Scottish Caravan & Camping Forum

Economic Impact of the Holiday Park Sector in Scotland

A Report on behalf of

The Scottish Caravan and Camping Forum

November 2014

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The Economic Impact of the Holiday Park Sector in Scotland

Report for the Scottish Caravan and Camping Forum

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Executive Summary

Tourism is one of Scotland's key industries; it is worth more than £3.2bn in Gross Value Added (GVA) terms and supports 211,200 jobs [1]. The strategic ambition for the industry (as set by the Scottish Tourism Alliance in their *National Tourism Strategy*) is to increase tourism overnight expenditure by £1bn from £5.5bn to £6.5bn over the period 2015 to 2020.

In specific reference to the holiday park sector, VisitScotland's *Tourism Development Framework for Scotland* (2013) states:

> *"Holiday parks are important largely for the domestic tourism market in terms of the volume of rural tourism bed spaces they provide and the economic benefits that flow from this level of tourism activity."*

The Scottish Caravan and Camping Forum (SCCF)[2] appointed Frontline Consultants to undertake an economic impact assessment of the Holiday Park Sector in Scotland. The primary aims of the study were to:

> *"Provide an independent, evidence based understanding of the direct and indirect economic impact and contribution of the holiday park sector in Scotland and identify the number of full time equivalent (FTE) jobs supported both directly and indirectly by the sector."*

The study drew evidence from a survey of 89 holiday parks and a survey of 7,034 recent visitors to holiday parks in Scotland.

The research found that, in the twelve months to October 2014, Scotland's holiday park sector generated an estimated:

- **gross direct visitor expenditure impact of £491.1m**: this figure is higher than the £396m figure recorded for the self-catering (rented) accommodation sector in 2013[3], and significantly higher than the £86m figure for the guest house and B&B sector in *The GB Tourist - Statistics 2013* (p73)
- **gross direct, indirect and induced visitor expenditure impact of £700.8m**
- **net visitor expenditure impact of £307.1m**, which equates to a GVA impact of £156.1m, and to 5,688 supported FTE jobs in the Scottish economy.

In terms of overall gross impacts **- £700.8m visitor expenditure supports 12,977 FTE jobs and contributes £356.3m of Gross Value Added to Scotland's economy.**

Forty-five of the Holiday Parks surveyed provided information on their capital expenditure, operating expenditure, wages and salaries and **spent a combined £25.4m on these areas.**

The sector's GVA contribution equates to approximately 7.8% of total Scottish tourism GVA.

[1] Gross value added (GVA) is a measure in economics of the aggregate value of all goods and services produced in an area, industry or sector of an economy. Latest GVA figure relates to 2012, employment figure relates to 2013.
[2] SCCF consists of the British Holiday & Home Parks Association (BH&HPA), The Caravan Club, The Camping & Caravanning Club, the National Caravan Council Ltd (NCC), Thistle Holiday Parks and VisitScotland.
[3] It should be noted that these figures were based on different sampling methodologies, and that the figure for the self-catering sector excludes non-GB visitors.

1 Introduction

In July 2013, the Scottish Caravan and Camping Forum (SCCF) appointed Frontline to undertake an assessment of the economic impact of the holiday park sector in Scotland.

SCCF consists of the British Holiday & Home Parks Association (BH&HPA), The Caravan Club, The Camping & Caravanning Club, the National Caravan Council Ltd (NCC), Thistle Holiday Parks and VisitScotland. Its purpose is to provide a collective voice for the whole of the holiday park sector in Scotland.

This is the first time such a research study has been undertaken in Scotland. The primary research was carried out between January 2014 and September 2014 (park-owners) and March 2014 and October 2014 (visitors) and covered, for park-owners, the twelve months leading up to the time they completed the survey and, for visitors, their previous two holidays.

1.1 Objectives

The aims of the study were to:

- provide an independent, evidence-based knowledge of the direct and indirect economic impact of /contribution of the holiday park sector in Scotland
- provide information on the economic impact of/contribution from different types of accommodation provided on holiday parks (including touring and self-catering)
- identify the number of FTE jobs supported by the sector, both those employed directly and indirectly
- provide, where possible, a regional breakdown of findings, as well as a national one

A key outcome of this report is an estimate of the economic value of the sector in 2014, together with a methodology that is easy to replicate and can be used in future years to track changes in the sector's performance.

1.2 Method

The research is based on a combination of desk-based analysis, consultations with key stakeholders and surveys of park-owners and visitors.

2 Contextual Review

2.1 Introduction

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

2.2 National Tourism Strategy

The National Tourism Strategy (*Tourism 2020*, *VisitScotland, 2013*) confirms the importance of tourism to Scotland's economy and emphasises the resilience of the tourism industry since the start of the economic downturn in 2008. However, the strategy cautions that Scotland must remain competitive, by developing and changing its products and marketing in order to improve the quality of the customer experience and increase sales.

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

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

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

2.3 Tourism Development Framework

A Tourism Development Framework (*Tourism Development Framework for Scotland*, *VisitScotland, 2013*) has been produced to support the Strategy, and to identify, in operational terms, how best to assist and promote growth in Scotland's tourism economy up to 2020. The plan supports the National Tourism Strategy drawn up by the Scottish Tourism Alliance. The Framework sets out a much broader development strategy and proposals across a wider agenda, highlighting the important role played by local partners, notably Area Tourism Partnerships and Local Authorities.

The Framework states that:

> *"Accommodation is one of the main drivers of tourism revenue. The expansion of Scotland's tourist accommodation supply, particularly at the higher end of the market, would significantly help support the growth of the visitor economy." (p.10)*

The authors also recognise that ongoing investment in Scotland's tourist accommodation by the private sector is imperative in order to ensure that visitors' expectations as to the quality of the accommodation are met in the future.

In order to improve the "Customer Journey', the Framework identifies priority areas for investment in new or upgraded accommodation serving key destinations, including:

- Loch Lomond & Trossachs
- Cairngorms National Park
- St Andrews
- Perthshire
- Highlands and Islands – key destinations in the following Councils; Highland, Argyll & Bute, Western Isles, Orkney and Shetland

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

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

In specific reference to the holiday park sector the Framework states:

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

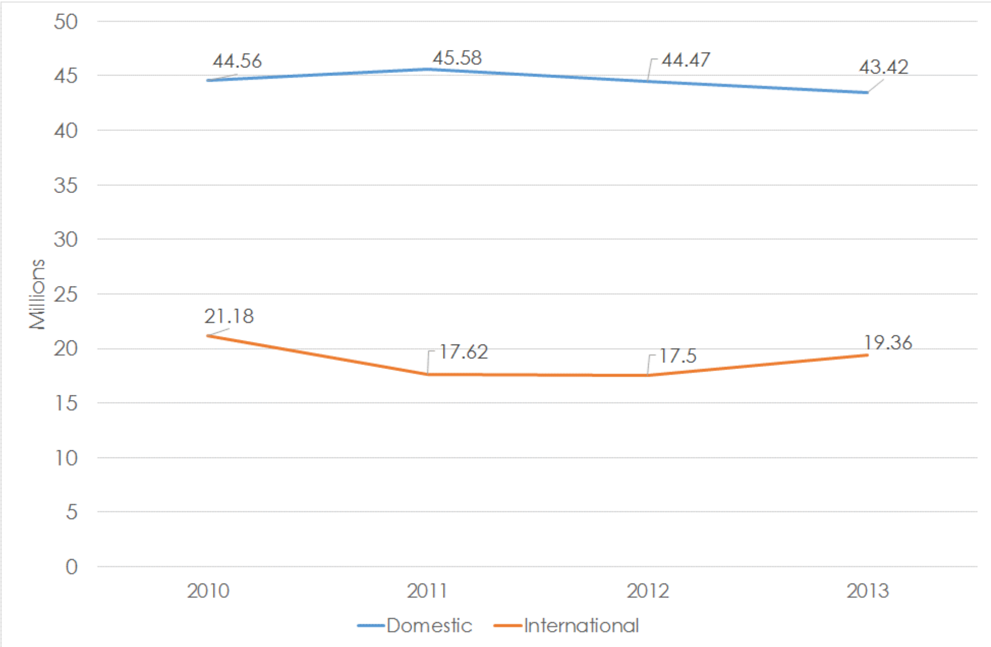
One of the four priorities of the accommodation theme is *'Investment in rural areas in new and existing self-catering accommodation, bunkhouse provision, holiday parks and eco-friendly developments which support the wider "rural tourism product"'. (p.11)*

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

2.4 National tourism statistics

A review of national (Scotland) tourism statistics over the period 2010 to 2013, as shown in Figure 2.1, highlight the fact that the total number of tourism nights in Scotland (domestic and international combined) has fallen by 4.5% over the past four years from 65.7m in 2010 to 62.8m in 2013. However, it is worth noting that the total of (domestic and international) tourism nights increased by 1.3% between 2012 and 2013, and that international visits increased by 10.6% over this period.

Figure 2.1: Tourist nights in Scotland 2010 - 2013[4]



Source: VisitScotland, Tourism in Scotland 2010 – 2013

Total tourism expenditure has increased from £4.1bn in 2010 to £4.6bn in 2013, representing a 13.6% increase. However, this represents a very small decrease in real (inflation adjusted) expenditure as the UK Consumer Price Index increased by 14% over the same period.

When assessing the economic value of the tourism industry, using the *Scottish Government's Annual Business Statistics (2008 - 2012),* it was found that the Gross Value Added (GVA) of the industry increased from £2.6bn in 2008 to £3.2bn in 2012, representing a 25% increase over the four-year period, and the total headcount employment of the industry was 175,000. While GVA figures for 2013 were unavailable at the time of writing, figures from the Scottish Government[5] showed that employment in the sector rose to 211,200 in 2013.

In terms of accommodation market share, Figure 2.2 suggests that the proportion of domestic visitors staying in 'Touring Caravan and Camping' has fallen over the period 2010 (8%) – 2013 (6%). However, caution should be taken when reviewing national statistics because they do not classify a 'holiday park' per se, and many holiday parks also provide 'Self Catering' accommodation, where there has been an increase in market share from 12% to 14% over the same period.

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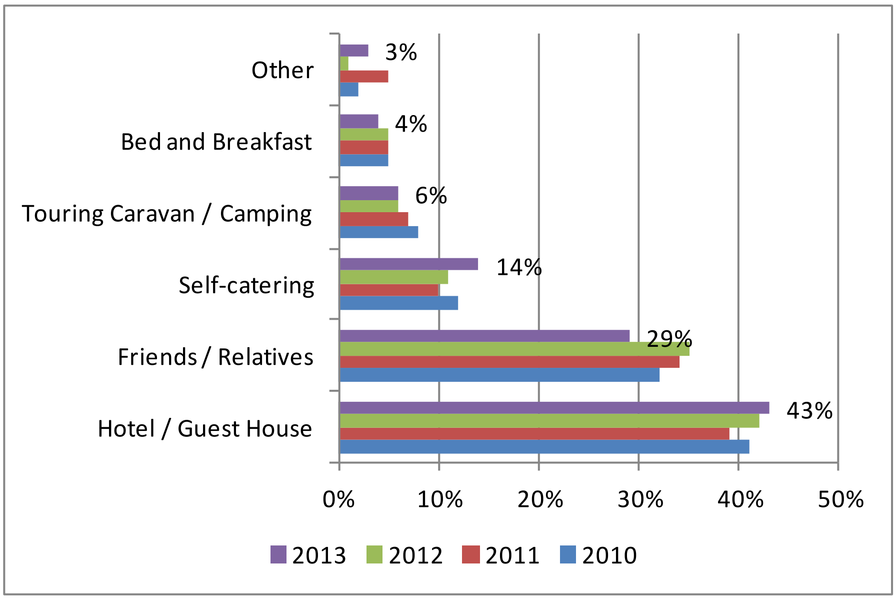
[4] Domestic figures relate to expenditure by visitors who live in Great Britain and Northern Ireland. International relates to expenditure from visitors who live outside of the UK.
[5] *High Level Summary Statistics Trends, Growth Sector Employment*, http://www.scotland.gov.uk/Topics/Statistics/Browse/Business/key-sector

Figure 2.2: Accommodation used by GB tourists 2010 - 2013[6]



Source: VisitScotland, Tourism in Scotland 2010 – 2013

Figures from the *Great Britain Tourism Survey (GBTS)*,for 2013 show that in Scotland there were 5.5m domestic (UK) holiday nights (4.4m in 2012) in holiday park, touring caravan or camping accommodation; these trips generated visitor expenditure of £219m (£164m in 2012). Although figures for 2013 are above those for 2012; they are below the 6.5m holiday nights in 2011; however, the £219m level of spend in 2013 is above the £215m achieved in 2011.

A review of the annual surveys undertaken over the period 2010 to 2012 by VisitScotland, the BH&HPA and Thistle Holiday Parks; (Scottish Camping, Caravanning & Holiday Parks Sector, 2010 – 2012), identified the fact that holiday parks had found trading conditions challenging over this period. However, the respondents to these surveys – the park-owners – were more optimistic about future prospects, with two thirds of parks, in the 2012 survey, saying that they were confident about business prospects in 2013.

A more recent report, based on a survey of small businesses involved in tourism in Scotland, commissioned by the Federation of Small Businesses in Scotland (*Eating, Sleeping, Shopping, Doing,* August 2014), confirms a growing confidence and appetite for investment, noting:

> *"Firms in the sector are ambitious and optimistic: two thirds of businesses want to grow in the next 12 months and expect to do so through increasing customer numbers, expanding their online presence, and investing more in their business." (p.3)*

[6] Figures relate to GB visitors to Scotland. These include overnight visitors from England, Wales or elsewhere in Scotland, but exclude visitors from Northern Ireland.

2.5 Database of Scottish holiday parks

According to evidence provided by the Scottish Caravan and Camping Forum member organisations, there were, in the summer of 2014, 318 SCCF member holiday parks operating in Scotland, which in total had 34,116 pitches[7].

The majority of these pitches are either owner-occupied caravan holiday homes or lodges (17,012 pitches in total, equivalent to 47% of all pitches) or touring pitches (13,108 pitches in total, equivalent to 37% of all pitches). However, the parks have a wide and growing mix of other accommodation options which cater for a broad range of tastes and budgets, including chalets, lodges, wigwams, yurts and pods.

Highlands contains both the highest number of holiday parks in Scotland (69) and the highest number of pitches (5,819); Argyll and the Isles, Ayrshire and Arran, Dumfries and Galloway, and the Kingdom of Fife also contain a high number of both parks and pitches.

Table 2.1: Composition of Scotland's holiday park sector

VisitScotland Region	Number of Parks	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned[8]	Other Rented	Total pitches (all types)
Aberdeen City and Shire	22	306	51	689	16	16	**1,078**
Argyll and the Isles	36	2,381	234	777	267	235	**3,894**
Ayrshire and Arran	31	3,467	530	556	15	188	**4,756**
Dumfries and Galloway	45	2,958	304	1,795	134	71	**5,262**
Dundee and Angus	6	381	13	219	6	12	**631**
Edinburgh and Lothians	17	723	156	1,107	0	24	**2,010**
Glasgow and Clyde	6	172	28	215	0	13	**428**
Highlands	69	1,129	404	3,875	172	161	**5,741**
Kingdom of Fife	23	2,488	151	673	101	12	**3,425**
Loch Lomond and Trossachs	13	371	25	1,078	57	32	**1,563**
Orkney	2	0	0	119	0	0	**119**
Outer Hebrides	2	0	3	43	0	3	**49**
Perthshire	26	1,140	171	1,233	134	138	**2,816**
Scottish Borders	18	1,496	62	666	43	14	**2,281**
Shetland	2	0	0	63	0	0	**63**
Scotland	**318**	**17,012**	**2,132**	**13,108**	**945**	**919**	**34,116**

Source: Scottish Camping and Caravan Forum, 2014

[7] This is not a comprehensive list, for example it does not include The Caravan Club and Camping and Caravanning Club Certificated Sites and Locations, therefore all of the figures in this report should be seen as conservative estimates of the true value of the sector.

[8] 'Other Owned' relates to owner occupied lodges, apartments and chalets. 'Other rented' relates to rented lodges, apartments, chalets, pods, wigwams and yurts.

2.6 Findings from the stakeholder workshop

As part of the research, Frontline facilitated a stakeholder workshop on 31 October 2013, involving representatives from:

- The British Holiday and Home Parks Association
- The Camping and Caravanning Club
- The Caravan Club
- National Caravan Council
- Thistle Holiday Parks
- VisitScotland

The purpose of this workshop was to develop a shared view of the strengths, weaknesses, opportunities and threats faced by Scotland's holiday park sector. The findings are presented below.

Table 2.2: SWOT analysis of the holiday park sector

STRENGTHS	WEAKNESSES
• Great outdoors/lifestyle/freedom • Good value for money • Quality and variation of offering on onsite facilities – quality – variation in offering	• Negative perceptions/lack of understanding of the product • Distance – fuel costs • Seasonality – availability of facilities in local communities
OPPORTUNITES	**THREATS**
• Getting young people interested • Product diversification, new products/new areas • Promotion of lifestyle – outdoors, wellness • Demonstrate contribution to rural economy	• Touring caravans – lack of innovation • Restrictive legislation • Financial climate – investment/low discretionary spend • Competitor industries growing e.g. hotels; Competitive markets – mainland Europe

Source: Participants at October 2013 Workshop

2.7 Summary

Tourism is one of Scotland's key industries. In 2012 it was worth more than £3.2bn in gross value-added terms (GVA) and employed more than 175,000 people. The strategic ambition (as set out by the Scottish Tourism Alliance) is to grow the tourism industry by £1bn (in overnight expenditure terms) over the period 2015 to 2020.

The industry has had a difficult trading period over the last four years (2010-2013) with the total number of trips and nights both falling. 2012 was a particularly difficult year but total tourism nights increased in 2013.

Following this difficult trading period, evidence from our consultations with park owners suggests that confidence in the performance of the holiday park sector grew in 2014. The findings from the park owner's survey will be considered in detail in the next chapter.

3 Findings from the Park-Owners' Survey

As part of the research a survey was conducted of 45 caravan park operators in Scotland (some of whom operated more than one park), who, together, provided information on 89 caravan parks across Scotland.

The survey sample was drawn from a database of 318 caravan parks provided by the SCCF. This list included all the BH&HPA member parks, all the Thistle Park members, and all the parks operated by The Caravan Club and by The Camping and Caravanning Club. While this represents a near-comprehensive list of all of the holiday parks in Scotland, it does not include either the 15 BH&HPA member parks which are entirely residential (as these do not fall within the remit of this study), or The Caravan Club and Camping and Caravanning Club Certificated Sites and Locations (as in these cases the management of the site is likely to only account for a proportion of the land owner's business activities). For this reason, the impact figures presented in this report can be considered to be a prudent estimate of the total value of the sector.

3.1 Sampling methodology

In order to maximise the chances of securing a sample of responses representative of the sector as a whole, the researchers began the study by developing a list of 50 key target parks, which together represented a microcosm of the entire sector. i.e. they were proportionately representative in terms of:

- the number of small and large parks
- the number of rural and urban parks
- the number of group-owned parks and independently owned parks
- the number of parks that mostly served touring holiday makers; and the number which mostly contained either owner occupied or rented holiday homes

The aim was to interview the owners of all 50 of these parks, by contacting each of them by phone to secure an interview. Through this process, it was possible to gather information on 37 parks.

The SCCF and Frontline met in June 2014 to review the responses received, in order to identify which geographic areas or accommodation types were still under-represented. A second target list of 41 parks was then developed, and these parks were contacted following the same process. It was also agreed at this point to e-mail each of the remaining 192 parks which were not on either of the two target lists and invite them to participate electronically.

The final survey sample of 89 parks included:

- 37 of the 50 parks on our first target list (telephone survey)
- 38 of the 41 parks on our second target list (telephone survey)
- 14 of the 192 parks invited to participate by e-mail (e-survey)

The researchers believe that, as a result of this process, a comprehensive picture of the sector was achieved.

3.2 Geographic locations

The geographic location of the surveyed parks was broadly representative of the sector as a whole. For example, it included parks from all 12 of VisitScotland's mainland regions, as well as the Outer Hebrides, and in each of these areas included at least 8% of all parks.

Table 3.1: Locations of survey participants

VisitScotland Region	Number of parks interviewed	Number of parks in area	Percentage interviewed
Aberdeen City and Shire	4	22	18%
Argyll and the Isles	3	36	8%
Ayrshire and Arran	5	31	16%
Dumfries and Galloway	16	45	36%
Dundee and Angus	2	6	33%
Edinburgh and Lothians	5	17	29%
Glasgow and Clyde	2	6	33%
Highlands	25	69	36%
Kingdom of Fife	8	23	35%
Loch Lomond and Trossachs	7	13	54%
Orkney	0	2	0%
Outer Hebrides	1	2	50%
Perthshire	5	26	19%
Scottish Borders	6	18	33%
Shetland	0	2	0%
Total	**89**	**318**	**28%**

Source: Frontline Park-Owners' Survey, 2014

3.3 Park size

Our survey sample also contained a diverse and representative mix of small, medium, large and very large parks, including 13 very large parks (parks with 251 pitches or more); and 9 small parks (parks with 50 pitches or fewer).

Table 3.2: Sizes of the parks surveyed

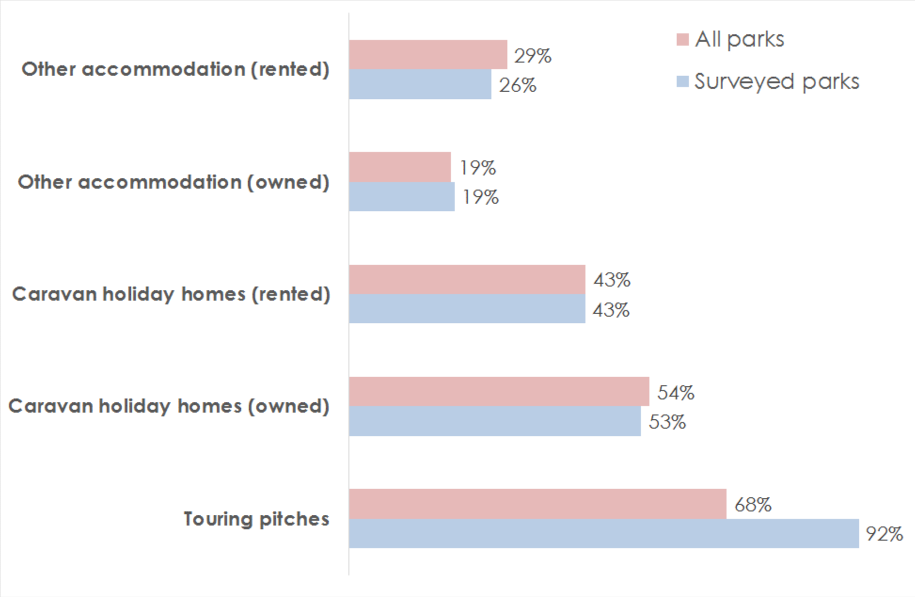
Number	Number of parks interviewed	Number of parks in Scotland	Percentage interviewed
Small parks (1-50 pitches)	9	92	10%
Medium sized parks (51-100 pitches)	42	115	37%
Large parks (101-250 pitches)	25	82	30%
Very large parks (251 pitches or more)	13	29	45%
Total	**89**	**318**	**28%**

Source: Frontline Park-Owners' Survey, 2014

3.4 Accommodation provided

Over half of the parks surveyed had touring pitches and owner-occupied holiday homes on their parks, and over two-fifths offered rented caravan holiday homes. Most of the parks surveyed offered both of these types of accommodation.

Figure 3.1: Types of accommodation on the parks surveyed



Source: Frontline Park Owners Survey, 2014
(figures sum to over 100% as most parks offer more than one type of accommodation)

3.5 Facilities provided

In addition to accommodation, many holiday parks offer a range of leisure facilities and amenities. Participants were asked to list what other facilities they had on-site. Over half had a laundrette and a playground, and over a quarter had a shop. Other facilities included bars and restaurants, games rooms, swimming pools and putting greens. A football pitch, a chip shop, a tennis court and a private beach were also mentioned in the parks' responses.

Note that the figures below capture only those parks who listed each type of facility in their response; it is possible that some of the parks may have some of these facilities, but did not respond to this question. The figures may, therefore, under-estimate the true mix of facilities on Scotland's holiday parks.

Table 3.3: Facilities listed by survey participants

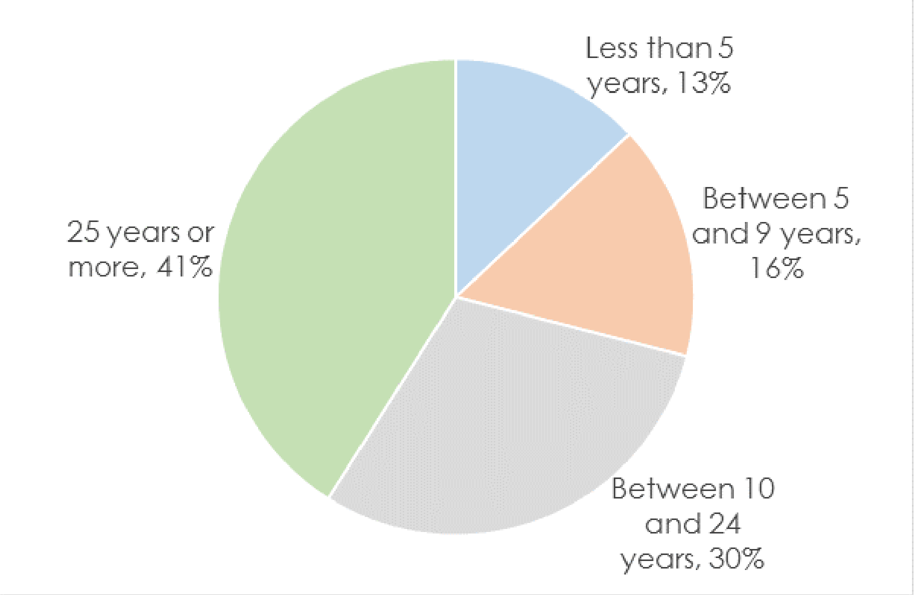
Facility	Number of parks	% of parks
Laundrette	80	88%
Playground/play area	63	69%
Shop	31	34%
Games room	17	19%
Bar/restaurant	16	18%
Swimming pool	14	15%
Golf *	7	8%
Woodland walk	3	3%
Boat hire	2	2%

Source: Frontline Park-Owners' Survey, 2014
** includes golf courses, adventure golf, pitch & putt, putting greens and driving ranges)*

3.6 Park ownership

The research found that, in the vast majority of cases, owners saw their holiday parks as long-term investments, with the parks owned and operated by the same person, family or organisation for at least ten years and often much longer. Note that the figures in this pie-chart relate only to the length of time that the parks have been in the hands of the current owners (up to Summer 2014), and that in many cases, holiday parks had been operating on the site for much longer than this.

Figure 3.2: Length of time survey participants have owned their parks

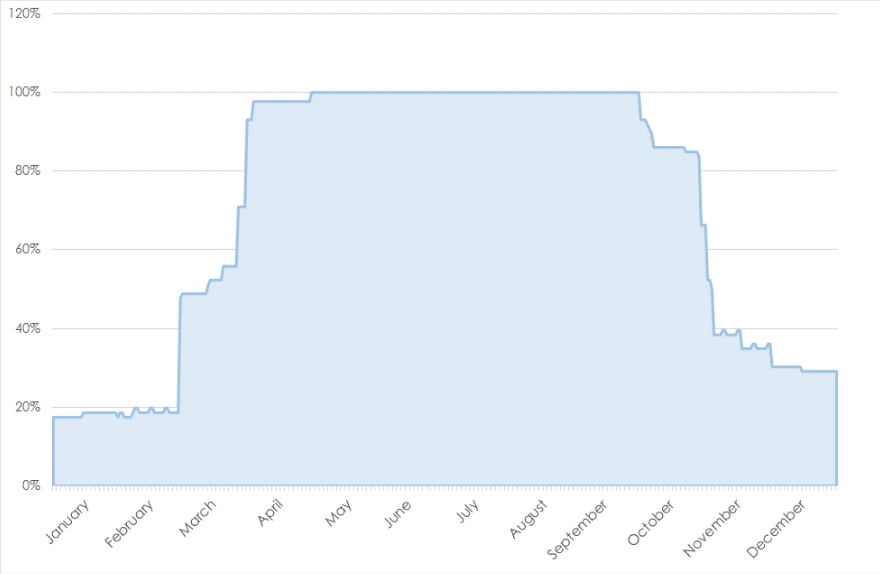


Source: Frontline Park-Owners' Survey, 2014

3.7 Length of season

All the survey participants reported that their parks were open throughout the months of May, June, July and August, while all but two were open throughout April. The vast majority of parks are open from late March to the end of October and 19% are open all year round.

Figure 3.3: Times of year at which participants' parks are open



Source: Frontline Park-Owners' Survey, 2014

3.8 Occupancy rates

Park-owners were asked to report their typical occupancy rates at six points in the year, including a typical:

- weekend in high season
- midweek day in high season
- weekend during the mid-season
- midweek day during the mid-season
- weekend in low season; and
- midweek day in the low season

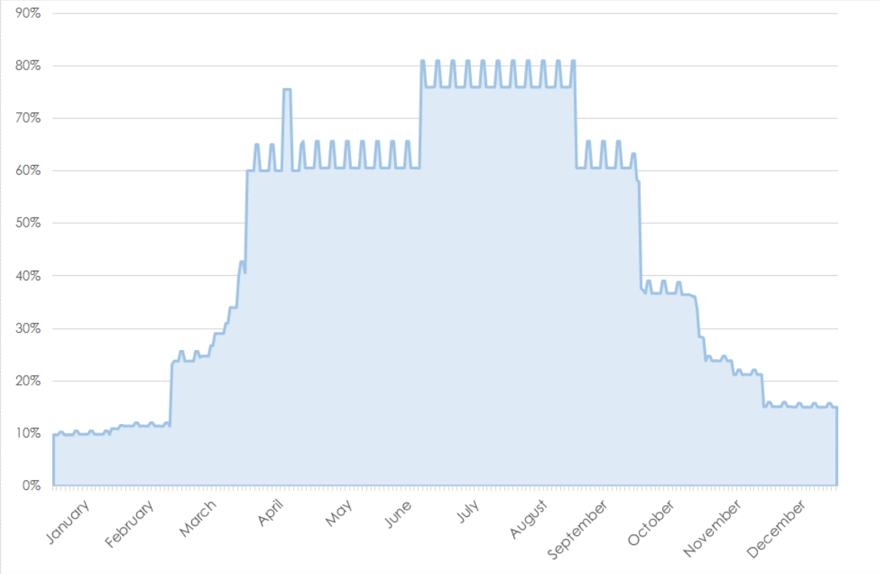
A weighted average was taken of each of these figures for Scotland as a whole (weighted by the total number of pitches on each park), and these were used to estimate a Scotland-wide occupancy rate for all 365 days of the year, based on the assumptions that:

- high season fell in 2014 between Saturday 21 June (the first day of the school holidays in many Scottish local authority areas) and Sunday 31 August
- the Easter weekend (18-21 April) was also classed as high season
- the mid-season was from Tuesday 1 April to Friday 20 June (excluding the Easter weekend) and from Monday 1 September to Tuesday 30 September
- the low season was from Wednesday 1 January to Monday 31 March and from Wednesday 1 October to Wednesday 31 December

Further adjustments were made to account for the fact that some parks were closed during certain months in the low season.

Based on these assumptions, it was estimated that occupancy rates in Scotland's holiday parks varied from 81% in peak season weekends to around 60% in mid-season.

Figure 3.4: Average occupancy rates on participants' parks



Source: Frontline Park-Owners' Survey, 2014

By multiplying the 365 daily occupancy rates in the figure above by the total stock of pitches available in Scotland we estimate that the sector had 5.6m filled bed nights in the year to October 2014.

3.9 Visitor origin

All the survey participants were asked what percentage of their visitors came from Scotland, from the rest of the UK and from the rest of the world.

There was a significant degree of variance in responses, both by location of the park and whether they offer owned or rented/touring accommodation. For example:

- visitors who owned their holiday home tended to live in closer proximity to their holiday location than tourers and visitors in rented accommodation
- visitors to the 'South of Scotland' area (defined as the Scottish Borders and Dumfries and Galloway VisitScotland regions) were the most likely to come from outwith Scotland
- visitors to the 'rest of Scotland' area (defined as Aberdeen City and Shire; Argyll & The Isles; Dundee & Angus; Highlands; Kingdom of Fife; Loch Lomond and the Trossachs; Orkney; Outer Hebrides; Perthshire, and Shetland VisitScotland regions) were the least likely to come from outwith Scotland

Table 3.4: Visitors' place of residence

	Rented and touring accommodation			Owned accommodation		
Area	**Scotland**	**Rest of the UK**	**Rest of the World**	**Scotland**	**Rest of the UK**	**Rest of the World**
South of Scotland	36%	63%	1%	55%	45%	0%
Central Belt	42%	50%	8%	64%	35%	1%
Rest of Scotland	46%	46%	8%	75%	24%	1%

Source: Frontline Park-Owners' Survey, 2014

3.10 Expenditure by park

Park-owners were asked to provide details of their capital expenditure, operating expenditure, wages and salaries as part of the survey questionnaire. For a variety of reasons, including concerns for commercial confidentiality and lack of access to the information, only 45 of the parks were able to provide this information. The total expenditure figures for these 45 parks were as follows:

Table 3.5: Total expenditure by parks

Area of expenditure	Total expenditure
Capital expenditure	£7.4m
Operating expenditure	£10.6m
Wages and salaries	£7.4m
Total expenditure	**£25.4m**

Source: Frontline Park Owners Survey, 2014

However, as these figures account only for expenditure in the 45 parks that could supply these figures, this figure is likely to be significantly lower than the total expenditure across all of the parks in Scotland. It should be noted that, over this period, one major player spent significant sums on their parks and that this could also skew the findings. It should be noted that the total expenditure on capital may vary considerably from year to year, as this may be dependent on just a handful of parks. Larger ones from time to time may invest in major new and upgraded facilities.

It should also be noted that, because of the possibility of double counting, these figures cannot be added to the visitor expenditure impact figures presented in Section 6 of this report. This is because the money invested by the park owners will usually either originate from park customers (e.g. from pitch fee receipts on on-site sales) or represent investments that are designed to generate future visitor income.

3.11 Corporate social responsibility

The survey found evidence to demonstrate how seriously park-owners take their responsibilities to the local communities. Examples included:

- buying goods and services locally where possible
- providing information on local businesses and attractions in reception areas
- allowing local residents to use the bars, restaurants, cafés and leisure facilities either free of charge or at discounted rates
- offering discounted stays to local residents, or family and friends of local residents
- offering discounted stays to performers at local festivals
- sponsoring prizes at local festivals
- providing free space for local community-group meetings
- organising charity events on their facilities
- sponsoring local sport teams

The research also identified a number of examples of ways in which the parks acted in an environmentally sensitive way, including:

- reducing food miles by buying locally
- supporting biodiversity by creating or maintaining wild-flower areas and scrubland or by building nesting boxes on the park

- harvesting their own water, power and heat
- use of low wattage and movement-sensitive lighting
- making provisions for visitors to access their parks by public transport
- providing on-site recycling facilities
- working with local ranger services or supporting local charities e.g. helping the RNLI on beach clean-ups
- making minimal use of pesticides and fertilisers

Sixteen of the parks surveyed participated in the David Bellamy Conservation Award Scheme, membership of which is restricted to BH&HPA members.

3.12 Summary

As part of this economic impact assessment, the researchers interviewed a representative sample of 89 holiday parks across Scotland.

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

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

The majority of park-owners have owned their parks for over 10 years and many have done so for over 25 years. Approximately one in five parks open throughout the year.

Park occupancy rates vary from 81% in peak season (August) to 60% in mid season (April), and the proportion of visitors to Scotland's holiday parks who live outwith Scotland varies significantly from park to park, depending on geographic location and whether the visitor accommodation is owner occupied or rented/touring.

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

- **procurement expenditure** - 45 parks from the total survey sample cumulatively spent £25.4m per year in capital expenditure, operating expenditure, wages and salaries;
- **employing local staff** - the employment impacts of the parks will be considered in greater detail in section 6 of this report;
- **local community engagement** – including hosting community events and offering local discounts; and
- **environmental activities** – including support for recycling and bio-diversity, and participation in the David Bellamy Conservation Award Scheme

4 Findings from the Visitors' Survey

4.1 Introduction

As part of the research an online survey was undertaken of 7,034 people who had taken a holiday on a holiday park in Scotland in either 2013 or 2014. The questionnaire was disseminated electronically by The Caravan Club and The Camping and Caravanning Club to all their members who had booked a holiday in Scotland in the previous twelve months; and to 67,000 Parkdean Holidays' visitors who had stayed at one of their parks in Scotland over the previous few years. An e-mail was also sent to the Thistle Holiday Parks' database established in 2012, and all BH&HPA member parks were e-mailed with a request to disseminate the survey to visitors on their contact list. Further details of how the survey was promoted are provided in Appendix 7.

4.2 Visitor origins

A majority of the survey participants lived outwith Scotland; including 2% who came from overseas.

Table 4.1: Visitors' place of residence

Area of origin	% of respondents
Scotland	43%
England, Wales and Northern Ireland	55%
Outside of the UK	2%

Source: Frontline Park Visitors Survey, 2014

4.3 Type of accommodation used

Visitors staying in rented accommodation took, on average, 4.1 caravan holidays or short breaks per year, while visitors staying in owned accommodation took an average of 9.1. 87% of visitors had stayed in a touring caravan, motorhome or tent over the course of the previous year. 11% stayed in an owner-occupied caravan holiday home or lodge; while 18% stayed in some form of rented, stationary accommodation.

It is likely that touring caravan and camping holiday-makers are over-represented in the survey, because of a particularly high response rate by members of The Caravan Club and The Camping and Caravanning Club, whose members are tourers; and who are known to always respond well when asked to take part in a survey. They were all e-mailed a link to the survey. However, 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 4.2: Type of accommodation stayed in

Type of accommodation stayed in	% of respondents
Stationary accommodation types	
Rented Caravan Holiday Home	12%
Owned Caravan Holiday Home	9%
Rented Lodge/Chalet/Cottage/Apartment	4%
Owned Lodge/Chalet/Cottage/Apartment	2%
Pod/Wigwam/Yurt	2%
Mobile accommodation types	
Touring Caravan	43%
Motorhome	38%
Tent	6%

Source: Frontline Park Visitors Survey, 2014
Figures sum to over 100% as a small proportion of visitors took holidays in more than one of the above types of accommodation

4.4 Visitor expenditure

Visitors who stayed in rented or touring accommodation spent, on average, £563.13 per visit, including £247.67 on-site and £315.46 off-site. Visitors who owned their holiday home spent, on average, £645.66 per visit, including £321.84 on-site and £323.82 off-site. Accommodation (including pitch fees and loan repayments), transport and food and drink were the biggest expenditure items.

Table 4.3: Visitor spend per visit

Area of expenditure	Renters and tourers	Owners
Accommodation costs (includes pitch fees and loan repayment)	£153.68	£171.20
Transport to destination (including petrol)	£88.02	£70.76
Eating out/drinking out in the area	£77.30	£88.67
other shopping (e.g. gifts, clothes, souvenirs etc)	£64.02	£77.90
Eating in/drinking in holiday accommodation	£50.80	£73.97
Visitor attractions (e.g. heritage sites, gardens, museums)	£33.18	£29.62
Eating in/drinking on the park	£30.83	£50.72
Outdoor recreation off-site (e.g. cycling, golf, tennis)	£16.60	£22.09
Outdoor recreation on-site (e.g. cycling, golf, tennis)	£5.89	£11.53
Entertainment in the area	£14.31	£21.33
Entertainment on the park	£6.47	£14.42
Other	£22.04	£13.44
Total – on site	**£247.67**	**£321.84**
Total – off site	**£315.46**	**£323.82**
Total – both on and off site	**£563.13**	**£645.66**

Source: Frontline Park Visitors Survey, 2014

By dividing the above figures by the average holiday length (6.5 days for renters and tourers, 7.2 days for owners), it was calculated that visitors who stayed in rented and touring accommodation spent, on average, £86.64 per day, including £38.10 on-site and £48.53 off-site. Visitors who owned their holiday home spent, on average, £89.68 per day, including £44.70 on-site and £44.98 off-site.

Table 4.4: Visitor spend per day

Area of expenditure	Renters and tourers	Owners
Accommodation costs (includes pitch fees and loan repayment)	£23.64	£23.78
Transport to destination (including petrol)	£13.54	£9.83
Eating out/drinking out in the area	£11.89	£12.32
other shopping (e.g. gifts, clothes, souvenirs etc)	£9.85	£10.82
Eating in/drinking in holiday accommodation	£7.82	£10.27
Visitor attractions (e.g. heritage sites, gardens, museums)	£5.10	£4.11
Eating in/drinking on the Park	£4.74	£7.04
Outdoor recreation off-site (e.g. cycling, golf, tennis)	£2.55	£3.07
Outdoor recreation on-site (e.g. cycling, golf, tennis)	£0.91	£1.60
Entertainment in the area	£2.20	£2.96
Entertainment on the park	£1.00	£2.00
Other	£3.39	£1.87
Total – on site	£38.10	£44.70
Total – off site	£48.53	£44.98
Total – both on and off site	£86.64	£89.68

Source: Frontline Park Visitors Survey, 2014

4.5 Influences on visitor decisions on which park to visit

Visitors were asked "what influenced you in making these visits?" The most popular responses were "I wanted to visit the area"; and "It's an area I know well/been before".

Table 4.5: Influences on visitor decisions on which parks to visit

Factor	% of responses
I wanted to visit the area	59%
It's an area I know well / been before	54%
The Caravan Club/The Camping and Caravanning Club members communication	28%
Specific activities in the area, such as golf, walking, cycling	20%
It was recommended to me by friends/family	13%
Family connections in the area	13%
I was attending an event/festival	12%
I saw advertising for the park	11%

Source: Frontline Park Visitors Survey, 2014
Figures sum to more than 100% as multiple answers were allowed to this question. The majority of people who responded to this question were tourers.

4.6 Summary

An online survey was undertaken of 7,034 holiday-makers in Scotland.

Visitors in rented/touring accommodation spent, on average, £563.13 per holiday (£86.64 per day), and went on holiday 4.1 times per year. Visitors staying in owned accommodation spent, on average, £645.66 per holiday (£89.68 per day) and holidayed 9.1 times per year.

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

One of the key objectives of this research is to assess the total value of gross and net visitor spend attributable to the Scottish holiday park sector in the twelve months to October 2014. This assessment was conducted in accordance with HM Treasury Green Book appraisal and evaluation guidance and the Scottish Enterprise and Highlands and Islands Enterprise economic impact assessment methodologies.

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

- days of the year (365)
- accommodation type (8)
- VisitScotland region (15)

In other words, the model includes 43,800 separate economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures[9].

5.2 Measuring gross on-site and off-site expenditure

The box below provides an illustrative example of how the gross on-site expenditure figures were estimated for touring caravans in Fife on Saturday 2nd August:

	Total number of touring caravan pitches in Fife	673
Multiplied by	Average occupancy rate on Saturday 2nd August	81%
=	Number of pitches occupied on Saturday 2nd August	545
Multiplied by	Ave. on-site expenditure per day for renting holiday-makers:	£40.17
=	Gross on-site expenditure of touring caravan visitors to Fife on 2nd August:	£21,893

The gross off-site expenditure was measured in exactly the same way, but using the average off-site expenditure per-day figure instead of the on-site one. Therefore, following the same worked example as above, it was calculated that in Fife, on Saturday 2nd August, total off-site expenditure by touring caravan visitors equalled:

	Total number of touring caravan pitches in Fife	673
Multiplied by	Average occupancy rate on Saturday 2nd August	81%
=	Number of pitches occupied on Saturday 2nd August	545
Multiplied by	Ave. off-site expenditure per day for renting holiday-makers:	£51.95
=	Gross off-site expenditure of touring caravan visitors to Fife on 2nd August:	£28,313

[9] Park-by-park, town-by-town or season-by-season breakdowns of these figures are also available on request.

5.3 Measuring indirect and induced expenditure

In addition to the two above types of impacts, 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. For example, if a visitor spends £1.00 on a loaf of bread in the local bakery, the shop-owner may pay £0.60 to a local wholesaler to buy a replacement loaf for their shelf; the wholesaler may, in turn, pay the local manufacturer £0.40 to replace the loaf in their warehouse; and the local manufacturer may pay a local farmer £0.20 for the wheat used to make this.[10]
- **Induced expenditure:** the knock-on benefits that take place as a result of employees' expenditure of income. For example, if a holiday-park employee spends some of his or her earnings in a local hairdressing business, this would boost the income of the staff employed there. If they, in turn, were to spend some of their earnings in a local shop, this would increase the earnings of those people working there

The most comprehensive study ever undertaken into tourism multipliers in Scotland was the 1990 Scottish Tourism Multipliers Study, conducted by the Surrey Research Group on behalf of what was then the Scottish Office. This study recommended that the following three multipliers be used as a proxy for the combined indirect and induced multipliers associated with tourist expenditure by overnight visitors:

- 0.41 in urban areas
- 0.43 in rural areas
- 0.36 in remote rural areas

Therefore, in the case of the above worked example for Fife (classified here as a rural area), the value of the multiplier effect is estimated as:

	Total on-site expenditure:	£21,893
Plus	Total off-site expenditure:	£28,313
=	Total combined on and off site expenditure:	£50,206
Multiplied by	Multiplier:	0.43
=	Indirect and induced effects:	£21,589

5.4 Measuring gross visitor impact

The gross expenditure impact is equal to the sum of the on-site expenditure, off-site expenditure and multiplier impacts. For example, in the worked example:

	Total on-site expenditure:	£21,893
Plus	Total off-site expenditure:	£28,313
Plus	Indirect and induced effects:	£21,589
=	Gross visitor impact	£71,795

[10] Note that these numbers are entirely fictional, and are included for illustrative purposes

5.5 Measuring net visitor impact

The purpose of this research was to measure the contribution that the holiday park sector makes to Scotland's economy.

To comply with HM Treasury, Scottish Enterprise, and Highlands and Islands Enterprise guidance, all expenditure by people who live in Scotland has to be excluded from the economic impact calculation.

This adjustment is based on the logic that, for every £1.00 these visitors spend during their holiday, they will have £1.00 less left in their bank account to spend on their local high street at other times during the year.

Therefore, in the worked example, the calculation of the net economic impact was based on the following calculation:

	Gross visitor expenditure impact	£71.795
Multiplied by	Percentage visitors who live outside of Scotland	54% (see table 3.4)
=	Net visitor expenditure impact	£38,769

5.6 Measuring employment impacts and gross value added associated with visitor spend

According to research by VisitBritain[11], every £54,000 spent by tourists in a local economy sustains 1 full-time equivalent (FTE) job. This proxy was applied in the assessment of the gross and net FTE employment impacts associated with the above visitor expenditure.

According to figures from the most recent Scottish Annual Business Statistics Publication[12], every £100 of turnover generated by Scotland's sustainable tourism industry translates to a gross value added (GVA) impact of £50.84. This proxy was applied to the above turnover figures to produce an estimate of the holiday park sector's contribution to Scottish GVA.

[11] *Tourism: Jobs and Growth - The economic contribution of the tourism economy,* 2013
[12] *2012 Scottish Annual Business Statistics*, Scottish Government, 2014

6 Economic Impact Assessment – Key Findings

This section presents a summary of the gross and net visitor expenditure, gross value added (GVA) and full time equivalent (FTE) employment impacts of the holiday park sector in Scotland, broken down by VisitScotland region and by accommodation type. More detailed findings are appended.

6.1 Impact by VisitScotland region

It is estimated that, in the twelve months leading up to October 2014, visitors to Scottish holiday parks spent a total of £700.8m in the Scottish economy, made up as follows:

- £231.4m on-site spend
- £259.7m off-site spend
- £209.7m of multiplier impacts

The majority of this spend was in the Argyll and the Isles, Ayrshire and Arran, Dumfries and Galloway, Highlands and Kingdom of Fife regions.

This visitor expenditure supports 12,977 FTE jobs in the Scottish economy, and contributes £356.3m of Gross Value Added to Scotland's economy.

Table 6.1: Gross impacts by VisitScotland region[13]

VisitScotland Region	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Aberdeen City and Shire	21.7	402	11.0
Argyll and the Isles	80.6	1,492	41.0
Ayrshire and Arran	98.6	1,826	50.1
Dumfries and Galloway	108.6	2,010	55.2
Dundee and Angus	12.7	236	6.5
Edinburgh and Lothians	40.6	751	20.6
Glasgow and Clyde	8.7	160	4.4
Highlands	117.0	2,166	59.5
Kingdom of Fife	71.1	1,316	36.1
Loch Lomond and Trossachs	31.9	591	16.2
Orkney[14]	2.3	42	1.2
Outer Hebrides	0.9	17	0.5
Perthshire	57.8	1,071	29.4
Scottish Borders	47.2	874	24.0
Shetland	1.2	22	0.6
Scotland	**700.8**	**12,977**	**356.3**

Source: Frontline, 2014

[13] Shaded columns represent the five regions of Scotland in which the holiday park sector made the greatest contribution to Scottish GVA

[14] While our survey did not include any interviews with parks based in Orkney and Shetland, we were able to estimate impact figures for these areas based on the information we know about parks in these areas from the SCCF members' database information.

After removing non-additional expenditure from the analysis (i.e. expenditure by visitors who live in Scotland), it is estimated that, over the twelve months to October 2014, visitors to Scottish holiday parks from outwith Scotland spent a total of £307.1m in the Scottish economy, supporting 5,688 FTE jobs, and contributing £156.1m of GVA to the economy.

Table 6.2: Net impacts by VisitScotland region

VisitScotland Region	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Aberdeen City and Shire	9.8	181	5.0
Argyll and the Isles	27.4	508	14.0
Ayrshire and Arran	41.2	762	20.9
Dumfries and Galloway	57.2	1,059	29.1
Dundee and Angus	4.5	84	2.3
Edinburgh and Lothians	20.2	375	10.3
Glasgow and Clyde	4.2	78	2.2
Highlands	55.3	1,023	28.1
Kingdom of Fife	22.7	420	11.5
Loch Lomond and Trossachs	14.6	271	7.4
Orkney	1.2	23	0.6
Outer Hebrides	0.5	9	0.3
Perthshire	23.5	435	11.9
Scottish Borders	24.1	446	12.2
Shetland	0.7	12	0.3
Scotland	**307.1**	**5,688**	**156.1**

Source: Frontline, 2014

6.2 Impact by accommodation type

Owner-occupied caravan holiday homes, which account for the highest proportion of pitches in Scotland, also account for the highest proportion of economic impacts, both in gross and net terms, followed by touring pitches.

Table 6.3: Gross and net impacts by accommodation type

VisitScotland Region	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Gross impacts			
Caravan Holiday Home Owned	355.5	6,583	180.7
Caravan Holiday Home Rented	43.0	797	21.9
Touring Pitches	264.1	4,890	134.3
Other Owned	19.8	366	10.0
Other Rented	18.4	341	9.4
All accommodation	**700.8**	**12,977**	**356.3**
Net impacts			
Caravan Holiday Home Owned	117.5	2,176	59.7
Caravan Holiday Home Rented	24.5	455	12.5
Touring Pitches	149.1	2,761	75.8
Other Owned[15]	5.7	106	2.9
Other Rented	10.3	190	5.2
All accommodation	**307.1**	**5,688**	**156.1**

Source: Frontline, 2014

6.3 Measuring the economic impacts associated with expenditure on caravan maintenance

The impacts discussed so far in this section include all the money that visitors to holiday parks in Scotland spent during the course of their visits, including their pitch fees.

However, the figures do not capture the ongoing costs of caravan holiday home owners and touring caravan/motorhome owners maintaining their property/tourer. Based on the survey, it is estimated that the average expenditure on maintenance by touring caravan owners and caravan holiday home owners was as follows:

Table 6.4: Average annual expenditure on caravan holiday home/touring caravan maintenance

Area of expenditure	Touring Caravan Owner	Caravan Holiday Home Owner
Servicing	£240.32	£183.25
Insurance	£252.73	£213.90
Road Tax	£149.63	N/A
General Upkeep	£164.56	£132.50
Total	**£807.24**	**£529.65**

Source: Frontline Park Visitors Survey, 2014

[15] 'Other Owned' relates to owner occupied lodges, apartments and chalet. 'Other rented' relates to rented lodges, apartments, chalets, pods, wigwams and yurts.

The gross expenditure figure for touring caravan owners is estimated to be £19.9m, based on the following calculation:

	Number of touring pitch nights per year:	1.6m[16]
Divided by	Number of trips per visitor per year:	4.1*[17]
Divided by	Average length of trip (nights):	6.5*
Minus	Proportion of visitors who live outside of Scotland	59%*[18]
=	Number of tourers residing in Scotland	24.615
Multiplied by	Average spend per tourer	£807.24*
Equals	Gross expenditure impact	£19.9m

However, as all this expenditure was incurred by people who lived in Scotland, none of it can be classified as 'net' expenditure.

The researchers estimated the gross expenditure figure for caravan holiday home/lodge owners as being equal to the number of owned caravan holiday homes (17,012[19]), multiplied by average maintenance expenditure per holiday home (£529.65). This equals £9.0 million.

They also estimated that the net impact of this expenditure was equal to the gross impact, multiplied by the percentage of owner occupiers who live outwith Scotland (40%). This produces a net expenditure impact of £3.6 million.

6.4 Summary

In the twelve months to October 2014 it is estimated that Scotland's holiday park sector generated:

- **a gross direct visitor expenditure impact of £491.1m**: this figure is higher than the £396m figure for the self-catering (rented) accommodation sector, and significantly higher than the £86m figure for the guest house and B&B sector in the 2013 GB Tourist Statistics (p74)[20]. It also equates to approximately 8% of the £5.5bn to £6.5bn ambition for the Scottish tourism industry quoted in the National Tourism Strategy.
- **a gross direct, indirect and induced visitor expenditure impact of £700.8m**
- **a net visitor expenditure impact of £307.1m**

This net expenditure impact equates to a GVA impact of £156.1m, and to 5,688 supported FTE jobs in the Scottish economy.

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

- **Dumfries and Galloway:** with a net expenditure of £57.2m, equivalent to a GVA impact of £29.1m, and to 1,059 supported FTE jobs
- **Highlands:** with a net expenditure of £55.3m, equivalent to a GVA impact of £28.1m, and to 1,023 supported FTE jobs

[16] Source: Great Britain Visitors Survey, 2013
[17] All figures marked with a '*' are sourced from the Frontline visitors' survey
[18] Assumes that all maintenance expenditure takes place close to the tourers' place of residence
[19] Source: SCCF, 2014
[20] While these figures allow an illustrative comparison to be made between the economic value of these two sectors, differences in calculation methodology mean that they do not represent a direct, like-for-like comparison. For example the figures for the B&B sector relate to GB visitors only, and to expenditure in 2013, while the figures for the holiday park sector relate to all visitors, and to the 12 months to October 2014.

- **Ayrshire and Arran:** with a net expenditure of £41.2m, equivalent to a GVA impact of £20.9m and to 762 supported FTE jobs.

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

- **Owner Occupied Caravan Holiday Homes:** with a net expenditure of £117.5m, equivalent to a GVA impact of £59.7m, and to 6,583 supported FTE jobs
- **Touring Pitches:** with a net expenditure of £149.1m, equivalent to a GVA impact of £75.8m, and to 4,890 supported FTE jobs

In addition to the figures above, money spent on maintenance by non-Scottish caravan holiday home owners adds a further £3.6 million of net expenditure to the Scottish economy.

7 Conclusions

This research provides evidence to demonstrate that Scotland's holiday park sector makes a substantial contribution to Scotland's economy.

It found that there are 318 SCCF member holiday parks in Scotland, with more than 34,000 pitches between them. These accounted for 5.6 million bed-nights over the course of the past year. These parks offer a flexible choice of accommodation and wide-ranging facilities, and regularly undertake activities which support local communities and help to protect the local environment.

The sector brings in a large number of non-Scottish tourists to Scotland, with 57% of all visitors to Scottish holiday parks resident out-with Scotland. In a peak season weekend, this equates to 16,573 visitor groups[21].

Visitors tend to take a holiday or short break on a holiday park on several occasions over the course of a year, with renters and tourers taking, on average, 4.1 holidays per year, and owner-occupiers taking, on average, 9.1 trips per year. They also tend to take lengthy stays, with renters and tourers spending, on average, 6.5 days on a holiday park on each holiday, and owners staying 7.2 days.

During each of these stays, visitors spend a significant amount of money per day in the local economy, including £38.10 on-site and £48.53 off-site by renters and tourers, and £44.70 on-site (including pitch fees) and £44.98 off-site by owners.

	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Gross Direct Impacts	491.1	9,094	249.6
Gross Indirect and Induced Impacts	209.7	3,884	106.6
Total Gross Impact	700.8	12,977	356.3
Net Impacts	307.1	5,688	156.1

The geographic areas which recorded the highest net visitor impacts were Dumfries and Galloway, the Highlands, and Ayrshire and Arran; while the accommodation types which recorded the highest net visitor impacts were owner-occupied caravan holiday homes and touring pitches.

In addition to the figures above, money spent annually on maintenance by non-Scottish caravan holiday home owners adds a further £3.6 million of net expenditure to the Scottish economy.

Forty-five of the Holiday Parks surveyed provided information on their capital expenditure, operating expenditure, wages and salaries-and spent a combined £25.4m on these areas.

Scottish Caravan and Camping Forum
November 2014
The research was conducted by Frontline and this report prepared by them.

[21] A visitor group is an collection of visitors (e.g. a family or group of friends), who stay together on the same pitch

Appendix 1

Park-Owners’ Survey Questionnaire

PARK-OWNER/MANAGER TOPIC GUIDE

An Economic Impact Assessment of the Holiday Park Sector in Scotland

The Scottish Caravan and Camping Forum (SCCF) has commissioned Frontline (http://www.frontline-consultants.com) to carry out an Economic Impact Assessment of the Holiday Park sector in Scotland. The findings from this research will provide evidence on the value of holiday parks to the Scottish economy and heighten the recognition of the parks sector as an important part of the tourism mix and economic growth.

An important aspect of this assessment is to consult with a representative sample of the park owners/managers. We have been provided your contact details from the SCCF and would like to arrange a suitable time to call you in order to run through the following questions. The call should take no more than 30 minutes and all responses will be unattributable because results will be aggregated for the study and none of the information you give will be traceable to you.

Introduction and Background

1. Type of park (in terms of accommodation provided - privately owned caravan holiday homes (CHHs)/lodges/cabins, rented CHHs/lodges/cabins, touring pitches, including camping and ‘glamping’)
2. Scale of operation (in terms of number of units by accommodation type)
3. Other activities and facilities on site (toilets, showers, retail, food and drink, entertainment and activities e.g. cycle hire)
4. Background to the park (e.g. age, key investments over past 5 years)

Expenditure (over the past twelve months)

1. Capital expenditure on park assets (including accommodation stock both new and second hand and other park assets) and origin of capital expenditure (local / non-local / national)
2. Operational expenditure on the park in a typical year (including cost of sales/purchases, cleaning, servicing, maintenance and running costs) and origin/location of operational costs
3. Expenditure on wages and salaries
4. Number of staff (full time, part-time presented as full time equivalent/FTEs), including location of staff (such as local / non-local / live in / seasonal etc)
5. Future planned expenditure split by maintenance and investment for growth

Visitor Profile

1. Details of season length / seasonality variations
2. Months of their peak, high, mid and low seasons
3. Estimates of the percentage of each accommodation type, including owner v holiday hire, that were occupied in each season and value by accommodation type
4. Estimated origin of visitors

Social / Environmental Benefits

1. Examples of how your park integrates with the local community
2. Examples of how your park supports environmental objectives

Visitor Survey Management

To assist with the visitor survey aspect of the study, we will ask visitors to your park to complete a short survey and will seek your assistance in promoting this and in collecting completed surveys during the April to June period. We will discuss this with you during our interview.

In recognition of your help in this important survey on the economic impact of holiday parks we will enter you name into a prize draw for 1 of 3 bottles of malt whisky.

Should you have any queries, you may contact Bob Hill at the SCCF on either 07967 384480, 02476 475306 or alternatively by email Bob.Hill@campingandcaravanningclub.co.uk

Appendix 2

Visitors' Survey Questionnaire and Introduction

Dear Holidaymaker,

WIN A HOLIDAY IN SCOTLAND

You could be one of seven lucky winners of a holiday in Scotland. All you need to do is complete this visitor survey, it should take no more than 10 minutes to complete.

The Scottish Caravan and Camping Forum has commissioned Frontline Consultants to carry out an Economic Impact Assessment of the Holiday Park Sector in Scotland. The evaluation will consider the economic impact of all short breaks and holidays across every holiday park in Scotland.

The findings from this research will help us to evidence the value of holiday parks to the Scottish economy and will provide an independent, evidence-based, understanding of the direct and indirect economic impact of the holiday park sector in Scotland.

As part of this research, Frontline has developed a questionnaire for you to complete, to let us know about your recent camping or caravanning stays in Scotland. We would therefore appreciate it if you could do one of the following:

- complete this survey in paper form and return it to the Park owners
- send your completed form to: Scottish Holiday Park Sector Visitors Survey

Freepost RTEZ - JHLJ - KEJU
Frontline Consultants
Willow House
Kestrel View
Strathclyde Business Park
Bellshill
ML4 3PB

- complete the survey electronically, and send it to steven.findlay@frontlinemc.com
- complete the on-line questionnaire at http://www.surveymonkey.com/s/caravan_visitors_survey
- scan the QR code below with your smart phone, and complete the survey by phone:

To thank you for participating in this research, Parkdean Holidays will offer the following prizes to seven randomly drawn survey participants:

- one of 2 full weeks in a caravan holiday home and
- one of 5 short breaks in a caravan holiday home

Kind regards,

Bob Hill, The Camping and Caravanning Club
(on behalf of the Scottish Caravan and Camping Forum)

1. Where do you live (tick one):	
Scotland (GO TO Q2)	☐
England, Wales or Northern Ireland (GO TO Q3)	☐
Outside of the UK (GO TO Q3)	☐

2. If you live in Scotland, please specify your home town and postcode:
Town
Postcode

3. During the last 12 months, how many times have you stayed in a holiday or touring or camping park in Scotland?
Number

4. What type of accommodation did you stay in during these visits? *(complete one column per visit, and tick one row per column. If you have visited more than four parks in Scotland in the past 12 months, describe your four most recent visits only)*		
	Visit 1	**Visit 2**
Accommodation Provided at Park		
Owned Caravan Holiday Home	☐	☐
Rented Caravan Holiday Home	☐	☐
Owned Lodge/Chalet/Cottage/Apartment	☐	☐
Rented Lodge/Chalet/Cottage/Apartment	☐	☐
Pod/Wigwam/Yurt	☐	☐
Other (please specify):	☐	☐
Your own accommodation		
Touring Caravan	☐	☐
Tent	☐	☐
Motorhome	☐	☐
Other (please specify):	☐	☐

5. For each of visit(s) please tell us: (if a tourer then each park is classed as a visit)		
	Visit 1	**Visit 2**
The name of the park you stayed in (or nearest town if in countryside)		
The number of nights you were there for		
The month in which your trip took began		
How many adults were in your party		
How many children (under 16) were be in your party		

6. During your visit, approximately to the nearest £10 how much did you spend per trip in Scotland on each of the following:		
	Visit 1	**Visit 2**
Transport to destination (including petrol)		
Hire of holiday park accommodation		
Pitch fees paid to park		
Eating in/drinking **in holiday accommodation**		
Eating in/drinking **on the Park**		
Eating out/drinking out **in the area**		
Other shopping *(e.g. may include gifts, clothes, souvenirs etc)*		
Outdoor recreation **on the park** *(e.g. sailing, surfing, cycling, horse riding, golf, tennis, fishing)*		
Outdoor recreation **in the area** *(e.g. sailing, surfing, cycling, horse riding, golf, tennis, fishing)*		
Entertainment **on the park** *(e.g. cinemas, festivals, arcades)*		
Entertainment **in the area** *(e.g. cinemas, festivals, arcades)*		
Visitor attractions *(e.g. heritage sites, theme parks, gardens)*		
Other (please specify below)		

7. If, for some reason, you had not been able to make this visit, what would you have done (tick one per visit)		
	Visit 1	**Visit 2**
Stayed at home or gone to work	☐	☐
Taken a caravan/camping holiday somewhere else near the site we visited	☐	☐
Taken a caravan/camping holiday somewhere else in Scotland	☐	☐
Taken a caravan/camping holiday somewhere else outside of Scotland	☐	☐
Stayed with friends/family/in a hotel/in another type of paid accommodation somewhere else in the area	☐	☐
Stayed with friend/family/in a hotel/another type of paid accommodation somewhere else in Scotland	☐	☐
Stayed with friends/family/in a hotel/ another type of paid accommodation somewhere else outside of Scotland	☐	☐

8. What influenced you in making these visits? (please tick all that apply)

	Visit 1	Visit 2
I saw advertising for the park	☐	☐
Caravan members club communication	☐	☐
I wanted to visit the area	☐	☐
I was attending an event/festival	☐	☐
It's an area I know well / been before	☐	☐
It was recommended to me by friends / family		
Family connections in the area	☐	☐
Specific activities available in the area, such as golf, walking, cycling	☐	☐
Other		
....	☐	☐

9. Are you a member of any caravan members club?

Yes – The Caravan Club ☐
Yes – The Camping and Caravanning Club ☐
No ☐

FOR OWNERS ONLY (RENTERS GO TO Q21)

10. How did you purchase your caravan holiday home / touring caravan / motorhome?

Through a holiday park ☐
Through a dealer ☐
Through a private sale ☐

11. Where was it purchased?

Scotland ☐
Elsewhere ☐

12. How often do you expect to replace your holiday home / caravan / motorhome?

Frequency (number of years per replacement) 1-3 years ☐ 4-6 years ☐ 7+ years ☐

13. If you decided to replace your holiday home / caravan / motorhome, how much would you expect to spend?

Expenditure (£s)

14. Do you allow other people to use your holiday home / caravan / motorhome (either free or paying)?

Yes (GO TO Q15) ☐
No (GO TO Q18) ☐

15. Approximately how many nights per year is your holiday home / caravan / motorhome used by other people?

Number of nights

16. Approximately how much rent do you receive in total per year?

Total rent per year (£s)

17. Do you arrange your own maintenance (e.g. winter drain down, gas safety checks etc.) or is it done by the park?	
Own maintenance (GO TO Q18)	☐
Done by the park (GO TO Q19)	☐
18. How much do you spend on average, in Scotland, per year maintaining your holiday home / caravan / motorhome on:	
Area of expenditure	**Total spend (£s)**
Servicing	
Insurance	
Road tax	
General upkeep	
19. What other Scottish based expenditure on your holiday home / caravan / motorhome do you have WHICH IS NOT BOUGHT THROUGH THE PARK e.g., bottled gas?	
Area of expenditure	**Total spend (£s)**
Expenditure 1 (please specify)	
Expenditure 2 (please specify)	
Expenditure 3 (please specify)	
20. If you are a camper, how much do you approximately spend per year in Scotland maintaining or replacing your equipment?	
Total per year (£s)	
21. Thank you for taking the time to complete our survey. As a token of our appreciation we will carry out a prize draw to win one of the following prizes[22]: • **A week's stay weeks in a Parkdean caravan holiday home(two prizes to be won)** • **A short break in a Parkdean caravan holiday home (five prizes to be won)** **To enter this draw, please provide your name and e-mail address / telephone number**	
Name	
E-mail address	
Telephone number	

[22] All prizes must be taken in 2015, and cannot be taken during July and August, or between 3rd April and 6th April. A short break can either be a three night stay, arriving Friday and departing Monday, or a four night stay, arriving Monday and departing Friday. The draw will be conducted on 7th October 2014 by a member of the Frontline Consulting research team, and will be witnessed and independently verified by a member of the Scottish Caravan and Camping Forum.

Appendix 3

List of Participating Parks

Name of Park	VisitScotland Region
The Caravan Club Sites (primarily touring)	
Altnaharra The Caravan Club Site	Highlands
Ayr Craigie Gardens The Caravan Club Site	Ayrshire & Arran
Balbirnie Park The Caravan Club Site	Kingdom of Fife
Brora The Caravan Club Site	Highlands
Bunree The Caravan Club Site	Highlands
Clachan The Caravan Club Site	Loch Lomond & Trossachs
Culloden Moor The Caravan Club Site	Highlands
Dunnet Bay The Caravan Club Site	Highlands
Edinburgh The Caravan Club Site	Edinburgh & Lothians
Forfar Lochside The Caravan Club Site	Dundee & Angus
Garlieston The Caravan Club Site	Dumfries & Galloway
Kinlochewe The Caravan Club Site	Highlands
Maragowan The Caravan Club Site	Perthshire
Melrose Gibson Park The Caravan Club Site	Scottish Borders
Morvich The Caravan Club Site	Highlands
New England Bay The Caravan Club Site	Dumfries & Galloway
Silverbank The Caravan Club Site	Aberdeenshire
Stonehaven Queen Elizabeth Park The Caravan Club Site	Aberdeen City & Shire
Strathclyde Country Park The Caravan Club Site	Glasgow
Yellowcraig The Caravan Club Site	Edinburgh & Lothians
The Camping and Caravanning Club Sites (primarily touring)	
Cashel Camping in the Forest Site	Loch Lomond & Trossachs
Cobleland Camping in the Forest Site	Loch Lomond & Trossachs
Culzean Castle The Camping and Caravanning Club Site	Ayrshire & Arran
Dingwall The Camping and Caravanning Club Site	Highlands
Dunbar The Camping and Caravanning Club Site	Edinburgh & Lothians
Glencoe The Camping and Caravanning Club Site	Highlands
Glenmore Camping in the Forest Site	Highlands
Inverewe Gardens The Camping and Caravanning Club Site	Highlands
Jedburgh The Camping and Caravanning Club Site	Scottish Borders
Lauder The Camping and Caravanning Club Site	Scottish Borders
Loch Ness Shores The Camping and Caravanning Club Site	Highlands
Luss The Camping and Caravanning Club Site	Loch Lomond & Trossachs
Millarochy Bay The Camping and Caravanning Club Site	Loch Lomond & Trossachs
Moffat The Camping And Caravanning Club Site	Dumfries & Galloway
Nairn The Camping and Caravanning Clubs Site	Highlands
Oban The Camping and Caravanning Club Site	Argyll & The Isles
Rosemarkie The Camping and Caravanning Club Site	Highlands
Scone Palace The Camping and Caravanning Club Site	Perthshire
Skye The Camping and Caravanning Club Site	Highlands
Speyside The Camping And Caravanning Club Site	Highlands
Tarland The Camping And Caravanning Club Site	Aberdeen City & Shire
Parkdean Holidays Sites	
Grannie's Heilan' Hame Holiday Park	Highlands
Nairn Lochloy Holiday Park	Highlands
Southerness Holiday Park	Dumfries & Galloway
Sundrum Castle Holiday Park	Ayrshire & Arran
Tummel Valley Holiday Park	Perthshire
Wemyss Bay Holiday Park	Ayrshire & Arran

Name of Park	VisitScotland Region
Independently Owned Parks	
Aberlour Gardens Caravan & Camping Park	Highlands
Aden Caravan and Camping Park	Aberdeen City & Shire
Anwath Holiday Park	Dumfries & Galloway
Auchenlarie Holiday Park	Dumfries &Galloway
Badrallach Camping Site	Highlands
Barlochan Caravan Park	Dumfries & Galloway
Blairgowrie Holiday Park	Perthshire
Brighouse Bay Holiday Park	Dumfries & Galloway
Bunroy Holiday Lodges	Highlands
Cairnsmill Caravan Park	Kingdom of Fife
Caolasnacon Caravan & Camping Park	Highlands
Cardoness Estate Holiday Park	Dumfries & Galloway
Clashwhannon Caravan Park	Dumfries & Galloway
Craigtoun Meadows Holiday Park	Kingdom of Fife
Dornoch Caravan & Camping Park	Highlands
Faskally Caravan Park	Perthshire
Glendaruel Caravan Park	Argyll & The Isles
Kippford Holiday Park	Dumfries & Galloway
Laxdale Holiday Park	Outer Hebrides
Lilliardsedge Holiday Park & Golf Course	Scottish Borders
Linwater Caravan Park	Edinburgh & Lothians
Loch Awe Holiday Park	Argyll & The Isles
Loch Ken Holiday Park	Dumfries & Galloway
Mortonhall Caravan & Camping Park	Edinburgh & Lothians
Mount View Caravan Park	Glasgow & Clyde
Pine Trees Leisure Park	Loch Lomond & Trossachs
Queensberry Bay Holiday Park	Dumfries & Galloway
Riverview Caravan Park	Dundee & Angus
Rosetta Holiday Park	Scottish Borders
Sandgreen Caravan Park	Dumfries & Galloway
Sandyhills Bay Leisure Park	Dumfries & Galloway
Sauchope Links Park	Kingdom of Fife
Scoutscroft Holiday Centre	Scottish Borders
Seaward Caravan Park	Dumfries & Galloway
Silverdyke Caravan Park	Kingdom of Fife
St. Andrews Holiday Park	Kingdom of Fife
St. Monans Holiday Park	Kingdom of Fife
Strathlene Caravan Park	Highlands
Tayport Links Caravan Park	Kingdom of Fife
Trossachs Holiday Park	Loch Lomond & Trossachs
Turnberry Holiday Park	Ayrshire & Arran
Wester Bonnyton Farm Caravan and Camping Park	Highlands

Detailed Impact Findings – Visitor Expenditure

On-site expenditure (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	2.2	0.3	4.3	0.1	0.1	**7.0**
Argyll and the Isles	17.4	1.5	4.8	1.9	1.5	**27.1**
Ayrshire and Arran	25.3	3.3	3.5	0.1	1.2	**33.3**
Dumfries and Galloway	21.6	1.9	11.2	1.0	0.4	**36.0**
Dundee and Angus	2.8	0.1	1.4	0.0	0.0	**4.3**
Edinburgh and Lothians	5.3	1.0	6.9	0.0	0.1	**13.3**
Glasgow and Clyde	1.3	0.2	1.3	0.0	0.1	**2.8**
Highlands	8.2	2.5	24.1	1.3	1.0	**37.1**
Kingdom of Fife	18.1	0.9	4.2	0.7	0.1	**24.1**
Loch Lomond and Trossachs	2.7	0.2	6.7	0.4	0.2	**10.2**
Orkney	0.0	0.0	0.7	0.0	0.0	**0.7**
Outer Hebrides	0.0	0.0	0.3	0.0	0.0	**0.3**
Perthshire	8.3	1.1	7.7	1.0	0.9	**18.9**
Scottish Borders	10.9	0.4	4.1	0.3	0.1	**15.8**
Shetland	0.0	0.0	0.4	0.0	0.0	**0.4**
Scotland	**124.1**	**13.3**	**81.5**	**6.9**	**5.7**	**231.4**

Off-site expenditure (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	2.2	0.4	5.5	0.1	0.1	**8.3**
Argyll and the Isles	17.5	1.9	6.2	2.0	1.9	**29.3**
Ayrshire and Arran	25.4	4.2	4.4	0.1	1.5	**35.6**
Dumfries and Galloway	21.7	2.4	14.2	1.0	0.6	**39.9**
Dundee and Angus	2.8	0.1	1.7	0.0	0.0	**4.7**
Edinburgh and Lothians	5.3	1.2	8.8	0.0	0.2	**15.5**
Glasgow and Clyde	1.3	0.2	1.7	0.0	0.1	**3.3**
Highlands	8.3	3.2	30.7	1.3	1.3	**44.7**
Kingdom of Fife	18.3	1.2	5.3	0.7	0.1	**25.6**
Loch Lomond and Trossachs	2.7	0.2	8.5	0.4	0.3	**12.1**
Orkney	0.0	0.0	0.9	0.0	0.0	**0.9**
Outer Hebrides	0.0	0.0	0.3	0.0	0.0	**0.4**
Perthshire	8.4	1.4	9.8	1.0	1.1	**21.6**
Scottish Borders	11.0	0.5	5.3	0.3	0.1	**17.2**
Shetland	0.0	0.0	0.5	0.0	0.0	**0.5**
Scotland	**124.8**	**16.9**	**103.8**	**6.9**	**7.2**	**259.7**

Indirect and induced multiplier impacts (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	1.8	0.3	4.0	0.1	0.1	**6.3**
Argyll and the Isles	15.0	1.4	4.7	1.7	1.4	**24.2**
Ayrshire and Arran	21.8	3.2	3.4	0.1	1.1	**29.6**
Dumfries and Galloway	18.6	1.8	10.9	0.8	0.4	**32.6**
Dundee and Angus	2.3	0.1	1.3	0.0	0.0	**3.7**
Edinburgh and Lothians	4.3	0.9	6.4	0.0	0.1	**11.8**
Glasgow and Clyde	1.0	0.2	1.2	0.0	0.1	**2.5**
Highlands	7.1	2.5	23.6	1.1	1.0	**35.2**
Kingdom of Fife	15.7	0.9	4.1	0.6	0.1	**21.4**
Loch Lomond and Trossachs	2.3	0.2	6.6	0.4	0.2	**9.6**
Orkney	0.0	0.0	0.6	0.0	0.0	**0.6**
Outer Hebrides	0.0	0.0	0.2	0.0	0.0	**0.2**
Perthshire	7.2	1.0	7.5	0.8	0.8	**17.4**
Scottish Borders	9.4	0.4	4.0	0.3	0.1	**14.2**
Shetland	0.0	0.0	0.3	0.0	0.0	**0.3**
Scotland	**106.6**	**12.9**	**78.8**	**5.9**	**5.5**	**209.7**

Gross visitor expenditure impact (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	6.3	1.0	13.7	0.3	0.3	**21.7**
Argyll and the Isles	49.8	4.7	15.7	5.6	4.7	**80.6**
Ayrshire and Arran	72.5	10.7	11.2	0.3	3.8	**98.6**
Dumfries and Galloway	61.9	6.1	36.3	2.8	1.4	**108.6**
Dundee and Angus	7.9	0.3	4.4	0.1	0.1	**12.7**
Edinburgh and Lothians	14.9	3.1	22.1	0.0	0.5	**40.6**
Glasgow and Clyde	3.5	0.6	4.3	0.0	0.3	**8.7**
Highlands	23.6	8.2	78.3	3.6	3.3	**117.0**
Kingdom of Fife	52.1	3.1	13.6	2.1	0.2	**71.1**
Loch Lomond and Trossachs	7.8	0.5	21.8	1.2	0.6	**31.9**
Orkney	0.0	0.0	2.3	0.0	0.0	**2.3**
Outer Hebrides	0.0	0.1	0.8	0.0	0.1	**0.9**
Perthshire	23.9	3.5	24.9	2.8	2.8	**57.8**
Scottish Borders	31.3	1.3	13.5	0.9	0.3	**47.2**
Shetland	0.0	0.0	1.2	0.0	0.0	**1.2**
Scotland	**355.5**	**43.0**	**264.1**	**19.8**	**18.4**	**700.8**

Net visitor expenditure impact (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	1.6	0.5	7.4	0.1	0.2	**9.8**
Argyll and the Isles	12.5	2.6	8.5	1.4	2.6	**27.4**
Ayrshire and Arran	26.1	6.2	6.5	0.1	2.2	**41.2**
Dumfries and Galloway	27.9	3.9	23.2	1.3	0.9	**57.2**
Dundee and Angus	2.0	0.1	2.4	0.0	0.0	**4.5**
Edinburgh and Lothians	5.4	1.8	12.8	0.0	0.3	**20.2**
Glasgow and Clyde	1.3	0.3	2.5	0.0	0.2	**4.2**
Highlands	5.9	4.4	42.3	0.9	1.8	**55.3**
Kingdom of Fife	13.0	1.6	7.3	0.5	0.1	**22.7**
Loch Lomond and Trossachs	1.9	0.3	11.8	0.3	0.3	**14.6**
Orkney	0.0	0.0	1.2	0.0	0.0	**1.2**
Outer Hebrides	0.0	0.0	0.4	0.0	0.0	**0.5**
Perthshire	6.0	1.9	13.5	0.7	1.5	**23.5**
Scottish Borders	14.1	0.8	8.6	0.4	0.2	**24.1**
Shetland	0.0	0.0	0.7	0.0	0.0	**0.7**
Scotland	**117.5**	**24.5**	**149.1**	**5.7**	**10.3**	**307.1**

Appendix 5

Detailed Impact Findings – FTE Employment

Employment associated with on-site expenditure (FTE jobs)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	41	6	79	2	2	**131**
Argyll and the Isles	322	27	89	36	27	**501**
Ayrshire and Arran	468	61	64	2	22	**617**
Dumfries and Galloway	399	35	207	18	8	**667**
Dundee and Angus	51	1	25	1	1	**80**
Edinburgh and Lothians	98	18	127	0	3	**246**
Glasgow and Clyde	23	3	25	0	1	**53**
Highlands	152	47	446	23	19	**687**
Kingdom of Fife	336	17	77	14	1	**446**
Loch Lomond and Trossachs	50	3	124	8	4	**188**
Orkney	0	0	14	0	0	**14**
Outer Hebrides	0	0	5	0	0	**6**
Perthshire	154	20	142	18	16	**350**
Scottish Borders	202	7	77	6	2	**293**
Shetland	0	0	7	0	0	**7**
Scotland	**2,298**	**245**	**1,509**	**128**	**105**	**4,285**

Employment associated with off-site expenditure (FTE jobs)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	42	7	101	2	2	**155**
Argyll and the Isles	324	34	114	36	34	**543**
Ayrshire and Arran	471	78	82	2	28	**660**
Dumfries and Galloway	402	45	263	18	10	**738**
Dundee and Angus	52	2	32	1	1	**87**
Edinburgh and Lothians	98	23	162	0	4	**287**
Glasgow and Clyde	23	4	32	0	2	**61**
Highlands	153	59	568	23	24	**828**
Kingdom of Fife	338	22	99	14	2	**474**
Loch Lomond and Trossachs	50	4	158	8	5	**225**
Orkney	0	0	17	0	0	**17**
Outer Hebrides	0	0	6	0	0	**7**
Perthshire	155	25	181	18	20	**399**
Scottish Borders	203	9	98	6	2	**318**
Shetland	0	0	9	0	0	**9**
Scotland	**2,312**	**313**	**1,922**	**128**	**134**	**4,809**

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

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	34	5	74	2	2	**117**
Argyll and the Isles	277	26	87	31	26	**449**
Ayrshire and Arran	404	60	63	2	21	**549**
Dumfries and Galloway	345	34	202	16	8	**604**
Dundee and Angus	42	1	24	1	1	**69**
Edinburgh and Lothians	80	17	119	0	3	**218**
Glasgow and Clyde	19	3	23	0	1	**47**
Highlands	132	45	436	20	18	**651**
Kingdom of Fife	290	17	76	12	1	**396**
Loch Lomond and Trossachs	43	3	121	7	4	**178**
Orkney	0	0	11	0	0	**11**
Outer Hebrides	0	0	4	0	0	**5**
Perthshire	133	19	139	16	16	**322**
Scottish Borders	174	7	75	5	2	**263**
Shetland	0	0	6	0	0	**6**
Scotland	**1,973**	**239**	**1,459**	**110**	**102**	**3,884**

Employment associated with gross visitor expenditure impact (FTE jobs)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	117	19	254	6	6	**402**
Argyll and the Isles	923	88	291	103	88	**1,492**
Ayrshire and Arran	1,343	198	208	6	70	**1,826**
Dumfries and Galloway	1,146	114	672	52	27	**2,010**
Dundee and Angus	146	5	81	2	2	**236**
Edinburgh and Lothians	276	58	409	0	9	**751**
Glasgow and Clyde	66	10	79	0	5	**160**
Highlands	437	151	1,450	67	60	**2,166**
Kingdom of Fife	964	57	252	39	4	**1,316**
Loch Lomond and Trossachs	144	9	403	22	12	**591**
Orkney	0	0	42	0	0	**42**
Outer Hebrides	0	1	15	0	1	**17**
Perthshire	442	64	461	52	52	**1,071**
Scottish Borders	580	23	249	17	5	**874**
Shetland	0	0	22	0	0	**22**
Scotland	**6,583**	**797**	**4,890**	**366**	**341**	**12,977**

Employment associated with net visitor expenditure impact (FTE jobs)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	29	10	137	2	3	**181**
Argyll and the Isles	231	47	157	26	47	**508**
Ayrshire and Arran	484	115	121	2	41	**762**
Dumfries and Galloway	516	73	430	23	17	**1,059**
Dundee and Angus	36	3	44	1	1	**84**
Edinburgh and Lothians	99	33	237	0	5	**375**
Glasgow and Clyde	24	6	46	0	3	**78**
Highlands	109	82	783	17	33	**1,023**
Kingdom of Fife	241	31	136	10	2	**420**
Loch Lomond and Trossachs	36	5	218	6	6	**271**
Orkney	0	0	23	0	0	**23**
Outer Hebrides	0	1	8	0	1	**9**
Perthshire	110	35	249	13	28	**435**
Scottish Borders	261	15	160	7	3	**446**
Shetland	0	0	12	0	0	**12**
Scotland	**2,176**	**455**	**2,761**	**106**	**190**	**5,688**

Detailed Impact Findings – Gross Value Added

GVA associated with on-site expenditure (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	1.1	0.2	2.2	0.1	0.1	**3.6**
Argyll and the Isles	8.8	0.7	2.5	1.0	0.7	**13.8**
Ayrshire and Arran	12.9	1.7	1.8	0.1	0.6	**16.9**
Dumfries and Galloway	11.0	1.0	5.7	0.5	0.2	**18.3**
Dundee and Angus	1.4	0.0	0.7	0.0	0.0	**2.2**
Edinburgh and Lothians	2.7	0.5	3.5	0.0	0.1	**6.7**
Glasgow and Clyde	0.6	0.1	0.7	0.0	0.0	**1.4**
Highlands	4.2	1.3	12.2	0.6	0.5	**18.9**
Kingdom of Fife	9.2	0.5	2.1	0.4	0.0	**12.2**
Loch Lomond and Trossachs	1.4	0.1	3.4	0.2	0.1	**5.2**
Orkney	0.0	0.0	0.4	0.0	0.0	**0.4**
Outer Hebrides	0.0	0.0	0.1	0.0	0.0	**0.2**
Perthshire	4.2	0.5	3.9	0.5	0.4	**9.6**
Scottish Borders	5.5	0.2	2.1	0.2	0.0	**8.1**
Shetland	0.0	0.0	0.2	0.0	0.0	**0.2**
Scotland	**63.1**	**6.7**	**41.4**	**3.5**	**2.9**	**117.6**

GVA associated with off-site expenditure (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	1.1	0.2	2.8	0.1	0.1	**4.2**
Argyll and the Isles	8.9	0.9	3.1	1.0	0.9	**14.9**
Ayrshire and Arran	12.9	2.1	2.2	0.1	0.8	**18.1**
Dumfries and Galloway	11.0	1.2	7.2	0.5	0.3	**20.3**
Dundee and Angus	1.4	0.1	0.9	0.0	0.0	**2.4**
Edinburgh and Lothians	2.7	0.6	4.5	0.0	0.1	**7.9**
Glasgow and Clyde	0.6	0.1	0.9	0.0	0.1	**1.7**
Highlands	4.2	1.6	15.6	0.6	0.6	**22.7**
Kingdom of Fife	9.3	0.6	2.7	0.4	0.0	**13.0**
Loch Lomond and Trossachs	1.4	0.1	4.3	0.2	0.1	**6.2**
Orkney	0.0	0.0	0.5	0.0	0.0	**0.5**
Outer Hebrides	0.0	0.0	0.2	0.0	0.0	**0.2**
Perthshire	4.3	0.7	5.0	0.5	0.6	**11.0**
Scottish Borders	5.6	0.2	2.7	0.2	0.1	**8.7**
Shetland	0.0	0.0	0.3	0.0	0.0	**0.3**
Scotland	**63.5**	**8.6**	**52.8**	**3.5**	**3.7**	**132.0**

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

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	0.9	0.2	2.0	0.0	0.0	**3.2**
Argyll and the Isles	7.6	0.7	2.4	0.9	0.7	**12.3**
Ayrshire and Arran	11.1	1.6	1.7	0.0	0.6	**15.1**
Dumfries and Galloway	9.5	0.9	5.5	0.4	0.2	**16.6**
Dundee and Angus	1.2	0.0	0.6	0.0	0.0	**1.9**
Edinburgh and Lothians	2.2	0.5	3.3	0.0	0.1	**6.0**
Glasgow and Clyde	0.5	0.1	0.6	0.0	0.0	**1.3**
Highlands	3.6	1.2	12.0	0.6	0.5	**17.9**
Kingdom of Fife	8.0	0.5	2.1	0.3	0.0	**10.9**
Loch Lomond and Trossachs	1.2	0.1	3.3	0.2	0.1	**4.9**
Orkney	0.0	0.0	0.3	0.0	0.0	**0.3**
Outer Hebrides	0.0	0.0	0.1	0.0	0.0	**0.1**
Perthshire	3.6	0.5	3.8	0.4	0.4	**8.8**
Scottish Borders	4.8	0.2	2.1	0.1	0.0	**7.2**
Shetland	0.0	0.0	0.2	0.0	0.0	**0.2**
Scotland	**54.2**	**6.6**	**40.1**	**3.0**	**2.8**	**106.6**

GVA associated with gross visitor expenditure impact (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	3.2	0.5	7.0	0.2	0.2	**11.0**
Argyll and the Isles	25.3	2.4	8.0	2.8	2.4	**41.0**
Ayrshire and Arran	36.9	5.4	5.7	0.2	1.9	**50.1**
Dumfries and Galloway	31.5	3.1	18.4	1.4	0.7	**55.2**
Dundee and Angus	4.0	0.1	2.2	0.1	0.1	**6.5**
Edinburgh and Lothians	7.6	1.6	11.2	0.0	0.2	**20.6**
Glasgow and Clyde	1.8	0.3	2.2	0.0	0.1	**4.4**
Highlands	12.0	4.2	39.8	1.8	1.7	**59.5**
Kingdom of Fife	26.5	1.6	6.9	1.1	0.1	**36.1**
Loch Lomond and Trossachs	3.9	0.3	11.1	0.6	0.3	**16.2**
Orkney	0.0	0.0	1.2	0.0	0.0	**1.2**
Outer Hebrides	0.0	0.0	0.4	0.0	0.0	**0.5**
Perthshire	12.1	1.8	12.7	1.4	1.4	**29.4**
Scottish Borders	15.9	0.6	6.8	0.5	0.1	**24.0**
Shetland	0.0	0.0	0.6	0.0	0.0	**0.6**
Scotland	**180.7**	**21.9**	**134.3**	**10.0**	**9.4**	**356.3**

GVA associated with net visitor expenditure impact (£m)

VisitScotland Region	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Touring Pitches	Other Owned	Other Rented	Total
Aberdeen City and Shire	0.8	0.3	3.8	0.0	0.1	**5.0**
Argyll and the Isles	6.3	1.3	4.3	0.7	1.3	**14.0**
Ayrshire and Arran	13.3	3.2	3.3	0.1	1.1	**20.9**
Dumfries and Galloway	14.2	2.0	11.8	0.6	0.5	**29.1**
Dundee and Angus	1.0	0.1	1.2	0.0	0.0	**2.3**
Edinburgh and Lothians	2.7	0.9	6.5	0.0	0.1	**10.3**
Glasgow and Clyde	0.6	0.2	1.3	0.0	0.1	**2.2**
Highlands	3.0	2.2	21.5	0.5	0.9	**28.1**
Kingdom of Fife	6.6	0.8	3.7	0.3	0.1	**11.5**
Loch Lomond and Trossachs	1.0	0.1	6.0	0.2	0.2	**7.4**
Orkney	0.0	0.0	0.6	0.0	0.0	**0.6**
Outer Hebrides	0.0	0.0	0.2	0.0	0.0	**0.3**
Perthshire	3.0	0.9	6.8	0.4	0.8	**11.9**
Scottish Borders	7.2	0.4	4.4	0.2	0.1	**12.2**
Shetland	0.0	0.0	0.3	0.0	0.0	**0.3**
Scotland	**59.7**	**12.5**	**75.8**	**2.9**	**5.2**	**156.1**

Appendix 7

Publicising the survey to park-owners and consumers

PUBLICISING THE SURVEYS

The SCCF members undertook the following in order to encourage park-owners to complete the park-owners' survey and consumers to go online to take part in the consumer survey.

PARK-OWNER

All members of the BH&HPA and Thistle Holiday Parks were e.mailed information on how they could participate; this was done more than once. This was followed up by telephone calls to ensure that key parks completed the survey.

The Caravan Club and The Camping and Caravanning Club completed the survey on behalf of their parks in Scotland.

Parkdean Holidays completed the survey on behalf of their six parks.

An article appeared in the sector magazine "Holiday Park Scene" and in the BH&HPA members' magazine.

Information was sent to www.holidayparksmanagement.com

CONSUMERS

The Caravan Club and The Camping and Caravanning Club e.mailed their members in late August and early September respectively. Both Clubs carried an article in their magazines.

Thistle Holiday Parks e.mailed their database of visitors in May and in early September. The survey was publicised on their website www.thistleparks.co.uk

The survey was publicised on the BH&HPA website (www.ukparks.com) and on the Scottish Caravan and Camping Forum website (www.scottishcaravanholidayparks.co.uk)

Parkdean Holidays e.mailed their database in late September.

Articles appeared in two issues of the "Scottish Caravanner".

A press release was sent to the caravanning consumer magazines published by the Haymarket Media Group and Warners Group Publications.

Warners included information in their e.shots to 20,000 subscribers to "Caravan" and to "MMM".

Information was also carried on the following websites: www.outandaboutlive.co.uk and www.caravansitefinder.co.uk

All parks were asked to publicise the survey by e.mailing their databases and/or displaying the small poster printed by the SCCF and/or giving a paper copy of the survey to their guests.

Appendix 8

Contact details for research funders

The following organisations funded this study:

BH&HPA (British Holiday and Home Parks Association)
Scottish Office
50 Grange Loan
Edinburgh
EH9 2EP
Tel: 0131.6671229
j.wilson@bhhpa.org.uk
www.bhhpa.org.uk/

The Caravan Club
East Grinstead House
East Grinstead
West Sussex
RH19 1UA
Tel (Corporate Communications): (01342) 336868
fiona.bewers@caravan-club.co.uk
http://www.caravanclub.co.uk

The Camping and Caravanning Club
Greenfields House
Westwood Way
Coventry
CV4 8JH
Tel 02476 475306
bob.hill@campingandcaravanningclub.co.uk ,
www.campingandcaravanningclub.co.uk

NCC Ltd (National Caravan Council)
Catherine House
Victoria Road
Aldershot
Hampshire
GU11 1SS
Tel: (01252) 318251
info@thencc.org.uk
www.thencc.org.uk