics

- In 2018, the overall 16-34 year old market generated 4 million trips, 17.2 million nights and £1.253bn in Scotland.
- They spent an average of £310 per trip, £73 per night and stayed in Scotland for 4.3 nights.
- Guilt free brands with a strong story are liberating and appealing.
- Younger people embrace diversity and practice absolute equality as much as they can.
- Brands that feel unique, original and offer truly authentic experiences will win.
- They will look at online information and particularly reviews as well as the opinion of their own peers before booking.
- On holiday and after the holiday they will update the social media platforms and are also highly likely to contribute to review sites.
- Factors that are critical to their journey:
 1. New - they like to discover things first.
 2. Value for money - so they will look for deals and would be quite happy to visit out of season if they thought it was a good deal.
 3. Braggable - allowing them to feel they are a leader and not a follower.
- VisitScotland research shows that the main reasons for them to visit Scotland are:
 1. Relaxing Retreat
 2. Romantic Getaway
 3. Arts and Culture
 4. Sightseeing
 5. Quality Time
 6. Outdoors and Adventure
 7. Activities and Events
 8. Partying

FAMILY MARKET

Key Statistics

- UK families took 1.9 million overnight family holidays in 2018, an increase of 14% on 2017.
- Three key reasons for taking a UK Holiday (research pre-Covid):
 1. Affordability
 2. Easy Transport Access
 3. Nostalgia
- 49% reveal a weekly spend of between £1,000 and £1,999.
- One size does not fit all there are many types of families:
 - **Lone wolves** - Single parents taking their kids away. Mums are more likely to travel alone than Dads.

- **Boomerang Generation** - With younger people staying longer at home or coming back after University, 16-24-year olds often travel with their parents.
- **Sandwich Generation** - Multi generational holidays - Grandparents, parents and children.
- **Grandparents** - Taking grandchildren on holiday.
- **Panks and Punks** - Aunts and uncles taking their nieces and nephews away for a short break.
- Top six passions of 8-12-year olds:
 1. Sport
 2. The outdoors
 3. Animals
 4. Being sociable
 5. History
 6. Having fun
- 8 key things that parents are looking from a Holiday
 1. Togetherness
 2. Whole family shared activities
 3. Sharing an exciting adventure
 4. Access to the outdoors and opportunities for exploration
 5. New activities as well as a chance to share everyday activities
 6. Fun, fun, fun
 7. Independence and opportunities for exploration for children
 8. Experiences and activities that reflect children's passions and interests

EMPTY NESTERS

Key Statistics

- Retired people can spend extended periods on holiday.
- People in the 55-64 year old range are likely to have a high disposable income.
- They have always been the main market for UK holidays and the evidence post Covid is that this is set to rise.
- People aged between 55 and 64 account for 26.7% of industry revenue while people aged 65 and over account for 24.2%.

Geography

The main market for the Scottish Borders is the two-to-three-hour radius of the area with 92% being the domestic market. That said a high-end property like this is likely to appeal to a market in the South of England and London particularly for a workcation or romantic escape. It will also appeal to overseas markets such as the German Market in this stunning location with access to the great outdoors and not far from the ferry port of Newcastle. With views also looking over to both countries it may also appeal to the North American market.

The main market will be the domestic market in the two-to-three-hour radius but there is also the opportunity to also enjoy business from further afield in the UK and also from some overseas markets.

6. KEY RECOMMENDATIONS

From the research, the competitor audit and our own extensive experience Bright Light Marketing would recommend the following seven recommendations:

1. Use your location to the best advantage - invest in quality photography
2. Charge a premium
3. Promote your wellness and green factors
4. Excel at 'Coorie In'
5. Use agencies at least for the first few years
6. Packages to sell including Alpacas and vouchers and food and drink
7. SSDA and VisitScotland

Looking at each of these:

6.1 LOCATION

Use your location in your marketing communications and particularly on your website and your social media pages. Both the stunning property and your location will sell this property. Although some customers will want to visit as they want to visit the area there will be a customer grouping who will visit as they like staying in top end unique properties, and you want to make an impact on them immediately. This will of course also work with those who are wanting to visit the area.

So, invest in photography and videos and ensure you showcase the property, so it is obvious at first glance how beautiful it is. Also show the exterior as that again is a key selling point with the 360-degree views. We would recommend that you take photos and videos to showcase the destination all year round so you can show it is equally stunning in winter as it is in summer. Given its panoramic views it is also worth considering quality drone footage.

This is an investment at the beginning but one we can guarantee will pay you back very quickly with bookings and you can use these images again and again in social media.

- ❖ **Invest in quality photography from the start and showcase this on your marketing communications.**

6.2 CHARGE A PREMIUM

We provide suggestions for occupancy and pricing in the final section, but just to say here do not be afraid of charging more than others in the area. You need to compare yourself with the properties in the competitor audit as they are your main competition. You certainly do not want to be too expensive but equally you don't want to be too cheap that people who stay in premium properties will question the quality of your product.

- ❖ **Carefully consider your pricing structure and look at other premium properties and what they charge.**

6.3 PROMOTE WELLNESS AND GREEN CREDENTIALS

As previously stated, staying here taps into two current trends; the need for holidays to restore mental health and the need to be more environmentally friendly. You have both which gives you a competitive edge so make sure you tell both stories in your marketing communications. Once you are up and running it is highly likely that these will come through customer reviews so make sure you promote these on your website and via social media. People will believe you when you say it but they are much more compelled to believe when a guest says it.

❖ **Promote ‘Wellness and Green’ in your marketing communications.**

6.4 EXCEL AT ‘COORIE IN’

Fiona Drane from Bright Light Marketing visited the proposed property location on a very wet day in the summer and one of the first things that struck Fiona was how ideal this property would be for VisitScotland’s concept of ‘Coorie in’ for winter breaks. It struck immediately how fantastic and cosy it would be to be in the property looking out at the winter landscape by the stove reading a book.

This property is ideal for promoting winter breaks and if you can have good Wi-Fi you could also promote to the new workcation market as this would be really appealing to people wanting to escape the city and would ensure for you that you had weekly stays or longer over the winter period.

We would therefore recommend that you really embrace this market and promote it through the winter period as you have an opportunity to really excel at this and to be seen as an exemplar by others.

❖ **Promote Winter as an ideal time to visit.**

6.5 AGENCIES AND LISTING WEBSITES

We would recommend that you use agencies at the start of your journey and that you look at two or three and use them and then measure which ones are giving you the best service and business and reduce the number as this is what properties in the competitor audit have done.

The advantage of agencies is that they will come out before you have built the property and give you advice on what the market is looking for. Once you are up and running you will be on their website and their investment in making sure that they appear high on the search engines is significant so it a great promotion for you. They will include you in media trips which gives you great media exposure and also can be used on your website as future guests will see this as a compelling reason to visit. Finally, they will bring you business particularly when you first set out and establish a customer base for you.

❖ **Use agencies and listing websites, two or three in the first instance, work closely with them and then measure which one or two is working best for you.**

6.6 PACKAGES

We would recommend that you have a welcome package with local food and drink as standard in the cost of a stay. But we would also recommend that you sell other packages on your website that guests can buy as part of their stay. So, for example a breakfast hamper or a barbeque hamper or a picnic lunch or even a chef prepared meal with local produce. You could also include a visit to Beirhope Alpacas and work with them to give your guests a special visit. The advantage of this is, firstly and most importantly, it is attractive to guests, and you will see by looking at the properties in the competitor audit that many do this. But it also gives you a further income as you can get a commission for putting them together essentially making it a win win for you and your guests.

❖ **Offer Packages and promote this on your website.**

6.7 SSSA AND VISITSCOTLAND

Work with VisitScotland and the South of Scotland Destination Alliance (SSDA).

We suggest that once you have planning permission that you contact both of these agencies and let them know about your plans and include them in regular communications. Establish what they can also offer you in terms of marketing and promotion and become a tourism provider that they come to for news stories. And keep communications ongoing. You will have to join the SSSA as a member but in our opinion, this is worth it but only if you keep in close communication with them and seize each suitable opportunity. One business that does this well is Beirhope Alpacas, so it is worth speaking with them. Both organisations have photos and videos of the destination which you can use in your marketing communications, and this is another reason for working with them.

In addition, once face to face meetings are the norm again, attend local tourism meetings for both organisations and get known by the local tourism community, raising awareness of you as a business and maximising networking opportunities.

❖ **Join the SSSA and also work closely with VisitScotland.**

7. POTENTIAL OCCUPANCY AND PRICING

In order to look at occupancy levels and potential pricing structures we have included the most recent research to establish the market in the Scottish Borders and with similar properties.

The following table highlights Scottish Borders and Scotland Self-Catering Occupancy for the years 2018 to last period pre Covid in 2020.

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2018 Scottish Borders			26%	43%	49%	44%	46%	58%	53%	56%	36%	28%
2018 Scotland	33%	39%	46%	55%	66%	65%	72%	78%	58%	57%	48%	43%
2019 Scottish Borders	22%	39%	40%	46%	66%	72%	66%	81%	66%	60%	39%	30%
2019 Scotland	32%	35%	37%	52%	56%	59%	64%	67%	54%	49%	33%	32%
2020 Scottish Borders	27%	33%										
2020 Scotland	24%	29%										

Scottish Borders average occupancy is 52.22% in 2019 and 42.6% in 2018 so up by 9.62% in 2019.

The following table highlights self-catering trends in unit occupancy by grading (annual average)

Grading	2011	2012	2013	2014	2015	2016	2017	2018	2019
Not graded	37%	38%	38%	42%	43%	44%	47%	58%	47%
1 star	na	na	na	na	na	na	na	45%	39%
2 stars	31%	37%	37%	39%	43%	47%	53%	38%	27%
3 stars	40%	41%	44%	42%	48%	48%	51%	51%	46%
4 stars	45%	52%	50%	53%	54%	51%	54%	52%	50%
5 stars	65%	57%	63%	62%	66%	62%	64%	61%	55%

Source – VisitScotland occupancy Survey 2019

The following tables highlights unit occupancy by tariff for self-catering properties

Weekly Tariff	2018	2019	% Change
Unknown	13.36%	11.46%	-1.90%
Under £299	42.72%	30.91%	-11.81%
£300 -£499	49.14%	38.52%	-10.60%
£500 - £799	56.47%	47.36%	-9.07%
£800 or more	65.15%	58.36%	-5.68%

Source – VisitScotland occupancy Survey 2019

The average peak tariff was £842.74 per week and off peak £823.52 per week in 2019.

Below is a summary of a selection of the competition's pricing structure, based on similar properties. These pricing comparisons are for 2021 and 2022 and taken from the Competitor and Agency/ Listing Websites Audits:

SCOTTISH BORDERS

UNIQUE PROPERTIES		Low season	Mid season	High season	Key feature
Old Mill, Dod Mill, Scottish Borders (2)	Short break	£380(2n) £384 (3n)	£416 (3n)	£520 (2n)	Authentic conversion
	7n	£480	£600-£670	£750	
Rink Hill, nr Galashiels (2)	3n	£795		£795	Location Views
	7n	£1750		£1750	
	Cool Stays	From £200pn			
Singdean Newcastleton (2)	2n with hot tub & Breakfast	£265pn		£265pn	Off-grid Log Chalet Eco
	7n with hot tub & Breakfast	£240pn		£240pn	
Smiddy, Melrose (4)	Crabtree & Crabtree	£615 (7n) £516 (3n) £548.25(4n)	£880 (7n)	£1,075 (7n)	Iconic views of the Eildons

UK PROPERTIES - Unusual properties targeting similar markets

Property, Location (sleeps)		Low season	Mid season	High season
Uist Forest Retreats (2)	7n	From £910 (7n)		£1250 (7n)
Loveshack, Lake District (2)	3n	£620	£800	£920
	7n	£800	£1000	£1250
	Cool Stays	£930 (7n)		£1700 (7n)
Brockloch Bothy, Kirkpatrick(4)	Canopy & Stars			£665(7n)
Brockloch Treehouse (2)	Canopy & Stars			£1,225(7n)
Coillabus Eco Luxury Lodges, Islay (2/4)		£1,300(7n)		£2,150 (7n based on 3 or 4 people)
The Stonehouses, Ullapool (4)	Own site	£1,560 (7n)		£2,240 (7n)
The Net Store, Applecross (4)	7n	£1,400		£1,900
Glenshee Treehouses, Blairgowrie (2)	Cool Stays	From £250pn		£290pn
Sky Den, Kielder (4)	Canopy & Stars	From £180pn		
Croft 103, Durness (2)	7n	From £1,980		£2,200
	Cool Stays	£1,880 (7n)		£2300 (7n)
Knoydart Hide (2)	Short breaks	£310pn		£310pn (2/3n) £295pn (4-6n)
	7n	£2,000		£2,050
Waterfell, Ullapool (2)	Cool Stays	£695(7n)		£1,150(7n)
Blue Reef Cottages (2)	Cool Stays	From £1250 (7n)		£2,200(7n)
Boat House, Belford (2)	Crabtree & Crabtree	£591 - £618 (7n)	£860-£987 (7n)	£1,333 (7n)
Lindisfarne View, Belford (4)	Crabtree & Crabtree	£1250 (7n)	£1550 (7n)	£1,950 (7n)
Old Cragg Barn, Hebden Bridge (6)	Cool Stays	£895 (7n)		£1,500 (7n)

OCCUPANCY AND PRICING

The pricing for the property should be based on the quality and standards delivered in the property and comparable to similar examples in the marketplace. Bright Light Marketing strongly believe that the clearest pricing structure is most customer friendly and that pricing which is clean and upfront and easy to follow is the recommended route.

Many of the market leaders are offering a consistent rate across the whole year and in conducting this research more and more businesses are moving to this model. It is the tendency of the agencies to charge a seasonal rate. Therefore, we would recommend a rack rate price which you discount as required for late availability and/or offering a value-added package (inclusive of add-ons such as BBQ pack, tickets for an event and so on).

- The following occupancy figures in the table below are based on modest occupancy levels, these figures are above the Scottish and Borders averages pre Covid but achievable for a property of this quality. This property would of course be a new addition to marketplace, it is felt these can realistically be achieved with marketing activity as outlined in the next section of this report.
- It is recommended that the primary offers are minimum of 3 nights and short breaks are offered for both 3 night weekend and 4 night midweek breaks, as well as for 7 night breaks. Pricing should be clean and clear for customers to follow. Indeed, most of the competition, even those charging a per night rate, have a minimum stay of 3 nights.
- In Year 1 as an incentive a 3 night weekend and 4 night mid-week are priced at the same rate and a 7 night break could be charged at £1,500. This however is a business decision based on cost incurred and could be the discount strategy you adopt for the low season or late availability.
- Going forward annually a peak holiday dates, such as Christmas, New Year and Bank holidays increment should be introduced as the property will be established in the marketplace and customer demand should have increased.
- The pricing model recommended is a consistent price throughout the year. In the traditional low season period, to boost occupancy consideration could be given to discounting, last minute offers rewarding existing customers and value-added offers such as charging the full rate but including a Luxury Borders Welcome Hamper, tickets to local events, Famously Hawick Package and so on.

For this type of property and given the findings of this report we would recommend having a consistent pricing model, charging a consistent rate throughout the whole year, charging a constant rate per night all year with consideration of charging a premium rate for one-night stays and key dates such as Xmas, Valentines, Easter, New Year, key events. Consideration could also be given to other peak demand such as weekends and Edinburgh Festival times as demand increases.

The other pricing model is using a seasonal pricing model. Given the nature of the market and the target market for the new property it is felt that a consistent rate should be charged all year.

The model below is based on £250pn for the 4 person in year 1. Projections also include incremental price increase year on year.

Consistent Pricing Model		Year 1	Year 2	Year 3
	Projected Revenue	75% occupancy	80% occupancy	85% occupancy
Year 1				
Based on 4 people staying £250pn	£1,750 x 52 weeks = £91,000	£68,250	£72,800	£77,350
Year 2				
Based on 4 people staying £265pn	£1,855 x 52 weeks = £96,460	£72,345	£77,168	£81,991
Year 3				
Based on 2 people staying £275pn	£1,925 x 52 weeks = £100,100	£75,075	£80,080	£85,085

8. MARKETING THE PROPERTY

This section outlines the marketing of the property with recommendations on how to carry this out.

8.1. HOW CUSTOMERS WILL BUY FROM YOU?

Customers are likely to buy from you in the following ways:

- Email enquiries and bookings.
- Telephone calls.
- Social Media - increasingly customers use particularly Facebook to either enquire or book.
- Website - this is where if you have an online booking system and we recommend that you do as you want customers to book direct as and when it suits them. Also, they can easily see what is available and is a good platform for you to upsell other packages.
- Third Parties - This primarily is booking agencies and could include the likes of Sawdays, Cool Cottages and icscape.

We concentrate in this section on the website as this should be the main booking platform. But that said, customers will use the other mechanisms mentioned above as well. So, we recommend:

- **Emails** should be answered quickly and efficiently. There used to be a rule of in 24 hours but today people expect a quicker response and if you don't, they may enquire or book elsewhere.
- **Phone calls** should also be answered quickly and answering machine messages should be returned as soon as you can.
- **Social Media** even more so than with emails people expect an instant response. You can on Facebook have an automated response which we recommend you do and point people to the website for booking. Do make sure that you answer all enquiries and bookings as even if it is not suitable there may be an opportunity in the future to convert this into a booking.
- **Third Parties** as highlighted in the competitor audit agencies are effective channels to generate sales. They have the potential to fill low season occupancy, generate advanced sales and provide additional marketing promotion and give you access to the media that you would not be able to access yourself.

8.1.2 WEBSITE

A clean image led website which instantly communicates the unique setting and the different experiences on offer is very important for this business. The professional photography will convey the quality customer experience on offer to potential customers. While navigation should be simple the functionality of the website should enable the customers to find the information they are looking for, to check availability, to book and to add on packages such as barbecue packs, local food and drink and alpaca tours and so on.

The competitor audit highlights key learnings and from this and the following could be considered in developing the website:

Branding - Ensure the website is on brand and that the copy reflects the brand values of the business. Key contact details of telephone and email should always be easy to find and the emails reflect the brand and business name.

Images - Make the images work for the business, communicate key messages but ultimately the overall customer experience, highlight features which set your business apart from others. Use experience photos, the location and views, bring the setting to life, day/night and seasonal photography setting the scene, highlight unique features of the accommodation such as the hot tub, the amazing view and location including any partnering businesses such as local food, restaurants, activity operators, attractions and so on. Also ensure the images can be updated and managed by the business. Caption and/or ensure you use 'alt tags' to describe the images and link back to you.

Film footage should be integrated into the website to highlight the accommodation and views. In addition, the use of videos and film are popular and effective for social media and links in e-newsletters.

People - Tell the story about the you as a couple and the farm which is effectively done by the likes of Hart Barns in the Lake District.

Supporting material - Ensure any supporting materials which are downloadable are branded, includes your contact details and are current. These documents should have a file name which is also identifiable and linked back to your website.

Content - Good copy is not easy to achieve as highlighted when looking at some of the competition. It is not about listing what you do it is about communicating subtle messages about the business including your personality, values and brand. Blog articles should be used to deliver specific messages and can work hard for you delivering supporting visitor information that is not included in the main navigation. The main copy of the website should communicate what you do and how you do it, whilst also including key words which a potential customer looking for your type of property and holiday experience will search for. The content should complement the other elements of the website such as photography, page headers and navigation, not duplicate it and therefore often less is more. A FAQ section on a website can also address any common questions which complicate and can confuse main copy but are equally important to a particular customer.

Structure - Once the framework of a website has been developed ultimately you should have control of the website and be able to manage and update the site without incurring development costs (other than structural).

In developing the website consideration should be given to the navigation and menus. Make it simple and easy for people to use.

Online availability chart and booking facility is important and should be quick and easy to find and you should have access to this tool so that it can be managed by yourselves.

'Our News' or 'blogs' are important as this is the most obvious section to be updated on a regular basis and this supports SEO, this could be combined with the blog and should be integrated into the main website. A 'Contact Us' page is essential to place the business and find out how to contact you and the location. Links to social media sites and business endorsements should be easy to find. There should also be a facility for people to sign up to receive the e-newsletter.

In short, the website is the main point of contact for many customers and should set the scene and make it easy for people to get further information and contact you. The website is also a tool to use as a comprehensive source of information and a valuable reference tool when using other communication channels such as e-newsletters, social media, press and PR and blogs and should always be up to date. We would recommend a newsletter sign up, so that you can capture data for future email newsletters, encourage people to find out more.

For evaluation and measurement purposes you must ensure you can access the website statistics. Google Analytics or similar provide simple tools which give a vast range of results to measure the website traffic and activity.

8.2. MARKETING MATERIALS

Bright Light Marketing have set out below the key marketing communication tools that we believe should be used to all of which should be established before the business is opened and then carried out on an ongoing basis thereafter.

This activity will include creating a brand identity, applications of the brand such as printed materials, signage and social media platforms.

8.2.1. BRAND

The brand identity will be the central part of the marketing activity as it should instantly portray the image of you as a high-quality new accommodation development which is situated in a stunning and unique location.

8.2.2. PHOTOGRAPHY AND VIDEO

Bright Light Marketing would strongly recommend that you invest in high quality photography and video footage.

It is worth investing in both photography and film footage from the very outset as this can then form a library for you to use to change the website, update social media and for your Press and PR campaigns as the property becomes established. We would recommend that you continue to invest in it so that you can build up a strong library that reflects the ongoing experience, the changing seasons, destination sell and that you also encourage visitors to share photos and videos and that you use these too in your marketing communications.

8.3. PROMOTIONAL STRATEGY

8.3.1 PRESS AND PR

As stated previously one advantage of using agencies is the Press and PR coverage that they can give you and when looking at what agencies you want to use, we would suggest that you make it clear that you want press coverage and get them to tell you what they can do for you. Equally, you can get Press and PR coverage by working with the SSDA and VisitScotland and again we would suggest that you talk to both agencies about how you do this.

You can of course either target the media yourself or use an agency but that is time consuming and the latter an added cost. Our experience is for a property like this working with agencies and tourism organisations will bring you to the attention of the media and result in articles. Once this is done you will virally get picked by the media as this is what happens naturally. A good example of this locally is Roulotte Retreat who we worked with, they followed our advice and this resulted in press coverage and although they do not use a press agency or pro-actively contact the media they frequently get used in the national press, the Scottish press and lifestyle magazines.

❖ **Work with agencies and tourism organisations on Press and PR.**

8.3.2 BLOGGERS/INFLUENCERS

Bright Light Marketing would though recommend that you use Bloggers, the cost is between £500 to £1,000. But you will get a huge benefit from this. The majority of these fall age wise into the Millennial category but also for the Family and Empty Nester categories and it worth targeting them all, say one per year. In return they will write about you in their blog and then promote you to their followers which are pro to holidaying in Scotland as this is why they are following them. In addition, the national and local tourism agencies consistently use their content in their social media platforms.

Bright Light Marketing would be happy to advise on bloggers when the time comes to set this up.

❖ **Use bloggers to promote your property.**

8.3.3 ONLINE MARKETING

Paid online advertising

To make the most of Facebook and Instagram, you will need to build 'likes' and engagement and Bright Light Marketing would recommend a dedicated Facebook and Instagram advertising campaign. This can be done for a modest daily budget and can be limited to a few days, a week or longer depending on budget. It is not only a very effective way of increasing your 'likes' and promote offers and therefore your reach and coverage, but it is also a very targeted and cost-effective advertising medium and allows you to target your customer for example by area and interest. Facebook owns Instagram, so you can run adverts across both mediums operating it from your Facebook account.

Social Media

Social media is now one of the key ways to market any business and this is clearly highlighted from the research and the fact that the majority of businesses in the competitor audit are using social media as a key part of their marketing communications. It is also very targeted and cost effective and has the benefit of providing a daily tool for communicating with your customers and potential customers.

Bright Light Marketing would recommend that Facebook, Twitter and Instagram accounts are set up especially as soon as the build starts. In addition, we would strongly recommend that to build up the Facebook and Instagram pages that you take advertising on an ongoing basis and set a monthly budget for this as outlined above.

Bright Light Marketing would recommend that you also proactively use a Twitter account. Although you can now also take advertising on Twitter, currently you can still significantly increase your followers on Twitter by simply following others that fit your customer profile. It is also one of the most effective ways of targeting the media and also of raising awareness to a local audience too so would be another way of targeting the wider Scottish Borders.

What can social media do for a business?

- **Raise awareness of your brand** - Facebook allows your existing customers and their friends to be updated about your business and keep your business in their mind. Twitter is a very effective way of creating awareness to new and potential customers. Instagram enables your customers and referrers to share your business with their wider networks of friends and is photo based so ideal for a tourism business.
- **Develop new partnerships** - Allows you to see local businesses or relevant businesses further afield who you can work with. For example, a local supplier or an accommodation operator who you can learn what they do and discuss issues you may have.
- **Follow competitor's customers** - Twitter allows you to look at your competition's followers and if they fit your customer profile you can also follow them.
- **Research** - Use social media to ask opinions about current and future product offerings.
- **Develop your network** - As well as creating awareness of your brand if you use Twitter effectively it will also give you a network of people who may not give you direct business but who will refer you to their clients and who you can discuss issues/views with.
- **Sell your product cost effectively** - Bar advertising, social media tools are free to use you just need to invest time in it, so it is the most cost-effective method of marketing to current and future clients.
- **Increase traffic to your website** - Using social media will increase traffic to our website and will also be noticed by the search engines.
- **Press & PR** - There are a lot of media journalists both working for the national and local press on Twitter as well as freelance journalists and Press and PR companies looking for

good stories. If you write topical and interesting tweets you may find that this is taken up by the media. It is a great way of cost effectively raising awareness of your brand to the media.

- **Generate business** - social media can and will bring you business. Like many marketing tools you cannot always analyse the results, but if you ask customers where they heard about your brand you can record and measure it and if you add offers on your social media pages, you can also analyse it this way as well.

In order to be effective on social media you need to be:

1. **Discoverable** - so make sure that your social media platforms are promoted in all your marketing communications and that there are links from your website.
2. **Distinctive** - Use your brand values as the key conversation points and have a voice that people instantly know it's you.
3. **Consistent** - Post on a regular basis or indeed on Instagram (their algorithms will reward you if you post daily and punish you by being seen less if you don't) and Twitter you need to consider daily posts. If you don't do this and go for a period of time without posting, you would be better to take the social media platform down. Both your customers and your potential customers will look at your media channels and if it's out of date that will stand against you. So, you are better to remove it.
4. **Engaging** - when measuring success on social media this is now one of the most important things to measure. You can buy likes and followers but if they are not interacting with you, sharing your posts and commenting then it is effectively a waste of time. It is also imperative that you communicate back and are seen to be personal and caring.
5. **Using Hashtags** - Instagram is the main social media channel for hashtags and the more you use and the more you research the best hashtags for you the more effective you will be on this platform. On Twitter and Facebook the rule is up to three hashtags, so your three most effective ones.

8.4. CONVERSION STRATEGY

Here we focus on customer service:

Customer Service

The businesses who deliver exceptional customer service do so from the initial search and enquiry to the actual stay to the post stay follow up. As you are already well aware, customer service is about exceeding the customer's expectations and ultimately these customers telling others via review sites, on your website and in other marketing materials.

With customer service there are some key actions which should be followed as listed below:

- Always answer the telephone promptly and if people leave a message on the answering machine get back to them as soon as you can, preferably the same day to secure the booking.
- As above answer email enquiries promptly and customise your response and make sure that it's a personalised answer to that customer, include links to your own and other relevant websites if suitable. Non personalised template/stock responses are not acceptable. You will stand out if you give an efficient yet personal response, especially in this market.
- Online availability and booking chart(s) should be updated immediately to avoid double bookings.

- Follow up communications on social media and comments on blogs and make them as friendly as possible getting over that you care and it's a family run business that they are dealing with.
- Welcome packs should be personalised where possible, this includes accommodating special diets and requests, welcome cards, special celebrations and so on.
- Local information packs should be available however bringing the local area to life is equally important to visitors both in advance of the stay as well as during, so ensure this information is also available electronically and given the impact of the pandemic printed materials may well be replaced with electronic alternatives.
- Guest books are useful as this helps to share other guest reviews and experiences, again this trend may be replaced with alternative online tools. Consider a guest book for your website which shares visitor's experiences.
- Follow up guest stays with a thank you and wherever possible capture their details for future communications.

Ensure that fantastic customer service is at the heart of the business and that it is constantly reviewed and improved.

BR!GHT LIGHT marketing

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APPENDIX 1 - NATIONAL STRATEGIES AND VISITSCOTLAND RESEARCH

Tourism Scotland Our Vision for the Future Beyond 2020 Presentation November 2019 Scottish Tourism Alliance (STA) March 2020

The landscape of the global tourism industry has changed. The way people travel, visit, explore and experience destinations is entirely different to what it was seven years ago and despite all the unknowns that exist within today's political and economic climate, we know with absolute certainty that the patterns and trends of today's tourism market will have changed again beyond recognition within the next ten years.

We know that today's traveller visits, books and experiences Scotland in a different way to what they did in 2012. We know that the global climate emergency agenda has shifted the way we think about where we travel and stay, how we get there; the impact we ourselves have on our global environment and our destinations, we are being much more conscious in making our leisure and food choices. We also know that our domestic market is becoming ever more cautious in their decision making and that their level of spend on tourism and hospitality experiences is at risk of further decline. As such, there is an increasing need to attract more visitors and the right visitors to Scotland year-round, to grow our tourism industry.

We have continued political and economic uncertainty; we are witnessing an even faster pace of technological change and global growth of tourism.

Our core markets are unlikely to change, new markets will emerge, and we will continue to build on our competitive and unique strengths that we have across all our assets. Our 'Landscape and Scenery', our 'Heritage and Culture', our 'People and Welcome', our 'Activities, Events and Festivals' and the 'Business Events' that we attract will continue to bring visitors to our shores.

As we look to the future, insights tell us that 'Food Tourism and Adventure Tourism', will have the potential to become key drivers of visits to Scotland. The healthy living trend has also led to well-being experiences becoming an important item on the checklist of tomorrow's traveller.

Mega Trends

In the medium term, global tourism experts refer to twelve megatrends happening today. For Scotland, we have merged these under four headings as we look forward to 2025 these are:

- Experience More
- Limitless Discoveries
- The Evolving Traveller
- Technology to Stimulate

We want our visitors to experience more - enjoying immersive 'live like a local' rich experiences. We need to market the whole of Scotland and ensure that our visitors can experience all of what our landscapes and destinations have to offer.

We know that today's traveller is evolving and that we attract many different types of visitors, both culturally and demographically. We also know just how important it is for data to inform how we improve and influence the visitor experience in what has become a very dynamic world.

Competitor Tourism Strategies

- Increasing competitiveness whilst pursuing sustainability.
- Strengthening international position.
- Building distinctiveness.
- Creating conditions for growth and investment.
- Supporting innovation.
- Improving knowledge and data.
- Spreading tourism - encouraging spend in areas of high potential.
- Attracting new source markets.
- Addressing seasonality.
- Improving quality through infrastructure, facilities, and services.
- Addressing skills and labour issues.
- Improving transport and connectivity.

We've also looked at how our competitors are shaping their future tourism strategies and we can see some distinct themes emerging, many of which mirror our own.

KEY ELEMENTS

Collaboration - working together to achieve a goal. As a result of what is happening in terms of trends, forecasts and future consumer behaviour, there is a need for our tourism industry, government, public sector and communities to collectively respond, adapt and collaborate to deliver a responsible, sustainable, managed growth for the future. Future success will only be achieved through partnership.

Agility and responsiveness to change is essential - Brexit, the climate emergency, the potential introduction of a tourist tax by some authorities, immigration and Scotland's de-population crisis is the backdrop to our current tourism landscape and remember too that our destinations all experience different challenges and indeed opportunities. It is therefore a time to act brave, be ambitious, forward thinking and maintain the level of resilience which we are known so well for.

It is now more important than ever that we create the very best memories for everyone who visits and experiences all that Scotland has to offer with no long-term damage to our environment.

Our strategy should enrich lives and preserve our places with our industry acting as pioneers for delivering responsible tourism. We need to look to build a 21st Century tourism industry for all - our visitors, our people, our businesses, our communities *and* our environment.

Tourism is important to Scotland

- 200k jobs
- 5% of GDP
- 32 Local Authorities

Tourism is acknowledged as having a hugely important role in delivering Scotland's wider economic strategy and national performance framework. The STA will continue to focus on the core of the organisation's agenda which is aligned to delivering sustainable growth for business, through representation of the industry voice to bring about changes at policy level that will have a positive impact on our tourism sector and wider economy.

Scotland has a global reputation to protect, and we will only realise our collective vision if our policies and economic conditions allow us to ensure that we are seen and can present the country as a quality, attractive destination throughout all stages of a visitor's journey, and that we are able to compete globally on price.

Partnership Approach

The draft of Scotland's future national tourism strategy has unlike TS2020 been developed through an equal partnership approach with a range of stakeholders from industry, Scottish Government, and our public agencies. It is reflective of the changing world we live in, our new mindset and approach to how we live and work and represents a bold step forward in setting our industry on a path to delivering benefits to those who visit us, Scotland's people, the communities within our destinations, local economies, our wider economy and indeed, all of our sectors.

We have ambitious aspirations for the future

We tested a draft vision and mission with all those who attended the workshops and focus groups, we listened to the feedback. The majority told us the sentiment was right, but we needed to be bolder, more ambitious and the words of our future vision and mission must reflect that and make clear it is Scotland's tourism vision.

FUTURE VISION

We will be the world leader in 21st Century Tourism.

21st century tourism?

What do we mean by this? Tourism is going to change, it must change. If the industry doesn't change it, governments will. If governments won't, tourists will. If tourists won't, communities will. A new model will be developed.

Sustainability, responsibility, innovation and technology already are in many destinations the driving forces that are influencing decisions on new ways of providing the visitor with the experiences they are looking for.

How will we deliver our vision? Through also having a clear and concise mission which is.

OUR MISSION

Together we will grow the value and positively enhance the benefits of tourism across Scotland by delivering the very best for our visitors, our businesses, our people, our communities, and our environment

The strategy has not been developed in isolation it is a result of widespread engagement across our industry. VisitScotland led events back in February and March to capture the views and opinions of industry leaders about the most significant trends that could impact tourism in Scotland in the coming years. The STA then led a programme of facilitated workshops across Scotland and a series of focus groups with young people working in the industry to test the essence of the Vision, Mission and the priority areas of focus.

You might ask is our vision too big? Well, a vision statement should set our direction, it should be ambitious and inspiring, it should energise us and if we're ever in any doubt about where we're heading, our vision should refocus us.

It should be our reality, but it should also be our collective dream.

It should inspire all our stakeholders - our tourism businesses, suppliers to industry, our government, local authorities, our public sector agencies, our people and future generations; and anyone who has a touchpoint with Scotland's tourism industry - this is *everyone's* strategy.

It's not inconceivable that Scotland can be the world leader in 21st Century tourism. We are already known and recognised globally for our joined-up approach in delivering our current tourism strategy and have become a case study for how businesses, communities and governments around the world should collaborate.

We look and will continue to look beyond our shores for insights, better ways of doing things. As a nation we are of course already world leaders in innovation - it's in our blood, our DNA and it's the nature of how we respond to opportunities and challenges. We have the strength of vision that enables us to lead the way. We inform the debate; we influence others to do the right thing and we act by taking the right steps.

It is entirely within our reach to be the world leader in 21st. Century tourism.

But... one question I am sure you will all have in your mind is - **'How are we going to achieve our goal?'**

Scotland's future tourism strategy has been developed around four key priorities - People, Place, Businesses and Experiences, each with a key aim, and set of outcomes.

We recognise that the visitor experience is a combination of several different elements all coming together and that for tourism in Scotland to thrive in the future, we must address the challenges and seize the opportunities that sit behind these 4 key priority areas:

Our passionate people
Our thriving places
Our diverse businesses
Our memorable experiences

6 CONDITIONS FOR SUCCESS

For us to deliver our aims and achieve our vision and mission, we must determine, define and bring about the right conditions for success.

We have identified these to be as follows:

1. Strengthen our ability to harness the power of technology and data.
2. Have the right policy and regulatory landscape in place.
3. Ensure access to investment.
4. Proactively invest in the right transport and digital connectivity.
5. Provide a support network for our businesses.
6. The successful positioning of Scotland and our tourism industry internally and externally.

Tourism cuts across every sector - we have always said that tourism is everyone's business; it touches every part of Scotland's economy.

VisitScotland Post Covid Research

VisitScotland produced five research papers which tapped into five post Covid themes, three of which are relevant to your self-catering venture:

- Localism and Authenticity
- Artisanal Retail and Food and Drink
- Hard Adventure

Insight Innovation: Localism and Authentic experiences May 2021

VisitScotland

Navigating the new normal

As the global community adapts to life during and after the Covid 19 pandemic, new and different consumer behaviours and expectations are developing. One important change for the tourism industry is a move towards Localism and the unique identity of a destination. This has a clear impact on target customers in the short term and a lasting impact on customer expectations of a “localised” experience when travelling more widely. What was at first inflicted upon residents through travel restrictions, both nationally and internationally, has developed into a passion to support both their own communities and businesses, and those of places they visit. Visitors will crave living like a local and creating memories discovering their own authentic Scotland.

The Basic need:

- 59% of consumers in Britain have used more local stores and services to support them during lockdown (Deloitte UK)
- 65% of Europeans have a new found appreciation of community since the onset of Covid 19 (mastercard.com)

Inspiration

Authentic, localised experiences often go hand in hand with food and drink where provenance is key, such as distilleries offering whisky or gin tasting and personalised food pairings. However, this trend can be more widely applied to opportunities across Scotland’s tourism sector.

- Promote local skills and craftsmanship through tours, classes or retail.
- Encourage visitors to discover your detonations art or music culture
- Give visitors the inside scoop on attractions and activities at the heart of your community.

Emotional Driver

Appreciation of *“experiencing a different culture, food, way of life, community”*

Slow burn: Responsible travel and the impact of high-volume tourism has been of increasing importance in recent years, illustrated by growth in movements such as Green Tourism and Tourism Declares.

Trigger Change- Covid 19 has accelerated this trend through the suspension of international travel and subsequent barriers to travel. Individuals have heightened awareness of their impact on the world around them and have rediscovered the joy of closer to home experiences.

Emerging Expectation: Visitors are keen to experience the unique attributes of a destination with an emphasis on “real” people, places and activities, whilst still getting the buzz and excitement associated with an overseas trip.

#RESPECTPROTECTJOY

Activities associated with localism will enable visitors to meet these pledges, as part of their

Responsible Tourism Promise:

- Slow down and savour every moment of what there is to see, do and learn.
- Shop local to enjoy the best products and support Scottish makers and businesses.
- Respect the locals and their resources.

Artisanal Retails and Food and Drink

The basic need

- 65% of people in the UK say they have a new found appreciation of their communities and local shops since the onset of Covid 19 (MasterCard)
- 17% of small businesses were prompted to develop an online store during the pandemic.

Inspiration

The history, heritage and culture of Scottish destinations is made tangible to visitors via retail, food and drink. Not only vital to the overall visitor experience, they also offer guests the opportunity to share their experience with friends and family and take a piece of their own experience home with them.

- Promote local artisanship and provenance of raw materials or ingredients.
- Incorporate elements of personalisation and do it yourself to refresh experiences.
- Evoke a sense of wonder and excitement with food, drink and shopping.

Emotional Driver

Appreciation: Finding a knowledge and understanding for new places by experiencing different cultures, food, customs and ways of life.

Slow burn: an increase in interest in supporting small, local and green businesses coupled with a desire to share these purchases, and experiences via social media.

Trigger Change: a sense of community driven by the pandemic resulting in support of local businesses in tough times, including online shopping.

Emerging Expectation: visitors will expect on demand, local, authentic, customisable, and easily accessed food, drink and produce.

Innovation Opportunity and Ideas

Nimble nibbles – packing up a picnic, a private dinner party or a local restaurant pop up, food and drink experiences should be flexible allowing transportation and incorporation into a wider experience, creating unique and memorable moments in home when visiting.

Premiumisation of Purchases – pent up demand for travel and hospitality will result in an interest in premium, personalised experiences, and a desire to share those on social media. Curated holidays and experiences are themselves likely to become gifts, with packages and upgrades increasing in popularity.

Food for thought: Worth 35% of domestic tourism spend; food, drink and retail is a key component of our visitor experience.

Adaptable Adventures

The need for outdoor experiences and adventures is a basic human necessity which has long motivated an increasing number of travellers to undertake a trip. During lockdown this became temporarily unavailable to many, particularly city residents and those without a car. A lot of people have had to rely on their own initiative and imagination to challenge themselves physically as an antidote to spending a lot of time inside their homes or in the virtual world.

This has resulted in hunger for outdoor activities and physical adventures that allow people to reconnect with nature, help them stay fit, and provide them with a sense of freedom. From adrenaline seekers on the hunt for some excitement and risk, to people simply embracing a feeling

of tiredness after a long day of walking – outdoor adventures will continue to grow as a driver for tourism with their universal appeal and authenticity.

The Basic Need

There is much evidence that the fundamental need for outdoor activities – which has been a growing tourism driver for years has been further strengthened by the pandemic related restrictions, with an increasing number of people becoming more active in their own local areas or looking for alternative ways of staying healthy and physically fit.

Inspiration

- Presents an opportunity for businesses across the whole of Scotland as natural beauty spots or places of interest are never too far away, and the possibilities are many. Business considerations include:
- Promoting local natural highlights and organised activities.
- Drawing attention to the sensory aspects of outdoor activities and experiences in the area – spectacular views, smell of the forest, the warmth of the sun.

Food for thought: According to UNWTO, across all European markets UK residents are the ones making the most adventure tourism trips (CBI)

Workcation Trend

New ways of working workcation

This again is a trend identified by VisitScotland and this one is a new trend resulting due to more flexible working conditions.

“One new opportunity arising from more flexible working is the mobility this offers individuals to travel whilst working – a “workcation”. Individuals are being enabled to make decisions about working environments based on their own personal circumstances and as such can choose to work from less traditional settings.

- *53% of visitors to Scotland in 2020 were motivated by a desire “to get away from it all and have a change of environment”*
- *30% of employees in Scotland feel their work impacts negatively on their mental health.*

Individuals will expect to flex more easily between work and leisure time, even in non-traditional work settings, and be enabled to do so by the businesses they interact with.

Winter working: Winter workers can experience the uniquely Scottish feeling of “coorie” by cosying up after a working day, sampling some Scottish hospitality or weather watching from their chosen accommodation. Workcations offer destinations the opportunity to attract visitors all year round, outside of the traditional holiday season.”

Relevant to your business

Wellness

Seeking sanctity in a chaotic world. As previously documented by Trends published by VisitScotland, the fast-paced digital age in which we live is driving consumers to interact with technology on almost a constant basis. From searching for hotel or restaurant recommendations, to communicating through social media, consumers are constantly presented with product marketing or information that previous generations could not comprehend a few years ago. The pace and development of technology has shifted tremendously, providing endless streams of data that measure micro moments of time within your consumer journey. This information whilst being useful to some, can also be used for personalisation or over personalisation depending on your point of view, leading consumers to become oversaturated or desensitized to marketing.

Further to this, various studies have raised concerns about the impact this new fast paced technology is having on our mental health. From dwindling short term memory, to creating anxiety, consumers are now more informed about the impact social media, smartphone technology, and digital marketing practices have on our mental health, as well as our online identities. Whilst this technology is extremely beneficial to both consumers and tourism stakeholders, it is widely recognised that smart phone usage should be used more efficiently. This has led to a rise in interest in a variety of well-being tourism activities, particularly faith and spiritual recreations.

Drivers	Opportunity
A long-term trend, well-being has become a mainstream tourism catalyst.	Scotland’s innate offering engages directly with the consumer’s requirements for wellness.
In a world where life pressures are almost constant, achieving a healthy mind and body are now incorporated into everyday activity.	Spas, mass participation sporting events, walking, nature and food provenance all contribute to the well-being trend.
Both physical and spiritual wellness are sought by the consumer.	The urban escapade stands next to the rural gateway.
	Ensuring that the delivery of your product is tuned to the consumers “vibe” is key to capitalising on well-being.

Coorie in, an bide a while (Cosagach)

Who needs hygge when you can have Cosagach? 2016 saw a boom in the trend of hygge a Danish word with no direct English translation. Hygge would be described as a type of cosiness and comfort that engages a feeling of contentment or wellbeing.

In 2015, over 4 million domestic tourists mentioned relaxing as an activity that they undertook when in Scotland. With tranquil seascapes, vast open spaces and many warm and welcoming pubs, Scotland is a perfect place for your wellbeing, so perfect in fact that a word of Scottish origin has been dedicated to that feeling of being snug, sheltered, or cosy - Cosagach.

In a world where everything from mobile connections to shopping deliveries are constantly vying to get quicker, there is a growing phenomenon for slowing down and taking care of wellbeing. Whilst Scotland has an array of outdoor activities and visitor attractions, it also has plenty of breath-taking views to enjoy from the comfort of your accommodation or a local pub or restaurant.

Scotland is a country where Cosagach can be achieved in all seasons, but it is winter when it comes into its own. It’s no secret that Scotland can, at times, have rather harsh and ferocious weather. In the winter when the storms rage and the waves crash against the rocks, there is nothing more satisfying than being curled up in front of the fire, book and toddy in hand, listening to the weather outside.

So how does this have an impact upon tourism? Whilst tourists come to Scotland to experience the scenery, landscapes and history and culture. 23% of visitors reported being attracted to Scotland to get away from it all. Scotland is world renowned for its hospitality and friendly locals, so going above and beyond the average offering and creating environments which induce a feeling of warmth and cosiness will make visitors feel welcome and allow them to unwind and relax.

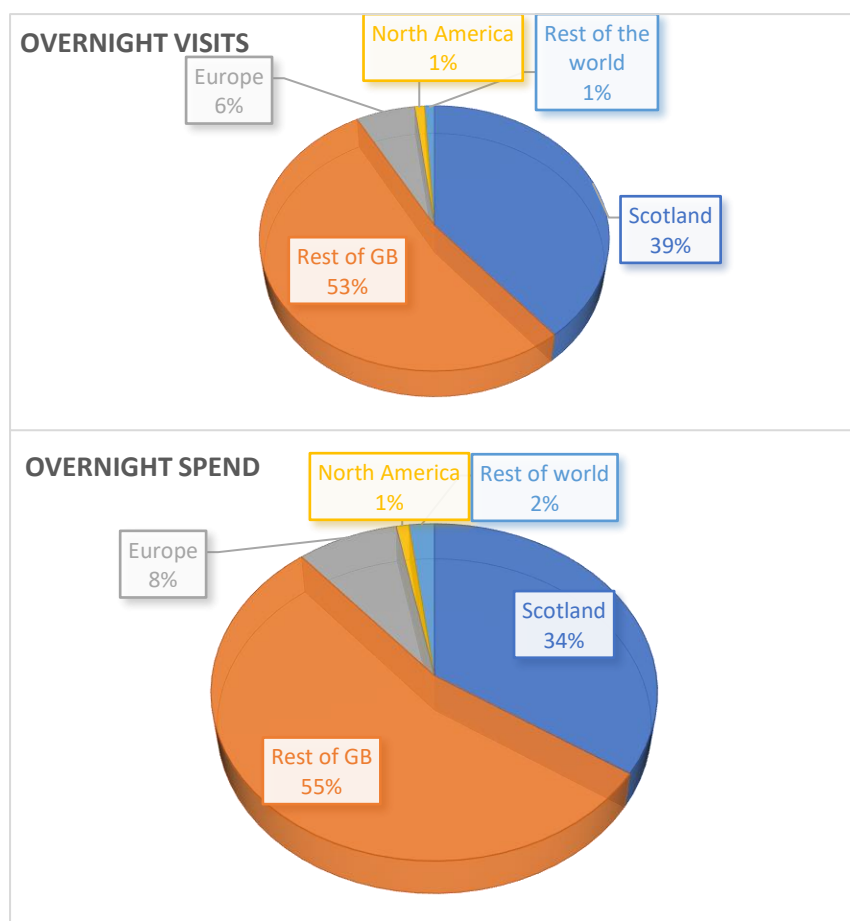
Drivers	Opportunity
Well-being is an interest that isn't going away anytime soon.	Creating a 365-day tourism season.
Relaxation and feeling of warmth identified as desirable traits for tourism products.	Offering relaxing and unwinding as an activity.
Long winter nights should be enjoyed.	Opportunity to highlight Scotland as a warm and inviting place.

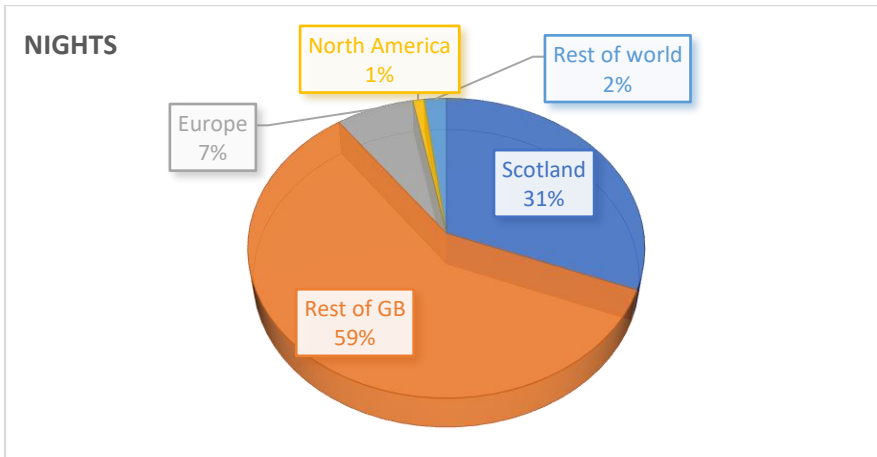
Visitors to the Scottish Borders
Tourism Performance 2019

In 2017-2019, the Scottish Borders experienced growth in overnight tourism. At 369,000 per year, the number of overnight visits to the region rose by 9% from 2016-2018. Bed nights and tourism expenditure increased more significantly, by 25% and 13%, respectively, over the same period.

The growth was largely driven by domestic visitors, in particular by residents of Scotland who made 13% more overnight trips during which they spent 14% more money compared to 2016-2018. English and Welsh residents also travelled more to the Scottish Borders in 2017-2019. They generated more than half of the total trips, bed nights and overnight expenditure in the region, and across all of Scotland, their significance for regional tourism performance was greater only in Dumfries and Galloway.

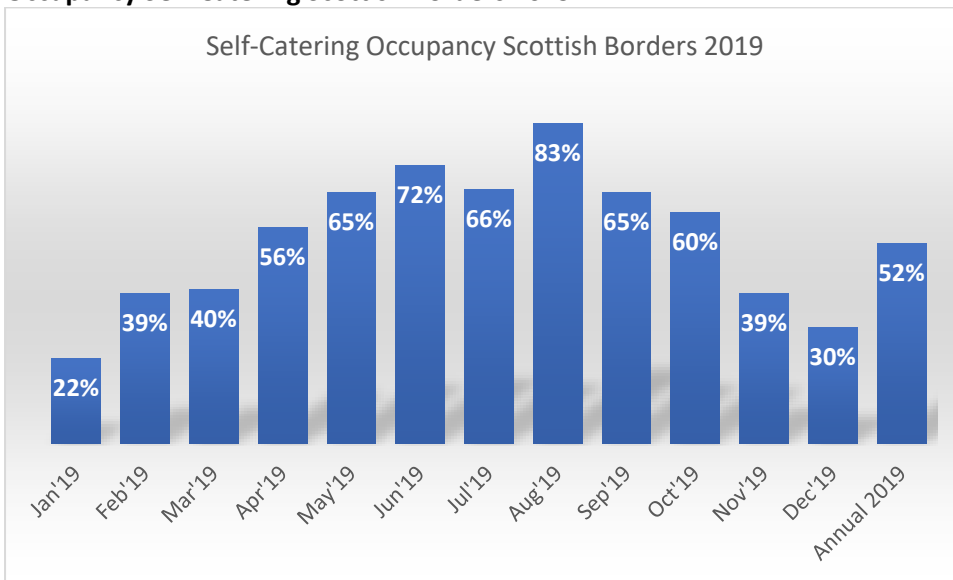
International visitors to the Borders also rose in numbers in 2017-2019. The increase in the total number of bed nights they spent in the region was much greater than the growth in trips, indicating a rise in visitors average length of stay. The vast majority of overseas travellers were European, predominantly residents of the Netherlands and Germany. There were no significant changes in the Borders mix from 2016-2018.



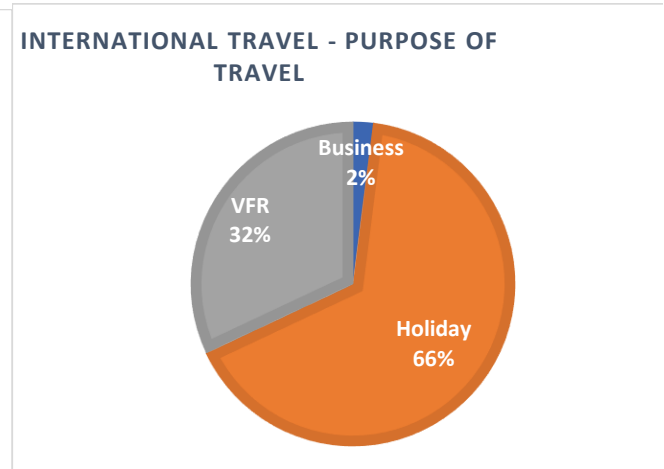


Source – VisitScotland 2017-2019 figures

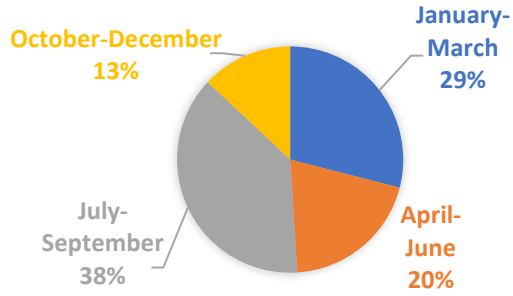
Occupancy Self-Catering Scottish Borders 2019



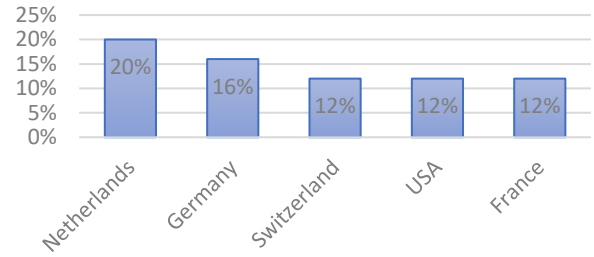
INTERNATIONAL TOURISM



INTERNATIONAL TRAVEL - SEASONALITY



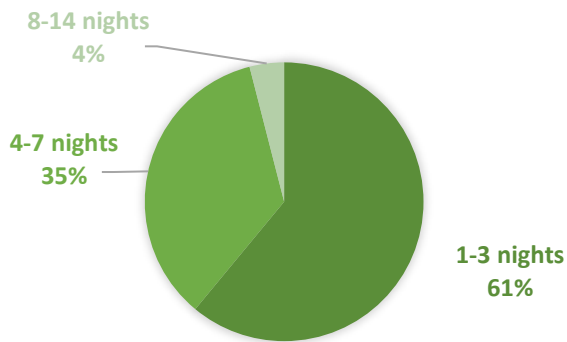
INTERNATIONAL TRAVEL - TOP 5 OVERSEAS MARKETS



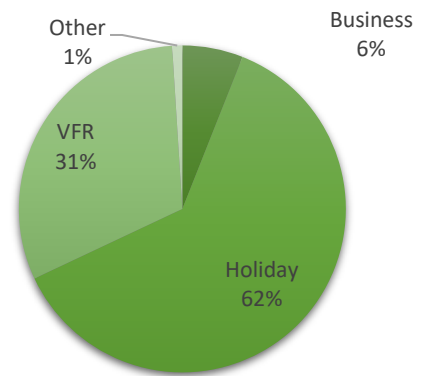
Based on 3 year average data 2017-2019

DOMESTIC TRAVEL

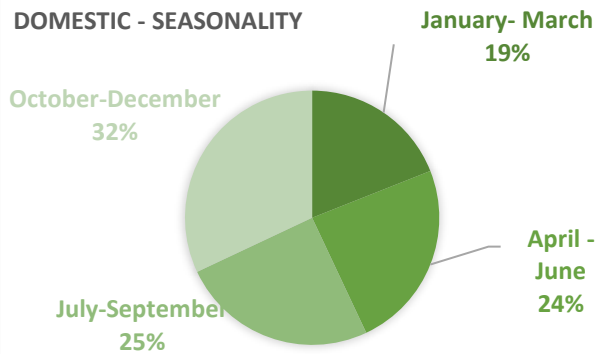
DOMESTIC - DURATION OF STAY



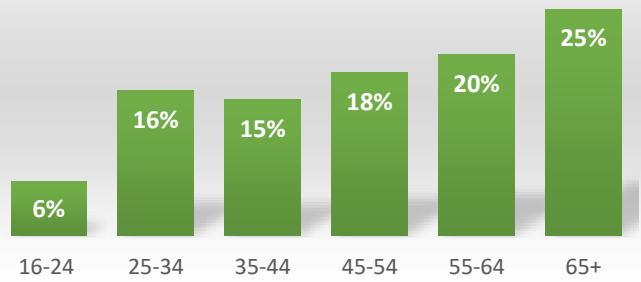
DOMESTIC - PURPOSE OF TRAVEL



DOMESTIC - SEASONALITY



DOMESTIC - VISITORS AGE



VisitScotland Scottish Accommodation Occupancy Survey 2019

Please note there is a 2020 version but given that was when Covid at its peak, we are using the 2019 version to provide a more accurate representation.

Highlights

Self-Catering Accommodation

Self-Catering percentage unit occupancy decreased by -7.3% when comparing 2019 with 2018. In 2019, Self-Catering unit occupancy peaked in August at 67% while in 2018 it was 78%.

In 2019, 99% of all participating self-catering accommodation providers had their own website. Just under three quarters had a Facebook page and just under 60% were listed on Trip Advisor.

Unit Occupancy

Scottish Borders average is 52.22% in 2019 and 42.6% in 2018 so up by 9.62%

Tariff and Occupancy

Tariff	2019	2018	19/18
Unknown	11.46%	13.36%	-1.9%
Up to £299	30.91%	42.72%	-11.8%
£300 to £499	38.52%	49.12%	-10.60%
£500 to £799	47.36%	56.37%	-9.07%
£800 plus	58.36%	64.04%	-5.68%

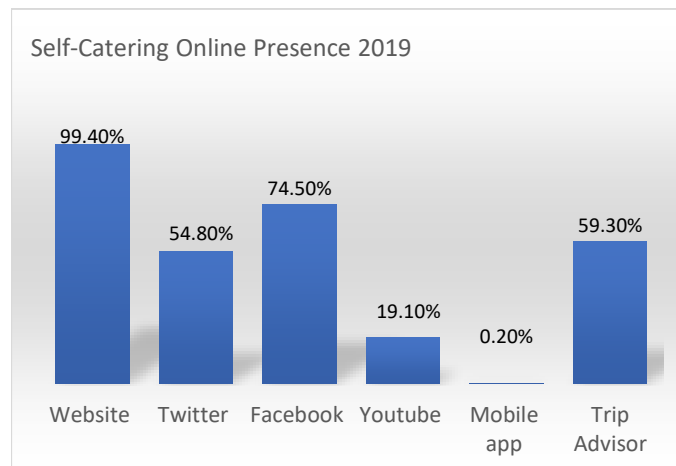
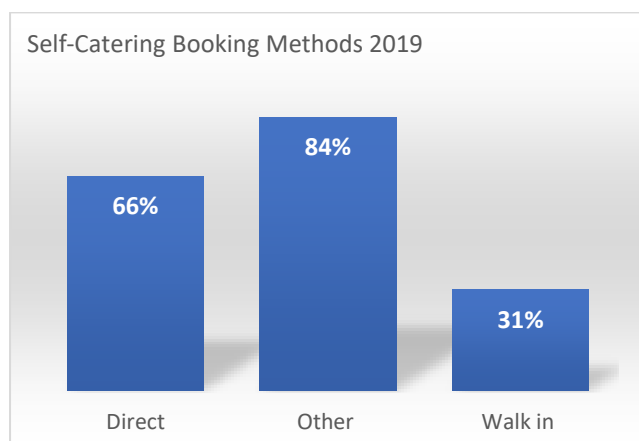
Grading by Occupancy

Grading	2019	2018	19/18
1 Star	38.7%	44.68%	-5.97%
2 stars	26.64%	37.60%	-10.96%
3 stars	46.19%	51.38%	-5.19%
4 stars	49.84%	51.59%	-1.75%
5 Stars	54.75%	61.17%	-6.42%
Unclassified	46.66%	58.45%	-11.79%

Self-Catering Monthly Distribution Unit Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
2019	32%	35%	37%	52%	56%	59%	64%	67%	54%	49%	33%	32%
2018	33%	39%	46%	55%	66%	65%	72%	78%	58%	57%	48%	43%

In 2019, the average peak tariff was £842.74 per week and the off peak was £832.52



MINTEL HOLIDAY RENTAL PROPERTY 2021

“UK Holiday rentals were hit hard in 2021, like all forms of tourism, but when restrictions have allowed, they have proved more resilient than other travel sectors. Holiday makers have sought out self-catering bubbles, away from the crowds, on the coast or in the country. The home has become a place of refuge during the pandemic, and this translates naturally into a preference for holiday cottages and other properties.

The staycation year of 2021 will have long term benefits for domestic rentals as consumers discover parts of the UK or try out this type of holiday for the first time. Long-term prospects are strong for both the UK and Overseas as consumers seek alternatives to hotel/resort accommodation, and travel brands see growing opportunities in this sector.”

John Worthington, Senior Analyst, Mintel, July 2021

The Market

Due to the impact of Covid 19, the volume of stays in UK holiday rental property fell by an estimated 40% in 2020, with expenditure down by 41%. However, demand for UK holiday rentals bounced back through the summer and early autumn when infection rates were low and Covid restrictions were eased, with high levels of occupancy in many rural and coastal locations.

Those glimmers of recovery have returned on a large scale since domestic holidays reopened in April 2021. The success of the UK vaccine rollout, and the continuing uncertainties and restrictions around overseas travel, are expected to result in a significant staycation year. The domestic holiday rentals market is expected to reach record levels. Mintel’s central forecast is that the volume of stays will rise by 84% in 2021, reaching 8.3 million, with an increase in associated expenditure of 110%, reaching £3.3 billion.

The domestic market is forecast to continue above pre-pandemic levels throughout 2022-2026. There is still considerable uncertainty surrounding the fight against Covid 19. Reflecting this uncertainty, Mintel has created two additional scenarios for the industry. In the rapid Covid 19 recovery scenario, we assume that the vaccination programme’s rapid rollout, alongside other control measures, allows us to return to normality even more quickly than currently expected, and that consumer’s appetite for discretionary spending rebounds strongly. In the extended Covid 19 disruption scenario we are likely to see prolonged social distancing measures and cautionary consumer spending.

Under Mintel’s rapid recovery scenario, we expect the volume and value of UK holiday rental property stays to reach 8.6 million and £3.4 billion respectively in 2021. However, in the event of extended disruption, our scenario forecasts volume and value to reach 6.7 million and £2.7 billion respectively in 2021.

The domestic market is currently expected to continue performing above pre-pandemic levels throughout the period from 2022-2026. Mintel’s central forecast is that the volume of domestic holiday rentals will be 8.4 million in 2026, with associated spending on these holidays of around £3.4 billion. However, the extent to which the value of the domestic holiday rental property market is impacted by Covid 19 and resulting measures is shown by a £700 million difference between the rapid Covid 19 recovery scenario and the extended Covid 19 disruption scenario in 2026.

Airbnb sees flights to the countryside

Airbnb has around 6 million active global accommodation listings. Its core product is city accommodation. However, during Covid 19 rural stays have grown significantly as a proportion of overall bookings. Within the UK they accounted for almost half (48%) of booking nights for June-August 2021 (as at May 2021). This compares with 23% in summer 2019.

Awaze and Sykes both report double digit growth in UK holiday cottage bookings

Within the domestic holiday cottage sector, there are a number of specialist property companies. The largest are the Awaze group and Sykes Holiday Cottages.

Awaze has around 30,000 UK places to stay via its Hoseasons brand including cottages and woodland lodges. Its Cottages.com brand offers around 21,000 holiday cottages. As of June 2021, Awaze reported that its year-to-date holiday cottage bookings were up 19% on pre pandemic levels in 2019. Sykes Holiday Cottages offers around 17,000 properties in the UK and Ireland, a portfolio which has steadily grown from 5,000 in 2015. As of June 2021, Sykes reported that its year-to-date holiday bookings were more than double compared to 2020, and 10% up on pre pandemic levels in 2019.

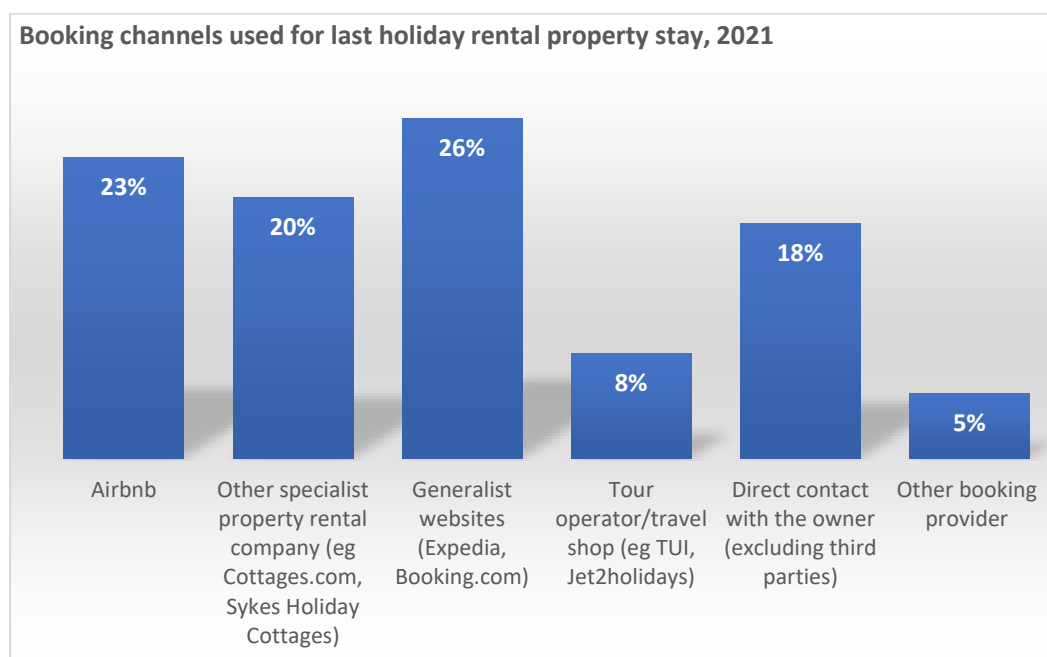
One in five consumers expect to stay in holiday rental property in 2021 and future growth potential. Rental property also has the highest growth potential of any holiday accommodation type. Some 47% of adults would be interested in staying in future, compared with 26% who have stayed in the past three years.

OTA's are extending their reach in the rentals market

Airbnb is the single largest booking channel for holiday rental property, accounting for 23% of the most recent bookings made. Other property rental specialists such as Sykes and Cottages.com accounted for 20% of bookings. Generalist online travel agents (OTA's) such as Booking.com and Expedia accounted for 26%. A comparison with Mintel's pre-pandemic booking data in 2019 shows a 5 percentage point gain in market share for generalist OTA's.

Booking channels used for last holiday rental property stay, 2021

Which of the following did you use to book the last time you rented a property for a holiday?



Base: 525 internet users aged 16+ who have stayed in a holiday rental property in the last 3 years. Source: Lightspeed/Mintel May 2021.

Pandemic pooches trigger a rise in pet-friendly properties

The three most important factors consumers look for when booking a rental property are:

1. Proximity to a beach
2. Proximity to a pub/restaurant
3. Availability of private parking

Being able to take pets is selected by 23% of those planning a domestic rental stay in 2021, a 5%

percentage point rise compared to those whose last visit was in 2019 or earlier. Sykes Holiday Cottages report that bookings for its pet friendly properties have risen by 40% in summer 2021 compared to 2019. This is likely driven by rising pet ownership during the pandemic.

Pools and hot tubs add a significant value to properties at home and abroad

Amongst those who plan to stay in a property abroad for their stay, a pool is equally important, chosen by 58%. Over a third (35%) of those intending to stay in the UK are also more likely to choose a property with a pool. Though a pool is less likely to be a feature of domestic properties, hot tubs are likely to appeal to many of this group.

Quirky properties and premium stays have strong prospects

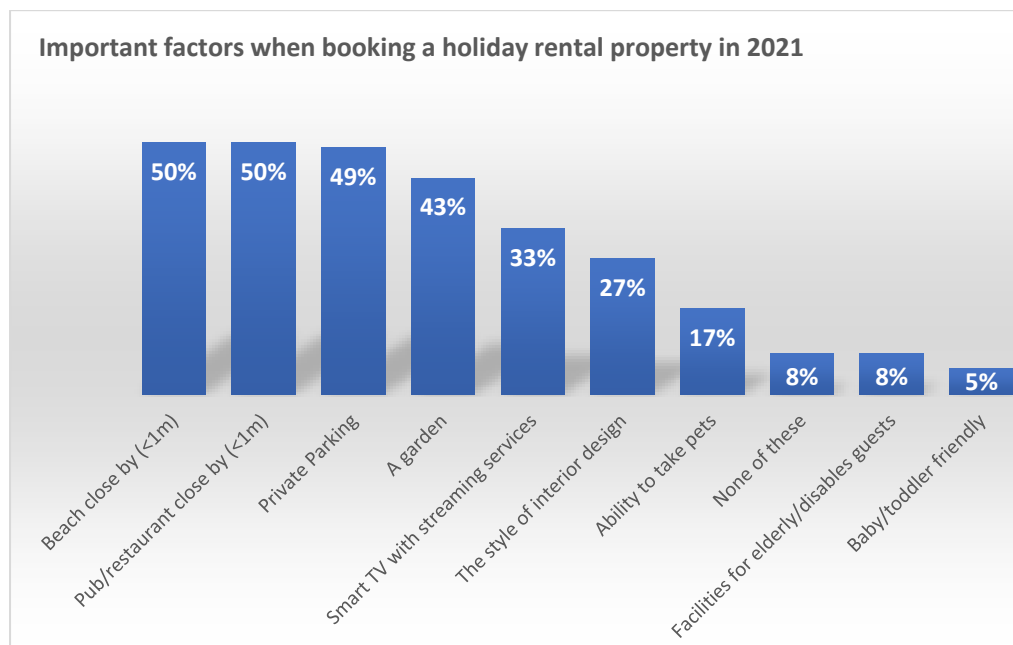
Some 35% of customers would be more likely to book an “unusual” property, for example a windmill or a lighthouse. Some 30% of potential guests would prefer a luxury/5 star property. The downturn in overseas luxury holiday travel is likely to have brought more premium spenders into the domestic rental property market. More affluent consumers have been able to save money during the pandemic and will be prepared to splash out on premium breaks, including property rentals, as the Covid-19 crisis recedes.

Pent-up demand for family celebrations

20% of guests would choose a larger property (4+ bedrooms). As Covid-19 restrictions end and household mixing becomes normal again, there is likely to be a release of pent-up demand amongst groups of friends and extended family gatherings, including those who missed out on a planned family Christmas in 2020.

Important Factors when booking a holiday rental property in 2021

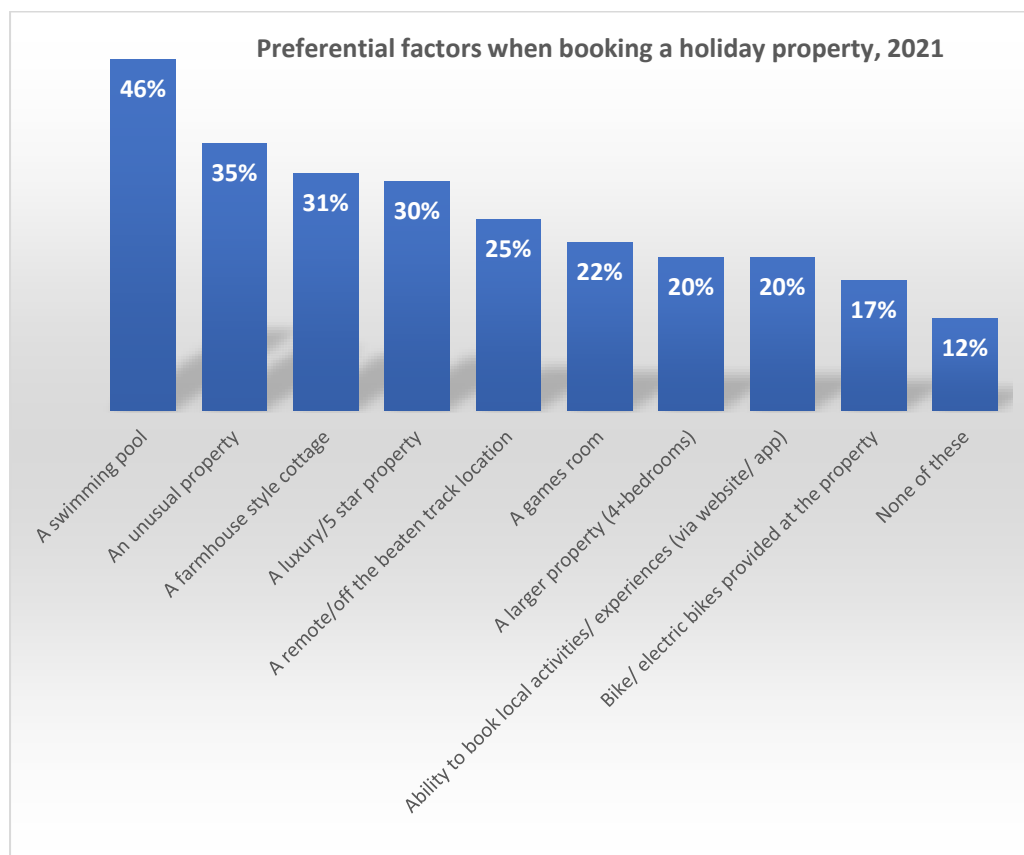
“Which of the following factors would be most important to you when booking a holiday rental property?”



Base: 957 internet users aged 16+ who would consider rental property in the future. Source Lightspeed/Mintel May 2021

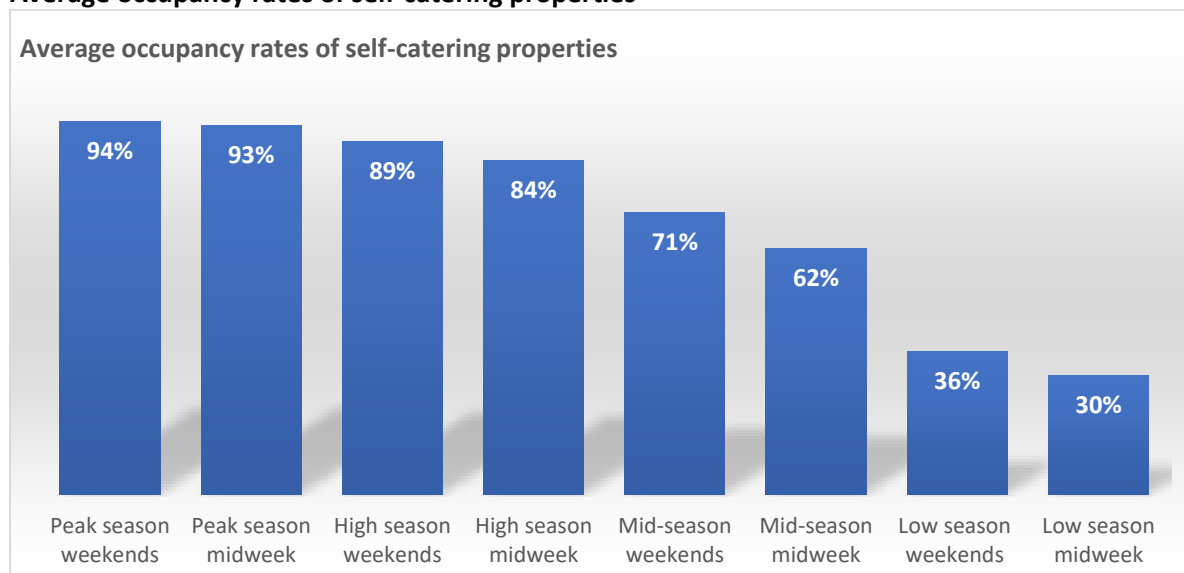
Preferential factors when booking a holiday property, 2021

“Which of the following would make you likely to choose one rental property over another for a holiday? Please select all that apply?”



Base: 957 internet users aged 16+ who would consider rental property in the future. Source Lightspeed/Mintel May 2021

Average occupancy rates of self-catering properties



Operator turnover

	2017	2018	2019	2020
Number of respondents	204	224	253	256
Average turnover	£41,037	£43,379	£47,318	£26,114
Total turnover	£8,371,632	£9,716,887	£11,971,447	£6,685,061

Property promotion

Promotion	Percentage
Website own	83%
Word of mouth/repeat	80%
Social Media	67%
Collaborative economy (Airbnb/Booking.com etc)	63%
Group Platform (Sykes etc)	49%

- Facebook - 95%
- Instagram - 52%
- LinkedIn - 13%

Green credentials

- 88% had low energy lighting
- 76% recycling facilities including composting
- 44% renewable energy source
- 24% ability to reduce carbon footprint
- 23% a green tourism accreditation

Integration with the local community

- 92% use local suppliers for local produce, cleaning and maintenance
- 80% promote local community activities
- 32% in partnership with other local providers
- 26% part of local community initiative
- 7% sell tickets for local events

Holiday Accommodation in the UK March 2021

IBIS

IBISWorld – Holiday Accommodation in the UK (Published March 2021) – I have attached pages from this report which cover the industry's Products & Markets as well as information on the Industry Outlook.

- In 2021, self-catering cottages and chalets are expected to account for 48.4% of industry revenue.
- Domestic guests are expected to account for 98.7% of industry revenue in 2020-21. This segment has benefited from the staycation trend during the past five years, as economic concerns and the sharp drop in the value of the pound after the EU referendum caused Britons to holiday in the United Kingdom rather than travelling abroad.
- Industry revenue is forecast to grow at a compound annual rate of 19.9% over the five years through 2025-26 to £2.1 billion.

MINTEL - Domestic Tourism Post Covid December 2020

Popularity of Scotland

Scotland was the second most visited domestic holiday destination in 2019, surpassing the North West of England. Scotland saw the volume of British holidaymakers increase by 31% between 2016 and 2019. Future growth rates for Scotland are expected to remain above the market average due to the higher appeal of rural escapes.

Consumers increased interest in outdoor activities and open natural spaces present the opportunity for Scotland to increase its focus on activity holidays. The younger generation can be enticed by offering adventurous activities that allow them to escape their everyday lives and to keep physically active.

Prior to Covid Growth was predominately Urban

However, Covid 19 has boosted interest in rural/countryside-based holidays while the appeal of populated areas has declined amid health concerns. Relatively high interest in cultural/historical sightseeing holidays in the UK provides opportunities to combine nature-based holidays with culture.

Working holidays provide the opportunity to reduce the dependence on short breaks

Prior to Covid 19, growth in the market came predominantly from breaks of 1-3 nights. 67.2% of domestic holidays taken by British residents in 2019 were short breaks, up from 65.5% in 2015.

Over-55s who tend to take longer domestic holidays, are less likely though in the year following July 2020. As such brands will have to entice other demographics to book longer stays.

One area of potential growth is working holidays. Employers have shown greater flexibility on working locations since Covid, enabling more travellers to stay longer at the holiday destination by combining leisure time with time spent working remotely. 42% of British employees stated that they would be interested in combining holidaying with work if their company allowed it, peaking at 55% of those aged 16-34.

Brands should make it easy for consumers to book the right accommodation for example by providing search filters for a desk, high speed Wi-Fi and so forth.

Over 55s

Over the longer term, over 55s are an important driver for growth in the domestic market. Although currently the older population are hesitant about booking holidays in the short term, over the longer

term this segment should be an important driver of growth of the domestic travel market. The number of over 50's in the UK is expected to grow by 5.5% in the period 2020-2025, while the number of people aged under 50 is expected to only grow by 0.2% according to ONS projections.

The over 55 traveller is more likely to holiday in the UK, the segment accounted for 36% of domestic holiday volume in 2019, according to GBTS figures, versus 29% of overseas travel (the segment accounts for 31% of the UK population according to ONS.) Its overall share of the domestic holiday night market was 42% and its share of domestic market expenditure reached 40% in 2019. As older consumers tend to take longer holidays compared to younger consumers (particularly over 65s), this makes them an interesting group to target over the longer term.

Impact of human activity on climate change is fuelling demand for greener travel

Reducing carbon emissions and recycling waste remain the most mentioned issues that UK travellers think travel companies should prioritise. However, 47% of UK travellers have not noticed travel companies making an effort to be sustainable. Travel companies should communicate the steps they have taken to protect the environment as well as guiding consumers by highlighting greener options in the planning and booking process.

MINTEL - Short Breaks September 2021

Future Short Break Taking

Three in four UK adults plan to take a short break in the next year. 75% of UK adults planned to take a short break in the 12 months following July 2021, which is more or less comparable to participation levels seen prior to the pandemic when 76% of UK adults took a short break.

Rural and coastal short breaks now among the most desired domestic short break types.

Prior to Covid 19, countryside and seaside breaks were roughly half as popular as city breaks.

Luxury escapes continue to be in high demand

Increased demand for luxury travel in the UK and abroad shows that there is still a consumer group willing to splash out on travel and to treat themselves. Promoting luxury short stay packages which include accommodation with private luxury amenities (sauna or hot tub) and gourmet dining are likely to appeal. Meanwhile services that help short breakers to make the most of their time will add value too, such as offering early check in and check out.

PREFERRED ACTIVITIES WHILE ON A SHORT BREAK

Activity	Percentage
Visiting places of historic and cultural interest	56%
Exploring nature and wildlife	50%
Exploring local cuisine	39%
Visiting family attractions	35%
Shopping	35%
Discovering secret places known only to locals	32%
Meeting new people	23%
Improving health	18%
None of these	4%

Opportunity to develop itineraries with a focus on both physical and mental wellness activities. 47% of those who are interested in a physical activity break, such as walking or golf, show an interest in improving health while on a short break, such as through yoga and wellness activities. 17% of those who plan to take a short break in the future say they would prefer to spend time on improving their mental health during a short break. The Mintel Trend Total Wellbeing describes how consumers are increasingly health conscious and taking a more holistic approach to their wellbeing.

Beauty/Spa treatments and physical fitness activities were the most participated health/wellness activities during health/wellness holidays. However, consumers varied interests, experience levels and motivations make it essential for brands to offer customised itineraries.

Meanwhile, 31% of wellness travellers were motivated to go on holiday to improve their health/wellness to gain an authentic cultural experience, making it the second most cited reason behind improving emotional/mental wellbeing. Destinations can capitalise on this by promoting their unique and traditional wellness practices.

PREFERRED ACTIVITIES WHILE ON A RURAL BREAK

Activity	Percentage
Visiting places of historic and cultural interest	67%
Exploring nature and wildlife	72%
Exploring local cuisine	50%
Visiting family attractions	37%
Shopping	31%
Discovering secret places known only to locals	46%
Meeting new people	24%
Improving health	22%
None of these	1%

Economic Impact of Self-Catering Sector to the Scottish Economy, August 2021
The Association of Scotland's Self Caterers and the Professional Association of Self Caterers

Scotland has:

- 17,794 properties
- 2.4 million visitors per year
- £867.1 million total visitor spend
- Supports 23,979 Full-Time jobs
- £672.3 million contribution to the Scottish economy

Areas with the greatest number of properties:

1. Highlands and the Hebrides (5,580)
2. Dunbartonshire /Argyll and Bute (2,343)
3. Lothian (1,870)
4. Tayside (1,432)
5. Dumfries and Galloway (1,386)

The Scottish Borders has 792 self-catering properties which is 5% of the total.

GROSS VISITOR SPEND BY ITEM

Item	Spend	Per Party
Accommodation fees	£414.6m	£1,024
Visitor Attractions	£21m	£39
Travel to and from property	£79.5m	£173
Travel during stay	£32.2m	£96
Food and drink (bars, cafes and restaurants)	£128.2m	£295
Food and drink in local shops	£41.5 m	£103
Food and drink supermarkets	£66.8m	£194
Other shopping	£43.8m	£111
Outdoor recreation and other sport	£32.5m	£27

Introduction

Since 2010 tourism has been the fastest growing sector in the UK in employment terms. By 2025, Britain aims to have a tourism industry worth over £257bn, supporting 3.8 million jobs. This is equivalent to almost 10% of UK GDP and around 11% of the total UK jobs.

Self-catering is an important component of this market, and this report looks at the economic benefit it brings.

AVERAGE OCCUPANCY RATES OF SELF-CATERING PROPERTIES

Period	Occupancy Percentage
Peak season weekends	94%
Peak season midweek	93%
High season weekends	89%
High season midweek	84%
Mid-season weekends	71%
Mid-season midweek	62%
Low season weekends	36%
Low season midweek	30%

OPERATOR TURNOVER

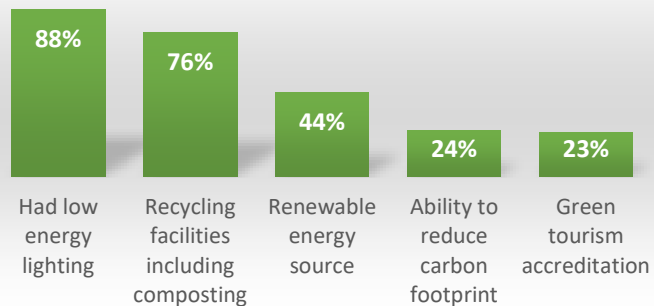
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Number of respondents	204	224	253	256
Average turnover	£41,037	£43,379	£47,318	£26,114
Total turnover	£8,371,632	£9,716,887	£11,971,447	£6,685,061

PROPERTY PROMOTION

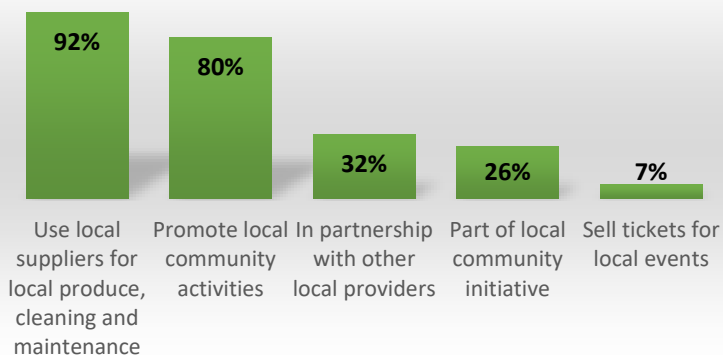
Promotion	Percentage
Website own	83%
Word of mouth/repeat	80%
Social Media	67%
Collaborative economy (Airbnb/Booking.com etc)	63%
Group Platform (Sykes etc)	49%

- Facebook - 95%
- Instagram - 52%
- LinkedIn - 13%

GREEN CREDENTIALS



INTEGRATION WITH THE LOCAL COMMUNITY



Sykes Scotland Staycation Index 2021

From Sykes Booking Data for 2021

- The Scottish Highlands was voted the fourth most popular holiday destination within the UK this year.
- British holidaymakers are set to boost Scotland's economy by 16 billion in 2021.

People book Scotland for:

1. Beautiful scenery
 2. Amazing wildlife
 3. Friendly people
- Bookings for Sykes Cottages were up 22% over the summer period and are currently up 46% during autumn and winter 2021 compared to 2019.
 - Almost a quarter (24%) of Scottish adults said they are more likely to consider setting up a holiday now compared to before the pandemic.

The 10 most popular regions for travel in Scotland in 2021 were:

1. The Highlands
2. Dumfries and Galloway
3. Scottish Borders
4. Aberdeenshire
5. Argyll and Bute
6. Perth and Kinross
7. Moray
8. Fife
9. South Ayrshire
10. Angus

The top three most popular destinations in Scotland for autumn 2021 are:

1. Southernness
2. Newtonmore
3. Granton-on -Spey

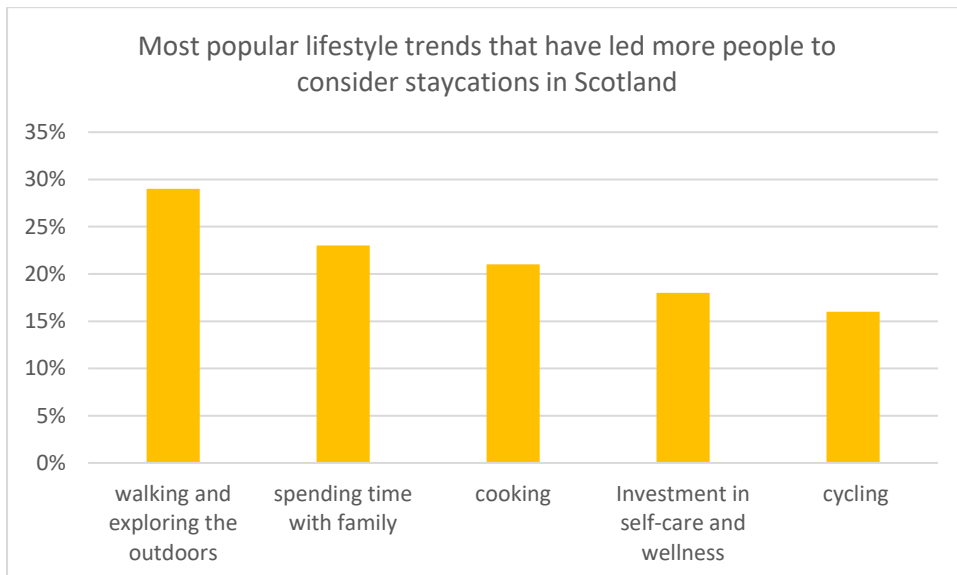
The most popular regions for short breaks (2-3nights) in winter 2021:

1. The Highlands
2. Perth and Kinross
3. Aberdeenshire

The top five things influencing choice of staycation accommodation in Scotland are proximity to:

1. Walking routes
2. Restaurants
3. Lochs
4. Rural wildlife
5. Shops

Guests are looking for a little luxury with 59% increase in bookings for our luxury properties in Scotland compared to 2019.



Source Sykes Booking Data for 2021

Scotland has year-round appeal, as our research shows a 25% increase in winter staycations compared to 2019.

Almost 24% of respondents would now consider a skiing holiday in Scotland this winter.

Investment hotspots

Analysis of the return in investment for holiday homes in Scotland vs buy-to-lets

Top Five Hot Spots

1. Ayrshire
2. Fife
3. Scottish Borders
4. Highlands and Islands
5. Dumfries and Galloway

Debunking the Millennial Myth

The Millennial generation is one of the largest demographic groupings in history - but just who are Millennials, what are they looking for when they travel, and what can Scotland offers that meets their specific needs?

Although dating is not precise, most researchers regard Millennials (also known as Generation Y) as people born in the 1980s to the early 2000s. Therefore, in 2020, this represents a group ranging in age from around 18 to 36 years.

However, from a tourism marketing perspective, it's important to remember that age alone does not create a uniform group with a single, common set of values and behaviours. To fully understand what makes this "Millennial" market tick, we also need to consider experience, maturity and circumstance - while these factors can be influenced by age, they are not specific to it. Indeed, within this relatively wide age group we find an equally wide cross section of life and career stages, levels of disposable income, amounts of free time, personal interests, and attitudes.

In other words, while this group may be a single Millennial generation, they are all individuals too. In this section we refer to them simply as "young" or "younger".

Overview

- Not all young people are the same. They have different beliefs and values, and age alone is not a determinant of behaviour, experience and maturity.
- Young people seek both escapism and reassurance in many forms. They have a desire to stand out...but also to fit in, especially at the younger end of the age group, as their true sense of self develops.
- Life is about achieving a balance so that experiences can be maximised and for younger people, brands that share their values can help to elevate their self-worth.

Critical factors for younger people's travel journeys are:

New - discovering things for the first time.

Braggable - being seen as ahead of the curve is important.

Value for money - income may not match the desire for new experiences.

Unique - seeking out experiences that are specific to destinations.

Younger visitors view Scotland in much the same way as all domestic tourists - they are attracted by the natural beauty of the landscape, the buzz and the culture of the cities, the opportunity for outdoor adventure and the reputation of a warm welcome. However, they are put off by a perceived lack of excitement and talkability as well as a lack of awareness of destinations beyond the typical and of course the weather.

Key Statistics

- In 2018, the overall 16-34 year old market generated 4 million trips, 17.2 million nights and £1.253 bn in Scotland. They spent on average £310 per trip, £73 per night and stayed in Scotland for 4.3 nights.
- Domestic 16-34 year old visitors to Scotland generated 2.8 million trips, 8.7 million nights and £658m in expenditure in 2018. On average, these young domestic visitors spent £234 per trip, £75 per night, and stayed in Scotland for 3.1 nights in 2018.

Is age more than a number?

Younger	Older
The younger end of this demographic are often dealing with the contradictory forces of both wanting to belong and yet craving independence while their true sense of self-worth is developing. As a result, the characteristics that this group shares may include:	More likely to have established a stronger sense of self. New relationships, a sense of success and new opportunities mean they are less dependent on peers. This group's perspective is likely to have become more pragmatic and also more open, reflecting both their increased responsibilities and also their growth in self-worth. The characteristics they share may include:
<ul style="list-style-type: none"> • More mainstream attitudes and less certainty around choices. 	<ul style="list-style-type: none"> • More disposable income so more experimentation with brands and experiences.
<ul style="list-style-type: none"> • More accepting of peer influence but less consciously so. 	<ul style="list-style-type: none"> • More responsibilities and the development of their own rules or guidelines to provide structure.
<ul style="list-style-type: none"> • More tribal in outlook, defining themselves through established codes. 	<ul style="list-style-type: none"> • Developing and sharing cultural ideas, taking as much pride in the sharing as in knowledge building.
<ul style="list-style-type: none"> • More first experiences – this is the norm at this stage. 	<ul style="list-style-type: none"> • More consistent in likes and dislikes and in sources of inspiration used.
<ul style="list-style-type: none"> • Ingesting culture and consuming trends and opinions, then recreating them as their own. 	
<ul style="list-style-type: none"> • Easily influenced and open to new trends and beliefs - fickle. 	
<ul style="list-style-type: none"> • Rejecting preceding generations to forge their own path. 	

What do younger people look for in a mini break?

Mini breaks provide an ideal opportunity for all travellers to explore new places and absorb new experiences and cultures and then broadcast their discoveries.

The young traveller journey

<p>Inspiration Seek inspiration from like-minded people online first (like and comment on social media) before seeking external views (talk to friends, family and colleagues, watch films and TV, read books and adverts, consult the experts via search engines.)</p>
<p>Planning Start planning - by looking for reassurance on value for money (investigate online reviews, qualify findings by asking friends and social media contacts) before booking (filter through travel and accommodation brands, connect and commit.)</p>
<p>On Holiday On holiday, make the most of everything to maximise the whole experience. Talk to locals and staff, get advice from tourist information centres, impress close friends via social media.</p>
<p>Post-Holiday Sell the experience and reinforce the memories (document on Facebook and broadcast on Instagram) by creating conversations and stories, and adapting social status (advise the wider world through Trip Advisor, share stories with friends, families and colleagues and create photo and gift products)</p>

What Factors are Critical to the Journey

New - originality for travellers

"I'm never really the first to do anything, but it's important to look as if you are – you don't want to be a sheep." Early 20's without children.

Value for Money - Young travellers are adept at seeking out deals and signing up for offers that keep them in the know.

"It was out of season, so it was really quiet. It was actually really nice to hang out with each other and switch off." 25-35 year old without children.

Braggable - staying in a log cabin rather than a hotel for example.

"I tend not to post these things on social media, but I can't help wanting to tell everyone if it's a really amazing experience." 25-35 year old with children.

Unique - different

"I don't want to stay in a hotel chain, so I tend to use Airbnb. Where you stay is part of the energy of the place." Early 20's without children.

Walking VisitScotland

June 2017

Overview

Short walks/strolls up to 2 hours are the preferred activity with domestic tourists when in Scotland, with 48% more trips including a short walk than those trips that included longer walks.

Consumer Profile

Gender	Short Walk/stroll up to 2 miles/1 hour	Long walk, hike or ramble min 2 miles/1 hour
Male	48%	46%
Female	52%	54%

Age of Visitors who participated in walking when in Scotland

Age	Long walk	Short Walk
65 plus	12%	21%
55-64	23%	22%
45-54	21%	19%
35 – 44	18%	19%
25 -34	17%	12%
16 -24	9%	7%

Walking visitors to Scotland are most likely to be female, however the gender gap is slightly more pronounced in the long walking market. The largest age group of walkers are 55-64 and 45 -54 for both the long and short walking markets. 25 – 34-year-old make up a larger share of the long walking market than the short walking market. Those over the age of 65 have a larger share in the short walking market than the long. Millennials make up 26% of visitors who participate in long walks and 19% of visitors who participate in short walks when in Scotland.

Places Visited and Accommodation

Types of place visited

Place	Trips (000's)
Seaside	593
Large City/town	1427
Small town	1268
Countryside/Village	1150

Accommodation

Accommodation	Short Walk/Stroll	Long Walk/hike
Hotel	30%	28%
Friends and Relatives	29%	24%
Self-Catering	20%	26%
BB	6%	7%
Caravan towed	5%	6%
Camping	3%	5%

Day Visitor - Activity

Day Visit Activity	Visits (000s)	Spend (£M)	Average daily spend (£)
Short walk	8,000	298	37
Long walk	7,000	136	19

Participation in walking when in Scotland is high and this is demonstrated by the popularity of the walking pages on VisitScotland's website. Walking is the second most popular activity page viewed.

Tourism Trends

With growth being identified in the health and wellbeing tourism sector, walking as part of a holiday looks as if it could become more popular. The walking industry could promote itself not just through the fantastic landscapes that it boasts but also through the health benefits that walking can give the participant. As Scotland could be seen as one of the **quietest** places in Europe. We have the right of access policy benefiting walkers and outdoor enthusiasts, getting out for a walk in the countryside can provide advantages to the mind as well as the body.

Insight Department: Cycling Tourism in Scotland

Gender	Road/surfaced path	Mountain Biking
Male	52%	76%
Female	48%	24%

Age

Age	Road/surfaced path	Mountain Biking
16-24	8%	14%
25-34	10%	19%
35-44	32%	29%
45-54	28%	25%
55-64	14%	11%
65 plus	8%	2%

Accommodation Used

Accommodation Type	On road/path	Mountain Biking
Self-Catering	20%	9%
Friend/relative	18%	15%
Hotel	17%	20%
Caravan (towed)	9%	13%
Holiday camp/Village self-catering	7%	0%
Static caravan not owned	6%	
Camping	6%	15%
B&B	0%	6%

Milestone birthdays are the most popular reason for a special occasion holiday

Over half (54%) of consumers have taken a holiday to mark a special occasion over the past five years. Mintel’s research indicates that 69% of those who have taken a special occasion holiday have done so to mark their own event, while 41% have done so to celebrate someone else’s event.

Birthdays are the most popular reason. Some 35% of adults have taken a break to celebrate a birthday over the past five years. Milestone birthdays are especially popular 25% of adults have been away to mark a birthday over the past five years (such as a wedding or first date). Amongst those living in couples almost one in three (29%) have done so.

Birthdays and anniversary holidays are popular across all age groups.

12% of adults have taken a holiday for a “marital occasion” in the past five years

Some 12% of adults have been on a holiday rental related to marital occasions over the past five years: this includes 6% who have been away on a honeymoon, 6% on a stag/hen break and 2% who have taken a trip to mark the renewal of their vows.

Marital occasions are heavily weighted towards younger age groups. Some 19% of under 45s (and 5% of over 45s) have been on holiday for these reasons. Those aged 25-34 are the most likely age group to do so: 25% have taken a trip for one of these reasons over the past five years; 12% of 25-34s have been away on honeymoon; 15% have been on a stag/hen break; 5% have been away to mark the renewal of their wedding vows. However, demographic trends suggest the biggest potential for growth may lie amongst older couples.

Special Occasion Holidays over the past 5 Years October 2019

Reason	percentage
A milestone birthday	25%
Relationship anniversary	18%
Any other birthday	16%
Educational achievement	7%
Stag/Hen celebration	6%
Honeymoon	6%
New job/work promotion	5%
Retirement	4%
Pregnancy/giving birth	4%
Renewal of wedding vows	2%
None of these	46%

Birth Breaks

Birth is a significant opportunity for tourism companies: 21% of parents with children under the age of 5 have taken a holiday to celebrate either pregnancy or giving birth over the past five years. This category could also include so called babymoos taken during pregnancy and breaks taken after the event itself. Canopy and Stars offer babymoon glamping holidays.

Celebrating success

Some 7% of adults as a whole have taken a holiday to mark an educational achievement such as graduation. Amongst those aged 16-24 as many as 21% have done so in the past five years. This may include a gap year travel, as well as shorter trips to celebrate the completion of studies.

Travel to celebrate a new job or promotion is also more likely amongst those in the earliest stage of their careers. Some 11% of under 35s have done so over the past five years (compared with 3% of those aged 35-64).

Multiple Celebrations

Some 30% of consumers have been on one type of special occasion holiday in the past five years. 15% have been on two types and 9% have been on three or more different types of celebration break. Those who take trips to mark a variety of occasions are most likely to be under 35s (peaking in the 25-34 group), ABs those with household income above £50k and younger parents.

Amongst those who have been away to celebrate a milestone birthday over the past five years, 22% have also taken a break to mark a normal birthday (compared to 16% of adults overall) and 26% have been away for a relationship anniversary (compared with 18% overall).

Some 25% of honeymooners over the past five years have also been on a stag/hen weekend, 38% have been away to mark a relationship anniversary and 18% have taken a break to celebrate pregnancy or giving birth. Some 11% of honeymooners even say they have already been away to mark the renewal of their wedding vows. There is great scope here to offer a portfolio of products, special offers and expert advice to people who are likely to celebrate a succession of occasions by going away for a series of short breaks and/or longer holidays.

APPENDIX 2 – COMPETITOR AUDIT

BROCKLOCH

www.brockloch.co.uk

Kirkpatrick, Dumfries & Galloway

BRAND - Simple square wood effect reflecting the strapline of 'Eco Retreat' and the build ethos.

PRODUCT DESCRIPTION

Brockloch Bothy is a contemporary micro timber framed building which has been sympathetically designed to complement its surroundings. Sleeps 2 adults and 2 children.



Brockloch Treehouse is designed as a cosy romantic hideaway for 2 people. It nestles in a Bluebell wood surrounded by native broadleaved trees and the odd red squirrel. The built-in double bed also has a skylight to gaze at the treetops and stars as you drift off to sleep.

Both these properties are off grid. The farm consists of 190 acres of unbroken scenery where red kites, red squirrels, deer and badgers are regular visitors.

Eco Credentials

- Sustainable timber
- Sheep's wool insulation
- Wood burning stove
- Solar powered radio
- Environmentally friendly paint throughout
- Wool mattress
- Natural goose down duvets
- 2 large solar panels (which provide enough electricity to charge a phone and a laptop and low voltage lighting)



GRADING – listed with VisitScotland but not graded

WEBSITE - An easy to navigate website which is clean and reflects the brand. As with many websites looked at it is not maintained on a regular basis and guest reviews refer to 2015. It would appear from the website that the businesses is inactive but looking at the likes of Canopy & Stars suspect most of the bookings are coming for agency channels.

SOCIAL MEDIA - Social media accounts are out of date.

PHOTOGRAPHY

They have some excellent photography, and it has been well invested in highlighting the eco features and design of these properties. On the website however, they are not really being used to the full potential as they are hidden in smaller images and on galleries which are not obvious. The images however are used consistently on other websites promoting the business such as Canopy and Stars.

PRESS

There is a page dedicated to press on their website which does highlight a wide range of articles, however like guest reviews these are dated 2015 and 2014 therefore are not current.

Coverage included – links on the website to each.

*Brockloch Treehouse made the Guardian's **Top 20** new hotel, hostel and campsites in mainland Europe and the UK for 2015.*

Brockloch Bothy featured in the first series of the Channel 4 show "George Clarke's Amazing Spaces" – Series 1 Episode 3

PRICE (as per Canopy & Stars)

Treehouse	Bothy
2 nights £350	3 nights £415
3 nights £525	7 nights £665
4 nights £700	
5 nights £875	
6 nights £1050	
7 nights £1225	

OCCUPANCY – Fully booked in both properties till March 2022.

AGENCY AND BOOKING SITES Canopy and Stars VisitScotland

KEY LEARNINGS AND INNOVATIONS

- Like many of the other businesses in this audit, invest money in good photography and use consistently to tell the story.
- Also as mentioned throughout, ensure the website and social media is current and updated regularly and speaking to the target audience. Testimonials should be up to date or not dated as with social media you are better shutting a social media account down rather than seeing it was last updated in 2018. The consumer will question if you are still in business.
- If for businesses reasons want to use agencies only do not have a website which offers booking facilities and not being updated.

COILLABUS ECOLUXURY LODGES

www.coillabus.com

Port Ellen, Islay – Argyll

sleeps 2/4

BRAND – the brand is a line etching with a strapline of ecoluxury lodges.

PRODUCT DESCRIPTION

"Architect designed turf-roofed, stone-clad lodges with luxurious interiors and outdoor Star Tubs - Romantic retreats on Islay's beautiful Oa peninsula."



Set high in the hills, the lodges

look out over the RSPB reserve nearby, so watching the local wildlife is sure to be a part of your stay.

Two lodges offering 2 bedrooms each. Designed to fit into the natural landscape.

GRADING – 5 star VisitScotland

WEBSITE - Big photographs on each page. The home page show who and what they are targeting:

Accommodation

- Islay
- Romance
- Food
- Celebrations
- Gifts
- Gallery
- Tariff
- Eco-tourism

SOCIAL MEDIA

The Facebook page has limited interaction and not as pro-active as other businesses of similar quality. The Twitter page has a following however like Facebook is ad hoc. Islay as an island has a strong Twitter following and they support each other so they are missing a trick

PRICE

High season 7 night stays April to October. Check out our flexible start dates - £1,950 per week for couples and £2,150 for 3-4 guests. Occasional short break slots arise.

Low season 7 night stays from November to March from £1,300 per week. Occasional short break slots arise.

OCCUPANCY - sitting at less than 40%

KEY LEARNINGS AND INNOVATIONS

- They have thought about their customer market with couples specifically in mind so mention bath robes, double end bath and saunas. Plus, they offer honeymoon packages.
- They are featured in the 100 best places to stay in Scotland and on the website one off places. The latter sounds like a website that would have really unique properties on it. It doesn't but that said if you did have a unique property you would really stand out.

CROFT 103

www.croft103.com

Durness

BRAND

As a family based in Durness 'the Mackay' family run a number of tourism businesses where the two luxury self-catering products go under the brand of Croft103 and they have recently introduced the 'By Mackay's' as a strapline. The introduction of a stags head sits as the brand image. That all said the use of 'Croft103' with the agencies means that the name is now quite recognised to the target audience.



PRODUCT DESCRIPTION

Luxury self-catering accommodation on the shores of Loch Eriboll near Durness in North-West Sutherland, Scotland - an area of unparalleled natural beauty. These stunning low impact buildings benefit from the very best in traditional craftsmanship and cutting-edge contemporary design. At Croft 103, Fiona and Robbie Mackay have created the ultimate escape for couples who want to be a world away from it all-together.

Croft 103 is completely private our guests are never disturbed however we are on-site daily should you need help with anything or require personal attention.

2 luxury purpose built, private self-catering cottages.

*Featuring a stunning fan-shaped design, **The Hill Cottage** perfectly complements the contours of the surrounding glacial landscape.*

*A bold, barrel-shaped building, **The Shore Cottage** offers spectacular, constantly changing views of sea, sky and mountain. A sense of space, light and tranquillity flood the apartment from morning to nightfall.*

Property features include

- A state-of-the-art home entertainment system, Sky package and Wi-Fi means you'll have plenty to keep you busy when the night gets inky black.
- Kitchen worktops are gorgeous - hand finished in Caithness stone and a commissioned dining table.
- 7ft bed, floor to ceiling windows, seating and furniture situated and designed to make the most of the views and setting.
- Hill Cottage has two baths – both designed to accommodate two people – one of which is outdoors on the secluded patio area overlooking the sea.
- Each property has been where possible decorated using local crafts and materials, be it work tops, stonework, textiles, ceramics and artwork.

Eco living and sustainability are also a key feature of this business. For example, it is stated owners Robbie and Fiona are passionate about the environment and both cottages are carbon negative courtesy of wind turbines, solar panels and local sheep, whose wool insulates the roofs

GRADING – 5 star VisitScotland

WEBSITE

This is a lovely website which truly sets the scene and communicates a quality product and a relaxing break. The site is simple and easy to navigate and compliments the product in its simplicity. The Mackay's clearly care and have worked hard to build this business and tell the story well and thoroughly understand what type of holiday their target audience are looking for through images and short concise copy. The online booking portal Supercontrol does not site well on the site, however this is an issue with online booking platforms rather than the business. The customer reviews however are out of date and this simply dates the business and gives the impression of lost focus.

SOCIAL MEDIA

Facebook, Twitter and Instagram. The Twitter page has not been updated for years and should be deleted; Facebook is good when there are posts but they are ad hoc. The Instagram has not been updated since 2019. All three accounts should be worked harder as this is a cost effective means to promote a business and ultimately could result in a reduced reliance on agencies to generate business. Given their location and quality of the photography they should be maximising the use of Instagram

PHOTOGRAPHY

Excellent use of photography to set the scene. Professional images of quality furniture positioned to take in the views, images of key fittings such local materials, all communicate the holiday experience without words. This photography has also consistently been used in partner and agency websites to consistently communicate the same core messages.

PRESS

Good press coverage in luxury publications and press has been achieved over the years. All of these are out of date, many achieved through the partnership and agencies the business works with. On Facebook they show recent coverage on Airbnb, but they have not put that on the website

PRICE

On the website – 2021/2022 - Rental is weekly only (Sat – Sat) from £1,980.

AGENCIES – BOOKING SITES

VisitScotland

i-escapes

Cool Stays

Cool Cottages

KEY LEARINGS AND INNOVATIONS

- This business has clearly worked hard to build and develop this quality holiday experience. Trip Advisor reviews are exceptional where many guests are describing the experience as 'world class'. Word of mouth is very important, and equally important at this level is to exceed visitors expectations as this business clearly is. We would recommend looking at the Trip Advisor comments for this business.
- This is a very good example of making the most of the location and setting. Also using 'local' quality products and producers to create a unique experience. Professional photography used effectively to communicate these messages.
- This is a good example of promoting eco credentials so worth looking at the website.
- Though they do need to update their website with more recent press coverage and either use the social media accounts they have or delete them.

WILD HART BARN

www.thewildhart.co.uk/

Patterdale near Penrith, Lake District

BRAND IDENTITY

Brand identity is good and links to the fact that Hartsop is valley of the deer. Use the strapline Stylish Lakeland Escapes

Hartsop means "valley of the deer" (which has inspired many of the touches and artwork in Hart Barn) including of course the antlers that have been used within the logo itself.



PRODUCT DESCRIPTION

When we first looked at this property business, it only had Hart Barn but they have now added two other cottages to their portfolio. Hartbarn and Hares Garth are properties for two people while Stone Cottage has four bedrooms for families.

Each of the properties are beautiful and designed with comfort and luxury in mind. It is worth looking at the specification for each one.

PRICES

Stone Cottage – from £775 - £1,540	sleeps 2-6
Hares Garth – from £625 - £875	sleeps 2/3
Hart Barn – from £625 - £895	sleeps 2

All three properties have no availability till October 2022.

Website

Website is really good and easy to navigate with good photography which clearly showcases the quality of the accommodation with good photography.

Social Media

They use Facebook and Instagram and are a really good example of how to sell the destination as well as their property.

KEY LEARNINGS/INNOVATIONS

- This is a really good example of showing your love of the destination which they do on the website and also via their Facebook page. The website conveys this would be a luxury stay but also that the owners love where they live are passionate about walking and the Lakes and share that with guests.
- On the website they have dedicated a whole section on the use of local crafts and artwork, and they showcase the work they have commissioned within the property which they describe as a 'living gallery'. From the railway sleeper staircase treads to the glass chandeliers this promotes the beautiful features within the property, and they also include details and links for the craftworkers themselves. A brilliant example of working with other local businesses to mutual benefit. 'It is our passion to seek out and support local craftspeople and artists – this is at the heart and soul of Hart Barn.'
- *Hotel-style service - we can arrange for interim cleans, change of linen & towels, even if only having a week's stay. Three Michelin starred restaurants are within 50-minute drive plus some other super little places which we can recommend.*

- *Honeymoon heaven - extras such as champagne, hampers and handmade chocolates can be included, as well as advice on where to go for a special meal and help organising the taxi if required.*
- *Why use the car? A myriad of walks on the doorstep with loads of walking guides provided - plus we can help with arrangements and offer an exclusive discount if choosing to stay and be car free.*
- *Local produce and meals can be ordered, breakfast can even be supplied. We are on hand and happy to help with ingredients for your culinary masterpieces if you just need some Sumac to make the Ottolenghi dish you have never attempted before!*
- *The barn showcases local contemporary arts and crafts. Fancy making something to take home? We can help find courses from creative cookery to willow weaving to accompany your stay.*

SEALOCH HOUSE

Ullapool

www.sealochhouse.co.uk

www.waterfell.co.uk

BRAND - They have a brand which depicts the setting of the house with trees and Loch Broom. This is used consistently throughout the website. They now have a guest house in Ullapool and the sister brand mirrors and compliments this one. There is no strapline to accompany the brand.

PRODUCT DESCRIPTION

Sealoch House is the perfect base for exploring the magnificent Wester Ross region and has been developed to pamper you with many large windows, a woodburner, a freestanding bath overlooking the loch, modern kitchen with quality fittings, 3 bedrooms each having luxury en-suite facilities, a grass roof, natural timber cladding and all the modern conveniences needed to allow visitors to really immerse themselves in this wonderful location. One of the bedrooms has a bath in the room which looks in the photo very close to the bed although you can see that it has wonderful views, although the proximity to the bed could be off putting.



For 2021 they have a built a new house for couples called Waterfell, architecturally designed by Eco Living.



GRADING - They are not graded but state on their website that they are graded by their visitors as five stars. There is no background behind how they can justify this.

WEBSITE - The website is very comprehensive with good use of photography and links both properties. It is clean and easy to follow and navigate and also good use of customer testimonials.

SOCIAL MEDIA - They have a Facebook page with 781 likes on it. The page is updated frequently and they have showed the building of Waterfell all the way through to opening which is a really good idea and worth taking a look at this as we recommend that you also do this.

PHOTOGRAPHY - Use the same photographer as Stonehouses so the destination images are similar. The photography is good but maybe better to use an alternative photographer to stand out more?

PRICES 2022: Per week and by season and short break rates

Sealoch Minimum stay 4 nights off season £165 per night. Weekly rates from £875 to £1,595 sleeps 6

Waterfell Minimum stay 4 nights £125 per night Weekly rates from £695 to £1,150 sleeps 2

OCCUPANCY - Sealoch is almost fully booked for 2022 with only December available. Waterfell as a new property does have more availability though is fully booked for November 2021 and May and June 2022. This is because it is a new property.

AGENCIES – BOOKING SITES

Coolstays

Elite Cottages

VisitScotland

KEY LEARNINGS AND INNOVATIONS

- They have been in business since 2016 and their first property has nearly 100% occupancy for 2022 with good reviews and it is likely their new property will also reach this level but probably even faster.
- Website is easy to navigate.
- It is a good example of a custom designed property(s) in beautiful settings.

STONEHOUSES

www.thestonehouses.co.uk

Ullapool, Highlands

BRAND

The Brand graphic is in the shape of an S (stonehouses) and the design replicates the stone building technique that is used. There is no strapline but the brand is used consistently.

PRODUCT DESCRIPTION

“Nestled into a hillside above the beautiful North Highland village of Ullapool, sit two stunning five-star holiday retreats. Built, or should we say sculpted, from stone, turf and glass, these retreats have been created to provide a truly unique and luxurious holiday experience.”

Treetop House sleeps 4,
Curved Stone sleeps 4
(see website for floor plans)

GRADING - 5 Star
VisitScotland Grading



WEBSITE

Very informative website and good use of photography. The website has been designed by an Edinburgh web company that also do websites for Gleneagles, BAA and EXO Travel. It really makes you want to visit.

SOCIAL MEDIA

They have a Facebook Page with 2,455 likes on it. Last time we looked at this property they updated on a regular basis. The page has not been updated since March this year 2021.

PRICES: Per week and by season and short break rates

Prices from £930 to £2240 from 3 nights to 7 nights at peak times.

OCCUPANCY - Almost fully booked in both properties

AGENCIES – BOOKING SITES

Sawdays

VisitScotland

Quirky Accommodation

KEY LEARNINGS AND INNOVATIONS

- Without exception all of the reviews on Trip Advisor mention the owners and the great customer service. Obviously, the luxury of the properties is also mentioned but it is evident that the warm welcome and the customer service is also a key reason why these properties are so successful. Their vision is to offer a personal touch whilst observing your privacy which is just ideal.
- They make a stand out feature of the bathroom with its views over Loch Broom and also the state-of-the-art showers.
- Overall, this is a top-quality self-catering business with fantastic occupancy figures and feedback from guests. As well as the luxury of the properties as previously stated guests enjoy the provenance and quality of the welcome packs and the genuine welcome from the owners. Personally, the second property is very close to the first and I wouldn't want to be as close, but their occupancy figures are not reflecting this.

THE NET STORE

www.thenetstore.com

Ardheslaig, Applecross, Highlands

BRAND

No real brand as such but consistency of name and grey/white muted colour palette has been used throughout the website. There is no brand strapline either.

PRODUCT DESCRIPTION

The Net Store is a holiday house completed in 2014 on the shores of Loch Beag on the Applecross Peninsula. Sleeping 4, it sits by the sea **on the site of a former fisherman's net store**. It has been designed to take advantage of the ever-changing views across the Minch to the Hebrides and allow you to absorb the daily activity of the quiet fishing village of Ardheslaig. It is approximately 70 miles from Inverness where the nearest airport is located.

"From the moment we walked through the door, we haven't stopped saying "wow" all week! The ever changing views are breathtaking and addictive and the house is everything we hoped for. We love the design, energy efficient features and thoughtful attention to detail. The craftsmanship of the build is excellent and the finished have clearly been well thought from the beginning. We have never stayed in a holiday home that is so well equipped and provided with such a wide range of store cupboard ingredients. We have loved exploring the local countryside and have enjoyed walks, beach combing and driving to remote spots. "

Belinda and John, Maurice and Gary, Suffolk and Shropshire, May 2019

OPEN PLAN KITCHEN, DINING AND LIVING AREA overlooking Loch Beag. The kitchen is equipped with Neff appliances, Dualit toaster and Quooker boiling water tap.

TWO BEDROOMS (one king, one twin/super king) with Hypnos beds, Egyptian cotton bedding, duck feather and down duvet and mattress toppers and built in wardrobe storage.

BATHROOM and EN-SUITE SHOWER ROOM with marble tiles, underfloor heating and walk-in waterfall shower.

GALLERY with sea and hill views.



OTHER FEATURES include a wall mounted flat screen SMART TV with Netflix, wireless internet connection, board games, wood burning stove, oak floors with underfloor heating, utility area with washing machine, tumble dryer, clothes pulley, iron and ironing board and teak outdoor furniture.

WEBSITE

Like the property, the website is clean and minimalist in style. Very 'Scandi chic' and the use of a white and muted grey colour palette matches the property completely and presents the photography very well. Easy to navigate and book with plenty of reviews.

One negative is that the owners do not feature with a photograph - this could have personalised the site and given it more of a warm welcome. They are named extensively in reviews.

Good 'see and do' section with links to recommended eating out, shops and attractions in the local area.

PHOTOGRAPHY

The photography is very good and has been carefully and tastefully staged by professional photographers. As well as showing the properties, the space, the light and the design features they have also managed to capture nice little local details too. The property is on the site of an old fishermen's net store (hence the name) and there are lovely prints of fishermen mending nets as well as what looks like old memorabilia framed up. There are also old wooden boxes from Iona and other nice local touches which give a nod to the heritage of the location and site.

PRICES: Per week and by season and short break rates

- Bookings are for 7 nights from Friday to Friday. Prices per week range from £1,400 in low season to £1,900 in high season.
- Parts of the property are located less than 3m from the sea and there is a steep drop to water level, which varies according to the state of the tide. For this reason, The Net Store is not suitable for children under the age of 10.
- No smoking and no pets.
- Linen and towels are provided.
- Electricity, logs and wireless internet use are included in the price.

OCCUPANCY - This property is fully booked for 2022 and into 2023.

AGENCIES – BOOKING SITES

VisitScotland

Sawday's

'Prepare to stare. Perched 10 feet from the shores of Loch Beag, this house is a dazzle of windows designed to make the most of the views: across the Minch to the Hebrides, to the mountains on the far side of Loch Torridon, plus non-stop sea life and birdlife. While outside is wild nature, inside is calm, crisp minimalism: walls are white, floors are pale oak, decoration is spare. The smooth, Scandi-chic look is softened with deerskin rugs, leather sofas and wool headboards. Choose between the downstairs bedroom with patio doors to the loch and the larger upstairs room with huge Velux to capture the hills and night sky. Linen and beds are top-notch as are the white-marble bathrooms. The open-plan, double-height living space is dominated by a floor-to-ceiling window – those views, again – and scattered with sofas, designer armchairs, bookshelves and a wood-burning stove. For cosiness, curl on the sofa on the mezzanine-level sitting area. The kitchen is a hi-tech gleam of everything you could need, with a handsome oak table for loch-view dining. There's a patio for sunset drinks. Walk, swim, fish or simply gaze.'

KEY LEARNINGS AND INNOVATIONS

- This property is out of the norm - from its quirky name that has been inspired by its former origins to its minimalist design and styling.
- This business has known the type of customer that it wanted to attract from the off-set and has clearly been very successful in achieving it. The reviews, occupancy and press coverage illustrate this and of course the location and views are world class albeit somewhere that you would have to make a real effort to get to. Yes, it is possible to fly into Inverness and then drive 70 miles but nevertheless this is a destination product and accommodation that bucks the trend for self-catering. With a combination of superb accommodation and superb location, guests will seek it out and make the effort.

THE SOUND OF HARRIS

www.soundofharris.co.uk

Harris, Outer Hebrides

BRAND - The brand is reflective of Harris landscape and the interior colours of both houses but not reflective of the exterior of the building.

PRODUCT DESCRIPTION

Our self-catering accommodation comprises two separate adjoined units (The Big House and The Other House), both with private access and separate outside seating area. Each is based around a light and spacious open plan kitchen/living/dining area linked to a single en-suite bedroom with king size bed. The seaward facing aspects are fully glazed, to make the most of the coastal location and uninterrupted views. Both sleep 2.



WEBSITE

The website was designed by a Skye based web company in the Autumn of 2017. The photography is by John Maher who was with the Buzzcocks and is now a renowned photographer in Harris. The website is very easy to navigate and is a good reflection of the experience you would enjoy while staying both of the accommodation and the island. It also has a good testimonial section and press area. They focus on their sustainability credentials and also on weddings which are increasingly popular on Harris. Finally, without giving too much away they also personalise the site with information about themselves.

SOCIAL MEDIA - On Facebook this business has 825 likes with a good mix of accommodation and destination sell. Twitter and Instagram have been hardly used and they would be best deleting the accounts.

PHOTOGRAPHY

As previously stated the photography has been invested in and reflects quality product by a renowned photographer who also features this property frequently in his own promotional material particularly social media. It is all high quality and showcases the quality of the interiors in both properties.

PRICE AND OCCUPANCY

Hard to get prices as they are fully booked much of the time seems to be £1,037 for a 3 night break and £1,850 for a full week.

AGENCIES – BOOKING SITES - Cool Cottages Scotland, VisitOuterHebrides, Handpicked cottages and Cool Stays

KEY LEARNINGS AND INNOVATIONS

- The value of using professionals in all aspects is clear here from the actual property and the interiors to the quality of the website and the photography.

RINK HILL

Selkirk, SCOTTISH BORDERS

www.rinkhill.com

BRAND - Very subtle and modern like the accommodation and carried out on the website.

PRODUCT DESCRIPTION

“Welcome to Rink Hill - understated luxury in the Scottish Borders. A gorgeous hillside bolthole for two, our glass-fronted self-catering lodge enjoys tremendous vistas over the Tweed Valley and offers beautiful, secluded escape from the frenetic lives we lead.

Come for the views, come for a hike in the hills, come to explore the area’s rather lovely villages and market towns, come to descend world famous mountain bike trails, or to jump on the train to Edinburgh, returning to a log fire and tranquillity. Just come to relax.”



WEBSITE - Very clean website with good photography and easy to navigate.

SOCIAL MEDIA - 856 Likes on Facebook and 976 on Instagram. Update Instagram more frequently than Facebook which makes sense as it is a business that is perfect for Instagram.

PHOTOGRAPHY - Good use of photography both internally and externally.

PRICE AND OCCUPANCY

£795 for 3 nights to £1,750 for 7 nights - reasonable occupancy for the next 6 months and tends to be more weekends in the off season and this is reflective of the two-person accommodation. Minimum stay 3 nights.

AGENCIES – BOOKING SITES

Cool Stays

Beautiful Hidden Cottages

KEY LEARNINGS AND INNOVATIONS

- This is an outstanding architectural building in a stunning location. Quality of the marketing in the main reflects the quality of the product.

APPENDIX 3 - BOOKING AGENCIES AND LISTING WEBSITES

Most businesses do use booking agencies and/or online booking sites to promote and book breaks. For a new property, these channels will raise awareness of the brand and location and specifically many of these agencies have a huge customer reach. Additionally, there is a perceived trust in booking through an established agency and many customers are seeking this security at the present time, so will use them over a new entrant to the market which is unknown. The likes of Sawdays, Host Unusual and Cool Stays are established as a provider of unusual, quality and aspirational breaks and it is apparent that many of the similar properties use these channels to promote their businesses.

Sawdays is the most obvious agency to use in this case as you are in a rural setting and sustainable and really fit with their ethos. They have an extensive marketing reach and are well established in the marketplace. They charge commission, often in the region of 25% and do prefer a degree of exclusivity but as many of the competition are listed with them, they are certainly worth considering.

Promotional sites such as Cool Stays, Host Unusual and Scotland's Best Cottages should be considered in year one. All these companies have strong marketing online, offer good Press and PR opportunities and that the target audiences are good fits.

Using agencies does have a place in the market, longer term you should review the return and business case for each agency/website so that you can potentially phase out or at least reduce the use of commission-based agencies. You do need to work hard to capture people's contact details and encourage them to book direct in the future so that you can grow your business internally.

The following pages offer a breakdown and summary of some of the booking agencies and listing websites in the marketplace, and those that may offer the best return and opportunities.

Airbnb www.airbnb.co.uk

No matter what kind of home or room you have to share, Airbnb makes it simple and secure to earn money and reach millions of travellers looking for unique places to stay, just like yours.

With Airbnb, you're in full control of your availability, prices, house rules, and how you interact with guests. You can set check-in times and handle the process however you like.

- Listings by location, experiences, homes.
- Currently in the Scottish Borders there are a number of quality products listed and using Airbnb as a booking and promotional channel for their business.
- As one Scottish Borders owner said – *“Rustic, Rural and Relaxing. I think the reviews sum it up. I only advertise on Airbnb as I love the ethos!”*

Benefits

- Business can be in total control of bookings and can profile each enquiry in advance via ‘approach the owner’.
- In 2021 the owner service fee increased to 15% but the customer is not paying the additional fees that were in place, so easier for the customer to understand the up front price they are paying.
- The personal ‘meet the owner’, ‘keys and comments’ and ‘mutual reviews’ generates a strong understanding of customer needs, generates a strong customer loyalty and reputation.
- Ability for the owners to work the bookings and generate increased reach and greater exposure for the business and especially when based on experience.
- Character and personality ensure a business stands out and the site already has a number of unique and quite unusual properties who have high levels of bookings.
- Enquiries and the whole booking experience can be managed remotely by owners and on the whole is very secure.
- No issue with owner allocation diaries associated with some agencies.
- Owners are updated on a regular basis as to search statistics, how owners can work the system more effectively, price suggestions and so on.

Disadvantages

Owners get out of it what they put in. Need to update photos, respond to enquiries and manage the whole process to get the most out of this holiday booking channel. You do need to work this channel to get the most out of it and the best return.

Recommendation

No, as in the initial years you will need the added value given by some of the dedicated agencies with extensive press and PR opportunities and a customer base which is a better fit for your property.

BEST SCOTTISH COTTAGES

www.bestscottishcottages.co.uk/

Best Scottish Cottages property - Amazing places to stay in Scotland

We go off grid, under the radar and above the parapet to showcase amazing places to Stay in Scotland. The very "Best Scottish Cottages", collection of accommodation. The unique, the quirky, the hidden and the divine. One stipulation – simply to be the best.

Fast track direct to the best in Scotland. We put you in touch direct, no middle man, agency or commissions.

Numbers – There are 5 properties in the Scottish Borders. There are a number of categories where the new property would fit, including – Best for 2, In the Wild, Remote, Cosy Collection and eco friendly.

Working with - No Commission, No Booking fee, No blackout dates - you are in control at all times and it's very very simple. One simple annual membership fee, no set up charges, no add ons. £300 (no VAT).

Benefits

- This is a new promotional website dedicated to Scotland launched in 2018. Many of the leading and outstanding properties are listed, so the portfolio is very strong.
- Their social media and SEO is working very well so a benefit to properties listed.
- The site design and structure is modern with excellent photography, navigation is clean and the offers stand out.
- Owners manage their own listing so can add last minute and special offers.
- There is clear navigation on each entry to go direct to owners website, so once people are on your site you can influence and up sell other properties/businesses you have.
- Encourage users to recommend properties who are not listed.

Disadvantage - You must include their brand on your website.

Recommendation

Take a listing with this platform. Maximize the opportunities for special offers and late availability as this is a relatively cost-effective promotional platform.

BOOKING.COM

www.booking.com/holiday-parks/country/gb.en-gb.html

Numbers – extensive!

Advertising

- *It's free to create a listing*
- *24/7 support by phone or email*
- *Set your own house rules for guests*
- *Sync your calendar with other sites you list on*

How do I find out how much commission I will pay for bookings?

When you add your property to Booking.com you pay commission for each booking. The commission percentage will be shown at the 'Agreement' step of the registration process. At the end of each month, we'll send you an invoice with the amount of commission owed.

Overview

There is a benefit in using this channel to promote a business, not least the customer reach and it is an international platform. That said it is easy to get lost in the number of listings and varied standards of offerings and property types.

A negative is commission which can be in excess of 25% and receiving payment from Booking.com on checking.

There is a good customer review platform, but naturally it takes time to build up and businesses are only as good as their last review. Commission can be high, but this channel if used strategically to support other marketing activity can be effective with careful management. Worth considering for businesses with multiple properties.

We would not recommend you list with this agency.

CANOPY AND STARS

www.canopyandstars.co.uk/

The most inspiring places to go glamping in the UK and Europe

Canopy & Stars is a collection of unique, creative places to stay in the great outdoors giving you a genuine experience of a life more wild. We've inspected every single one to make sure only the most special and creative spaces make it into our collection.

Niche focus

We're not really interested in being the biggest collection in world, so will only ever feature places that we believe are special and fit what we're all about. We're a bit obsessive about this. It means we can be extremely focused with our marketing and how we make our website the first destination if you're searching for a special cabin, yurt, treehouse or other quirky outdoor space.

Numbers – there is a number of collections or inspirations that can be searched for and which would be suitable, a property can be in multiple searches so there is duplication.

Unusual Places to stay Scotland (56)

Working with

- Business must apply to Canopy and Stars to be assessed for suitability, sustainability is a key criteria.
- Prefer to be the sole booking management for businesses and there is the option for Canopy & Stars to manage the whole process, but businesses can have their own website and promotions also.
- Traditionally charge a booking fee/commission of up to 25% on bookings, though this is subject to negotiation.

Overview

- The 'outdoor' platform for Sawday's and on its own is well placed in the market place.
- This is primarily a glamping agency.
- Excellent customer focus reflected in all activity from the website, social media, photography, content, press and PR and communications.
- The website, whilst it does offer many different search criteria and themes, is very easy to use and as such properties do stand out. This website works really hard and is very effective for businesses and as a result individual properties do appear on search engines.
- Extensive marketing budget and customer reach.

We do not recommend you list with this site given the glamping nature of the products and customer base. We do however recommend that you look at the site from time to time and learn from some of the more innovative properties in this market.

COOL COTTAGES

www.coolcottagescotland.com

Independent guide to the best unusual luxury holiday cottages to rent in Scotland.

A hand-picked independent selection of the best unusual luxury holiday cottages to rent in Scotland – quirky, fun, romantic and unusual places stay.

We've found some of the best self-catering cottages in Scotland to rent, amid some of the finest scenery in the world. We've done the hard work and have really stayed in all of the holiday cottages listed. Real cottages, real experiences.

Numbers

Romantic Runaways – there is a listing of 31 properties.

Working with

We require to stay overnight, ideally 2 nights to get a real feel for the cottage and how everything works and an idea of the local area, things to do etc. We would not expect to pay for this. There is a listing fee of £199 which is a contribution to our marketing costs. We are happy to promote offers and news via our social media channels such as Facebook, Twitter & Google Plus.

Benefits

- This is a simple website but there is a good following and strong social media accounts.
- The portfolio of properties is strong and does appear to be handpicked and offers genuinely unique properties.
- This is a good site to consider when launching new properties, it is a good referral site and offers increased online exposure and search engine ranking. The site is simple in format so the SEO needs to work hard for the business and we recommend that unique copy and images are also used to increase the traffic to your business.
- The costs are minimal.
- If you work the relationship you can benefit especially in terms social media exposure.
- There is a Facebook page which has a strong following, though not as engaged as could be.

Disadvantages

- Website does not showcase properties to the best of their potential, therefore good photography might be lost in the website framework.
- Seems to have lost its edge on previous years.

Recommend

As many of the key market leaders are listed with this site there are definite advantages in year 1 of being featured on this site. Whilst it would appear the site is performing as well as others, we suggest you monitor your listing, enquiry levels and conversions and assess annually the return from this site.

COOL STAYS

www.coolstays.com/

Stay somewhere extraordinary

Showcases unique and unusual places to stay across the UK, Europe and worldwide.

Tired of the difficult search for that perfect stay, we have made it our mission to find you that special place with a difference.

We now have a growing portfolio of over 1800 hand-picked, extraordinary places to stay. Each offering something truly quirky, noteworthy or stylish.

Numbers – there are currently 9 properties listed in the Scottish Borders, properties of all types but including Rink Hill. There are also a number of categories/collections which would be suitable for this property: such as Romantic Retreats, architectural gems, rural Retreats and Eco Friendly.

Work with

- There are 4 levels of subscription and offerings, from standard listing to priority positioning.
 - £199 for the basic Bronze package
 - £349 for Silver package
 - £649 for Gold package
 - £949 for Platinum package

Benefits

- Their marketing is effective and on trend. The search engines work very hard for properties, this is attributed to excellent content also.
- The email newsletters are very targeted, supported by blogs. E-newsletters are very targeted and on theme, proactively promoting on trend property types.
- The social media accounts are very strong with excellent engagement.
- There is a strong customer loyalty and appear to be effectively reaching the target audience.
- The portfolio is extensive and far ranging despite this the website does work hard and finding a property to match a customer's requirements is easier than expected.

Disadvantages

- The size of the portfolio of properties, it may be difficult to stand out unless you pay a higher subscription level for expanded levels of promotion.

Recommendation

Consider a listing with this advertising platform, excellent product fit with a strong profile, performs well. If you take a listing monitor results on an ongoing basis and assess on an annual basis.

ELITE COTTAGES

www.elitecottages.co.uk

Special places in stunning locations.

Numbers – There are 120 listed properties on this website in Scotland. Classifications include luxury and romantic boltholes. That said, it is not the easiest of searches and hard to separate out selections and/or for properties to stand out as photography on the initial searches is very small.

Working with

Link directly to your own online booking/availability page on your website sending guests straight to you and even better we do not take a penny in commission for doing so. Just a one off annual fee starting from just £125.00 plus vat allows you to be featured in front of thousands of potential new guests. There are additional charges for enhanced entries.

PRICING STRUCTURE

Single Entry - 500 plus word advert, Contact details (including web & email link), 1 Image - 12 months advertising starting from £125.00 plus vat

Standard Entry - 500 plus word advert, Contact details (including web & email link), Up to 10 images - 12 months advertising starting from £150.00 plus vat

Benefits

This website does perform well in a range of searches when looking for quality, luxury and similar properties. There is a strong glamping section however could get lost amongst the format and number of 'tent', shepherd huts and other glamping properties. The annual fee is not excessive and worth watching for a year to monitor activity.

Disadvantages

- The site does lack direction, is busy and search results are muddled.
- The social media accounts need work.

We would not recommend listing as there are a number of other more suitable options.

FURTHER AFIELD www.furtherafield.com

Strapline – ‘*Exclusively inclusive*’.

Further Afield’s carefully selected collection of hotels, B&Bs and self-catering places to stay have been chosen for their distinctive personality and style. Having featured the very best gay-friendly accommodation since 2009, we are dedicated to inclusivity and welcome to all travellers.

Better still, by booking directly with our properties you are always guaranteed the best rates.

Numbers – There are 9 self-catering properties listed in Scotland.

Working with

The annual fee for being on the site relates to the size and type of your property (self-catering sleeping up to 4 - £250 annually). We are not a booking agent so there are no commission fees to be paid on any bookings you receive as a result of Further Afield. The fees are not subject to VAT. Along with a photographic listing can feature up to four special deals and late availability onto our offers page, newsletter and social channels.

Benefits

- The social media accounts are strong with large followings and interaction.
- Well presented website with strong photography and clear navigation.
- There is also a good range of press activity supporting this online.
- There is a strong international profile also of properties and visitors to the site - Over 270 places in 23 countries including England, France, Italy and Spain.
- No extra fee because you book directly with the owners.
- For the minimal cost worth considering testing for a year.

Disadvantages

- The portfolio could work harder in terms of overall level and quality of all properties. That said this could be driven by the customer base looking for varied standards. There are quality luxury properties and locations in the portfolio but these can get diluted and there are some that are a little more ordinary.

HOLIDAY COTTAGES www.holidaycottages.co.uk

This is a mass market agency and website listing and have recently acquired a number of smaller bespoke agencies and therefore now offer a reasonable range and quality offering of properties.

This does highlight that customers' expectations are demanding and the self-catering industry as a whole is improving the product offering, where a self-catering holiday is no longer a cottage with used furniture, customers are expecting as good as, if not better than what they have at home. There are 38 properties listed in the Scottish Borders.

Benefits

- As with other agencies they take care of all the bookings, administration, marketing and offer support and assistance.
- The website is cluttered with key words and phrases, which whilst does make navigation difficult, works hard at ensuring the site is easily found by multiple customer types and various searches.
- Reasonable national exposure.

Disadvantages

- Product portfolio whilst better than some agencies it is unlikely to generate the right types of enquiries and ultimately levels of business.
- Hard to stand out due to the volume of properties.

We would not recommend listing.

HOST UNUSUAL www.hostunusual.com/destinations/scotland/

Host Unusual is a holiday accommodation directory designed to promote your unusual accommodation to individuals searching for a holiday or short break with a difference.

Numbers

Scottish properties - (131)

Borders - (9) Roulotte Retreat, Rink Hill, Aikwood, Old Mill/Dod Mill, Five Turrets, Cairns House, Folly Old Melrose and Neidpath Castle.

Working with

*Offers two types of membership (Basic and Premier) for an annual fee. As we are an advertising platform and not an agency, we take **no** commission on bookings - all you pay is your annual membership fee. We can offer special reduced rates for multiple listings and agencies.*

Host Unusual work in affiliation with other website listing sites and appear to be linked to Sykes Holidays.

Benefits

- Offers a range of property types and themes on the website which are classified accordingly.
- Excellent marketing reach across all mediums of social media, website, search engine optimisation and email communications to the database.
- One advertiser specifically mentioned the benefit to their businesses of the Press and PR opportunities and the exposure an article extended to the business and ultimately bookings.
- Properties do stand out in search engine searches as this website performs well.

Disadvantages

- Unable to search specifically by property size or compare pricing however when people are searching for 'unusual' price is not the primary motivation.

Recommendation

Consider a listing with this advertising platform, good product fit with a strong profile, performs well. If you take a listing monitor results on an ongoing basis and assess on an annual basis.

LHH

www.lhhscotland.com

*Self-catering holiday homes throughout Scotland....and beyond!
We offer a professional service and are Highland-based.*

LHH stands for Large Holiday Houses - 5 or more bedrooms; Little Holiday Houses - 1 to 4 bedrooms; Luxury Holiday Houses - those holiday houses which can boast the very highest 4 and 5 star grading - and then some which are so stunningly beautiful they surpass even the highest grading.

Numbers – In the complete portfolio there are 3 in the Scottish Borders with the majority based in the Highland and Islands.

Working with

Apply for further details. The agency do charge commission and produce an annual brochure of all properties.

Benefits

- Established large scale property portfolio so more suitable for those businesses accommodating large numbers.
- Increasing the range of and style of properties, introducing Little Holiday Houses and Luxury Holiday Houses.
- Have an established service level with repeat customer base.

Disadvantages

- The format of the website and the portfolio is limiting.
- As an agency discourage multi agency listings this will limit the properties reach to a wider target audience that LHH have at present.
- Not fared well in terms of customer service over the last year, poor response times, slow refunds and negative comments.

We would not recommend listing with this agency.

ONE OFF PLACESwww.oneoffplaces.co.uk

Numbers – There are 25 properties listed under ‘Eco-Houses’ in Scotland listed on this website and 12 properties in total in the Scottish Borders.

Working with

One off Places offers a single advertising option - a small commission payable per each booking which comes about as a result of a One off Places enquiry. We also sometimes work on an affiliate basis. All properties are listed in the search and destinations pages, as well as being indexed individually by the search engines. The listing price includes images, full detailed text about the property and the surrounding areas, contact details and enquiry form. All enquiries are stored in your login area and are sent to you by email. You can also receive enquiry notifications by SMS message if you choose to opt into this service. You can also choose to pay a bit more to get homepage listing features, results features, newsletter features or to add more properties.

Prices vary depending on the package and duration of the listing. Contact to find out more. There are additional items available at extra cost.

Benefits

- Type of properties classification includes ‘Off Grid Escapes’, ‘Eco Houses’ and ‘True Romance’.
- There is clearly a focus on Eco properties and some outstanding properties listed in Scotland in this category.
- The actual pages are a little cluttered but are informative, visual and include guest reviews.
- To check availability people need to make an enquiry so there is a delayed process but the owner does get to manage the booking.
- The properties listed do appear to be genuinely one off places and not run of the mill properties.
- International reach and range of properties.

Disadvantages

- The marketing and search engine optimisation is not as strong as some of the other sites.
- The property range is very varied and not sure the selection process is neat enough.

Recommendation

Worth contacting to establish their terms, working practices and also pricing structure. The product fit is strong, so would need to establish the return they suggest. Subject to the terms, consider in year 1 and monitor levels of enquiries and conversions.

QUIRKYACCOMM.COM

www.quirkyaccom.com/

A leading unusual accommodation directory we expect around 3 million unique visitors a year to currently around 800 UK properties.

Numbers – There are 40 properties listed in Scotland. The Scottish properties are mostly pods and wooden cabins though does include Airhouses at Lauder’s pod.

Working with - *We will create a description page to promote your place, set up a calendar, LogIn details in case you wish to make alterations yourself and access to our Helpdesk team for assistance, adding special offers etc. All we ask is that you give listing on QA a try for a minimum of 4 months to see how well it can work for your property.*

We offer a quick quote system where we charge a reasonable commission only on a converted booking. For popular places and those with various accommodation, enquire to find out if it is more suitable to direct our visitors to your own booking service.

Benefits

- Although there are a number of properties listed, the initial views are customer oriented, clear pricing, with short descriptions, obvious occupancy numbers and regional navigation.
- Visually category icons are illustrations, which look childish initially but work really well. The site is easy to drill down and quickly find what you are looking for. Navigation wise this is a very intuitive and well thought out website. Will perform well for businesses.

We do not recommend listing.

RURAL RETREATS www.ruralretreats.co.uk

The Rural Retreats portfolio represents the cream of self-catering luxury holiday cottages throughout the UK and Ireland. With over 500 stylishly presented country houses and cottages to choose from, each carefully selected to meet our high standards of comfort, Rural Retreats makes it easy to find just the holiday home you are looking for.

Numbers – There are 9 properties listed in the Scottish Borders including all the new Dryburgh properties recently renovated and launched to a very high standard and also Purves Hall and Aikwood.

Working with – they offer two options – marketed (charge commission based on full stay fee) or fully managed where they do everything (fee plus commission).

Benefits

- The site has been updated and is relatively easy to follow, images are bigger and there's various search terms/inspiration filters which means properties will be found in multiple categories so a great chance of standing out.
- The quality and diversity of properties is good and included quite a number of unique and different properties.
- Traditionally very South of England based with affiliations with 'Hideaway' agencies on the South Coast but have expanded to include a stronger profile in Scotland to mirror a similar portfolio of properties.
- The Scottish Borders profile of properties has increased substantially with the inclusion of the Dryburgh properties and given the high standard means the quality in the region is very high.
- The agency seems to have a better understanding of the 'rural' customer and properties and the search filters reflect this than many other agencies charging a commission.
- Worth contacting to see level of commission.

Consideration

Worth contacting to see levels of commission, though it is likely to be high commission levels so you will need to weigh up the return given the other sites and agencies you are going with. We would however recommend monitoring this site from time to time as customer fit is good and see what new innovations other businesses are offering.

SAWDAYS www.sawdays.com

Life's too short for ordinary. That's why we've spent 25 years finding, visiting and choosing brilliant places to stay. For people who love special.

Sawday's themes or 'Inspirations' properties are presented in collections and the most appropriate sections would be – 'Secret Sanctuaries', 'Cosy Romantic Breaks', 'Perfect Weekend Breaks'.

Numbers – Currently there are 18 properties listed in the Scottish Borders.

To work with Sawday's

Businesses must apply to join Sawday's and they will then inspect properties (or planned developments) to see if they are suitable.

Fees charged – If suitable an annual membership fee based on property size and charges is agreed, based on 2 properties the fee is in the region of £500 to £600 + vat. Additionally, fees and charges include:

- A small initial fee is charged to cover Sawday's costs of visit.
- Inclusion in targeted customer e-newsletters such as 'Valentines breaks for two', last minute offers and so on. Inclusion in one off direct mail and guidebooks. Also, online highlighted promotions such as last minute offers, summer breaks and so on.

Benefits of working with Sawday's

- Businesses can't just sign up to be part of Sawday's, they must be inspected to see if the property and the service fits within Sawday's model. They are about atmosphere, welcome and the overall warmth be it welcome, customer service and the feel of the property. Character is a driving force for Sawday's as to those businesses which are not too commercial in look and feel.
- Reputation and well established in the market place, with an ethos for promoting local, independent, quirky and creative.
- Excellent customer profile and established marketing including Press and PR. The Press and PR opportunities and exposure are extensive. Strong Empty Nester profile of customers.
- Ability to manage your own property enquiries and bookings, no commission is charged for bookings, rather a membership fee and the businesses receives a website listing and link directing people to the owners website.
- From time to time you can buy into additional promotions, whilst this will cost for advertising the customer fit is excellent and will give additional exposure and assist with search engine ranking.
- They had been trialling an online diary booking system, which owners could use on their own websites as well as Sawday's. It was to be launched early 2019 where the emphasis was for the owners managing their own business rather than Sawday's.

Disadvantages of working with Sawday's

- If you opt to take part in a number of promotions the advertising costs can increase.
- Appears to be a slight reduction on properties based in the north of England and Scotland from the last time we carried out an agency and listing audit.

Recommend – Definitely worth considering and we would recommend value in the Press and PR alone.

UNIQUE COTTAGES

www.unique-cottages.co.uk

Unique holiday cottages in stunning locations are our speciality. We have carefully selected each property to bring you the best cottage holidays Scotland has to offer.

A cottage letting agency based in the Scottish Borders and is also known as Ecosse Unique.

Numbers – There are 3 properties listed in the Scottish Borders region listed as ‘one of a kind’ and 1 ‘Green Cottage’.

Working with

- Commissions on bookings.
- Must use their booking system but it can be displayed on your website.

Benefits

- Based in the Scottish Borders the agency does have local knowledge.
- Marketing costs are included in the commission fee, so there are not additional charges.

Disadvantages

- Previously have been required to market with this agency exclusively for a minimum of the year, suspect this remains the case.
- Overall the product range is varied and the standard could be higher and therefore quality and truly unique properties get lost.
- Whilst the agency does offer a number of marketing opportunities due to the existing portfolio the marketing is unlikely to generate the correct customer fit.

We would not recommend listing with this agency.

OTHER SITES TO MONITOR/READ OR CONSIDER

WALK AND CYCLE SCOTTISH BORDERS walkscottishborders.com/plan-your-visit/stay/cyclescottishborders.com

A site highlighting walking routes in and about the region.
Entry is free for accommodation and attractions so definitely worth being listed.

Enter listing here -

<https://docs.google.com/forms/d/e/1FAIpQLSdpQ9bDGLNy1Mq7svHbPIaU3ngoiV8SS1tUk2EhsMBb8deCUg/viewform>

Recommendation – yes and useful websites to use as links from your own website or link to routes on social media feeds.

www.ssdalliance.com/

The **South of Scotland Destination Alliance (SSDA)** is the strategic Destination Management and Marketing Organisation for the South of Scotland, encompassing Dumfries and Galloway and the Scottish Borders. Worth being involved as may offer in kind promotional opportunities for both businesses and also the indirect benefit of networking to communicate what you are offering.

APPENDIX 4 – SWOT

<p>Strengths</p> <ul style="list-style-type: none"> • Stunning unique location with 360-degree views looking back to England and right across the Scottish Borders. • The property will have its own access and will be totally private. • Architecturally designed and built property to fit into the existing landscape. • Designed and built with the customers needs in mind in terms of fixtures and fittings so that they have the best stay. • Ideal as a '<i>Coorie in</i>' destination in winter but with the opportunity to have all year-round occupancy. • It will have green credentials, and this can be highlighted in all communications. • Access to walking and cycling on the doorstep. 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Wear and tear of the property will require ongoing maintenance.
<p>Opportunities</p> <ul style="list-style-type: none"> • Proximity to Beirhope Alpacas and other local businesses. • Easy access to main Border towns and attractions. • Selling local produce hampers. • Working with SSDA and VisitScotland. • Fit in with green and sustainable trends and promote it. • Fit in with the wellness trend as it is the ideal location to totally unwind. • People want to discover places unique to them, opportunities to walk and cycle routes that only they can access while staying with you. • Really promote the '<i>Coorie in</i>' VisitScotland trend for the winter period. 	<p>Threats</p> <ul style="list-style-type: none"> • Another black swan event such as Covid. • Competition. • Bad reviews.

APPENDIX 5 - PEST

<p>Political</p> <ul style="list-style-type: none">• Political uncertainty with Brexit and another Scottish Independence referendum.• Implications of the impact of the virus which covers political, economic, social, and technological.• UK government migration policy.	<p>Economic</p> <ul style="list-style-type: none">• Outcomes of Covid 19.• Brexit.• Mintel predicts that there will be a staycation effect in the UK till 2026.• ASSC report showed that the Scottish Borders has only 792 (5%) of self-catering properties in Scotland compared to 1,386 in Dumfries and Galloway.• Sykes has identified the Scottish Borders as one of five areas which are property hot spots identifying two-bedroom properties.
<p>Social</p> <ul style="list-style-type: none">• Even greater interest in green post Covid 19.• Greater interest in rural areas since Covid 19 and accessing own space.• Consumers more aware of their mental health and the importance of relaxing since Covid 19.• Consumers more aware of supporting local and the value of communities.• Consumers want to live like a local and create memories discovering their own authentic Scotland.• Workcations is now a key trend identified by Mintel and VisitScotland.	<p>Technological</p> <ul style="list-style-type: none">• Huge technological expansion in the past few years but it is having an impact on our mental health.• Growth of social media.• Consumers use phones to book and expect mobile friendly websites.