Pitching the Value

2024 Economic Benefit Report: Holiday Parks and Campsites SCOTLAND

Report for the

UK Caravan & Camping Alliance

February 2024

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Executive Summary

The Scottish holiday park and campsite sector makes a substantial contribution to the Scottish tourism economy, generating £991m in visitor expenditure, which is equivalent to £565m GVA and supports 18,354 FTE jobs.

Visitors to Scotland's holiday parks and campsites stayed 89% longer and spent 34% more than the Scottish tourism averages.

Background

Travel and tourism contribute significantly to the UK economy. According to the World Travel and Tourism Council (WTTC), in 2022, **UK tourism's GDP contribution was £214bn (8.9% of total GDP),** a 62.7% increase on the previous year[1].

A 2023 Mintel report looking at **the UK camping and caravanning sector**,[2] found that total volumes returned to pre-pandemic levels in 2022, with the overall number of camping and/or caravanning trips reaching an estimated 16.7m[3]. Furthermore, *the* value of the domestic market has risen by 25% over the past five years with touring holidays (e.g. in a caravan or motorhome) and rental holiday caravans estimated to be the key areas of growth over the next five-years.

Report Purpose

In November 2022, **the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent reassessment of the economic impact and benefit of the holiday park and campsite sector in 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.

Economic Impact

In 2022/23 it is estimated that the Scottish holiday park and campsite sector generated **a gross direct visitor expenditure impact of £991m in the economy**. This visitor expenditure **supports 18,354 FTE jobs and contributes £565m** (including multipliers) **of GVA to the economy.** In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £99m of expenditure to the Scottish economy**.

Holiday Park and Campsite Operators

According to evidence provided by the UKCCA and the Frontline survey, **in 2023 there were 401 holiday parks and campsites operating in the UK, accounting for 35,093 pitches[4].** This was drawn from a database provided by the UKCCA as well as wider non-member holiday parks and campsites.

Consultations were undertaken with 79 of these parks. Research found that **Scottish 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 caravans and lodges; and rented holiday caravans and lodges, apartments, chalets, wigwams, pods and yurts. **Scottish holiday parks/campsites also offer a wide range of facilities and amenities**, including restaurants, swimming pools, Wi-Fi and games rooms.

The majority have run their holiday parks and campsites for over 10 years (84%) and many have done so for over 25 years (51%). Occupancy rates peaked at 67% in high season (August) and 57% in mid-season (September). Holiday park and campsite operators support their local communities through:

- **expenditure** – 52% from the total survey sample cumulatively spent £22m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local business and causes, and fundraising for charitable causes
- **environmental activities** – including support for recycling and biodiversity, water and energy conservation initiatives, renewable energy adoption and participation in the Green Tourism award
- **health and wellbeing** – including signposting to walking and cycle paths, promotion of wider community health and fitness sessions and healthy food options provided on-parks

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[1] https://wttc.org/news-article/new-report-from-wttc-reveals-uk-travel-and-tourism-sector-is-expected-to-create-700000-jobs-over-the-next-decade
[2] *Camping and caravanning is defined as holidays that use tents, trailer tents, touring caravans, caravan holiday homes, park homes, and motorhomes or campervans as accommodation.*
[3] *Camping and Caravanning UK, Mintel, 2023.*
[4] *This includes Certificated Sites and Certificated Locations.*

Several external factors affecting the sector in recent years were highlighted, including:

- **COVID-19** – leading to an initial spike in bookings which are only now returning to pre-COVID-19 levels, and a change in consumer behaviour
- **consumer demographics** – with new, younger guests and families engaging in camping leading to new consumer behaviours such as more customers renting motorhomes, and guests spending fewer nights away
- **cost of living** – affecting both businesses with operating costs and pricing challenges as well as consumers becoming more frugal and changing how they book, leading to uncertainty for operators
- **Brexit** – leading to some supply chain disruptions for operators, as well as a delays in repairs and poor-quality products

Holiday Park and Campsite Visitors

638 respondents to the survey had made a visit to a holiday park and campsite in Scotland in 2023. The majority of the survey respondents lived in Scotland (56%). Over half of the respondents (57%) stayed on a holiday park and campsite in the UK five times or more during the last 12 months. **85% stayed in a touring caravan, motorhome or tent over the course of the year**. 10% stayed in an owner-occupied holiday caravan or lodge, a further 4% stayed in some form of rented, stationary accommodation, while 1% stayed in other accommodation. **The average adult group size was 2,** and **10% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 2. **34% of groups brought a pet.** Visitors spent, on average, 5.1 nights per trip. **This is higher than the average tourism number of nights per trip at 2.7[5].**

Visitors who stayed in rented accommodation spent, on average, £223 per day, including £134 on-site and £90 off-site. **Touring visitors spent, on average, £119 per day**, including £47 on-site and £72 off-site. **Visitors who owned their holiday caravan spent £114 per day**, including £49 on-site and £65 off-site. **This is higher than the average spend per night by those taking a trip in Scotland of £95[6].**

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[5] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms

[6] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms)

1 Introduction

In November 2022, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent reassessment of the economic impact and benefit of holidays taken in all forms of accommodation on holiday parks and campsites in 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**[7].

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 and campsite sector to the UK.
- Provide the economic impact/contribution from all forms of accommodation on holiday parks and campsites, including:
  - touring caravan/ motorhome/ campervan – owned
  - touring caravan/ motorhome/ campervan – rented
  - holiday caravans and lodges – owned
  - holiday caravans and lodges – rented
  - camping (including trailer tents)
  - glamping – all unit types
- Understand the type of spend by the sector and each subset, both direct and indirect, and how much income remains in the UK and 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 UK level as well as for the four countries (England, Scotland, Wales and Northern Ireland).
- Consider expenditure by the holiday park and campsite owners/operators, e.g. ongoing maintenance, capital investment to extend, improve and/or provide new facilities and also infrastructure, to accommodate changes such as EV charging points, energy efficiency, environmental and sustainability aspects.
- Consider spend by visitors to the holiday parks and campsites, both on and off-site, for all types of accommodation.
- Assess the impact caused by Brexit and the pandemic on the sector.
- Consider how the study can link to other aspects, such as:
  - health, social wellbeing, family time
  - closeness to nature and the outdoors
  - cost of living implications, affordable holidays
  - consumer demographics – new entrants, staycations
  - sustainability, environmental and green benefits
  - how the COVID-19 pandemic has changed the sector and shaped it moving forward

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

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

2 Scottish Tourism in Context

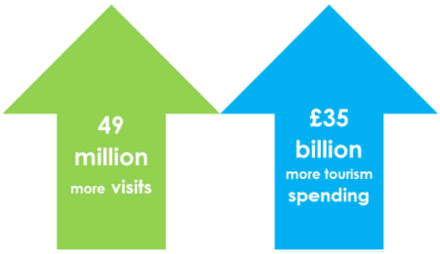
This section provides a contextual review of national tourism policies and available statistics at a Scottish level.

2.1 National tourism strategies

VisitBritain developed the *"Delivering a Golden Legacy"* strategy covering 2012 to 2020, and in 2020 they released a new five-year strategy covering up to 2025[8]. Each country except for England (England use Visit Britain's strategy) also has their own tourism strategy:

- Scotland – Scotland Outlook 2030[9]
- Northern Ireland – Tourism Strategy for Northern Ireland 2020-2030[10], which is currently in consultation for a new ten year plan[11]
- Wales – Welcome to Wales: Priorities for the Visitor Economy 2020-2025[12]

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



VisitBritain's strategy has the ambitions of[13]:

- achieving 49m visits by 2025
- generating £35bn in visitor spend
- growing the value of tourism while also driving the dispersal of tourism across Britain

This strategy comes at an important time with the market evolving, changing visitor demands, a complex political agenda and increased global competition having a significant impact on the sector. The strategy aims to adapt and flex to the fast pace of change, adopting an agile and innovative approach.

The Scotland Outlook 2030 Strategy [14][15] has a key theme around sustainability, and considering the impact that tourism has on the environment, infrastructure and communities. The strategy includes many commitments based around responsible tourism, the workforce, and communities, amongst others. Some of them include:

- Scotland's tourism sector will make a full contribution to the national ambition to become a net-zero society by 2045
- Scotland's tourism assets will be nurtured to deliver high quality, memorable experiences that benefit visitors and the places they visit
- Support will be provided to tourism businesses in Scotland to become more entrepreneurial, agile and resilient

Mark Crothall, Chief Executive of the Scottish Tourism Alliance, states:

> *"21st century Scottish tourism is about harnessing the potential that tourism has and does deliver. It's about tourism continuing to be the engine that drives positive change and enriching the lives of all those who visit us while ensuring that the benefits it brings are also felt across the whole of Scotland."*

[8] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/visitbritainvisitengland_2020_strategy.pdf
[9] *https://scottishtourismalliance.co.uk/scotland-outlook-2030-overview/*
[10] *https://www.economy-ni.gov.uk/topics/tourism#:~:text=The%20department%20is%20leading%20on,of%20the%20growth%20of%20the*
[11] *https://www.economy-ni.gov.uk/consultations/draft-tourism-strategy-northern-ireland-10-year-plan*
[12] *https://www.gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf*
[13] *https://www.visitbritain.org/introduction-tourism-britain/tourism-action-plan*
[14] *https://scottishtourismalliance.co.uk/scotland-outlook-2030-overview/*

2.2 National tourism statistics

Travel and tourism contribute significantly to the UK economy. According to the World Travel and Tourism Council[16]:

- the total contribution of travel and tourism to the UK's **GDP increased by 40%** from 2020 to 2023
- in 2022, **UK tourism's GDP contribution was £214bn (8.9% of total GDP)** this represents a 62.7% increase on the previous year
- tourism's GDP contribution should **grow by 3%** annually between 2022 and 2032

40% increase in GDP from 2020 to 2023

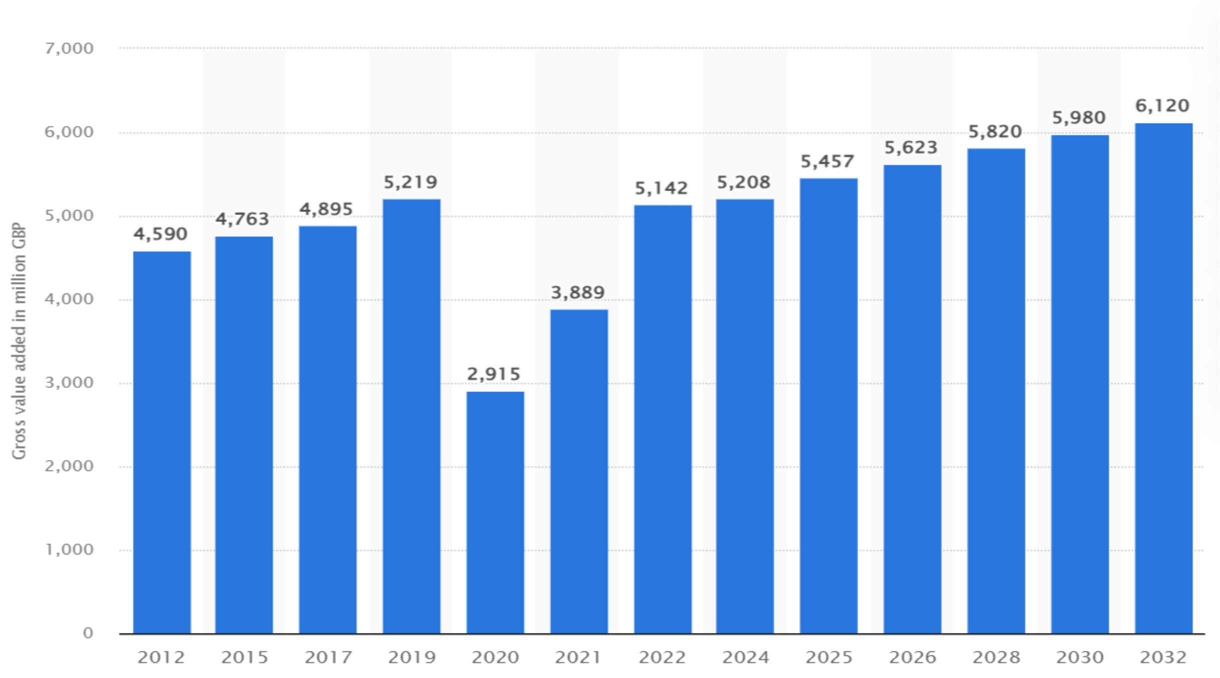
GDP contribution of £214 billion in 2022

3% annual growth 2022 - 2032

In 2022, there were 94.8m total domestic trips made to Scotland, of which 13.5m included a stay of at least 1 night. Over 7.6m of the visits were from within Scotland, while almost 6m were from England[17]. Domestic day trips to Scotland in 2022 generated around £3.9bn[18]. The average spend for tourism day visits in Scotland was £42[19]. The **spend per night by visitors to Scotland was £95**[20]**(per adult equivalent). Visitors spent an average of 2.7 nights per trip**[21]**.**

The Gross Value Added (GVA) of the tourism sector in Scotland was expected to rise significantly in 2022 in comparison to the previous year, after falling dramatically with the onset of the COVID-19 pandemic. The country's tourism GVA was forecast to reach around £5.1bn in 2022, remaining slightly below pre-pandemic levels. By 2032, this figure is predicted to surpass £6bn[22].

Figure 2.1: Gross value added (GVA) of tourism sector in Scotland



Source: Statista 2023

There were 13.6m domestic overnight tourist trips in Scotland in 2021, with 1.7m of these involving camping, caravanning or glamping[23].

[16] https://wttc.org/news-article/new-report-from-wttc-reveals-uk-travel-and-tourism-sector-is-expected-to-create-700000-jobs-over-the-next-decade
[17] https://www.dreambigtravelfarblog.com/blog/scotland-travel-tourism-statistics
[18] https://www.visitscotland.org/research-insights/about-our-visitors/uk/day-visits-survey
[19] https://www.visitscotland.org/research-insights/about-our-visitors/uk/day-visits-survey
[20] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results
[21] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results
[22] https://www.statista.com/statistics/1305374/tourism-gross-value-added-scotland/
[23] https://www.visitscotland.org/research-insights/about-our-visitors/uk/overnight-tourism-survey

A 2023 Mintel report looking at the UK camping and caravanning sector,[24] found that total volumes returned to pre-pandemic levels in 2022, with the overall number of camping and/or caravanning trips reaching an estimated 16.7m[25]. Other notable statistics include:

- value of the domestic market has risen by 25% over the past five years
- touring holidays (e.g. in a caravan or motorhome) and rental holiday caravans are estimated to be the key areas of growth over the next five-years
- rental holiday caravan spending reached £1.2bn

Since the pandemic, a more affluent demographic has entered the market (across the UK); 37% of new campers have a household income above £50,000, compared with just 21% of those who camped/caravanned pre-pandemic[26].

Demand remains robust at the premium end of the spectrum. Some 69% of recent and potential future campers/caravanners say they would pay more to stay on a holiday park and campsite with private bathroom facilities, 55% would pay more to stay in a luxury caravan, and 54% would pay more to stay in unusual 'glamping' accommodation[27].

[24] *Camping and caravanning is defined as holidays that use tents, trailer tents, touring caravans, caravan holiday homes, park homes, and motorhomes or campervans as accommodation.*
[25] *Camping and Caravanning UK, Mintel, 2023.*
[26] https://www.easier.com/141247-carry-on-camping-4-5-million-brits-took-their-first-camping-holiday-during-the-pandemic.html
[27] *Camping and Caravanning UK, Mintel, 2023.*

3 Holiday Park and Campsite Operator Consultation

This section provides evidence from consultations with holiday park and campsite operators across Scotland. This was drawn from a database provided by the UKCCA[28] as well as wider non-member holiday parks and campsites, including:

- British Holiday and Home Parks Association
- Camping and Caravanning Club
- Caravan and Motorhome Club
- National Caravan Council
- Non-member parks completing the survey[29]

While this represents a comprehensive list of holiday parks and campsites in Scotland it does not include all of them.

For this reason, the impact figures presented in this report are considered to be a conservative estimate of the total value of the sector.

3.1 Composition of Scotland's holiday parks and campsites

According to evidence provided by the UKCCA and our survey, **in 2023 there were 401 holiday parks and campsites operating in Scotland, accounting for 35,093 pitches[30].**

The majority of these pitches are either owner-occupied holiday caravans (17,341, 49%) or touring pitches[31] (11,883, 34%). However, the holiday parks and campsites have a wide and growing mix of other accommodation options which cater for a broad range of tastes and budgets, including wigwams, yurts and pods.

The Highlands and Islands region contains both the highest number of holiday parks and campsites (102) and the highest number of pitches (7,146); Dumfries and Galloway, Edinburgh, the Lothians and Borders and Tayside also contain a high number of both. Table 3.1 summarises the composition of Scotland's holiday park and campsite sector and Appendix 1 provides a breakdown of areas included in each region.

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

	Number of holiday parks and campsites	Touring Pitches*	Glamping **	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/ chalet/ cottage	Rented lodge/ chalet/ cottage	Total pitches
Aberdeen & Aberdeenshire	29	963	16	8	589	35	1	26	**1,638**
Ayrshire & Arran	36	553	10	6	3,269	641	42	199	**4,720**
Dumfries and Galloway	68	1,478	43	17	2,577	297	158	40	**4,610**
Edinburgh, the Lothians and Borders	35	1,588	59	18	2,144	779	25	23	**4,636**
Fife	31	677	18	6	2,640	200	135	61	**3,737**
Greater Glasgow & The Clyde Valley	8	327	8	0	532	148	30	21	**1,066**
Loch Lomond, The Trossachs, Stirling & Forth Valley	34	1,227	62	25	1,260	147	129	82	**2,932**
Tayside	58	2,573	37	26	1,088	304	264	316	**4,608**
The Highlands & Islands	102	2,497	33	47	3,242	1,096	107	124	**7,146**
Scotland	**401**	**11,883**	**287**	**153**	**17,341**	**3,647**	**891**	**892**	**35,093**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023
**Includes touring caravans, motorhomes/campervans and tents*
***Includes yurts/wigwams/other excluding pods*

[28] This includes Certificated Sites and Certificated Locations.
[29] Where holiday parks/campsites that were not members of the UKCCA completed the survey, they were added to the population database.
[30] This includes Certificated Sites and Certificated Locations.
[31] This includes touring caravans, motorhomes/campervans and tents.

3.2 Sampling methodology

Holiday parks and campsite operators across Scotland were invited to participate in the research. This was done by the various sponsor members reaching out to 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.

79 out of 401 holiday parks and campsites across Scotland participated giving us a 95% confidence +/– 10% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population.

3.3 Geography locations

The geographic location of those completing the survey was broadly representative of the sector. For example, it included holiday parks and campsites from all eight regional areas, receiving a minimum response of at least 9%.

Table 3.2: Locations of holiday parks and campsites surveyed

Location	Number responding	Estimated population	Percentage consulted
Aberdeen and Aberdeenshire	8	29	27%
Ayrshire and Arran	6	36	17%
Dumfries and Galloway	10	68	15%
Edinburgh, the Lothians and Borders	10	35	29%
Fife	3	31	10%
Greater Glasgow and The Clyde Valley	2	8	25%
Loch Lomond, The Trossachs, Stirling and Forth Valley	6	34	18%
Tayside	5	58	9%
The Highlands & Islands	28	102	27%
Unknown	1		
Total	**79**	**401**	**20%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023

3.4 Holiday parks and campsites size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large holiday parks and campsites, including one very large (251 pitches or more); and 21 very small (5 pitches or fewer); these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 3.3: Sizes of the holiday parks and campsites surveyed

Number	Number responding	Estimated population	Percentage consulted
Very small (1-5 pitches)	21	153	14%
Small (6-50 pitches)	5	50	10%
Medium sized (51-100 pitches)	27	83	33%
Large (101-250 pitches)	14	87	16%
Very large (251 pitches or more)	1	28	4%
Total	**68**	**401**	**17%**

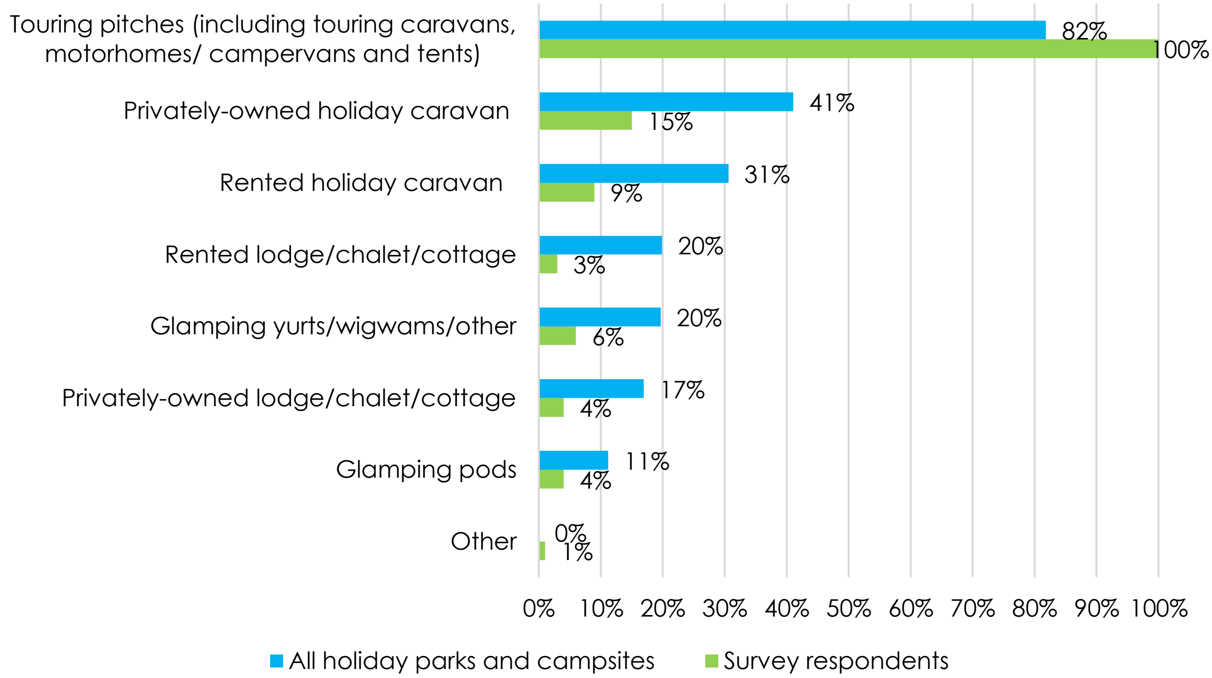
Source: UKCCA, 2023

3.5 Accommodation provided

The accommodation type was also broadly representative of the sector. Those surveyed all had touring pitches which includes touring caravans, motorhomes/campervans and tents.

19%[32] had owner-occupied accommodation (holiday caravans or lodges), and 10% offered rented accommodation (18% including glamping pods and yurts/wigwams).

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



Source: Frontline Holiday Park and Campsite Operator Survey, 2023
(figures sum to over 100% as most offer more than one type of accommodation)

N=68 (survey respondents)
N=419 (all holiday parks and campsites)

3.6 Facilities and activities provided

In addition to accommodation, many offer a range of **facilities**. The figures in Table 3.4 capture only those who listed each type of facility in their response; it is possible that some may have these facilities but did not answer this question in full. The figures may therefore under-estimate the of facilities on Scotland's holiday parks and campsites.

In very small holiday parks and campsites, over 60% had toilet blocks 40% had showers and under a third (30%) had Wi-Fi.

Small, medium and large holiday parks and campsites (6-50, 51-100 and 101-250 pitches respectively), had a wider range of facilities. In addition to showers, toilet and Wi-Fi, the majority also had a laundry (80%), outdoor play area (54%) and defibrillators (48%).

Other facilities included shops, restaurants, bars, takeaways, games rooms, information rooms, fisheries, and drying rooms.

[32] *Percentage of parks that have either privately owned caravans, lodges/chalets, or both.*

Table 3.4: Facilities listed by holiday park and campsites surveyed

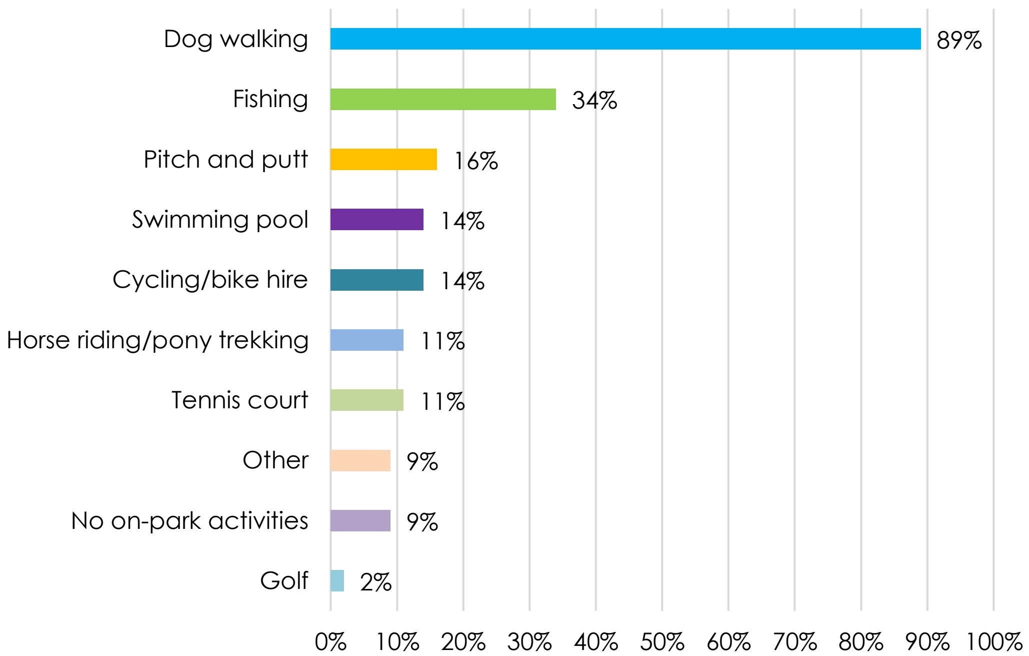
Facility	Very small holiday parks and campsites %	Small, medium and large holiday parks and campsites %	Very large holiday parks and campsites %
Toilet block	60%	98%	100%
Showers	40%	100%	100%
Laundry	10%	80%	100%
Retail/shop	10%	11%	100%
Restaurant/bar/takeaway			100%
Entertainment			100%
Outdoor play area		54%	100%
Games/information room		33%	100%
Wi-Fi	30%	78%	100%
Electric vehicle charging points	10%	2%	
Dog washing facilities		2%	
Bike cleaning stations		2%	
Locker and or back packing facilities			100%
Defibrillators		48%	100%
Solar panels		7%	
Heat pumps			
Other	10%		
Total consulted	**10**	**46**	**1**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N= 57
(figures sum to over 100% as most offer more than one type of facility)

Across all holiday parks and campsites the most common **activities** provided on-site included dog-walking (89%), followed by fishing (34%), pitch and putt (16%) swimming pools (14%), and cycling or bike hire (14%).

'Other' activities included cultural and historical sites and walks and trails.

Figure 3.2: Activities listed by holiday parks and campsites surveyed

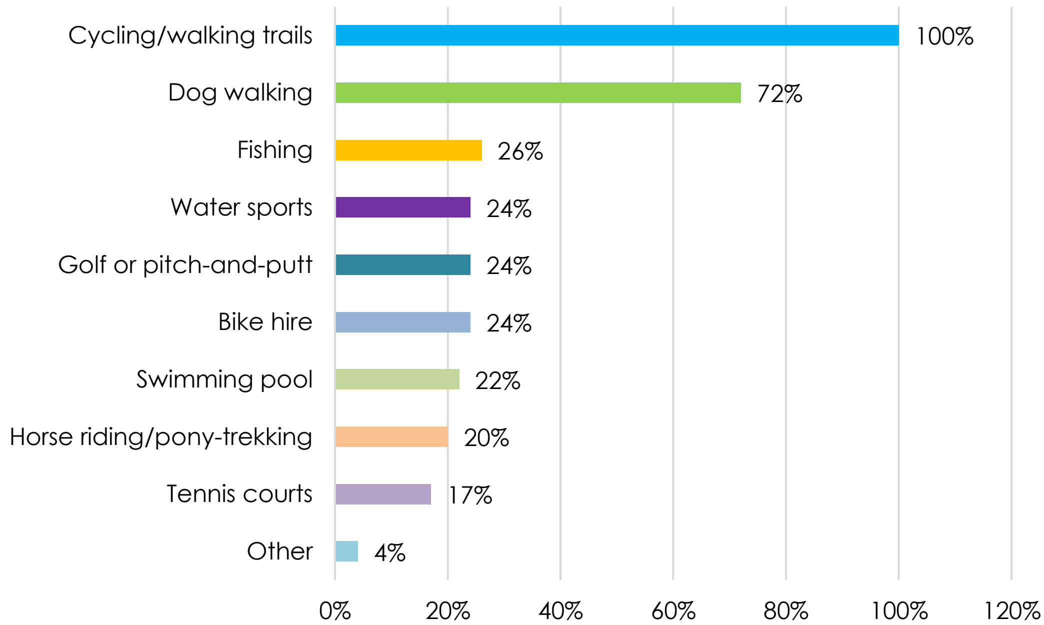


Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=44
(figures sum to over 100% as most offer more than one type of facility)

Holiday parks and campsites have access to a range of **activities in the local area**. 100% had cycling/walking trails and 72% had dog walking trails.

Ove a quarter (26%) had fishing, 24% had watersports, and 24% had golf/pitch and putt.

Figure 3.3: Range of activities in the local area



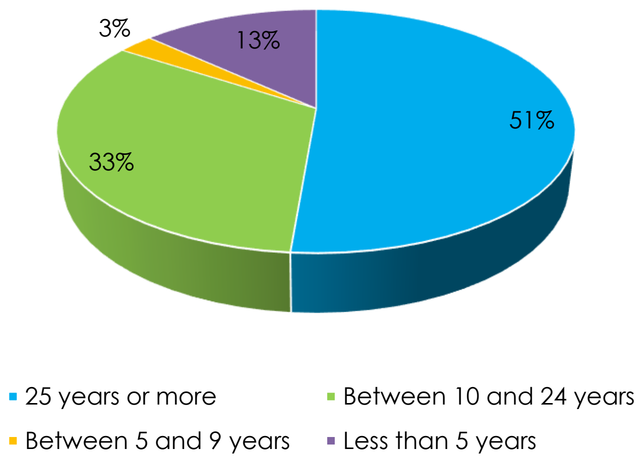
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=46
(figures sum to over 100% as most had more than one type of activity in the local area).

3.7 Holiday park and campsite ownership

In the majority of responses, operators saw their holiday parks and campsites as long-term investments, with the majority (84%) owned and operated for at least 10 years, and over half for over 25 years (51%).

Figure 3.4 summarises the feedback.

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



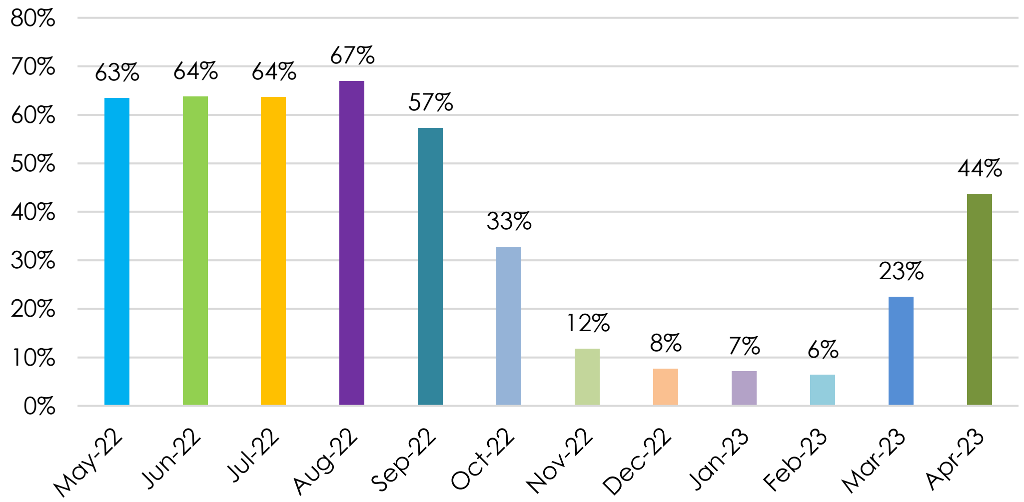
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=76

3.8 Length of season and occupancy rates

Over two thirds (68%) operated seasonally with the remainder (32%) open all year. Where holiday parks and campsites were seasonal, most were open from March – October/November.

Average occupancy rates peaked at 67% in high season (August 2022), falling to 57% in mid-season (September 2022). Low season average occupancy ranged from a low of 6% in February (2023) to a high of 23% in March (2023) as presented in Figure 3.5.

Figure 3.5: Average occupancy rates on holiday parks and campsites surveyed



Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=56

3.9 Visitor origin

When asked where their visitors came from, respondents said that, 42% came from England, 40% from Scotland, 2% from Wales, and 2% from Northern Ireland; 15% were from outside the UK. The most cited market for visitors from outside the UK were countries such as Germany, the Netherlands, Belgium, France and Switzerland.

When segmented by region (Table 3.5) there was some variance.

The eastern regions (Aberdeen and Aberdeenshire, Fife and Tayside) had higher percentages of visitors from Scotland and most of the other regions had higher percentages of visitors from England.

The region with the most visitors from Northen Ireland was Ayrshire and Arran, the closest geographically. Fife and the two populous central belt regions had the highest percentage of visitors from outside the UK.

Table 3.5: Visitor origin of holiday parks and campsites surveyed

Area	England	Scotland	Wales	NI	Outside UK
Aberdeen and Aberdeenshire	33%	46%	2%	<1%	18%
Ayrshire and Arran	27%	45%	2%	5%	16%
Dumfries and Galloway	56%	36%	3%	3%	2%
Edinburgh, the Lothians and Borders	43%	34%	2%	<1%	20%
Fife	12%	58%	2%	2%	25%
Greater Glasgow and The Clyde Valley	41%	37%	1%	<1%	21%
Loch Lomond, The Trossachs, Stirling and Forth Valley	55%	31%	2%	1%	11%
Tayside	40%	46%	2%	3%	10%
The Highlands and Islands	49%	33%	3%	1%	14%
Total*	**42%**	**40%**	**2%**	**2%**	**15%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=38 total

***Total percentages may add up to under/over 100% due to rounding and recipient input*

3.10 Staff employed

Results show that on average, there were 5.3 full-time and 1.1 part-time staff all year round and 2.6 full-time and 1.0 part-time seasonal staff.

As not all holiday parks and campsites responded on this question it is therefore likely to be an underrepresentation of employment in the sector.

3% employed migrant workers.

Table 3.6: Average staff employed per holiday park and campsite surveyed

Holiday Park and Campsite Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small (1-5 pitches)*	-	-	2.0	1.0
Small (6-50 pitches)	0.8	0.3	0.9	0.4
Medium sized (51-100 pitches)	1.8	0.3	2.5	0.4
Large (101-250 pitches)	2.3	0.8	3.7	0.7
Very large (251 pitches or more)	40	30	125	30
Average across all holiday parks and campsites**	**2.6**	**1.0**	**5.3**	**1.1**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=51

**There was only one response from holiday parks and campsites which had 1-5 pitches, 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*

***Ranges from 0-125 full time and 0-30 part time all year staff, and 0-40 full time and 0-30 part time seasonal staff*

3.11 Expenditure by holiday park and campsite[33]

Operators were asked to provide details of their capital and operating expenditure, wages and salaries for the last financial year (2022/23, or the most recent one available).

The total expenditure is presented in Table 3.7. Again, this is likely to be an underrepresentation as not all parks responded.

Table 3.7: Total expenditure by holiday parks and campsites surveyed

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£4,413,340	£183,889
Operating expenditure	£10,650,794	£266,270
Wages and salaries	£6,943,415	£169,352
Total expenditure	**£22,007,549**	**£619,511**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=24-41

**Ranges from £10,000-£20m (capital), £43,365--£3.5m (operating) and £0-£1.3m (wages and salaries)*

95% of operators stated that their capital expenditure had increased over the last three years, with 2% saying it had decreased and just 2% saying it had stayed the same. Some of the reasons given for the increase were:

- **rising costs of utilities**
- **investments** – into sustainability projects and business growth
- **new developments or upgrades** – such as installing or upgrading pitches, expansion, new or improved facilities, and developing utilities e.g. electric or gas

The top five areas of capital expenditure reported over the last five years included:

- **accommodation** – including hiring or buying new holiday caravans, glamping pods and pitches, and/or a range of refurbishments
- **utility development** – including installing solar panels, upgrading and connecting electricity supply and renewable energy projects
- **facilities** – including new and refurbished toilet blocks, shower blocks, kitchens and reception area
- **infrastructure** – road resurfacing and improvements
- **digital** – Wi-Fi infrastructure and IT booking systems

The total and average planned expenditure is presented in Table 3.8.

[33] *For various reasons some holiday parks/campsites were unable to provide this information.*

Table 3.8: Planned expenditure

	Expenditure			
	Average maintenance	Total maintenance	Average improvements	Total improvements
Next financial year	£231,633	£6,022,452	£297,729	£7,740,955
Next three financial years	£451,386	£11,736,037	£566,901	£17,007,040

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=26-30

** Ranges from: maintenance £100-£2.6m (next financial year) and, £300-£5.3m (next three financial years); improvements £0-£2.6m (next financial year) and £0-£5.3m (next three financial years)*

When asked how their income had changed over the last two years, just under half (48%) of the 56% who responded said it had increased, with 48% saying it stayed the same and only 4% stating that it had decreased.

The main reason cited for an increase in income was due to an increase in domestic tourism due to COVID-19 restrictions, as well as the growing popularity of some routes e.g. the NC500.

3.12 Community engagement

Over a third (35%) of respondents provided information on how they **engage with the local community**; responses included:

- **promoting local events** – 93% promoted and sponsored local events including school events
- **social media advertising** – 93% advertise and signpost local businesses and causes on social media
- **promoting local business** – 89% actively promote local producers, suppliers, restaurants and shops
- **fundraising** – 86% fundraise for the community or charities related to climate action
- 14% work with **community groups and community councils**

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

"Share and advertise local businesses on our information sheet. Engagement with community council, local schools and scout groups to support youth activities on-site all for free, including camping mid week and training on park. Food bank donations to local school food bank from supplies left behind by customers at our collection point. All the above publicised on social media and our new blog."

Edinburgh, the Lothians and Borders

"Support school events, gala days and youth organisations. Free stays for all local youth organisations like schools, guides, scouts for education support and/or Duke of Edinburgh. Charity support including regular and guest donations on booking."

Edinburgh, the Lothians and Borders

"We direct campers to the Community Centre."

The Highlands & Islands

3.13 Environmental improvement

Over a third of holiday park and campsite operators (35%) provided information on how they **supported environmental improvements**. Three quarters (75%) of respondents had a carbon reduction plan, and the most frequently occurring environmental initiatives included:

- **recycling** – which was highlighted by 100% and included educating and encouraging visitors to follow recycling procedures
- **energy and water conservation** – 89% did this through water harvesting, and renewable electricity

- 89% showed **support for local wildlife** – including wildflower meadows and tree planting
- **award participation** – 82% took part in award schemes including the Green Tourism Award
- **using sustainable accommodation** – 79% had sustainable accommodation including the use of upcycled materials for refurbishment
- 7% had **restricted vehicle movement** – such as car-free zones

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

"Recycling points on-site. Solar field supplying 1/3 of our electricity. Water Harvesting for flower watering. Green Tourism Gold, Living Wage accredited employer. Support wildlife in all of business. EV for site use and Cargo bike for cleaning team."

Edinburgh, the Lothians and Borders

"All our electric is renewable. We are about to install enough solar to cover all site usage. We have full recycling facilities and a car charger. We have a wildflower meadow, fruit trees and other pollinator friendly areas."

Tayside

"On part of our site we have a herd of Large Blacks, a breed of pig that is on the endangered list."

Dumfries and Galloway

3.14 Health and wellbeing

Over two fifths (42%) provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **walking and cycling routes, waterways and beaches** – 85% provided access to and information about these
- 82% **encourage dog owners**
- 73% **provided local health and wellbeing facilities** – and granted access to the broader community (e.g. school groups) to these amenities
- **healthy food options** – 67% had on-site restaurants/cafes

'Other' responses (15%) included promoting local cultural and nature trails, socialising events and providing health and wellbeing information for guests.

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

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

"New toilet block with family space and non-binary space. Campers kitchen with free games, DVDs, books etc for all to use. Shop stocks variety of things for all tastes, including those on vegan/vegetarian diets…local woodlands which people are free to explore and build dens in."

Edinburgh, the Lothians and Borders

"Our very rural location is aimed at promoting peace, relaxation and the tranquilly of the Angus glens, utilising the sites woodland walk for soaking up nature, flora, wildlife and enjoying exercise…It's more than just a dog walk."

Tayside

3.15 COVID-19 pandemic

Operators were asked how the COVID-19 pandemic had changed the sector; over a third (37%) provided some insight. These included:

- **initial surge in bookings** – due to travel restrictions, as well as new guests taking up camping or glamping, and an increase in motorhome/caravan purchases and touring bookings
- **changing customer behaviour** – for example, the type of accommodation booked i.e. opting for self-contained units, a new generation coming through, people being more self-reliant and not using as many of the on-site offerings and customers being more environmentally aware

Operators were also asked what effect COVID-19 had on their operational expenditure over the last two years. Of the 54% who responded, 95% said it had risen while only 3% said it had reduced; 2% said it had stayed the same.

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

" Yes at the start people were holidaying in UK now we have started to see a drop off as people can go abroad again."

Ayrshire & Arran

" More people staying in UK. More people aware of environmental impact of their actions and choosing places to holiday that align with this."

Edinburgh, the Lothians and Borders

"Customers are more self-reliant, not necessarily spending in our shop reception."

Dumfries and Galloway

3.16 Consumer demographics

Operators were asked if consumer demographics have changed over the years; over half (61%) provided some insight, with the majority (85%) indicating that there had been some noticeable change. Examples included:

- **demographic shift** – both in terms of new younger guests who camped for the first time during the pandemic, and an increase in sales in families compared to the mature segment
- **spending behaviour** – for example, reduced customer spending on-site
- **changing customer behaviour** – with more customers renting motorhomes, and guests spending fewer nights away

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

" Sales and membership have increased. Sales from mature segment have reduced where empty nesters and established families have increased."

Greater Glasgow & The Clyde Valley

" Yes – more younger people with outfits and more new entrants."

Loch Lomond, The Trossachs, Stirling & Forth Valley

"More budget conscious customers. Staying one night to utilise the facilities then spending three or four days parking up off grid."

Tayside

3.17 Cost of living implications

Operators were asked about the implications of the cost-of-living crisis; 65% responded. The most frequently occurring examples included:

- **rising utility costs** – in particular electricity, with a potential impact (i.e. closure) on business survival or operating time
- **changing customer behaviour** – in particular shorter visitor stays, not going on as many holidays per year, booking different accommodation or booking last minute
- **pricing challenges** – decreased margins due to trying to limit price increases to not discourage customers
- **impact on business** – the need to invest and improve to continue to attract customers who may be travelling/holidaying less

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

"Cost of fuel to travel, rising energy prices, less disposable income, holidays become a considered purchase."

Loch Lomond, The Trossachs, Stirling & Forth Valley

"If electricity and gas don't come down soon it will require us to reduce our opening times to when warmer weather arrives."

Tayside

"Reduced sales possibly due to customers making decisions and potentially are more money savvy so may only take 1 holiday a year instead of several."

Edinburgh, the Lothians and Borders

3.18 Brexit

One third of respondents (33%) provided feedback on the implications of Brexit on supplies; the majority (85%) had issues. The most frequently occurring examples included:

- **supply chain delays or disruption** – with fewer units available due to lack of parts
- **service issues** – including delays in repairs and poor-quality products

Operators were also asked if Brexit had produced more red tape for their business; of the 47% who responded, the majority (62%) said it had.

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

" Delay in availability of units due to lack of parts."

Greater Glasgow & The Clyde Valley

" Long delays, poor quality products."

Tayside

"I think COVID-19 had a bigger impact than Brexit."

The Highlands & Islands

3.19 Overseas travel and overseas visitors

Operators were asked if they had seen a decrease in overseas visitors; 56% responded. The vast majority (93%) said they had **seen a decrease during travel restrictions. Some estimated the reduction was up to 39%.**

3.20 Holiday park and campsite operator summary

This research found that Scotland's holiday parks and 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 caravans; and rented holiday caravans, lodges, apartments, chalets, wigwams, pods and yurts.

In addition to the diverse accommodation offered, they also offer a wide range of leisure facilities and amenities, including restaurants, swimming pools, Wi-Fi and games rooms.

The majority have run their holiday parks and campsites for over 10 years (84%) and many have done so for over 25 years (51%). Occupancy rates peaked at 67% in high season (August) and 57% in mid-season (September). The proportion of visitors from outside Scotland varied significantly, depending on the geographic location.

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

- **expenditure** – 52% from the total survey sample cumulatively spent £22m per year in capital and operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local businesses and causes, and fundraising for charitable causes
- **environmental activities** – including support for recycling and biodiversity, water and energy conservation initiatives, renewable energy adoption and participation in the Green Tourism award scheme
- **health and wellbeing** – including signposting to walking and cycle paths, promotion of wider community health and fitness sessions and healthy food option provided on-parks

Several external factors affecting the sector in recent years were highlighted, which will also shape the industry in the future. These included:

- **COVID-19** – leading to an initial spike in bookings which are only now returning to pre-COVID-19 levels, and a change in consumer behaviour
- **consumer demographics** – with new, younger guests and families engaging in camping leading to new consumer behaviours with more customers renting motorhomes, and guests spending fewer nights away
- **cost of living** – affecting businesses with operating costs and pricing challenges as well as consumers becoming more frugal and changing how they book leading to uncertainty for operators
- **Brexit** – leading to some supply chain disruptions, as well as a delays in repairs and poor quality products

4 Visitor Survey

An online visitor survey was open from May to November 2023. 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 of the holiday parks and campsites, in sector magazines, through various social media channels, visitor flyers and in the show guide at sector events as well as through Caravan Sitefinder.

638 respondents to the survey had made a visit to a holiday park and campsite in Scotland in 2023. Table 4.1 shows the spread of visitors across the Scottish regions.

Table 4.1: Location of holiday parks and campsites visited

Location	Visitors
Aberdeen and Aberdeenshire	7%
Ayrshire and Arran	7%
Dumfries and Galloway	12%
Edinburgh, the Lothians and Borders	16%
Fife	5%
Greater Glasgow and The Clyde Valley	1%
Loch Lomond, The Trossachs, Stirling and Forth Valley	8%
Tayside	11%
The Highlands and Islands	30%
Unknown	3%
Total consulted	**638**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

4.1 Visitor origin and number of trips

The majority of the respondents lived in Scotland (56%); less than 1% came from outside the UK. The Scottish holiday park and campsite operators reported that there were slightly more visitors coming from England (41% compared to 40% from Scotland), representing the largest visitor group in over half of the regions (Section 3).

Table 4.2: Visitor home country

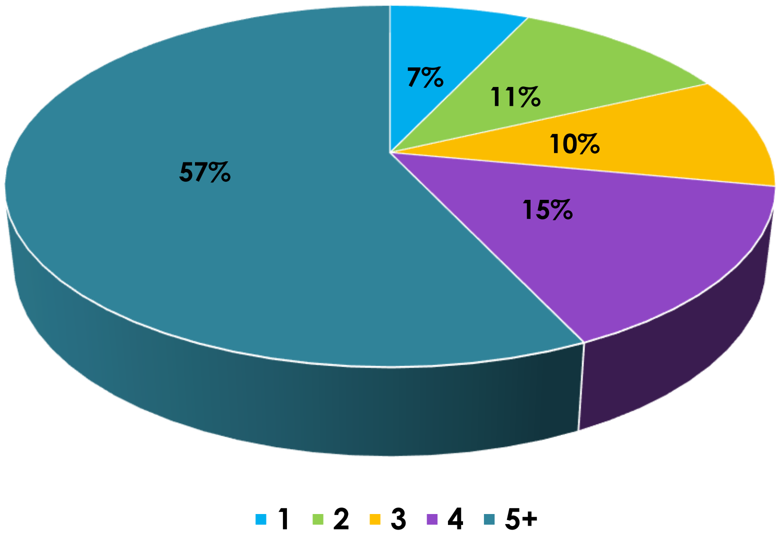
Location	Visitors
Scotland	56%
England	40%
Wales	2%
Northern Ireland	1%
Outside the UK[34]	1%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=638

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

Over half of respondents (57%) stayed on a holiday park and campsite five times or more during the last 12 months; a further 15% stayed four times. 11% of these were a rally campsite or temporary campsite. Where respondents stayed more than five nights, the average was 12 nights.

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



N=615

4.2 Visitor characteristics

84% of respondents had stayed in a touring caravan, motorhome or tent over the course of the year. 10% stayed in a privately-owned holiday caravan or lodge; while 4% stayed in another form of rented accommodation including glamping and rented lodge/chalet/cottage. Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	42%
Touring caravan	36%
Tent	7%
Static accommodation types	
Holiday caravan owned	9%
Holiday caravan rented	3%
Privately-owned lodge/chalet/cottage	1%
Glamping e.g. pods/yurts/wigwams/other	<1%
Rented lodge/chalet/cottage	<1%
Mixed types e.g. rented holiday caravan and motorhome	
Multiple or mixed types of accommodation	1%

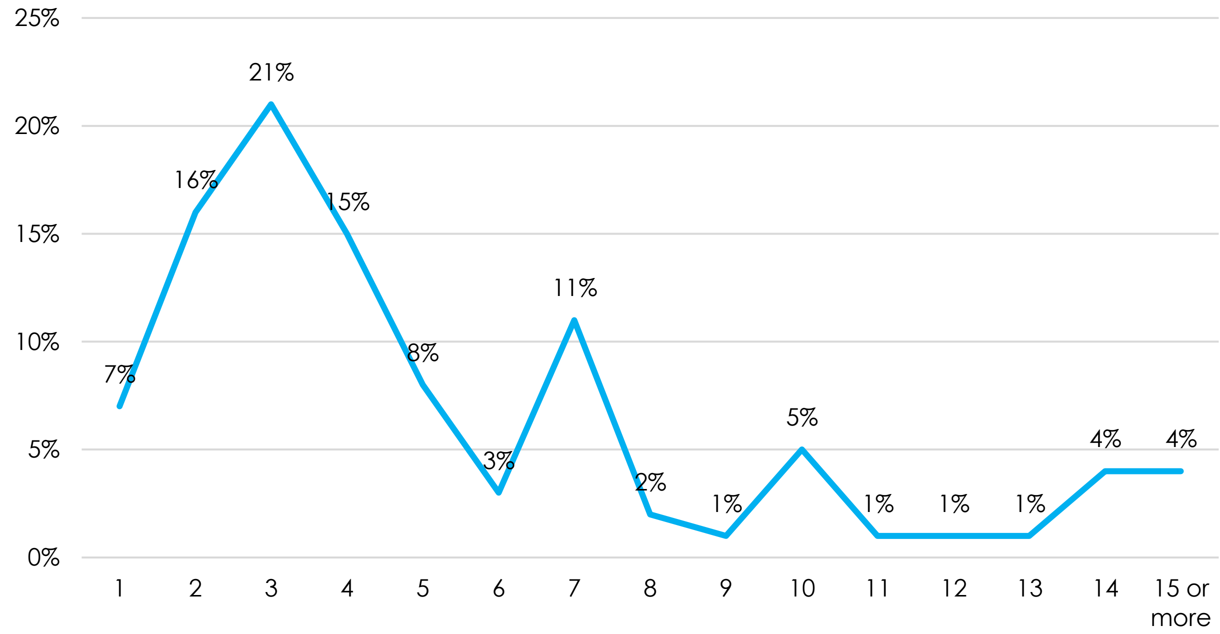
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=638

The high level of tourers is not surprising as the majority (80%) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club[35]. When broken down further:

- 20% were members of CCC
- 23% were members of CAMC
- 37% were members of both

On average respondents spent **5.1 nights per trip.** The distribution of responses is shown in Figure 4.2.

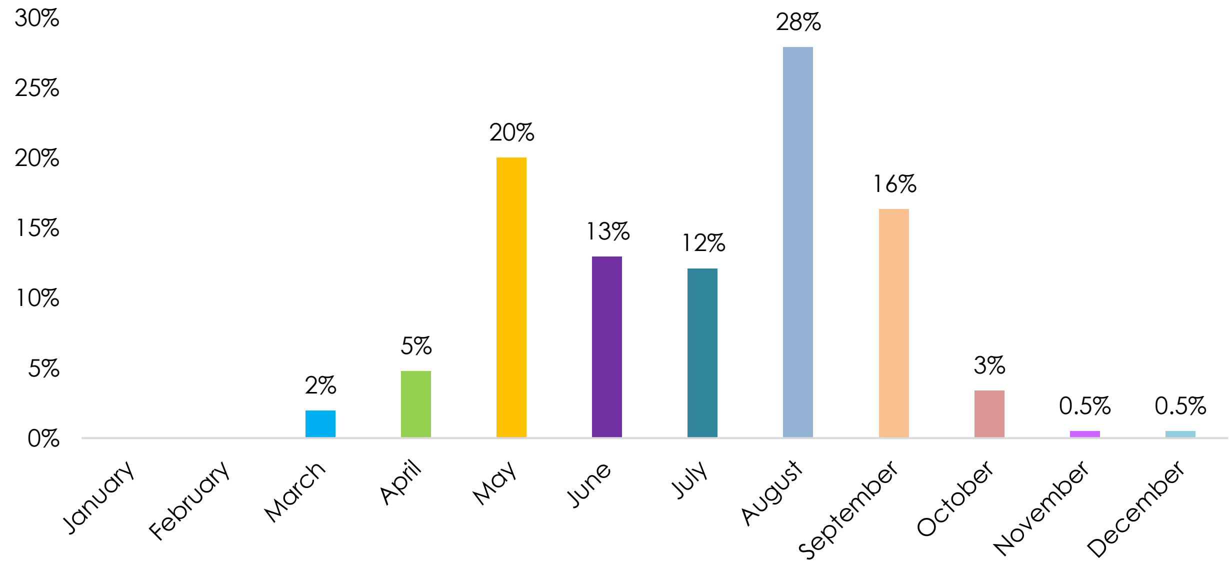
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=589

Figure 4.3 shows the month in which respondents began their trip. August (28%) was the most popular followed by May (20%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=355

[35] *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 2.0, and 10% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2.0. 34% of groups brought a pet.

The average total group size was 2.1. This is likely due to the high proportion of tourers completing the survey. When broken down by accommodation, renters and owners have larger group sizes (3.6 and 2.8 respectively) compared with tourers at 2.1.

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

Number	...of adults	... of children*	.....of pets**
1	11%	30%	78%
2	80%	52%	17%
3	6%	12%	5%
4	3%	3%	0
5+	1%	3%	0
Average	2.0	2.0	1.3

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
**of groups with children*
***of groups with pets*

4.3 Visitor expenditure

Visitors and their party who stayed in rented accommodation spent, on average, £1,162 per visit, including £694 on-site and £468 off-site.

Touring visitors and their party spent, on average, £602 per visit, including £238 on-site and £365 off-site.

Visitors who owned their holiday caravan spent, on average, £612 per visit, including £263 on-site and £349 off-site.

Accommodation including 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	Tourers	Owners
Transport to and from destination	£100	£111	£77
Transport spent during trip	£25	£38	£36
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)[36]	£537	£209	£150
Holiday park and campsite facilities (e.g. Wi-Fi, laundry etc)	£3	£5	£10
Eating/drinking on the holiday park and campsite	£80	£16	£67
Eating/drinking in the surrounding area	£147	£98	£109
Recreation/entertainment on the holiday park and campsite	£43	£1	£16
Recreation/entertainment in the surrounding area	£42	£25	£28
Shopping on the holiday park and campsite	£31	£6	£20
Shopping off the holiday park and campsite	£113	£69	£75
Visitor attractions off the holiday park and campsite	£33	£23	£25
Other	£7	£1	<£1
Total – on-site	**£694**	**£238**	**£263**
Total – off-site	**£468**	**£365**	**£349**
Total – both on and off-site	**£1,162**	**£602**	**£612**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
Due to rounding there may be slight discrepancies when totalling

[36] *As the accommodation spend has been provided for typically for the medium to high season – predominantly April-October a deduction of 25% has been applied to the low season months in the economic impact model.*

Visitors who stayed in rented accommodation spent, on average, £223 per day, including £134 on-site and £90 off-site.

Touring visitors spent, on average, £119 per day, including £47 on-site and £72 off-site.

Visitors who owned their holiday caravan spent, on average, £114 per day, including £49 on-site and £65 off-site.

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters[37]	Tourers	Owners[38]
Transport to and from destination	£19	£22	£14
Transport spent during trip	£5	£7	£7
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)	£103[39]	£41[40]	£28[41]
Holiday park and campsite facilities (e.g. Wi-Fi, laundry etc)	£1	£1	£2
Eating/drinking on the holiday park and campsite	£15	£3	£13
Eating/drinking in the surrounding area	£28	£19	£20
Recreation/entertainment on the holiday park and campsite	£8	<£1	£3
Recreation/entertainment in the surrounding area	£8	£5	£5
Shopping on the holiday park and campsite	£6	£1	£4
Shopping off the holiday park and campsite	£22	£14	£14
Visitor attractions off the holiday park and campsite	£6	£4	£5
Other	£1	<£1	<£1
Total – on-site	**£134**	**£47**	**£49**
Total – off-site	**£90**	**£72**	**£65**
Total – both on and off-site	**£223**	**£119**	**£114**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
Due to rounding there may be slight discrepancies when totalling

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

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

The most popular responses were *"It's an area I know well/been before"* (42%); and *"I wanted to visit the area/country"* (35%).

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

Factor	% responding*
It's an area I know well/been before	42%
I wanted to visit the area/country	35%
Specific activities available in the area, such as golf, walking, cycling	14%
CAMC/CCC club member communication	13%
The holiday park and campsite was recommended to me by family/friends	10%
I was attending an event/festival	10%
I had been to this country before and wanted to visit another area	9%
Family/friend connections in the area	9%
We/I saw advertising for the holiday park and campsite i.e. magazine/website/etc	6%
Other	18%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=498
**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*

[37] *Due to the low level of renter responses, the UK average has been used in the economic modelling.*
[38] *Due to the low level of owner responses, the UK average has been used in the economic modelling.*
[39] *Rental accommodation spend ranged from £47 per night to £267 per night.*
[40] *This does not include the cost of buying the accommodation.*
[41] *This does not include the cost of buying the accommodation. Where total accommodations fees per trip were more than £2,000, an assumption was made that this was the annual site fees, and this was divided by 365 to give a per day figure.*

'Other' (18% of total) responses included:

- convenient location or general convenience (21%)
- for a specific hobby/event/place (19%)
- general getaway (14%)
- ownership (12%)

Also included were trips with family or friends (9%), seasonal or regular trip (8%), following a recommendation (4%), special occasion (4%), good value holiday (3%) and club events or membership (1%).

4.5 Health and wellbeing

Almost all respondents (99%) stated time spent relaxing was what they did most whilst visiting a holiday park and campsite. This was followed by short walks (956%), long walks (88%) and spending time with friends and family (74%). Table 4.8 summarises the results.

Other included running, fishing, sightseeing and reading.

Table 4.8 summarises the results.

Table 4.8: Activities undertaken whilst visiting a holiday park and campsite

	Level of activity done				
	More of the activity	**Less of the activity**	**Same amount**	**I did not undertake this activity**	**Total**
Spent time relaxing	62%	5%	32%	1%	**464**
Short walks (under 2 miles)	47%	8%	42%	4%	**452**
Long walks (over 2 miles)	46%	11%	32%	12%	**461**
Spent time with family and friends	38%	5%	31%	26%	**454**
Wildlife/nature activities	29%	5%	36%	31%	**457**
Cycling	13%	6%	14%	67%	**449**
Other outdoor activities	10%	4%	8%	78%	**454**

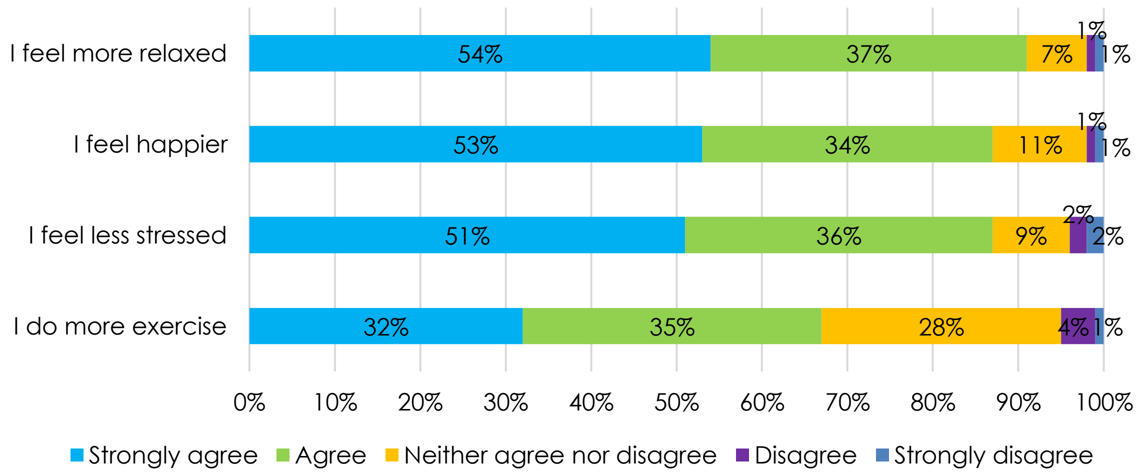
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

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

- 91% strongly agree or agree that they **feel more relaxed when visiting a holiday park and campsite**
- 87% strongly agree or agree that they **feel happier when visiting a holiday park and campsite**
- 87% strongly agree or agree that they **feel less stressed when visiting a holiday park and campsite**
- 67% strongly agree or agree that they **do more exercise when visiting a holiday park and campsite**

Figure 4.4 presents the detailed feedback.

Figure 4.4: When visiting a holiday park and campsite …



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

Comments are shown in the word cloud below:

Some **visitor** comments included:

"Like I'm recharging my batteries away from everyday life."
Motorhome/Campervan Owner, Edinburgh, the Lothians and Borders

"Relaxed and content being able to spend quality time with the family which I don't get the opportunity to do at home due to work/busy lifestyle."
Holiday/Campervan Owner, Fife

"A sense of freedom, which I use to enjoy the various attractions of the area."
Motorhome/Campervan Owner, Dumfries and Galloway

"Happy and relaxed feel the campsite is my second home; staff and fellow campers are really friendly. Have made life-long friends here."
Touring Caravan Owner, Tayside

"A large weight off my shoulders it's such a relaxing time spent more time with the family plus has a mixture of activities that all ages can be involved in."
Rented Static Caravan User, Ayrshire & Arran

4.5.1 Benefits and impacts of improved physical and mental health

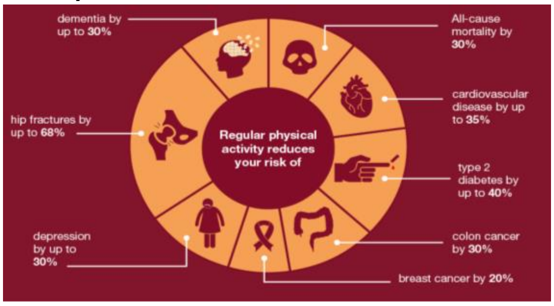
There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling. Holiday parks and campsites occupy green spaces and often have sport and recreational facilities or access to nature and are therefore widely recognised as a key contributor to improving physical and mental health.

The Chief Medical Officer stated that [42]:

> *"There is strong, consistent and convincing evidence that regular physical activity is beneficial for a wide range of health outcomes and risk factors."*

The health benefits include hard health outcomes such as all-cause mortality, cardiovascular disease, heart disease, and stroke. Regular physical activity reduces the risk for developing many cancers and improves metabolic health reducing the risk of developing Type 2 diabetes. There are also neurological benefits including reduced risk of dementia and mental health outcomes such as depression and anxiety. Moderate-to-vigorous physical activity has been shown to improve the quality of sleep[43].

Figure 4.5: The health benefits of physical activity



Source: Guidance Physical activity: applying All Our Health, 2022

As well as health impacts, **there are significant socioeconomic implications**. Physical inactivity is estimated to cost the UK £7.4bn annually (including £0.9bn to the NHS alone)[44].

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[45].

New data and economic modelling from AXA UK and the Centre for Business and Economic Research (CBER), indicated that burnout and stress cost the UK economy £28bn in sick days and lack of productivity (in 2022)[46]. Furthermore, in 2019, in-patient hospital admissions caused by stress-related illnesses in the UK cost over £8bn[47].

In 2019, the Office for Health Improvement and Disparities' introduced the *'All Our Health Framework'*. It is a call to action to all health and care professionals to embed prevention within their day-to-day work. As part of this, physical activity and mental wellbeing information has been created to help all health professionals:

- understand specific activities and interventions that can prevent physical inactivity
- access key evidence, data and signposting to trusted resources to help prevent illness, protect health and promote wellbeing

The evidence gathered from visitors during this study demonstrates that Scotland's holiday park and campsite sector is making a positive contribution to visitor 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, Scotland's holiday park and campsite sector is supporting the Scottish and wider UK policy agenda for health and wellbeing.

[42] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[43] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[44] https://www.gov.uk/government/publications/physical-activity-applying-all-our-health/physical-activity-applying-all-our-health#:~:text=Physical%20inactivity%20is%20associated%20with,35%25%20less%20active%20by%202030.
[45] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[46] https://www.hrgrapevine.com/content/article/2023-03-29-burnout-is-costing-the-uk-economy-28bn-a-year
[47] https://www.statista.com/statistics/1135048/costs-of-stress-related-illnesses-in-the-uk/

4.6 The COVID-19 pandemic, cost of living crisis and Brexit

Visitors were asked to complete the following phrase: *"In relation to my holidays, as a result of the COVID-19 pandemic I….?"*

The most popular responses were:

- *"I am more likely to continue to holiday on holiday parks and campsites in the UK"* (43%)
- *"I holidayed more on holiday parks and campsites in the UK i.e. a staycation"* (39%)
- *"I already had a caravan/motorhome/ tent/lodge/chalet and now do more touring/camping"* (38%)

Table 4.9 presents the detailed feedback.

Table 4.9: As a result of the COVID-19 pandemic I…

Response	Number responding*
am **more likely to continue to holiday** on holiday parks and campsites in the UK	43%
holidayed more on holiday parks and campsites in the UK i.e. a staycation	39%
already had a caravan/motorhome/tent/lodge/chalet/cottage and **now do more touring/camping**	38%
am looking to **combine both overseas holidays with staycations**	32%
bought a caravan/motorhome/tent/lodge/chalet/cottage and **have continued to use it**	20%
resumed overseas holidays	15%
discovered (rediscovered) holiday parks and campsites as a holiday destination	14%
done less holidaying in holiday parks and campsites	3%
bought a caravan/motorhome/tent/lodge/chalet/cottage **but have since sold it**	1%
bought a caravan/motorhome/tent/lodge/chalet/cottage **but have not used it in the last 12 months**	1%
other	2%
none of the above	14%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=463
**Figures sum to more than 100% as multiple answers were allowed to this question.*

Visitors were asked to complete the following phrase: *"In relation to my holidays, as a result of the cost-of-living crisis I……?"*. The most popular responses were:

- *"view holiday parks and campsites as a good value for money holiday option" (53%)*
- *"will holiday more in my caravan/motorhome/tent/lodge/chalet" (36%)*

When comparing holiday parks and campsites as either a good or poor value holiday choice, 87% of respondents see them as good value[48].

Table 4.10 presents the detailed feedback.

[48] The 'good value' and 'poor value' options were part of a larger group of responses as per Table 4.10. The figures above have been calculated by isolating and comparing the two specific responses, the figures in the table is the overall proportion of survey respondents who chose each response.

Table 4.10: As a result of the cost-of-living crisis I…

Response	Number responding*
view holiday parks and campsites as a **good value for money** holiday option	53%
will **holiday more** in my caravan/motorhome/tent/lodge/chalet/cottage on holiday parks and campsites	36%
will **travel shorter distances** to visit holiday parks and campsites	22%
view holidays **overseas to be a much more considered purchase**	17%
view holiday on **holiday parks and campsites to be a much more considered purchase**	13%
discovered (rediscovered) holiday parks and campsites as a **cost-effective** holiday destination	13%
invested in a tent/caravan/motorhome during the pandemic and **plan to continue using it rather than go abroad**	9%
view holiday parks and campsites as a **poor value for money** holiday option compared to other holiday choices	8%
will take **fewer trips** to holiday parks and campsites	8%
will stay **fewer nights** at holiday parks and campsites	7%
invested in a tent/caravan/motorhome during the pandemic and plan to **still go abroad** as I did before 2020 but also take holidays on campsites/parks due to that investment	5%
will **tour less** but stay the same length of time	5%
have **reduced my use** of activities/facilities in the holiday parks and campsites area	4%
invested in a tent/caravan/motorhome during the pandemic but **now plan to go abroad as I did before**	1%
other	4%
none of the above	14%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=462
**Figures sum to more than 100% as multiple answers were allowed to this question.*

Visitors were asked if they had been put off holidaying abroad as a result of Brexit and if so, is this likely to be short or long-term decision/choice. 75% of respondents claimed they had not been put off holidaying abroad as a result of Brexit. Whether they had or had not been put off holidaying abroad, respondents felt this was a long-term decision, though this effect was larger in those who **had not** been put off holidaying abroad (91%) than those who **had** been put off (66%).

Some **visitor** comments included:

"I love caravan holidays and so do the kids. Seeing them run free is so wholesome."
Holiday Caravan Owner, Fife

"We have camped since 1986. We have moved from trailer tents via caravan to motorhome. We are largely unaffected by financial or fashion changes & have the benefits of living in Scotland where there are many affordable camping options all year."
Motorhome/Campervan Owner, Edinburgh, the Lothians and Borders

"Camping in our tent provides us with the freedom to choose where we pitch and enjoy travelling our beautiful country without forking out a fortune."
Tent User, The Highlands & Islands

4.7 Visitor summary

The majority of the respondents lived in Scotland (57%), of which over half (56%) stayed on a holiday park and campsite in Scotland five times or more during the last 12 months.

84% stayed in a touring caravan, motorhome or tent over the course of the year. 10% stayed in an owner-occupied holiday caravan or lodge, and a further 4% stayed in some form of rented, stationary accommodation.

The average adult group size was 2, and 10% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. 34% of groups brought a pet.

Visitors spent 5.1 nights per trip. **This is higher than the average tourism number of nights per trip at 2.7[49].**

Visitors who stayed in rented accommodation spent, on average, £223 per day including £134 on-site and £90 off-site. Touring visitors spent, on average, £119 per day, including £47 on-site and £72 off-site. Visitors who owned their holiday caravan spent, on average, £114 per day, including £49 on-site and £65 off-site. **This is higher than the wider average spend per night by those taking a trip in Scotland at £95[50].**

[49] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms

[50] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms)

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 and campsite sector from May 2022-April 2023.

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

- days of the year (365)
- accommodation type (7)
- Scottish regions (9)

In other words, the model includes 22,995 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 gross on-site expenditure figures were estimated for touring caravans in the Fife on Saturday 5th August 2023.

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in the Fife	677
Multiplied by:	
Average occupancy rate on 5th August	67%
Number of pitches occupied on 5th August	454
Multiplied by:	
Average on-site expenditure per day for touring holiday-makers	£46.88
= On-site expenditure of touring caravan visitors to the Fife on 5th August	**£21,283**

Due to the low number of renters and owners responding to the survey in Scotland, the UK average spends for these groups was used instead. For accommodation spend (part of on-site spend), a 25% reduction has been applied to the low season months (October to April) to account for the fact that average daily spend by visitors was given primarily for the medium to high season months (April to October).

The gross off-site expenditure was measured in exactly the same way without the low season discount applied as the same off-site spending is assumed regardless of what time in the season they visit. Following the same worked example as above, in Fife on Saturday 5th August 2023, total off-site expenditure by touring caravan visitors has been calculated and presented in Table 5.2 below.

Table 5.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Fife	677
Multiplied by:	
Average occupancy rate on 5th August	67%
Number of pitches occupied on 5th August	454
Multiplied by:	
Average off-site expenditure per day for touring holiday-makers	£71.92
= Off-site expenditure of touring caravan visitors to Fife on 5th August	**£32,652**

5.3 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted above, the Fife economy would also have benefited from additional knock-on impacts 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 (2019). This publication recommended that the 0.64 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	£21,283
Plus	
Total off-site expenditure	£32,652
Total combined on and off-site expenditure	**£53,935**
Multiplied by:	0.64
= Indirect and induced effects	**£34,518**

5.4 Measuring visitor impact

The gross 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	£21,283
Plus	
Total off-site expenditure	£32,652
Indirect and induced effects	£34,518
Visitor impact	**£88,453**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[51], 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 and campsite visitor expenditure.

Figures from the most recent ONS publication[52], indicate that every £100 of turnover generated by Scotland's overnight accommodation sector translates to a GVA impact of £57.01[53].

This proxy was applied to the above turnover figures to produce an estimate of the holiday park and campsite sector's contribution to Scottish GVA.

5.6 Capturing owner annual pitch fees

In our spend figures in Section 4.3, anything over £2,000 in the privately-owned holiday caravan and privately-owned lodge/chalet spend figures was assumed to be annual site fees, and this was divided by 365 to give a per day figure. As the yearly average occupancy was only 38%, the remaining 62% of fees are not captured.

To account for this we undertook desk research to understand the average annual pitch fees and divided this by 365 to get a per day spend. This was then multiplied by the 62% as shown in Table 5.5.

As a result, £7.66 per day was added to the privately-owned holiday caravan and privately-owned lodge/chalet on-site spend figures in our model as shown in Table 5.5 below.

Table 5.5: Owner annual pitch fees

Average annual pitch fees	£4,512[54]
Divided by 365 days	
Remaining average daily pitch fees spend	£7.66

[51] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[52] *2021 Annual Business Survey, ONS.*
[53] *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).*
[54] *https://www.parkholidays.com/caravan-holiday-homes-for-sale/costs-to-consider*

6 Economic Impact of Holiday Parks and 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 and campsite sector in Scotland, broken down by region and by accommodation type.

6.1 Impact by Scottish region

It is estimated that in 2022/23 visitors to Scottish holiday parks and campsites spent **a total of £991.1m in the Scottish economy**, made up as follows:

- £288.1m on-site spend
- £315.8m off-site spend
- £387.2m of multiplier impacts

This visitor expenditure supports **18,354 FTE jobs** and contributes **£565m of GVA to the Scottish economy.**

Table 6.1: Economic impacts by Scottish region

Region	Visitor expenditure (£m)	Employment (FTE jobs)
Aberdeen and Aberdeenshire	43.8	811
Ayrshire and Arran	128.4	2,378
Dumfries and Galloway	124.9	2,314
Edinburgh, the Lothians and Borders	136.5	2,528
Fife	97.9	1,812
Greater Glasgow and The Clyde Valley	35.3	654
Loch Lomond, The Trossachs, Stirling and Forth Valley	81.4	1,507
Tayside	133.2	2,467
The Highlands and Islands	209.7	3,883
Scotland	**991.1**	**18,354**

Source: Frontline, 2023
Due to rounding there may be slight discrepancies when totalling

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)
Touring Pitches*	311.6	5,770	177.6
Glamping yurts/wigwams/others	13.7	253	7.8
Pods	7.3	135	4.2
Privately-owned holiday caravans	426.8	7,904	243.3
Rented holiday caravans	173.3	3,209	98.8
Privately-owned lodge/chalet/cottage	24.2	448	13.8
Rented lodge/chalet/cottage	34.3	635	19.5
All accommodation	**991.1**	**18,354**	**565**

Source: Frontline, 2023
**Includes touring caravans, motorhomes/campervans and tents*
***Due to rounding there may be slight discrepancies when totalling*

6.3 Assessing the economic impacts of maintenance expenditure

The impacts presented to date are based on visitor expenditure to holiday parks and 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 privately-owned holiday caravan and touring caravan/motorhome maintenance

Area of expenditure	Touring Caravan/Motorhome Owner*[55]	Privately-owned holiday caravans/lodge owner[56,57]
Servicing	£277	£499
Insurance	£327	£229
Road Tax	£185	N/A
General upkeep	£199	£613
Total	**£988**	**£1,341**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
**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 (75,500[58]) multiplied by average maintenance expenditure per touring caravan/motorhome (£988). This equals £74.6m.

Aligned to the approach presented above, the estimated gross expenditure figure for privately-owned holiday caravan/lodge owners is 18,232[59], multiplied by average maintenance expenditure per holiday caravan (£1,341). This equals £24.4m.

The total impact associated with expenditure on maintenance by tourers and privately owned holiday caravans **is estimated to be in the region of £99m per annum.**

More detailed impact findings are shown in Appendix 2**.**

6.4 Economic impact summary

In 2022/23 it is estimated that Scotland's holiday park and campsite sector generated **a gross direct visitor expenditure impact of £991.1m. This expenditure supports 18,354 FTE** jobs and contributes **£565m** (including multipliers) **GVA impact** to Scotland's economy.

The **geographic areas** which recorded the highest visitor impacts were:

- **The Highlands and Islands**: with visitor expenditure of £209.7m, equivalent to a GVA impact of £119.5m, and 3,883 supported FTE jobs
- **Edinburgh, the Lothians and Borders:** with visitor expenditure of £136.5m, equivalent to a GVA impact of £77.8m, and 2,528 supported FTE jobs
- **Tayside**: with visitor expenditure of £133.2m, equivalent to a GVA impact of £76m and 2,467 supported FTE jobs

The **accommodation types** which recorded the highest net visitor impacts were:

- **privately-owned holiday caravans**: with visitor expenditure of £426.8m, equivalent to a GVA impact of £243.3m, and 7,904 supported FTE jobs
- **touring pitches**: with visitor expenditure of £311.6m, equivalent to a GVA impact of £177.6m, and to 5,770 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £99m of expenditure to the Scottish economy**.

[55] *These figures were taken from visitors who lived in Scotland as it was assumed that's where they would spend their money.*
[56] *These figures were taken from visitors visiting Scotland as it was assumed that's where they would spend their money.*
[57] *Note this is based on 22 respondents.*
[58] *https://www.caravantimes.co.uk/features/the-strange-and-wonderful-sights-of-caravanning/ and apportioned according the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[59] *UKCCA, 2023.*

7 Conclusions

The Scottish holiday park and campsite sector makes a substantial contribution to the Scottish tourism economy, generating £991.1m in visitor expenditure, equivalent to £565m GVA and supporting 18,354 FTE jobs.

Visitors to Scottish holiday parks and campsites spend more money than the national tourism average: During each of these stays, visitors spend a considerable amount of money per day in the local economy, including £223 on-site and off-site by renters, £114 on-site and off-site by owners and £119 on-site and off-site by tourers. This is an increase on the average Scottish tourism visitor spend (per day) of £95[60].

Flexible accommodation and facilities provision, supporting local communities, protecting the environment and encouraging a healthier lifestyle: Scotland's 401 holiday parks and campsites account for 35,093 pitches[61]. These holiday parks and 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 homeowners adds a further £99m of expenditure to the economy.

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

Several external factors have and may potentially continue to affect the sector including:

- **COVID-19** – leading to an initial spike in bookings which are only now returning to pre-COVID-19 levels, and a change in consumer behaviour
- **consumer demographics** – with new, younger guests and families engaging in camping leading to new consumer behaviours with more customers renting motorhomes, and guests spending fewer nights away
- **cost of living** – affecting both businesses with operating costs and pricing challenges as well as consumers becoming more frugal and changing how they book leading to uncertainty for operators
- **Brexit** – leading to some supply chain disruptions for operators, as well as a delays in repairs and poor-quality products

[60] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms)
[61] *This includes Certificated Sites and Certificated Locations.*

Appendix 1 – Regional Breakdown

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

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

Tayside – includes Dundee and Angus and Perthshire

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

Appendix 2 – Detailed Impact Findings

Visitor Expenditure

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	5.9	0.3	0.1	4.2	0.6	0.0	0.5	**11.6**
Ayrshire and Arran	3.4	0.2	0.1	23.2	11.3	0.3	0.5	**39.0**
Dumfries and Galloway	9.1	0.8	0.3	18.3	5.3	1.1	0.7	**35.5**
Edinburgh, the Lothians and Borders	9.7	1.0	0.3	15.2	13.8	0.2	0.4	**40.7**
Fife	4.2	0.3	0.1	18.7	3.5	1.0	0.4	**28.2**
Greater Glasgow and The Clyde Valley	2.0	0.1	0.0	3.8	2.6	1.0	1.1	**10.6**
Loch Lomond, The Trossachs, Stirling & Forth Valley	7.5	1.1	0.4	8.9	2.6	0.9	1.4	**23.0**
Tayside	15.8	0.7	0.5	7.7	5.4	1.9	5.6	**37.5**
The Highlands and Islands	15.3	0.6	0.8	23.0	19.4	0.8	2.2	**62.1**
Total	**72.9**	**5.1**	**2.7**	**123.0**	**64.5**	**7.1**	**12.8**	**288.1**

Due to rounding there may be slight discrepancies when totalling

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	9.5	0.2	0.1	4.7	0.4	0.0	0.3	**15.1**
Ayrshire and Arran	5.4	0.1	0.1	25.9	7.2	0.3	0.3	**39.4**
Dumfries and Galloway	14.6	0.5	0.2	20.4	3.4	1.3	0.5	**40.7**
Edinburgh, the Lothians and Borders	15.6	0.7	0.2	17.0	8.8	0.0	0.3	**42.5**
Fife	6.7	0.2	0.1	20.9	2.3	1.1	0.3	**31.4**
Greater Glasgow and The Clyde Valley	3.2	0.1	0.0	4.2	1.7	1.1	0.3	**10.5**
Loch Lomond, The Trossachs, Stirling and Forth Valley	12.1	0.7	0.3	10.0	1.7	1.0	0.9	**26.6**
Tayside	25.3	0.4	0.3	8.6	3.4	2.1	3.6	**43.8**
The Highlands and Islands	24.6	0.4	0.5	25.7	12.4	0.8	1.4	**65.8**
Total	**117.0**	**3.2**	**1.7**	**137.2**	**41.2**	**7.7**	**7.7**	**315.8**

Due to rounding there may be slight discrepancies when totalling

Indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Aberdeen and Aberdeenshire	9.9	0.3	0.1	5.7	0.6	0.0	0.5	**17.1**
Ayrshire and Arran	5.7	0.2	0.1	31.4	11.9	0.4	0.5	**50.1**
Dumfries and Galloway	15.1	0.8	0.3	24.7	5.5	1.5	0.7	**48.8**
Edinburgh, the Lothians and Borders	16.2	1.1	0.3	20.6	14.5	0.1	0.4	**53.3**
Fife	6.9	0.3	0.1	25.4	3.7	1.3	0.4	**38.2**
Greater Glasgow and The Clyde Valley	3.3	0.2	0.0	5.1	2.7	1.3	1.5	**14.2**
Loch Lomond, The Trossachs, Stirling & Forth Valley	12.6	1.1	0.5	12.1	2.7	1.2	1.5	**31.8**
Tayside	26.3	0.7	0.5	10.5	5.6	2.5	5.9	**52.0**
The Highlands and Islands	25.5	0.6	0.9	31.1	20.3	1.0	2.3	**81.8**
Total	**121.6**	**5.3**	**2.8**	**166.6**	**67.6**	**9.4**	**13.8**	**387.2**

Due to rounding there may be slight discrepancies when totalling

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Aberdeen and Aberdeenshire	25.2	0.8	0.4	14.5	1.7	0.0	1.2	**43.8**
Ayrshire and Arran	14.5	0.5	0.3	80.5	30.4	1.0	1.2	**128.4**
Dumfries and Galloway	38.7	2.1	0.8	63.4	14.1	3.9	1.9	**124.9**
Edinburgh, the Lothians and Borders	41.6	2.8	0.9	52.8	37.0	0.3	1.1	**136.5**
Fife	17.8	0.9	0.3	65.0	9.5	3.3	1.1	**97.9**
Greater Glasgow and The Clyde Valley	8.6	0.4	0.0	13.1	7.0	3.3	2.9	**35.3**
Loch Lomond, The Trossachs, Stirling & Forth Valley	32.2	2.9	1.2	31.0	7.0	3.2	3.9	**81.4**
Tayside	67.5	1.8	1.2	26.8	14.5	6.5	15.0	**133.2**
The Highlands and Islands	65.5	1.6	2.2	79.8	52.1	2.6	5.9	**209.7**
Total	**311.6**	**13.7**	**7.3**	**426.8**	**173.3**	**24.2**	**34.3**	**991.1**

Due to rounding there may be slight discrepancies when totalling

FTE Employment

Employment associated with on-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	109	5	3	77	11	0	9	**215**
Ayrshire and Arran	63	3	2	429	210	6	9	**721**
Dumfries and Galloway	168	14	6	338	97	21	13	**657**
Edinburgh, the Lothians and Borders	180	19	6	282	255	3	8	**754**
Fife	77	6	2	347	65	18	8	**523**
Greater Glasgow and The Clyde Valley	37	3	0	70	48	18	20	**196**
Loch Lomond, The Trossachs, Stirling & Forth Valley	139	20	8	166	48	17	27	**425**
Tayside	293	12	9	143	100	35	103	**694**
The Highlands and Islands	284	11	15	426	359	14	41	**1,150**
Total	**1,351**	**94**	**50**	**2,278**	**1,194**	**131**	**236**	**5,335**

Due to rounding there may be slight discrepancies when totalling

Employment associated with off-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	176	3	2	86	7	0	5	**280**
Ayrshire and Arran	101	2	1	479	134	6	5	**729**
Dumfries and Galloway	269	9	4	378	62	23	8	**753**
Edinburgh, the Lothians and Borders	290	12	4	314	163	0	5	**788**
Fife	124	4	1	387	42	20	5	**582**
Greater Glasgow and The Clyde Valley	60	2	0	78	31	20	5	**195**
Loch Lomond, The Trossachs, Stirling & Forth Valley	224	13	5	185	31	19	17	**493**
Tayside	469	8	5	159	64	39	66	**810**
The Highlands and Islands	455	7	10	475	229	16	26	**1,218**
Total	**2,167**	**60**	**32**	**2,541**	**763**	**142**	**143**	**5,849**

Due to rounding there may be slight discrepancies when totalling

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

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	182	5	3	105	12	0	9	**317**
Ayrshire and Arran	105	3	2	581	220	7	9	**928**
Dumfries and Galloway	280	15	6	458	102	28	14	**903**
Edinburgh, the Lothians and Borders	301	20	6	381	268	2	8	**987**
Fife	128	6	2	470	69	24	8	**707**
Greater Glasgow and The Clyde Valley	62	3	0	95	51	24	29	**263**
Loch Lomond, The Trossachs, Stirling & Forth Valley	232	21	9	224	50	23	28	**588**
Tayside	488	13	9	194	104	47	108	**963**
The Highlands and Islands	473	11	16	577	376	19	43	**1,515**
Total	**2,252**	**99**	**53**	**3,084**	**1,252**	**175**	**255**	**7,170**

Due to rounding there may be slight discrepancies when totalling

Employment associated with visitor expenditure impact (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	468	14	7	268	31	0	23	**811**
Ayrshire and Arran	268	9	5	1,490	564	19	23	**2,378**
Dumfries and Galloway	717	38	15	1,174	262	72	35	**2,314**
Edinburgh, the Lothians and Borders	771	52	16	977	686	5	21	**2,528**
Fife	329	16	5	1,203	176	62	21	**1,812**
Greater Glasgow and The Clyde Valley	159	7	0	242	130	62	53	**654**
Loch Lomond, The Trossachs, Stirling & Forth Valley	596	55	22	574	129	59	72	**1,507**
Tayside	1,249	33	23	496	268	120	278	**2,467**
The Highlands and Islands	1,212	29	41	1,478	964	49	109	**3,883**
Total	**5,770**	**253**	**135**	**7,904**	**3,209**	**448**	**635**	**18,354**

Due to rounding there may be slight discrepancies when totalling

Gross Value Added

GVA associated with on-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	3.4	0.2	0.1	2.4	0.4	0.0	0.3	**6.6**
Ayrshire and Arran	1.9	0.1	0.1	13.2	6.5	0.2	0.3	**22.2**
Dumfries and Galloway	5.2	0.4	0.2	10.4	3.0	0.6	0.4	**20.2**
Edinburgh, the Lothians and Borders	5.6	0.6	0.2	8.7	7.9	0.1	0.2	**23.2**
Fife	2.4	0.2	0.1	10.7	2.0	0.5	0.2	**16.1**
Greater Glasgow and The Clyde Valley	1.1	0.1	0.0	2.1	1.5	0.5	0.6	**6.0**
Loch Lomond, The Trossachs, Stirling & Forth Valley	4.3	0.6	0.3	5.1	1.5	0.5	0.8	**13.1**
Tayside	9.0	0.4	0.3	4.4	3.1	1.1	3.2	**21.4**
The Highlands and Islands	8.7	0.3	0.5	13.1	11.0	0.4	1.3	**35.4**
Total	**41.6**	**2.9**	**1.5**	**70.1**	**36.8**	**4.0**	**7.3**	**164.2**

Due to rounding there may be slight discrepancies when totalling

GVA associated with off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	5.4	0.1	0.1	2.7	0.2	0.0	0.2	**8.6**
Ayrshire and Arran	3.1	0.1	0.0	14.7	4.1	0.2	0.2	**22.4**
Dumfries and Galloway	8.3	0.3	0.1	11.6	1.9	0.7	0.3	**23.2**
Edinburgh, the Lothians and Borders	8.9	0.4	0.1	9.7	5.0	0.0	0.2	**24.3**
Fife	3.8	0.1	0.0	11.9	1.3	0.6	0.2	**17.9**
Greater Glasgow and The Clyde Valley	1.8	0.1	0.0	2.4	1.0	0.6	0.2	**6.0**
Loch Lomond, The Trossachs, Stirling & Forth Valley	6.9	0.4	0.2	5.7	0.9	0.6	0.5	**15.2**
Tayside	14.4	0.2	0.2	4.9	2.0	1.2	2.0	**24.9**
The Highlands and Islands	14.0	0.2	0.3	14.6	7.1	0.5	0.8	**37.5**
Total	**66.7**	**1.9**	**1.0**	**78.2**	**23.5**	**4.4**	**4.4**	**180.1**

Due to rounding there may be slight discrepancies when totalling

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

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	5.6	0.2	0.1	3.2	0.4	0.0	0.3	**9.7**
Ayrshire and Arran	3.2	0.1	0.1	17.9	6.8	0.2	0.3	**28.6**
Dumfries and Galloway	8.6	0.5	0.2	14.1	3.1	0.9	0.4	**27.8**
Edinburgh, the Lothians and Borders	9.3	0.6	0.2	11.7	8.2	0.1	0.2	**30.4**
Fife	4.0	0.2	0.1	14.5	2.1	0.7	0.2	**21.8**
Greater Glasgow and The Clyde Valley	1.9	0.1	0.0	2.9	1.6	0.7	0.9	**8.1**
Loch Lomond, The Trossachs, Stirling & Forth Valley	7.2	0.7	0.3	6.9	1.6	0.7	0.9	**18.1**
Tayside	15.0	0.4	0.3	6.0	3.2	1.4	3.3	**29.6**
The Highlands and Islands	14.6	0.3	0.5	17.8	11.6	0.6	1.3	**46.6**
Total	**69.3**	**3.0**	**1.6**	**95.0**	**38.6**	**5.4**	**7.9**	**220.7**

Due to rounding there may be slight discrepancies when totalling

GVA associated with visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Aberdeen and Aberdeenshire	14.4	0.4	0.2	8.3	0.9	0.0	0.7	**25.0**
Ayrshire and Arran	8.3	0.3	0.2	45.9	17.4	0.6	0.7	**73.2**
Dumfries and Galloway	22.1	1.2	0.5	36.2	8.1	2.2	1.1	**71.2**
Edinburgh, the Lothians and Borders	23.7	1.6	0.5	30.1	21.1	0.2	0.6	**77.8**
Fife	10.1	0.5	0.2	37.0	5.4	1.9	0.6	**55.8**
Greater Glasgow and The Clyde Valley	4.9	0.2	0.0	7.5	4.0	1.9	1.6	**20.1**
Loch Lomond, The Trossachs, Stirling & Forth Valley	18.3	1.7	0.7	17.7	4.0	1.8	2.2	**46.4**
Tayside	38.5	1.0	0.7	15.3	8.2	3.7	8.6	**76.0**
The Highlands and Islands	37.3	0.9	1.3	45.5	29.7	1.5	3.4	**119.5**
Total	**177.6**	**7.8**	**4.2**	**243.3**	**98.8**	**13.8**	**19.5**	**565.0**

Due to rounding there may be slight discrepancies when totalling