Pitching the Value

2019 Economic Benefit Report: Holiday Parks and Campsites SCOTLAND

Report for the UK Caravan and Camping Alliance

February 2019

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Executive Summary

Scotland's holiday park and campsite sector makes a substantial contribution to Scotland's tourism economy, generating £772.3m in visitor expenditure, equivalent to £478.2m GVA and supporting 14,301 jobs.

The Scottish holiday park and campsite sector accounted for 8.4% of Scottish GVA in 2018, compared to 7.8% in 2014.

Visitors to Scottish holiday parks and campsites stayed up to 41% longer and spent up to 39% more than the national tourism average.

Background

Tourism is one of Scotland's key industries. In Scotland, there were 11.7 million domestic tourism trips in 2017. These trips generated **39.1 million bed nights** and **£3bn in visitor spend.** International inbound markets to Scotland for the year increased 16.9% in terms of trips and 23% in expenditure. This provided a record year for international visitor numbers to Scotland with **3.2 million international visitors coming to Scotland spending £2.3bn**[1].

The National Tourism Strategy[2] **confirms the importance of tourism to Scotland's economy and emphasises the resilience of the tourism industry since the start of the economic downturn in 2008**. The strategy sets an ambition for the industry as a whole to achieve an overnight visitor spend of between £5.5bn and £6.5bn by 2020, thus generating an additional £1bn or more (at 2011 prices).

Report Purpose

In November 2017, **the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd to undertake an independent economic impact and benefit assessment of the holiday park and campsite sector across the UK**. This included an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland.

Economic Impact

In 2018 it is estimated that Scotland's holiday park and campsite sector generated **a total visitor expenditure impact of £772.3m** – compared to £700.8m in 2014[3]. **This expenditure equates to a GVA impact of £478.2m (including multipliers) and supports 14,301 FTE jobs in the Scottish economy. This is an increase on the 2014 figures of £356.3m GVA and 12,977 FTE jobs.**

According to a report commissioned by VisitBritain[4] **the tourism sector in Scotland had a direct GVA of £6.1bn**[5] **(excluding multipliers). Therefore the holiday park and campsite sector in Scotland at £325.7m (excluding multipliers)**[6] **makes a substantial contribution to the sector's GVA.**

To allow direct comparison with the 2014 economic impact assessment, which was based on the Scottish Annual Business Statistics for the Sustainable Tourism sector[7], **the holiday park and campsite sector increased to 8.4% of tourism GVA in 2018, compared to 7.8% in 2014.**

In addition, tourers and caravan holiday home owners spend money on **maintenance which adds a further £69.3m of expenditure to the economy**.

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[1] https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/tourism-in-scotland-2017-summary.pdf
[2] http://scottishtourismalliance.co.uk/page/national-strategy/
[3] *Note that while this study expanded the population to include Certificated Locations and Certificated Sites the increase in visitor expenditure is still greater overall and is not simply as a result of the increased number of parks.*
[4] https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf
[5] *Converted to 2018 prices.*
[6] *See Appendix 2 for GVA excluding multipliers summary table.*
[7] https://www2.gov.scot/Topics/Statistics/Browse/Business/SABS/Sectors/GrowthSectors; *2018 GVA £3.88bn excluding multipliers.*

Holiday Park/Campsite Operators

According to evidence provided by the UKCCA, **in the summer of 2018 there were 390 member holiday parks/campsites operating in Scotland accounting for 34,662 pitches**[8]. This was drawn from a database of holiday parks/campsites provided by the UKCCA. Consultations were undertaken with 98 of these parks. Research found that **Scotland's holiday parks/campsites offer a wide range of accommodation options to visitors**, which allows it to serve a diverse range of customers' tastes and budgets. These include touring pitches for caravans, campervans, motorhomes and tents; owner-occupied holiday homes; and rented holiday homes, lodges, apartments, chalets, wigwams, pods and yurts.

In addition to this diverse accommodation, **Scotland's holiday parks/campsites also offer a wide range of facilities and amenities**, including restaurants, swimming pools, cafés and games rooms.

The majority of holiday park/campsite operators have owned/operated their parks for over 10 years and many have done so for over 25 years. Park occupancy rates vary from an average of 74% in high season (August) to 59% in mid season (May and September). The proportion of visitors who live outside Scotland varies significantly depending on the park's geographic location.

As well as supporting local economies by providing a source for visitor off-site expenditure, holiday park/campsite operators also support their local communities through:

- **expenditure** – 50% of parks from the total consultation sample cumulatively spent £32.6m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events and fund raising particularly around sports and community groups
- **environmental activities** – including support for recycling, encouraging biodiversity, and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing walking and cycling routes, promotion of wider community health and fitness sessions and healthy food options

Park Visitors

1,071 respondents had made 1,553 visits to a holiday park in Scotland in 2018 across two trips. The remainder of this analysis is based on those visiting Scotland in **Trip 1 only (798)** which had the most comprehensive data set as all respondents participated in at least one trip.

The majority of the survey participants lived in Scotland (62%) and over half of respondents (55%) had stayed on a holiday park or campsite in Scotland 5 times or more during the last 12 months.

82% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 7% stayed in an owner-occupied caravan holiday home or lodge; while 12% stayed in some form of rented/static accommodation. **The average adult group size was 2.1, and 22% of all groups included children**. Where parties were travelling with children, **the average number of children in each group was 1.8. 40% of groups brought a pet.**

Visitors in rented/touring accommodation spent, on average, £496 per visit (£107 per day), spending, on average, 4.6 days on a holiday park on each **holiday. Visitors staying in owned accommodation spent, on average, £415 per visit** (£87 per day) and stayed, on average 4.8 days. This is higher than the national tourism average of £77 per day[9] and 3.4 days per holiday[10].

Health and wellbeing was also improved with visitors reporting doing more exercise and feeling more relaxed when staying on a holiday park or campsite. This is supported by holiday park/campsite operators who provide easy access to a variety of sporting activities or support a range of health and wellbeing activities for their visitors.

[8] *This includes Certificated Sites and Certificated Locations.*
[9] *https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf*
[10] *https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf*

1 Introduction

In November 2017, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent economic impact and benefit assessment of the holiday park/campsite sector across the UK. This includes an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland. **This report is for Scotland[11].**

The UKCCA comprises the following sponsor organisations:

1.1 Research objectives

The **objectives of the impact and benefit assessment** were to:

- provide an independent, evidence – based, understanding of the direct and indirect economic impact/contribution of the holiday park/campsite sector in the UK
- provide the economic impact/contribution from all forms of holiday parks/campsites accommodation including:
  - touring caravan/motorhome/ campervan (owned and hired)
  - caravan holiday homes/lodges (park or privately owned/rented)
  - camping
  - glamping
  - self-catering (apartments, chalets, permanent lodges/cabins)
- understand the type of spend by the sector and each subset and estimate how much tourism spend, both direct and indirect, is made, and how much income remains in the UK/regional economies
- determine the number of full-time equivalent (FTE) jobs supported by the sector and each subset, both those employed directly and indirectly as well as seasonal and part-time jobs
- report and provide robust data at the UK level as well as the four countries (England, Scotland, Wales and Northern Ireland); include regional level within each of the four countries
- consider expenditure by the holiday park/ campsite owners/operators, e.g. ongoing maintenance, capital investment to extend, improve and/or provide new facilities
- consider spend by visitors to the holiday parks/campsites, both on and off-site, for all types of accommodation; identify spend by overseas visitors
- consider how the study can link to aspects of health and social wellbeing

The UKCCA intend to conduct this assessment periodically to maintain an up-to-date position.

The assessment method is presented in Appendix 1.

[11] *This report, the other country and UK reports can be found at www.ukcca.org.uk*

2 Scottish Tourism in Context

This section provides a contextual review of national tourism policies and available statistics at a Scottish level.

2.1 National tourism strategies

VisitBritain has developed the *"Delivering a Golden Legacy"*[12] strategy covering 2012 to 2020. Each country also has their own tourism strategies:

- Scotland – Tourism 2020 initiative
- Northern Ireland – draft strategy "Economy 2030"
- Wales – Partnerships for Growth initiative
- England – Strategic Framework for Tourism (2012 – 2020)

These strategies promote sectoral growth and strong economic performance at a country and UK level.

VisitBritain's strategy has the ambitions of:

- achieving 40 million visits by 2020 – 9 million additional visits a year compared to 2012
- £8.7bn visitor spend annually
- support for 200,000 additional jobs across the UK per annum

This strategy aims to build from the past while taking advantage of the opportunities for Britain including:

- prominence following the London 2012 Olympics
- large global aviation route network
- strong associations with culture and heritage
- strong tourism infrastructure
- English language
- London being a global city

In Scotland, The National Tourism Strategy[13] confirms the importance of tourism to Scotland's economy and emphasises the resilience of the tourism industry since the start of the economic downturn in 2008. However, the strategy cautions that Scotland must remain competitive, by developing and changing its products and marketing in order to improve the quality of the customer experience and increase sales.

The strategy sets an ambition for the industry as a whole to achieve an overnight visitor spend of between £5.5bn and £6.5bn by 2020, thus generating an additional £1bn or more (at 2011 prices). Other targets include:

- increase Scottish tourism's advocacy score from 25% to over 50%
- increase the average visitor spend (per trip) from £359 in 2011
- increase total employment from 185,100 in 2011
- increase total turnover from £6.2bn in 2011

'Improving the Customer Journey' is one of the key pillars of the strategy, and within this theme, accommodation is recognised as playing a critical role in enhancing Scotland's reputation as a place to visit. Specifically, the strategy states:

> *"It's also about addressing fundamentals such as providing a consistently good standard of accommodation regardless of location. This includes investing in new and upgraded accommodation, and developing the skills needed to make a convincing case for such investment." (p.13)*

2.2 Tourism Development Framework

A Tourism Development Framework[14] has also been produced to identify how best to assist and promote growth in Scotland's tourism economy up to 2020. The Framework sets out a broad development strategy that includes proposals across a wide agenda, highlighting the important role played by local partners, notably Area Tourism Partnerships and Local Authorities.

The Framework recognises that ongoing investment in Scotland's tourist accommodation by the private sector is imperative to ensure that visitors' expectations are met or exceeded.

[12] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Britain_Growth_%20Strategy%20_inbound_Golden_Legacy_2012_to_2020.pdf

[13] http://scottishtourismalliance.co.uk/page/national-strategy/

[14] https://www.visitscotland.org/about-us/what-we-do/our-plans/tourism-development-framework

The Framework identifies priority areas for investment in new or upgraded accommodation serving key destinations, including:

- Loch Lomond and Trossachs
- Cairngorms National Park
- St Andrews
- Perthshire
- Highlands and Islands – focussing on five council areas of Highland, Argyll & Bute, Western Isles, Orkney and Shetland

The Framework also seeks to encourage investment in urban and rural resort developments in the following localities:

- Edinburgh – East Lothian Corridor
- Glasgow
- A9 Stirling – Perth Corridor
- Loch Lomond & Trossachs National Park
- Skye and Kyle of Lochalsh
- Inverness, Loch Ness and Nairn Corridor
- Cairngorms National Park

The National Tourism Strategy and its supporting *Tourism Development Framework* are ambitious, and place tourism accommodation at the heart of the '*Improving the Customer Journey*' theme. The Tourism Development Framework identifies priority areas for investment in new and existing accommodation and recognises the importance of the holiday park/campsite sector in helping achieve the ambitions set out in the *National Tourism Strategy*.

The specific references are presented as follows:

"Holiday parks are important largely for the domestic tourism market in terms of the volume of rural tourism bed spaces they provide and the economic benefits that flow from this scale of tourism activity. Such parks may offer a range of accommodation, including static caravan holiday homes, low carbon holiday chalets and pitches for touring caravans, motor-homes, camping and other more novel accommodation as well as a diverse range of infrastructure and amenity provision." (p.11)

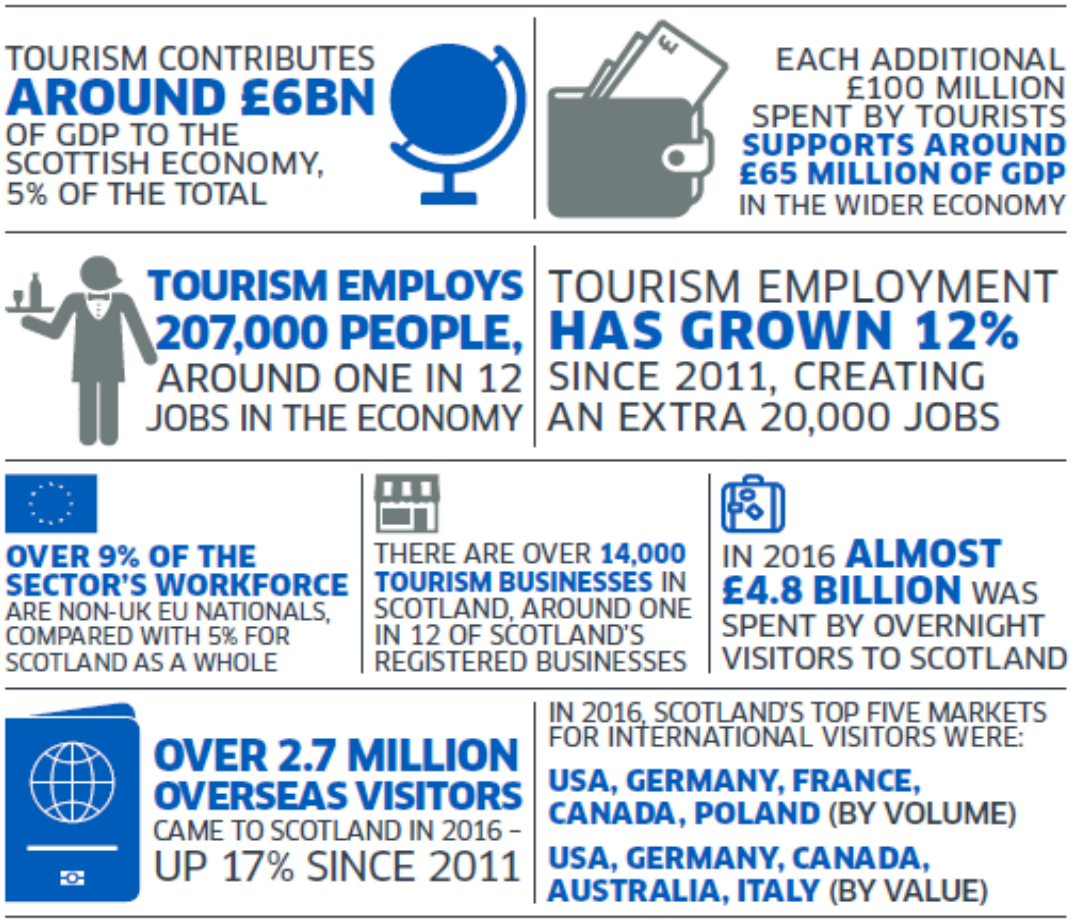
"Investment in rural areas in new and existing self-catering accommodation, bunkhouse provision, holiday parks and eco-friendly developments which support the wider "rural tourism product". (p.11)

2.3 National tourism statistics

In 2018 The Scottish Government, published a report commissioned by the Tourism Leadership Group which assessed the economic contribution of the tourism sector in Scotland[15].

Figure 2.1 presents an overview of the sector's substantial contribution to the Scottish Economy.

Figure 2.1: The Importance of Scottish Tourism



Source: Tourism in Scotland: The Economic Contribution of the Sector (April 2018)

A review of the latest Scottish tourism statistics[16] for 2017 highlight the continued positive contribution of the sector. There were 166 million trips to Scotland, representing a 6.2% increase on 2016 figures, compared to a fall of 1.9% over the same period at the UK level. In terms of total visitor expenditure, tourists spent £11.2bn in 2017, a 17% increase on 2016, compared to a fall of 37% at the UK level. There were also 11.7 million trips and £3bn spend by British residents taking overnight visits to Scotland. This represents a 1.3% increase in trips and 3.8% growth in spend compared to 2016.

In 2017, International inbound markets to Scotland increased by a further 16.9% in terms of trips and 23% in expenditure. This proved a record year for international visitor numbers to Scotland with 3.2 million international visitors coming to Scotland spending £2.3bn.

When assessing the economic value of the tourism industry, using the *Scottish Government's Annual Business Statistics*[17] *(2011 - 2016)*, it was found that the Gross Value Added (GVA) of the industry increased from £2.8bn in 2011 to £3.9bn in 2016, representing a 36% increase over the period.

[15] *Tourism in Scotland: The Economic Contribution of the Sector (April 2018).*

[16] https://www.visitscotland.org/binaries/content/assets/dot-org/pdf/research-papers-2/tourism-in-scotland-2017-summary.pdf

[17] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/40413193-260c_gb_tourist_2017_annual_report_v17.pdf
https://www2.gov.scot/Topics/Statistics/Browse/Business/SABS/Sectors/GrowthSectors

3 Holiday Park/Campsite Operators Consultation

This section provides evidence from consultation with holiday parks/campsites across Scotland. This was drawn from a database of holiday parks/campsites provided by the UKCCA[18]. This database includes data from the:

- British Holiday and Home Parks Association
- Camping and Caravanning Club
- Caravan and Motorhome Club
- National Caravan Council

While this represents a comprehensive list of the UKCCA member holiday parks/campsite in Scotland it does not include them all. For this reason, the impact figures presented in this report can be considered to be a prudent estimate of the total value of the sector.

3.1 Database of Scottish holiday parks/campsites

Based on the information provided by the UKCCA, **in the summer of 2018 there were 390 member holiday parks/campsites operating in Scotland accounting for 34,662 pitches**[19].

The majority of these pitches are either owner-occupied caravan holiday homes or lodges (17,345 pitches, 49%) or touring pitches[20] (13,048 pitches, 37%). However, the holiday parks/campsites have a wide and growing mix of other accommodation options that cater for a broad range of tastes and budgets, including wigwams, yurts and pods.

The Highlands & Islands contains both the highest number of holiday parks/campsites (96) and the highest number of pitches (7,286); Tayside, Dumfries and Galloway, and Edinburgh, the Lothians and Borders also contain a high number of both parks and pitches. Table 3.1 summarises the composition of Scotland's holiday park/campsite sector.

Table 3.1: Composition of Scotland's holiday park/campsite sector

	Number of parks	Touring pitches	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Glamping	Lodge/ chalet/ cottage Owned	Lodge/ chalet/ cottage Rented	Total pitches
Aberdeen & Aberdeenshire	29	803	568	39	2	0	25	1,437
Ayrshire & Arran	33	529	2,968	492	4	5	86	4,084
Dumfries and Galloway	71	1,595	2,422	918	31	158	63	5,187
Edinburgh, the Lothians and Borders	42	1,883	2,017	496	64	55	25	4,540
Fife	28	667	2,467	172	12	110	9	3,437
Greater Glasgow & The Clyde Valley	9	246	690	135	0	3	17	1,091
Loch Lomond, The Trossachs, Stirling & Forth Valley	35	1,674	488	32	51	54	95	2,394
Tayside	47	3,135	1,188	292	39	356	196	5,206
The Highlands & Islands	96	2,516	3,479	704	47	317	223	7,286
Total	**390**	**13,048**	**16,287**	**3,280**	**250**	**1,058**	**739**	**34,662**

Source: UKCCA, 2018

[18] *This includes Certificated Sites and Certificated Locations.*

[19] *This includes Certificated Sites and Certificated Locations.*

[20] *This includes touring caravans, motorhomes/campervans and tents.*

3.2 Sampling methodology

Holiday parks/campsites across Scotland were invited to participate in the research. This was done by the various sponsor groups reaching out to holiday park/campsite operators and gaining consent. Telephone interviews and e-surveys were conducted with those agreeing to participate.

The UKCCA and Frontline met at various stages throughout the project to review the response rates, identifying which geographic areas or accommodation types were under-represented and those were targeted accordingly.

98 holiday parks/campsites out of a population of 390 across Scotland participated giving us a 95% confidence +/- 5% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population and is therefore representative of the holiday park/campsites sector in Scotland.

3.3 Geographic locations

The geographic location of the surveyed holiday parks/campsites was broadly representative of the sector as a whole. For example, it included holiday parks/campsites from all nine regional areas, receiving a minimum response of at least 9%.

Table 3.2: Locations of holiday parks/campsites

Location	Number of parks responding	Estimated number of parks	Percentage consulted
Aberdeen & Aberdeenshire	5	29	17%
Ayrshire & Arran	3	33	9%
Dumfries and Galloway	15	71	21%
Edinburgh, the Lothians & Borders	17	42	40%
Fife	9	28	32%
Greater Glasgow & The Clyde	2	9	22%
Loch Lomond, The Trossachs, Stirling & Forth Valley	12	35	34%
Tayside	11	47	23%
The Highlands & Islands	24	96	25%
Total	**98**	**390**	**25%**

Source: Frontline Holiday Park/Campsite Operators Survey, 2018

3.4 Holiday park/campsite size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large parks, including 13 very large parks (parks with 251 pitches or more); and 22 very small parks (parks with 5 pitches or fewer), these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 3.3: Sizes of the holiday parks/campsites surveyed

Number	Number of parks responding	Number of parks	Percentage consulted
Very small parks (1-5 pitches)	22	153	14%
Small parks (6-50 pitches)	13	42	31%
Medium sized parks (51-100 pitches)	22	87	25%
Large parks (101-250 pitches)	25	77	32%
Very large parks (251 pitches or more)	13	31	42%
Total	**95***	**390**	**24%**

Source: UKCCA Group, 2018

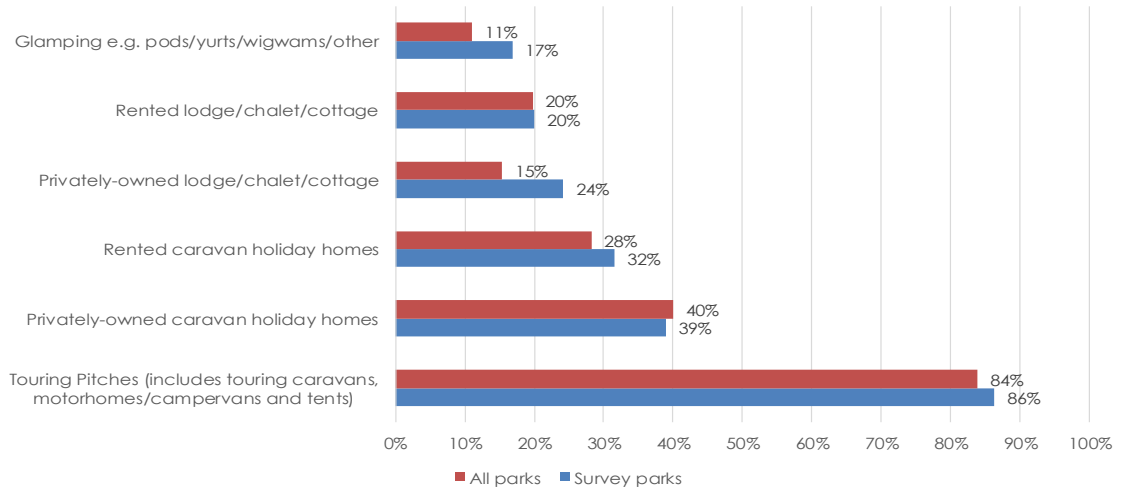
**3 parks did not provide pitch data*

3.5 Accommodation provided

The accommodation type of surveyed holiday parks/campsites was broadly representative of the sector. The majority of holiday parks/campsites (86%) had touring pitches which includes touring caravans, motorhomes/campervans and tents.

39% of the holiday parks/campsites had owner-occupied holiday homes on their holiday parks/campsites, and just under a third (32%) offered rented caravan holiday homes.

Figure 3.1: Types of accommodation on the holiday parks/campsites surveyed



N=95

Source: Frontline Holiday Park/Campsite Operator Survey, 2018
(figures sum to over 100% as most parks offer more than one type of accommodation)

3.6 Facilities and activities provided

In addition to accommodation, many holiday parks/campsites offer a range of leisure facilities. Surveyed holiday parks/campsites were asked to list what **other facilities they had on-site**. In the very small sites (1-5 pitches) 60% had toilet and shower blocks 50% had Wi-Fi and 30% had laundry facilities.

In the small to large parks (6-250+ pitches), facilities were more frequent with toilet blocks, Wi-Fi and laundry being most common.

When assessed by type of holiday park/campsite almost all those offering touring pitches provided toilet and shower blocks, compared to those that only had static accommodation.

'Other' facilities included:

- hardstandings
- electric hook ups
- motorhome service point
- dishwashing facilities

Table 3.4: Facilities listed by holiday park/campsite operators

	Very small parks		Small to very large parks	
Facility	**Number of parks**	**% of parks**	**Number of parks**	**% of parks**
Toilet blocks	12	60%	65	90%
Shower blocks	12	60%	64	89%
Wi-Fi	10	50%	62	86%
Laundry	6	30%	70	97%
Outdoor play area	-	-	44	61%
Restaurant/bar/takeaway	-	-	21	29%
Retail/shop	-	-	27	38%
Games room	-	-	16	22%
Entertainment	-	-	25	35%
No on-park facilities	-	-	-	-
Others (please specify)	16	80%	11	15%
Total parks consulted	**20**	-	**72**	-

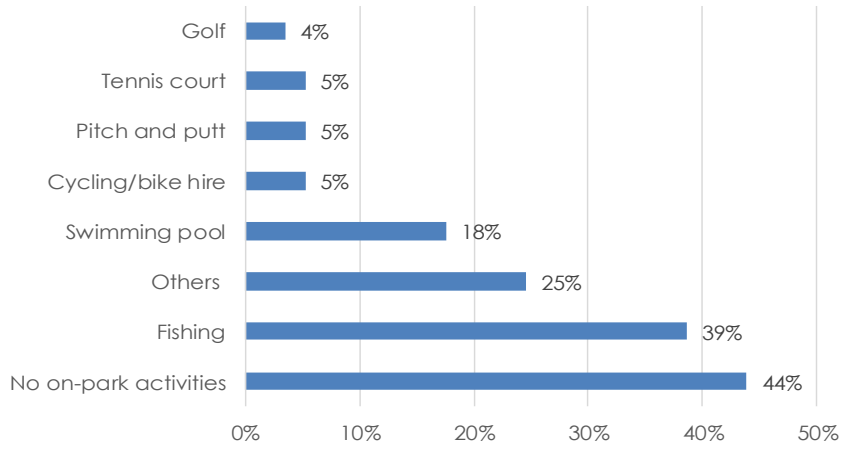
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most parks offer more than one type of facility)

The figures in Table 3.4 capture only those holiday parks/campsites who listed each type of facility in their response; it is possible that some of the holiday parks/campsites may have some of these activities but did not answer this question in full. Therefore, the figures may under-estimate the true mix of facilities on Scotland's holiday parks/campsites. Holiday parks/campsites were also asked about the activities provided on-site.

Less than half (44%) provided no on-park activities while over a third provided fishing (39%), 18% provided a swimming pool and 24% provided a mix of tennis courts, golf and pitch and putt. Others included: ball park, soft play, quad biking and sauna.

Only 18% of very small parks (1-5 pitches) had onsite activities.

Figure 3.2: Activities listed by holiday park/campsite operators



N=57

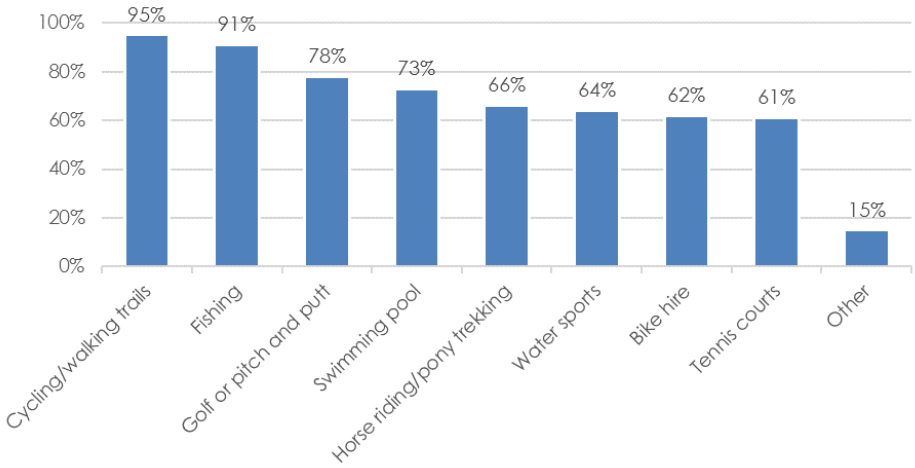
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites offer more than one type of facility)

Surveyed holiday parks/campsites were also asked about the **range of activities provided in the local area.** The vast majority of holiday parks/campsites had cycling/walking trails (95%) in the areas as well as fishing (91%). A further 78% had golf or pitch and putt, while 73% had a swimming pool. Over half had horse riding/pony trekking, water sports, bike hire and tennis courts.

'Other' included:

- concert hall
- ski slope
- trampoline park
- kayaking
- boat tours
- clay pigeon shooting

Figure 3.3: Range of activities in the local area



N=74

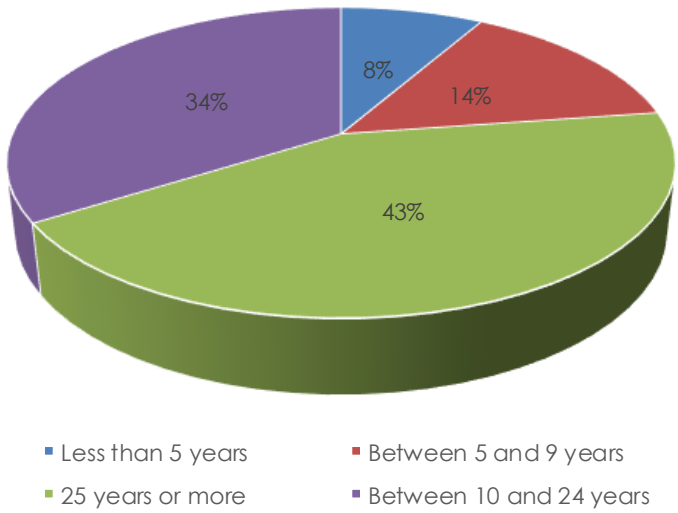
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites had more than one type of activity in the local area)

3.7 Holiday park/campsite ownership

In the majority of cases, holiday park/campsite operators saw their holiday parks/campsites as long-term investments, with the holiday parks/campsites owned and operated for more than ten years (77%).

Figure 3.4 summarises the feedback.

Figure 3.4: Length of time survey participants have owned/operated their holiday parks/campsites



N=97

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

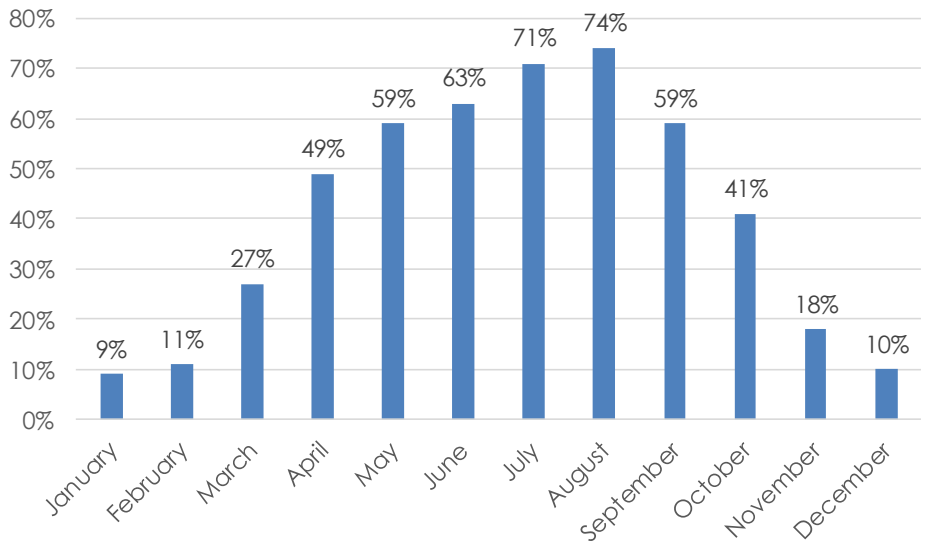
3.8 Length of season and occupancy rates

The majority of holiday parks/campsites (69%) operated seasonally with under a third open all year round. The majority (72%) are open from late March to the end of October.

Holiday park/campsite operators were asked to report their typical occupancy rates for each month opened.

Occupancy rates in Scotland's holiday parks/campsites peaked at 74% in high season (August) to 59% in mid season (May and September). Low season average occupancy ranged from a low of 9% in January to a high of 27% in March as presented in Figure 3.5.

Figure 3.5: Average occupancy rates on participants' holiday parks/campsites



N=75

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

3.9 Visitor origin

All survey participants were asked where their visitors came from.

Approximately half were from Scotland (49%), over a third from England (36%) and 11% from outside the UK.

Table 3.5: Visitor origin

Area	Scotland	England	Wales	NI	Outside UK
Aberdeen & Aberdeenshire	50%	27%	3%	0%	20%
Ayrshire & Arran	59%	33%	1%	1%	6%
Dumfries and Galloway	42%	48%	3%	2%	5%
Edinburgh, the Lothians and Borders	39%	47%	3%	1%	10%
Fife	76%	8%	5%	4%	7%
Greater Glasgow & The Clyde Valley	33%	52%	7%	3%	5%
Loch Lomond, The Trossachs, Stirling & Forth Valley	44%	36%	2%	2%	16%
Tayside	52%	34%	2%	1%	11%
The Highlands & Islands	42%	38%	3%	1%	16%
Total	**49%**	**36%**	**3%**	**2%**	**11%**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=80

When segmented by region (Table 3.5) there was a significant degree of variance in responses by holiday park/campsite:

- visitors to Fife were the most likely to come from within Scotland
- visitors to Aberdeen and Aberdeenshire were the most likely to come from outside the UK, closely followed by the Highlands and Islands
- visitors to Greater Glasgow and Clyde, Dumfries and Galloway and Edinburgh, the Lothians and Borders were the most likely to come from England

3.10 Staff employed

Surveyed holiday parks/campsites were asked to provide staff numbers across part and full-time as well as seasonal and all year round.

Results show that on average, across all holiday parks/campsites, there were 7.4 full-time and 0.9 part-time staff all year round and 9.2 full-time and 10.2 part-time seasonal staff.

Numbers varied depending on the size of the holiday park/campsite. **8% of holiday parks/campsites employed migrant workers; this represented, on average,17% of their total workforce.**

Table 3.6: Average staff employed per holiday parks/campsites

Park Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small parks (1-5 pitches)*	-	-	-	-
Small parks (6-50 pitches)	1	1.5	3.4	0.4
Medium sized parks (51-100 pitches)	1.2	3.7	3.3	0.6
Large parks (101-250 pitches)	4.3	2.1	6	1
Very large parks (251 pitches or more)	22.4	25.7	19.9	1.4
Average across all parks	**9.2**	**10.2**	**7.4**	**0.9**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=70

**No employee numbers were gathered on the very small parks, typically because these are CL/CS sites that have a small number of pitches and do not require employees directly related to this element of the business.*

3.11 Expenditure by park/campsite[21]

Surveyed holiday parks/campsites were asked to provide details of their capital expenditure, operating expenditure, wages and salaries for the last financial year (2017/18).

The total expenditure for respondent holiday parks/campsites is presented in Table 3.7.

Table 3.7: Total expenditure by holiday parks/campsites

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£10,235,591	£173,485
Operating expenditure	£9,941,251	£202,883
Wages and salaries	£12,415,056	£197,064
Total expenditure	**£32,591,898**	**£573,432**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=51-65

Holiday park/campsite operators were asked to comment on the top three areas of capital expenditure over the last five years; the following were most frequently cited:

- **accommodation** – new and existing renovation across all accommodation types
- **utility development** – electric hook up and connections; power upgrades and water supplies
- **pitch development** – adding new and improving existing – across touring and owned
- **facilities** – new and refurbishment of washrooms, shower blocks, play areas, leisure facilities and restaurants
- **fleet development** – cars and wider transportation
- **park infrastructure** – roads
- **materials and plant/equipment**

Some were also involved in acquisition of new holiday parks/campsites and a couple mentioned Wi-Fi enablement.

Looking to the future, holiday parks/campsites were then asked to provide their planned expenditure for maintenance and/or expansion/improvement of their park and on-site facilities. The total expenditure is presented in Table 3.8.

Table 3.8: Planned expenditure

	Expenditure	
	Maintenance	**Improvements**
Next financial year	£39,333,617	£7,291,675
Next three financial years	£11,702,234	£13,937,632
Total	**£51,035,851**	**£21,229,307**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=39-73

[21] *For various reasons some holiday parks/campsites were unable to provide this information; this will be highlighted and reason provided where available.*

3.12 Community engagement

Over half (54%) of holiday park/campsite operators provided information on how they **engage with the local community**, the most frequently occurring included:

- **local events** – promotion and sponsorship
- **fundraising** – particularly around sports and community groups
- **working with community** – and working groups and community councils
- **leaflets and local information**

A few respondents believed they could be doing more for their local communities, but staff resource was hampering them.

Some **holiday park/campsite operator** feedback included:

"Fundraising for local hospice – sale of walking maps, book exchange, support for school events."
Tayside

"We have an arrangement with Respitality to offer free holidays to carers to give them a break from looking after a member of the family."
Fife

"For the past 5 years we have hosted the Cowal Primary School's annual orienteering competition – 8 - 10 schools participate in an all-day event at the park."
The Highlands and Islands

"Collaborating with council to create a public footpath alongside our park."
Dumfries and Galloway

"Sponsor local park, train and work projects – collect and participate in local charity fund raising."
Fife

"Sponsor and promote local events via social media and information/office areas, also advise verbally to customers on local events."
Tayside

3.13 Environmental improvement

Over half of holiday park/campsite operators (57%) provided information on how they **supported environmental improvement** at their holiday parks/campsites, the most frequently occurring included:

- **recycling** – which was highlighted by the majority (82%) and included the education of guests
- **light sensors and low wattage** – solutions
- **David Bellamy Award participation** – many have now achieved gold
- **support for local wildlife** – flora and fauna
- **restricted vehicle movement** – some have no car policy
- **energy and water conservation** – water harvesting, solar panels, compost toilets

Some holiday park/campsite operators mentioned that they used to actively encourage recycling however in 2018 they gave up as *"we received no support from the council"*. Another said they found little interest in their small park with environment and conservation. The word cloud below shows the **importance of recycling and the David Bellamy Award Programme**.

Some **holiday park/campsite operator** feedback included:

"Recycling – providing guests with clear bags and instructions how to do it for our area. Timing on shower tokens so water is not wasted."

Dumfries and Galloway

"We ask visitors to try and reduce vehicle movements around site to protect the environment and give consideration to other site users and the wildlife within the site and the surrounding area."

Greater Glasgow and the Clyde Valley

"We operate a mini bus service from the site in peak season to try and reduce the number of vehicles going to and from the site. We use LED lighting and have all lights on sensors."

Greater Glasgow and the Clyde Valley

"Well engaged with David Bellamy scheme and supporting Zero Waste Scotland. Encouraging wildlife and educating guests."

Edinburgh, the Lothians and Borders

"We have introduced water and energy saving initiatives deployed via the 'Save It' campaign and are considering negative emissions technologies in collaboration with buying specifications for new assets."

The Highlands and Islands

"Own wind turbine, private water supply, waste recycling."

Aberdeen & Aberdeenshire

"All our huts are made from recycled materials, we do not allow cars to the door so conserving the woodland they are in. All service points have separate bins for recycling. Bird and insect boxes around the site."

The Highlands and Islands

3.14 Health and wellbeing

Almost half (44%) of holiday park/campsite operators provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **cycle paths and walks provision and information** – some on-park but mostly linked to surrounding area
- **positive effect of being outdoors** – close to nature
- **provision of local health and wellbeing facilities and promotion within the wider community** – includes on-site fitness sessions and park runs
- **healthy food options in holiday parks/campsites restaurants/cafes** – this includes vegan, gluten free etc
- **dog owners encouraged** – dog friendly areas

2% stated they did not provide any health and wellbeing activities.

More detail on the health and wellbeing benefits for visitors is presented in Section 4.5.

Some **holiday park/campsite operator** feedback included:

"We encourage walking as a pastime and have a large selection of route guides available. The local bike hire shop will deliver to the park and we promote a wide range of local outdoor activity suppliers."

Loch Lomond, the Trossachs, Stirling and Forth Valley

"We promote the wider park area for cycling and general exercise as it has lots of communal areas to do such activities and there is also a leisure centre within the grounds of the wider park that visitors can access."

Greater Glasgow and the Clyde Valley

"Healthy option in bistro. Cycle paths advertised and walks. Great area for sporting activities. Adjacent tennis court. Walking and cycling routes. Fishing on local river as well as golf course and bowling green. Two day spas in the town as well as a chiropractor."

Dumfries and Galloway

"We promote locally made food in our breakfast packs from artisan suppliers. We will offer retreat type activities - yoga weekends, reiki weekends, painting, crafting, photography workshops etc."

Highlands and Islands

"We actively promote dog owning visitors who are able to walk their dogs safely."

Tayside

3.15 External factors impacting the business

A small sample of Scottish holiday park/campsite operators (12%) provided some insight to the external factors affecting their business, not surprisingly the weather came out first with almost all highlighting this. This was closely followed by uncertainty aligned to Brexit; although many saw positive aspects due to current positive exchange rates.

Others mentioned:

- lack of locally available skilled staff and less overseas staff
- poor broadband, Wi-Fi and mobile infrastructure
- tourism tax and business rates relief changes
- cost of materials

Some **holiday park/campsite operator** feedback included:

"Weather, lack of skilled people to employ locally."

Dumfries and Galloway

"Worry over Business Rates relief which may choke investment/growth in the market/EU employees and uncertainty over whether they will be able to stay post Brexit."

Edinburgh, the Lothians and Borders

"Good Exchange rates at moment bringing in more overseas trade."

Edinburgh, the Lothians and Borders

"The cost of materials has increased by about 15% which has increased the cost of new caravans. As a result, caravan sales have been slower but touring has increased."

Loch Lomond, The Trossachs, Stirling & Forth Valley

"Weather, camping can be all about the sunshine! And we are not as lucky as other parts of the UK. The Brexit issue has had a positive effect with more UK guests staying at home and overseas guests coming in bigger numbers due to the fall in the pound."

Highlands and Islands

3.16 In summary

This research found that Scotland's holiday parks/campsites offer a wide range of accommodation options to visitors, which allow them to serve a diverse range of customers' tastes and budgets. These include both touring pitches for caravans, campervans, motorhomes and tents; owner-occupied holiday homes; and rented holiday homes, lodges, apartments, chalets, wigwams, pods and yurts.

In addition to this diverse accommodation offered, Scotland's holiday parks/campsites also offer a wide range of leisure facilities and amenities, including restaurants, swimming pools, cafés and games rooms.

The majority of holiday park/campsite operators have run their holiday parks/campsites for over 10 years and many have done so for over 25 years. Holiday parks/campsites occupancy rates vary from an average of 74% in peak season (August) to 59% in mid season (May and September). The proportion of visitors to Scotland's holiday parks/campsites who live outside Scotland varied significantly from park to park, depending on geographic location.

As well as supporting local economies by providing a source for visitor off-site expenditure, holiday park/campsite operators also support their local communities through their:

- **expenditure** – 50% of holiday parks/campsites from the total survey sample cumulatively spent £32.6m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events and fund raising particularly around sports and community groups
- **environmental activities** – including support for recycling and biodiversity, and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycling paths, promotion of wider community health and fitness sessions and healthy food option provided on-parks

4 Visitor Survey

An online visitor survey was open from May to November 2018. The survey was disseminated electronically by the Caravan and Motorhome Club and the Camping and Caravanning Club to a sample of their members. The survey was also promoted by some holiday parks/campsites, in sector magazines and through social media.

1,071 respondents had made 1,553 visits to a holiday park/campsite in Scotland in 2018 across two trips. Table 4.1 shows the spread of visitors across the Scottish regions.

Table 4.1: Location of holiday parks/campsites visited

Location	Visitors	
	Trip 1	Trip 2
Aberdeen & Aberdeenshire	7%	6%
Ayrshire & Arran	7%	5%
Dumfries & Galloway	12%	11%
Edinburgh, Lothians and the Borders	15%	15%
Fife	4%	4%
Greater Glasgow & The Clyde Valley	2%	2%
Loch Lomond, The Trossachs, Stirling & Forth Valley	8%	8%
Tayside	10%	8%
The Highlands and Islands	37%	35%
Unknown	4%	7%
Total consulted	**798**	**755**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The remainder of this section is based on those **visiting Scotland in Trip 1 only (798)** which had the most comprehensive data set as all respondents participated in at least one trip.

4.1 Visitor origin and number of trips

The majority of survey participants lived in Scotland (62%). This aligns to the Scottish holiday park/campsite operators who reported that the majority of their visitors come from Scotland (Section 3).

1% came from outside the UK.

Table 4.2: Visitor home country

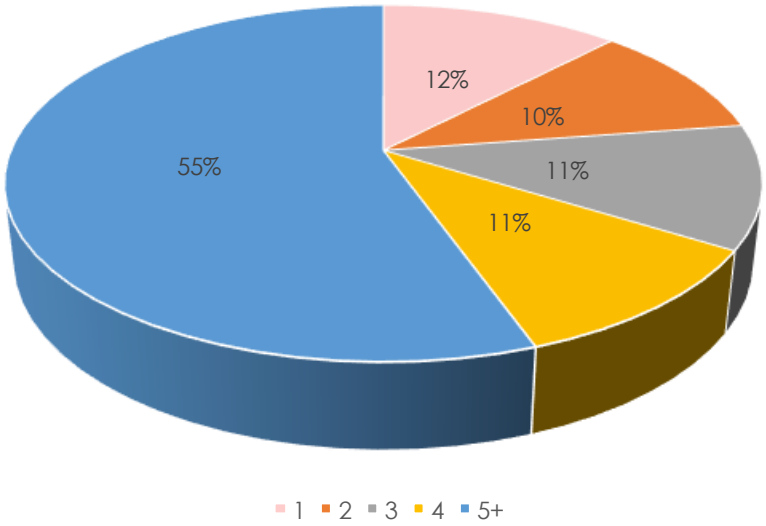
Location	Visitors
Scotland	62%
England	33%
Northern Ireland	2%
Wales	1%
Outside the UK[22]	1%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=798

[22] *This is an underrepresentation of actual overseas numbers and is a result of difficulty in engaging this group to participate in the study.*

Over half of respondents (55%) stayed on a holiday park/campsite in Scotland five times or more during the last 12 months; a further 11% stayed four times.

Figure 4.1: Average number of visits made in the past 12 months



N=795

4.2 Visitor characteristics

82% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 7% stayed in an owner-occupied caravan, holiday home or lodge; while 9% stayed in some form of rented accommodation.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Touring caravan	29%
Motorhome/campervan	44%
Tent	9%
Static accommodation types	
Caravan holiday home owned	6%
Caravan holiday home rented	6%
Glamping e.g. pods/yurts/wigwams/other	2%
Privately-owned lodge/chalet/cottage	1%
Rented lodge/chalet/cottage	4%

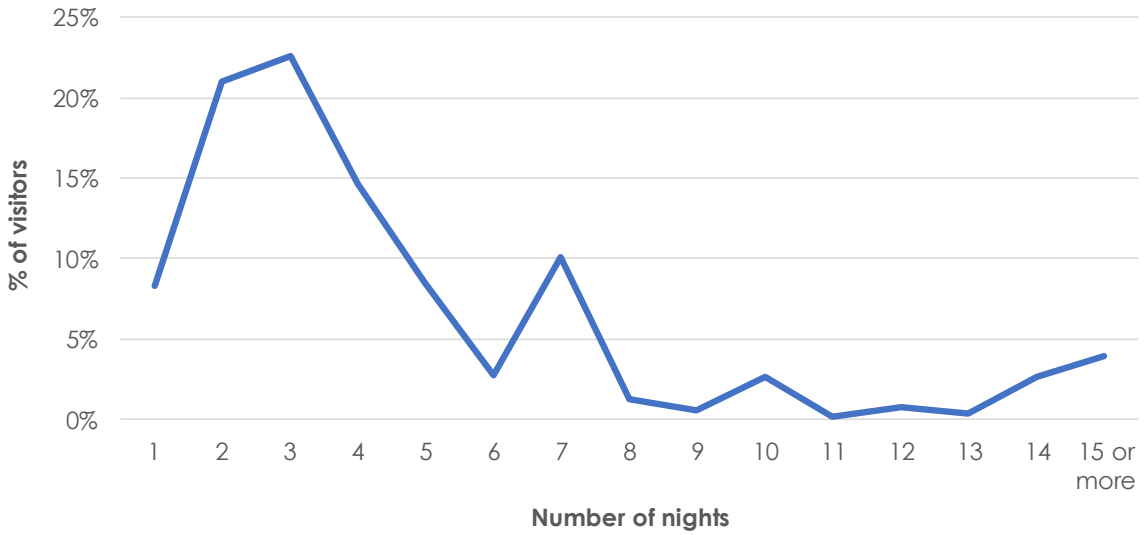
Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The high level of tourers is not surprising as over **two thirds (69%, 551) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club**[23]. When broken down further:

- 59% (325) were members of the Camping and Caravanning Club
- 81% (448) were members of the Caravan and Motorhome Club
- 40% (222) were members of both

On average visitors spent 4.6 nights per trip. The distribution of responses is shown in Figure 4.2.

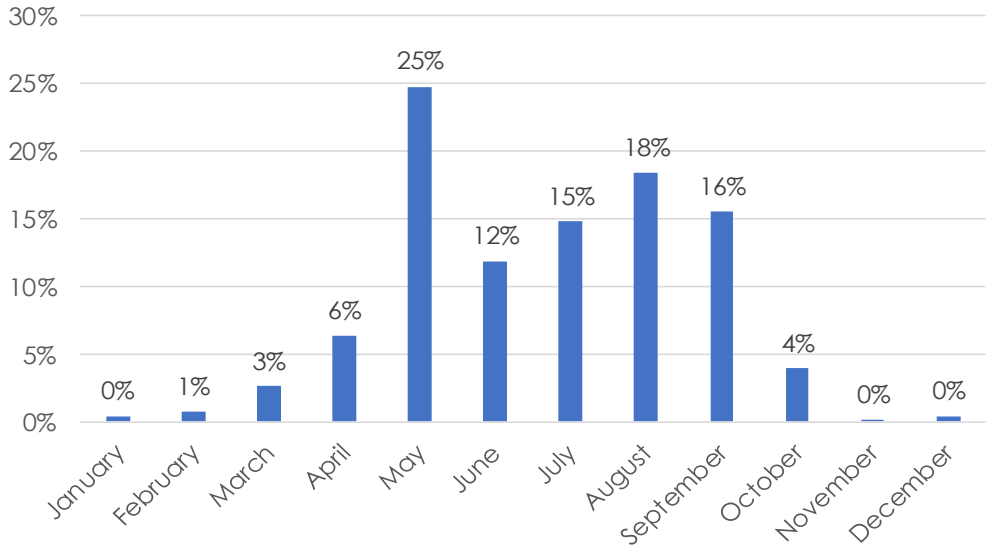
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=798

Figure 4.3 shows the month in which respondent visitors began their trip. May (25%) was the most popular for visitors followed by August (18%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=690

[23] *This representation has no bearing on the reliability of the survey findings as the methodology involves calculating the impacts for the owner-occupier/renter and the touring markets separately, then aggregating these together.*

Table 4.4 shows the number of adults, children and pets in each party. The average adult group size was 2.1, and 22% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.8. 40% of groups brought a pet.

The average total group size was 2.4. When broken down by tourers and owners, tourers had an average group size of 2.3 and owners 2.9.

Table 4.4: Number of adults, children and pets in each group

	Number of adults	Number of children	Number of pets
1	8%	75%	56%
2	81%	9%	28%
3	5%	12%	12%
4	4%	2%	3%
5+	2%	0%	0%
Average	2.1	1.8	1.4

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

4.3 Visitor expenditure

Visitors who stayed in rented or touring accommodation spent, on average, £496 per visit (per group), including £260 on-site and £236 off-site. Visitors who owned their holiday home spent, on average, £415 (per group) per visit, including £227 on-site and £188 off-site. This is an increase on the average Scottish tourism visitor spend (per trip) in 2011 of £359[24].

Accommodation hire cost, touring and pitch fees, transport and food and drink were the biggest expenditure items.

Table 4.5 summarises the areas of expenditure.

Table 4.5: Visitor spend per visit

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£94	£71
Transport spent during trip	£45	£23
Total cost of holiday accommodation	£129	£100
Touring-pitch/fees paid to park	£98	£87
Park facilities (e.g. Wi-Fi, laundry etc)	£6	£3
Eating/drinking on the park	£23	£31
Eating/drinking/takeaways in the surrounding area	£63	£63
Recreation/entertainment on the park	£4	£6
Recreation/entertainment in the surrounding area	£17	£14
Visitor attractions	£15	£14
Other	£2	£3
Total – on-site	**£260**	**£227**
Total – off-site	**£236**	**£188**
Total – both on and off-site	**£496**	**£415**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors who stayed in rented and touring accommodation spent, on average, £107 per day, including £56 on-site and £51 off-site.

Visitors who owned their holiday home spent, on average, £87 per day, including £47 on-site and £39 off-site. Table 4.6 summarises daily expenditure.

[24] http://scottishtourismalliance.co.uk/page/national-strategy/

Table 4.6: Visitor spend per day

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£20	£15
Transport spent during trip	£10	£5
Total cost of holiday accommodation	£28	£21
Touring-pitch/fees paid to park	£21	£18
Park facilities (e.g. Wi-Fi, laundry etc)	£1	£1
Eating/drinking on the park	£5	£7
Eating/drinking/takeaways in the surrounding area	£14	£13
Recreation/entertainment on the park	£1	£1
Recreation/entertainment in the surrounding area	£4	£3
Visitor attractions	£3	£3
Other	£0.44	£1
Total – on-site	**£56**	**£47**
Total – off-site	**£51**	**£39**
Total – both on and off-site	**£107**	**£87**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

4.4 Influences on visitor decisions on which holiday park/campsite to visit

Visitors were asked *"what influenced you in making these visits?"*

The most popular responses were *"I wanted to visit the area"* (41%); and *"wanted to revisit the area"* (31%).

Table 4.7: Influences on visitor decisions on which holiday parks/campsites to visit

Factor	Number responding*
Wanted to visit the area	41%
Wanted to revisit the area	31%
Had been to this region/country before and wanted to visit another area	19%
Club member communication	15%
Park/site recommended by family/friends	12%
Family/friends in the area	12%
Saw advertisement for the park(s) in a magazine, newspaper or website	11%
Attending an event/festival	6%
Specific activities available in the area	9%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=640

**Figures sum to more than 100% as multiple answers were allowed to this question. The majority of people who responded to this question were tourers.*

4.5 Health and wellbeing

Time spent relaxing (66%) was the most commonly undertaken activity by visitors followed by short walks (54%).

Table 4.8 summarises the results.

Table 4.8: Activities undertaken whiles visiting a holiday park/campsite

	More	Less	Same	I did not undertake this activity	Total
Spent time relaxing	66%	4%	30%	0%	**637**
Short walks (under 2 miles)	54%	4%	38%	4%	**616**
Spent time with family and friends	50%	6%	27%	16%	**593**
Wildlife/nature activities	42%	3%	29%	25%	**586**
Long walks (over 2 miles)	40%	6%	22%	10%	**619**
Other outdoor physical activities	29%	3%	22%	46%	**555**
Cycling	20%	5%	13%	62%	**581**

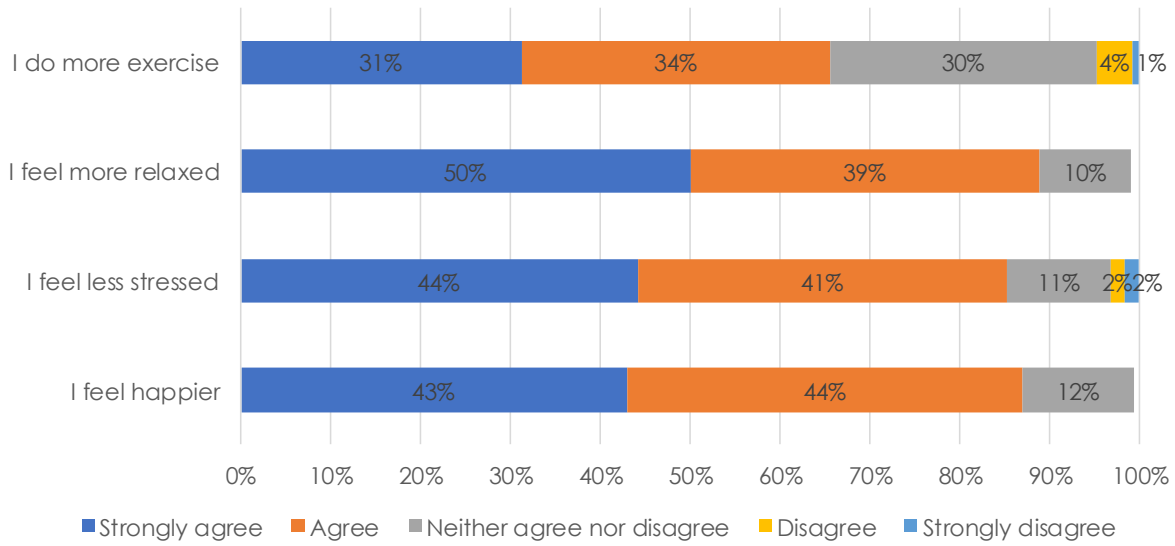
Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors were asked to what extent they agreed with a range of health and wellbeing statements; results were as follows:

- 89% strongly agree or agree that they **feel more relaxed when visiting a holiday park/campsite**
- 87% strongly agree or agreed that they **feel happier when visiting a holiday park/campsite**
- 85% strongly agree or agree that they **feel less stressed when visiting a holiday park/campsite**
- 65% strongly agree or agree that they **do more exercise when visiting a holiday park/campsite**

Figure 4.4 presents the detailed feedback.

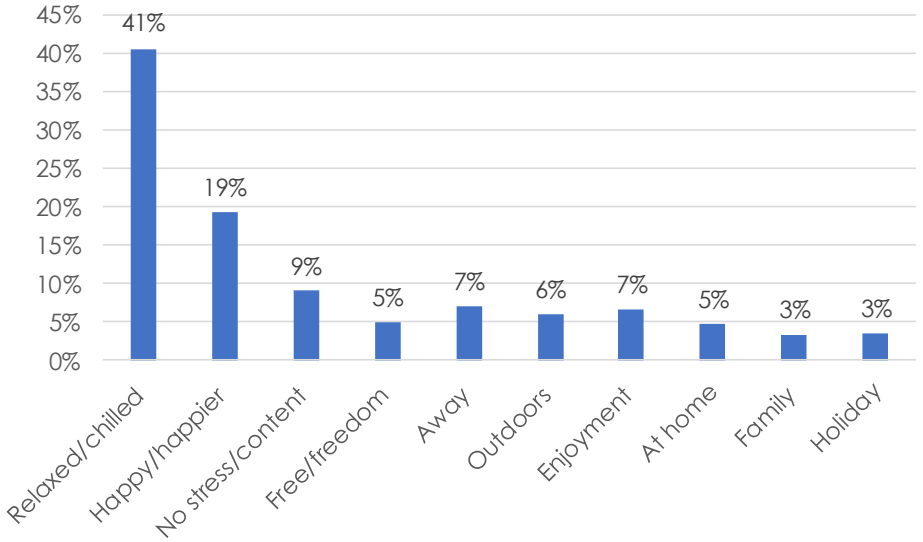
Figure 4.4: When visiting a holiday park/campsite…



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors felt more relaxed (41%), happier (19%) and more content (9%) as a result of visiting a holiday park/campsite. This is summarised in Figure 4.5 and the word cloud below.

Figure 4.5: During my time visiting a holiday park/campsite I feel……



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=579

Some **visitor** comments included:

"A release from normal living pressures, a greater appreciation of our environment, and simplification in the "stuff" with which we surround ourselves normally."

Touring Caravan Owner, The Highlands and Islands

"I feel alive and not hemmed in by the stresses and strains of daily life and appreciate every moment with my family away from modern technology enjoying nature and life."

Rented Caravan User, The Highlands and Islands

"A more relaxed and contented person who is a better person to be around. It is the only time I truly switch off."

Touring Caravan Owner, Tayside

"I want to explore the great outdoors, play more outdoor activities, get away from the electronic world, play more games/activities like I did as a kid. Visit local arts craft type shops."

Glamping User, The Highlands and Islands

"Relaxed and relieved to get away from the stresses of everyday work and living. Feels like a mini holiday even if just for one night. Particularly like sites within easy safe walking distance of shops etc and not having to re-park motorhome as this can be a problem in some towns."

Motorhome/Campervan Owner, Aberdeen & Aberdeenshire

"Relaxed and free to do what I want to do. I take my two dogs everywhere with me and enjoy the outdoors which I'm not able to do as much at home."

Touring Caravan User, Loch Lomond, The Trossachs, Stirling & Forth Valley

"Like I've been away longer: a weekend feels like half a week, a week feels like 10 days and a fortnight feels like forever!"

Motorhome/Campervan Owner, Edinburgh, Lothians and the Borders

4.5.1 Benefits and impacts of improved physical and mental health

There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling.

According to the Chief Medical Officer[25]:

> *"If a medication existed which had a similar effect to physical activity [like walking], it would be regarded as a wonder drug or a miracle cure"* (2010).

Data shows that walking regularly at any speed will[26]:

- help manage weight
- reduce the risk of Type 2 diabetes
- reduce the risk of certain cancers such as colon, breast and lung cancer
- improve flexibility and strength of joints, muscles and bones, and reduce the risk of osteoporosis
- increase 'good' cholesterol
- boost the immune system
- improve mood, reduce anxiety, aid sleep and improve self-image

As well as health impacts, **there are significant socioeconomic implications**. The annual cost of treating conditions associated with being overweight and obese is estimated to range from £363m to £600m. The total annual cost to the Scottish economy of overweight and obesity, including labour market related costs such as lost productivity, is estimated to be between £0.9bn and £4.6bn[27].

Research also shows that **feeling more relaxed can reduce stress in a person's everyday life** which is vital for maintaining overall health, as it can improve mood, boost immune function, promote longevity and allow greater productivity[28].

A study by the New Economics[29] Foundation found there were 17,500 episodes where stress or anxiety was the primary cause for hospital admissions in 2016/17, which led to 165,800 days when beds were occupied. According to the think tank, the average cost of a bed day to the NHS is around £429, which means the total cost to the taxpayer of these episodes is £71.1m[30].

Increased focus on health and wellbeing is something at the forefront of the Scottish Government's agenda. Policy in Scotland widely recognises the importance of improving the health and wellbeing of the country's population. In 2018 the Government published *Scotland's Physical Activity Delivery Plan*[31]. This Delivery Plan is one of five linked public health strategies and delivery plans published in 2018. Taken together they create a healthy environment whilst encouraging people to make good choices about their health, their life and their communities. Other plans focus on diet and healthy weight as well as Scotland's health and social care system.

The evidence gathered from visitors during this study demonstrates that Scotland's holiday park and campsite sector is making a positive contribution to visitors' health and wellbeing. Visitors were:

- increasing their physical activity
- improving their mental health through being more relaxed and less stressed
- accessing the natural environment

Therefore the Scotland's holiday park and campsite sector is supporting the country's policy agenda for health and wellbeing.

[25] https://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[26] http://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[27] https://www.gov.scot/publications/healthier-future-scotlands-diet-healthy-weight-delivery-plan/pages/2/
[28] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[29] https://neweconomics.org/2018/05/stressed-economy-stressed-society-stressed-nhs
[30] https://www.shponline.co.uk/stress/stress-and-anxiety-costing-the-nhs-71m-a-year/
[31] https://www.gov.scot/publications/active-scotland-delivery-plan/

Some **visitor** comments included:

"I want this to last longer."
Touring Caravan User, Loch Lomond, The Trossachs, Stirling & Forth Valley

"Welcomed by staff & made knowledgeable of events or facilities surrounding the area due to their information given."
Motorhome/Campervan Owner, The Highlands and Islands

"We look forward to our trips, they are our main holidays and spend much time planning. We tour Britain and Europe in a much more leisurely manner and happy to miss out the stress of flying."
Motorhome/Campervan Owner, Dumfries & Galloway

"We love our caravan breaks...very chilled, affordable, versatile and easy to plan."
Touring Caravan Owner, Tayside

"We use our camper van as a base for outdoor activities, mountain climbing, cycling, hiking. It makes it so easy to stay where we want to go. Sitting in the awning of the tent having a cup of tea listening to wildlife is so peaceful. So much different from my day to day life in the city."
Campervan/Tent Owner, The Highlands and Islands

"Just love my campsites and I am away very often in my campervan. I like cleanliness and good facilities but no bar on a campsite."
Motorhome/Campervan Owner, The Highlands and Islands

4.6 In summary

The majority of the survey participants lived in Scotland (62%) and over half of respondents (55%) stayed on a holiday park/campsite in the Scotland five times or more during the last 12 months.

82% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 7% stayed in an owner-occupied caravan holiday home or lodge; while 12% stayed in some form of rented, stationary accommodation.

The average adult group size was 2.1, and 22% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.8. 40% of groups brought a pet.

Visitors in rented/touring accommodation spent, on average, £496 per visit (£107 per day), spending, on average, 4.6 days on a holiday park/campsite on each holiday. Visitors staying in owned accommodation spent, on average, £415 per visit (£87 per day) and stayed, on average 4.8 days. **This is higher than the average daily spend by visitors to Scotland of £77[32] and longer than the average stay of 3.4days[33].**

[32] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf

[33] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

The main objective of this research was to assess the total value of visitor spend attributable to the Scottish holiday park/campsite sector in the twelve months to December 2018.

As part of the impact model, an economic figure was calculated for every possible combination of:

- days of the year (365)
- accommodation type (6)
- Scottish region (9)

In other words, the model includes 19,710 separate economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures.

5.2 Measuring on-site and off-site expenditure

Table 5.1 provides an illustrative example of how the on-site expenditure figures were estimated for touring caravans in Fife on Saturday 4th August:

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Fife	667
Multiplied by:	
Average occupancy rate on 4th August	74%
Number of pitches occupied on 4th August	494
Multiplied by:	
Ave. on-site expenditure per day for renting holiday-makers	£56.48
= On-site expenditure of touring caravan visitors to Fife on 4th August	**£27,901**

The off-site expenditure was measured in exactly the same way. Following the same worked example as above, it was calculated that in Fife, on Saturday 4th August, total off-site expenditure by touring caravan visitors is presented in Table 5.2.

Table 5.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Fife	667
Multiplied by:	
Average occupancy rate on 4th August	74%
Number of pitches occupied on 4th August	494
Multiplied by:	
Ave. off-site expenditure per day for renting holiday-makers	£51.32
= Off-site expenditure of touring caravan visitors to Fife on 4th August	**£25,352**

5.3 Measuring indirect and induced expenditure

In addition to the types of impact highlighted above, the Fife economy would also have benefited from additional knock-on impact on this day as a result of:

Indirect expenditure: the knock-on benefits that take place further down the supply chain.

Induced expenditure: the knock-on benefits that take place as a result of employees' expenditure of income.

The most up-to-date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (March 2018). This publication recommended that the 0.47 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation.

Table 5.3 presents a worked example for Scotland.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£27,901
Plus	
Total off-site expenditure	£25,352
Total combined on and off site expenditure	**£53,253**
Multiplied by:	0.47
= Indirect and induced effects:	**£25,029**

5.4 Measuring visitor impact

The expenditure impact is equal to the sum of the on-site expenditure, off-site expenditure and multiplier impacts. Table 5.4 presents a worked example.

Table 5.4: Visitor impact

Total on-site expenditure	£27,901
Plus	
Total off-site expenditure	£25,352
Indirect and induced effects	£25,029
Visitor impact	**£78,282**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[34], every £54,000 spent by tourists in a local economy sustains one full-time equivalent (FTE) job. This proxy was applied in the assessment of the FTE employment impacts associated with the holiday park/campsite visitor expenditure.

According to figures from the most recent ONS's publication[35], every £100 of turnover generated by Scotland's sustainable tourism industry translates to a GVA impact of £61.92.[36] This proxy was applied to the above turnover figures to produce an estimate of the holiday park/campsite sector's contribution to Scotland's GVA.

[34] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[35] *2018 Annual Business Survey, ONS, 2018.*
[36] *Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks).*

6 Economic Impact of Holiday Parks/Campsites in Scotland

This section presents a summary of the visitor expenditure, gross value added (GVA) and full-time equivalent (FTE) employment impacts of the holiday park/campsite sector in Scotland, broken down by region and by accommodation type.

6.1 Impact by Scottish region

It is estimated that in 2018 visitors to Scottish holiday parks/campsite spent **a total of £772.3m in the Scottish economy**, made up as follows:

- £280.5m on-site spend
- £244.9m off-site spend
- £246.9m of multiplier impacts

This visitor expenditure **supports 14,301 FTE jobs and contributes £478.2m of GVA to the Scottish economy**.

Table 6.1: Economic impacts by UK Country

Region	Visitor expenditure (£m)	Employment (FTE jobs)
Highlands & Islands	161.7	2,992
Tayside	121.1	2,242
Dumfries & Galloway	115.6	2,142
Edinburgh, Lothians & Borders	102.2	1,890
Ayrshire & Arran	86.4	1,605
Fife	72.7	1,341
Loch Lomond, Trossachs, Stirling & Forth Valley	56.5	1,046
Aberdeen and Aberdeenshire	32.6	607
Glasgow & Clyde	23.5	436
Scotland	**772.3**	**14,301**

Source: Frontline, 2019

6.2 Impact by accommodation type

Table 6.2 summarises the impacts aligned to accommodation type.

Table 6.2: Economic impacts by accommodation type

Scotland	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Caravan Holiday Home (owned)	324.0	5,998	200.5
Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	322.0	5,960	199.6
Caravan Holiday Home (rented)	81.1	1,500	50.1
Lodge/chalet/cottage (owned)	20.7	390	12.8
Lodge/chalet/cottage (rented)	18.4	338	11.3
Glamping e.g. pods/yurts/wigwams/other	5.9	115	3.9
All accommodation	**772.3**	**14,301**	**478.2**

Source: Frontline, 2019

6.3 Assessing the economic impacts of maintenance expenditure

The impacts presented are based on visitor expenditure in holiday parks/campsites in Scotland, including their pitch fees. However, the figures do not capture the ongoing costs of maintaining their accommodation.

Based on the survey, Table 6.3 estimates the average maintenance expenditure across Scotland.

Table 6.3: Average Scottish annual expenditure on caravan holiday home and touring caravan/ motorhome maintenance

Area of expenditure	Touring Caravan/ Motorhome Owner[37]	Caravan/Holiday Home Owner[38]
Servicing	£272	£225
Insurance	£248	£194
Road Tax	£183	
General Upkeep	£208	£125
Total	**£911**	**£544**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018
**includes touring caravans, motorhomes/campervans and tents*

The predicted expenditure figure for touring caravan owners is equal to the estimated number of touring caravans/owned motorhomes in Scotland (62,400[39]) multiplied by average maintenance expenditure per touring caravan/motorhome (£911). This equals £56.8m.

Aligned to the approach presented above, the estimated expenditure figure for caravan holiday home/lodge owners is equal to the number of owned caravan holiday homes (16,287[40]), multiplied by average maintenance expenditure per holiday home (£544). This equals £8.7m.

The total impact associated with expenditure on caravan and holiday home maintenance is estimated to be in the region of £65.5m.

6.4 In summary

In 2018 it was estimated that Scotland's holiday park/campsite sector generated **a total visitor expenditure impact of £772.3m** – compared to £700.8m in 2014. Note that while this study expanded the population to include Certificated Locations and Certificated Sites the increase in visitor expenditure is still greater overall and is not simply as a result of the increased number of holiday parks/campsites.

This expenditure impact equates to a £478.2m GVA impact (including multipliers) and supports 14,301 FTE jobs in the Scottish economy. This is an increase on the 2014 figures of £356.3m of GVA and 12,977 FTE jobs.

According to a report commissioned by VisitBritain[41] the tourism sector in Scotland had a direct GVA of £6.1bn[42] excluding multipliers, therefore the holiday park/campsite sector at £325.7m (excluding multipliers)[43] makes a substantial contribution (5%) to the sector's GVA.

[37] These figures were taken from visitors who lived in Scotland as it was assumed that's where they would spend their money.
[38] These figures were taken from visitors visiting Scotland as it was assumed that's where they would spend their money.
[39] NCC https://www.thencc.org.uk/Our_Industry/statistics.aspx and apportioned according the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.
[40] UKCCA, 2018.
[41] https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf
[42] Converted to 2018 prices.
[43] See appendix 3 for GVA excluding multipliers summary table.

To allow direct comparison with the 2014 economic impact assessment, which was based on the scale of Scotland's Sustainable Tourism sector[44], **the holiday park/campsites sector increased to 8.4% of GVA in 2018, compared to 7.8% in 2014.**

The geographic areas which recorded the highest visitor impacts were:

- **Highlands and Islands**: with visitor expenditure of £161.6m, equivalent to a GVA impact of £100.1m, and to 2,993 supported FTE jobs
- **Tayside:** with visitor expenditure of £121.1m, equivalent to a GVA impact of £75.0m, and to 2,242 supported FTE jobs
- **Dumfries and Galloway**: with visitor expenditure of £115.6m, equivalent to a GVA impact of £71.6m and to 2,141 supported FTE jobs

The accommodation types which recorded the highest visitor impacts were:

- **owner-occupied caravan holiday homes**: with visitor expenditure of £323.8m, equivalent to a GVA impact of £200.5m, and to 5,997 supported FTE jobs
- **touring pitches**: with visitor expenditure of £322.0m, equivalent to a GVA impact of £199.4m, and to 5,994 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and caravan holiday home owners adds a **further £65.5m of expenditure to the Scottish economy**.

[44] *https://www2.gov.scot/Topics/Statistics/Browse/Business/SABS/Sectors/GrowthSectors; 2018 GVA £3.88bn excluding multipliers.*

7 Conclusions

Scotland's holiday park and campsite sector makes a substantial contribution to Scotland's tourism economy, generating £772.3m in visitor expenditure, equivalent to £478.2m GVA and supporting 14,301 jobs.

High proportion of non-Scottish visitors: The sector brings in a large number of non-Scottish tourists to Scotland, with 50% of all visitors to Scottish holiday parks/campsites resident out-with Scotland.

Visitors stay longer on Scottish holiday parks/campsites than the national tourism average: Visitors take a holiday or short break on a holiday park/campsite on several occasions over the course of a year, with 50% of respondents taking five or more trips a year. They also tend to take lengthy stays, with renters and tourers spending, on average, 4.6 days on a holiday park/campsite on each holiday, and owners staying 4.8 days. This is longer than the average stay figures of 3.4 reported by VisitScotland[45].

Visitors to Sottish holiday parks/campsites spend more money than the national average: During each of these stays, visitors spend a considerable amount of money per day in the local economy, including £107 on-site and off-site by renters and tourers, and £86 on-site and off-site by owners. This is higher than the average daily spend by visitors to Scotland at £77[46].

The biggest impact was in some of Scotland's more rural and remote areas: The geographic areas which recorded the highest visitor impacts were the Highland and Islands, Tayside and Dumfries and Galloway; while the accommodation types which recorded the highest visitor impacts were owner-occupied caravan holiday homes and touring pitches.

Flexible accommodation and facilities provision, support local communities, protect the environment and encourages a healthier lifestyle: Scotland's 390 member holiday parks/campsites account for 34,662 pitches[47]. These holiday parks/campsites offer a flexible choice of accommodation and wide-ranging facilities, and regularly undertake activities which support local communities, help to protect the local environment and promote health and wellbeing.

Local suppliers also benefit: In addition to the figures above, money spent on maintenance by tourers and caravan holiday home owners adds a further £65.5m of expenditure to the economy.

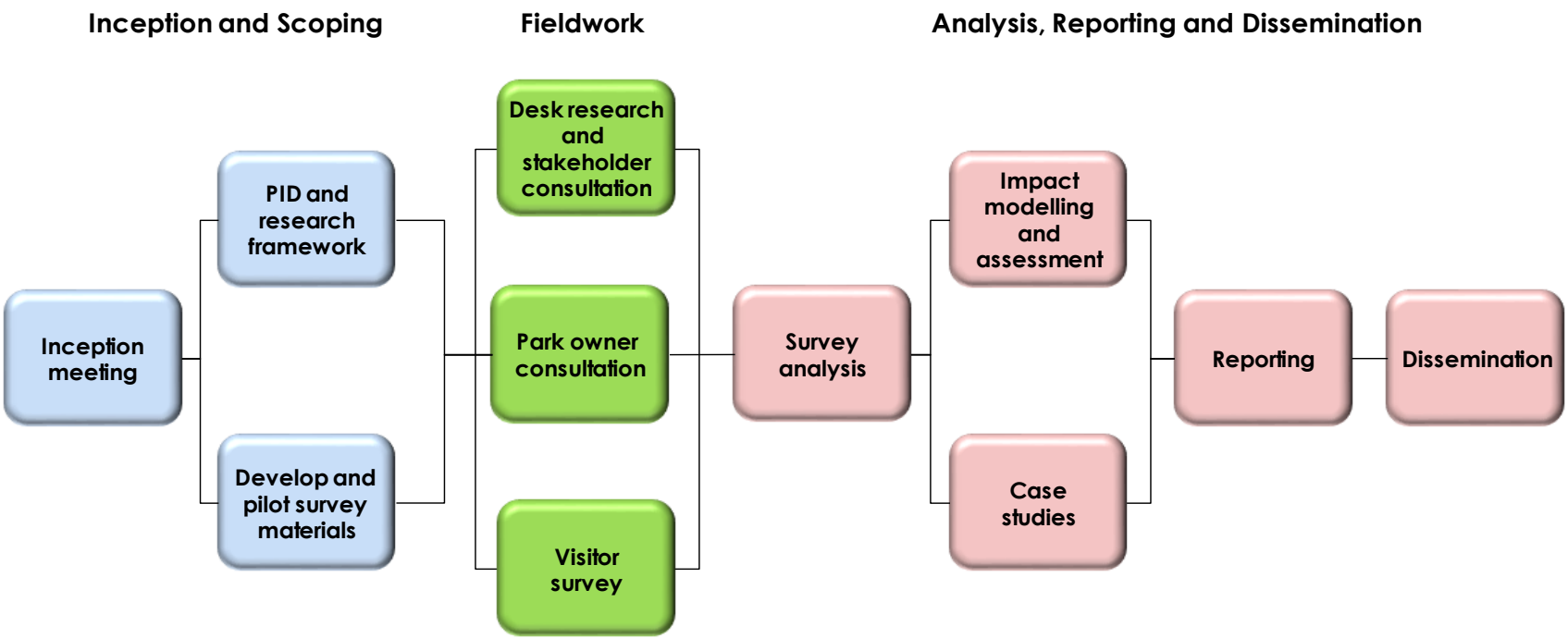
Usage of migrant workforce may negatively impact a small proportion of holiday parks/campsites following Brexit: While only 8% of holiday park/campsite respondent operators reported using migrant workers, this equated to an average of almost one-fifth (17%) of their workforce. Brexit could therefore result in staff shortages for a small proportion of holiday parks/campsites.

Visitors' health and wellbeing is also improved: Visitors reported doing more exercise and feeling more relaxed when visiting a holiday park/campsites. This is supported by holiday park/campsite operators who provide or support a range of health and wellbeing activities for their visitors.

[45] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf
[46] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf
[47] *This includes Certificated Sites and Certificated Locations.*

Appendix 1 – Method

The research was undertaken during March through to December 2018 and is based on a combination of desk-based analysis, consultations with key stakeholders and surveys of holiday park/campsite operators and visitors. The method is summarised below.



Appendix 2 – Regional Breakdown

Aberdeen & Aberdeenshire – includes all the Grampian postcodes

Ayrshire and Arran – includes North Ayrshire, South Ayrshire and East Ayrshire and Arran

Dumfries and Galloway – includes all Dumfries and Galloway postcodes

Edinburgh, the Lothians and Borders – East Lothian, City of Edinburgh, Midlothian, West Lothian areas along with the Scottish Borders

Fife – includes Dunfermline, Kirkcaldy and Fife

Greater Glasgow & The Clyde Valley – includes East Renfrewshire, Glasgow City Council, Inverclyde, North Lanarkshire, Renfrewshire and South Lanarkshire

Loch Lomond, The Trossachs, Stirling & Forth Valley – includes West Dunbartonshire, Falkirk, Stirling

Tayside - includes Dundee & Angus and Perthshire

The Highlands & Islands - includes Orkney, Outer Hebrides, Shetland and Argyll & Bute

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	7.1	4.2	0.3	0	0	0.2	11.8
Ayrshire & Arran	4.7	21.9	4.3	0	0	0.8	31.7
Dumfries and Galloway	14	17.9	8.1	0.3	1.2	0.6	42.1
Edinburgh, the Lothians and Borders	16.6	14.9	4.4	0.6	0.4	0.2	37.1
Fife	5.9	18.2	1.5	0.1	0.8	0.1	26.6
Greater Glasgow & The Clyde	2.2	5.1	1.2	0	0	0.1	8.6
Loch Lomond, The Trossachs, Stirling & Forth Valley	14.7	3.6	0.3	0.4	0.4	0.9	20.3
Tayside	27.6	8.8	2.6	0.3	2.6	1.7	43.6
The Highlands & Islands	22.1	25.7	6.2	0.4	2.3	2	58.7
Total	**114.9**	**120.3**	**28.9**	**2.1**	**7.7**	**6.6**	**280.5**

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet / cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	6.4	3.5	0.3	0	0	0.2	10.4
Ayrshire & Arran	4.2	18.2	3.9	0	0	0.7	27
Dumfries and Galloway	12.7	14.9	7.3	0.2	1	0.5	36.6
Edinburgh, the Lothians and Borders	15.1	12.4	4	0.5	0.3	0.2	32.5
Fife	5.3	15.2	1.4	0.1	0.7	0.1	22.8
Greater Glasgow & The Clyde	2	4.2	1.1	0	0	0.1	7.4
Loch Lomond, The Trossachs, Stirling & Forth Valley	13.4	3	0.3	0.4	0.3	0.8	18.2
Tayside	25.1	7.3	2.3	0.3	2.2	1.6	38.8
The Highlands & Islands	20.1	21.4	5.6	0.4	1.9	1.8	51.2
Total	**104.3**	**100.1**	**26.2**	**1.9**	**6.4**	**6**	**244.9**

Indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	6.3	3.6	0.3	0	0	0.2	10.4
Ayrshire & Arran	4.2	18.9	3.9	0	0	0.7	27.7
Dumfries and Galloway	12.6	15.4	7.2	0.2	1	0.5	36.9
Edinburgh, the Lothians and Borders	14.9	12.8	3.9	0.5	0.3	0.2	32.6
Fife	5.3	15.7	1.4	0.1	0.7	0.1	23.3
Greater Glasgow & The Clyde	1.9	4.4	1.1	0	0	0.1	7.5
Loch Lomond, The Trossachs, Stirling & Forth Valley	13.2	3.1	0.3	0.4	0.3	0.7	18
Tayside	24.7	7.6	2.3	0.3	2.3	1.5	38.7
The Highlands & Islands	19.9	22.1	5.6	0.4	2	1.8	51.8
Total	**103**	**103.6**	**26**	**1.9**	**6.6**	**5.8**	**246.9**

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	19.8	11.3	0.9	0	0	0.6	32.6
Ayrshire & Arran	13.1	59	12.1	0	0	2.2	86.4
Dumfries and Galloway	39.3	48.2	22.6	0.7	3.2	1.6	115.6
Edinburgh, the Lothians and Borders	46.6	40.1	12.3	1.6	1	0.6	102.2
Fife	16.5	49.1	4.3	0.3	2.2	0.3	72.7
Greater Glasgow & The Clyde	6.1	13.7	3.4	0	0	0.3	23.5
Loch Lomond, The Trossachs, Stirling & Forth Valley	41.3	9.7	0.9	1.2	1	2.4	56.5
Tayside	77.4	23.7	7.2	0.9	7.1	4.8	121.1
The Highlands & Islands	62.1	69.2	17.4	1.2	6.2	5.6	161.7
Total	**322.2**	**324**	**81.1**	**5.9**	**20.7**	**18.4**	**772.3**

FTE Employment

Employment associated with on-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	131	78	6	0	0	4	219
Ayrshire & Arran	86	406	80	1	1	14	588
Dumfries and Galloway	260	331	150	5	22	10	778
Edinburgh, the Lothians and Borders	307	276	81	10	8	4	686
Fife	109	337	28	2	15	1	492
Greater Glasgow & The Clyde	40	94	22	0	0	3	159
Loch Lomond, The Trossachs, Stirling & Forth Valley	273	67	5	8	7	15	375
Tayside	510	162	48	6	49	32	807
The Highlands & Islands	410	475	115	8	43	36	1,087
Total	**2,126**	**2,226**	**535**	**40**	**145**	**119**	**5,191**

Employment associated with off-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	119	65	6	0	0	4	194
Ayrshire & Arran	78	338	73	1	1	13	504
Dumfries and Galloway	235	276	136	5	18	9	679
Edinburgh, the Lothians and Borders	279	230	73	9	6	4	601
Fife	99	281	25	2	13	1	421
Greater Glasgow & The Clyde	36	79	20	0	0	3	138
Loch Lomond, The Trossachs, Stirling & Forth Valley	248	56	5	8	6	14	337
Tayside	464	135	43	6	41	29	718
The Highlands & Islands	372	396	104	7	36	33	948
Total	**1,930**	**1,856**	**485**	**38**	**121**	**110**	**4,540**

Employment associated with indirect and induced multiplier impacts (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	117	67	6	0	0	4	194
Ayrshire & Arran	77	349	72	1	1	13	513
Dumfries and Galloway	233	285	134	5	19	9	685
Edinburgh, the Lothians and Borders	275	237	72	9	6	4	603
Fife	97	290	25	2	13	1	428
Greater Glasgow & The Clyde	36	81	20	0	0	2	139
Loch Lomond, The Trossachs, Stirling & Forth Valley	245	57	5	7	6	14	334
Tayside	457	140	43	6	42	29	717
The Highlands & Islands	367	410	103	7	37	33	957
Total	**1,904**	**1,916**	**480**	**37**	**124**	**109**	**4,570**

Employment associated with visitor expenditure impact (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	367	210	18	0	0	12	607
Ayrshire & Arran	241	1,093	225	3	3	40	1,605
Dumfries and Galloway	728	892	420	15	59	28	2,142
Edinburgh, the Lothians and Borders	861	743	226	28	20	12	1,890
Fife	305	908	78	6	41	3	1,341
Greater Glasgow & The Clyde	112	254	62	0	0	8	436
Loch Lomond, The Trossachs, Stirling & Forth Valley	766	180	15	23	19	43	1,046
Tayside	1,431	437	134	18	132	90	2,242
The Highlands & Islands	1,149	1,281	322	22	116	102	2,992
Total	**5,960**	**5,998**	**1,500**	**115**	**390**	**338**	**14,301**

Gross Value Added

GVA associated with on-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	4.4	2.6	0.2	0	0	0.1	7.3
Ayrshire & Arran	2.9	13.6	2.7	0	0	0.5	19.7
Dumfries and Galloway	8.7	11.1	5	0.2	0.8	0.3	26.1
Edinburgh, the Lothians and Borders	10.4	9.2	2.7	0.3	0.3	0.2	23.1
Fife	3.6	11.3	0.9	0.1	0.5	0	16.4
Greater Glasgow & The Clyde	1.3	3.2	0.7	0	0	0.1	5.3
Loch Lomond, The Trossachs, Stirling & Forth Valley	9.1	2.2	0.2	0.3	0.2	0.5	12.5
Tayside	17.1	5.4	1.6	0.2	1.6	1.1	27
The Highlands & Islands	13.7	15.9	3.8	0.3	1.4	1.2	36.3
Total	**71.2**	**74.5**	**17.8**	**1.4**	**4.8**	**4**	**173.7**

GVA associated with off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	4	2.2	0.2	0	0	0.1	6.5
Ayrshire & Arran	2.6	11.3	2.4	0	0	0.4	16.7
Dumfries and Galloway	7.9	9.2	4.5	0.2	0.6	0.3	22.7
Edinburgh, the Lothians and Borders	9.3	7.7	2.5	0.3	0.2	0.1	20.1
Fife	3.3	9.4	0.9	0.1	0.4	0	14.1
Greater Glasgow & The Clyde	1.2	2.6	0.7	0	0	0.1	4.6
Loch Lomond, The Trossachs, Stirling & Forth Valley	8.3	1.9	0.2	0.3	0.2	0.5	11.4
Tayside	15.5	4.5	1.4	0.2	1.4	1	24
The Highlands & Islands	12.5	13.2	3.5	0.2	1.2	1.2	31.8
Total	**64.6**	**62**	**16.3**	**1.3**	**4**	**3.7**	**151.9**

GVA associated with indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	3.9	2.2	0.2	0	0	0.1	6.4
Ayrshire & Arran	2.6	11.7	2.4	0	0	0.4	17.1
Dumfries and Galloway	7.8	9.5	4.5	0.2	0.6	0.3	22.9
Edinburgh, the Lothians and Borders	9.2	7.9	2.4	0.3	0.2	0.1	20.1
Fife	3.3	9.7	0.8	0.1	0.4	0	14.3
Greater Glasgow & The Clyde	1.2	2.7	0.7	0	0	0.1	4.7
Loch Lomond, The Trossachs, Stirling & Forth Valley	8.2	1.9	0.2	0.2	0.2	0.5	11.2
Tayside	15.3	4.7	1.4	0.2	1.4	1	24
The Highlands & Islands	12.3	13.7	3.4	0.2	1.2	1.1	31.9
Total	**63.8**	**64**	**16**	**1.2**	**4**	**3.6**	**152.6**

GVA associated with visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Aberdeen & Aberdeenshire	12.3	7.0	0.6	0.0	0.0	0.3	20.2
Ayrshire & Arran	8.1	36.6	7.5	0.0	0.0	1.3	53.5
Dumfries and Galloway	24.4	29.8	14.0	0.6	2.0	0.9	71.7
Edinburgh, the Lothians and Borders	28.9	24.8	7.6	0.9	0.7	0.4	63.3
Fife	10.2	30.4	2.6	0.3	1.3	0.0	44.8
Greater Glasgow & The Clyde	3.7	8.5	2.1	0.0	0.0	0.3	14.6
Loch Lomond, The Trossachs, Stirling & Forth Valley	25.6	6.0	0.6	0.8	0.6	1.5	35.1
Tayside	47.9	14.6	4.4	0.6	4.4	3.1	75
The Highlands & Islands	38.5	42.8	10.7	0.7	3.8	3.5	100
Total	**199.6**	**200.5**	**50.1**	**3.9**	**12.8**	**11.3**	**478.2**