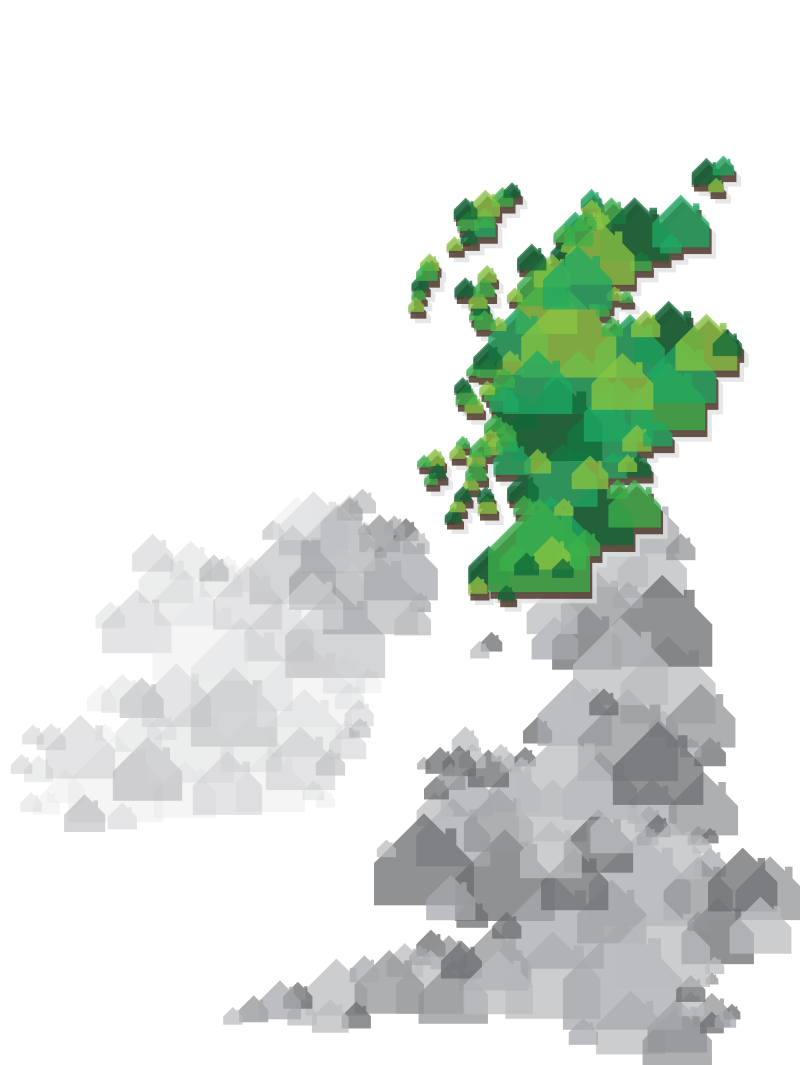


Economic Impact of Self-Catering Sector to the Scottish Economy



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for Association of Scotland's Self Caterers
and the Professional Association of Self-Caterers

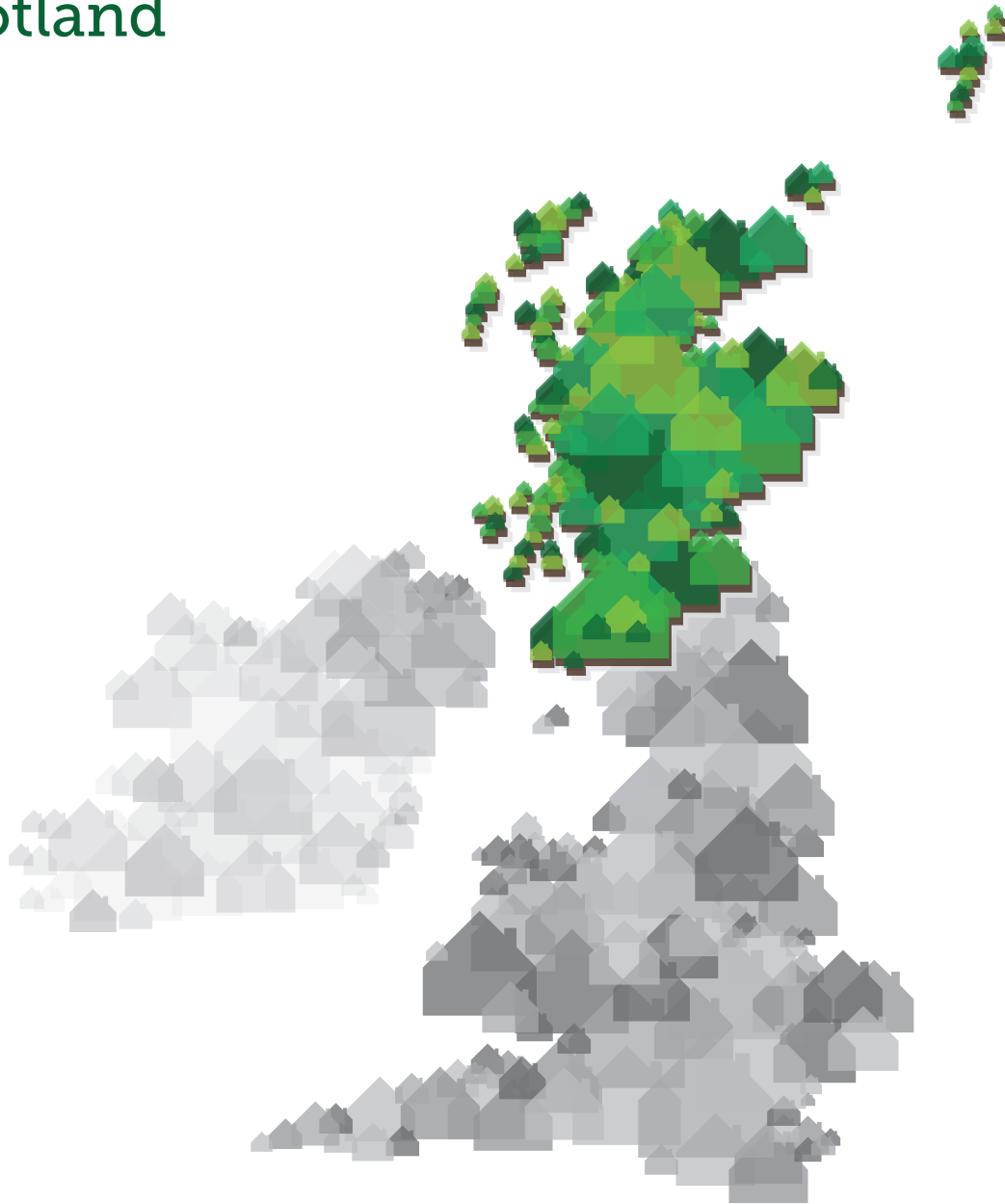
August 2021

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This economic impact assessment was sponsored by SuperControl

Scotland

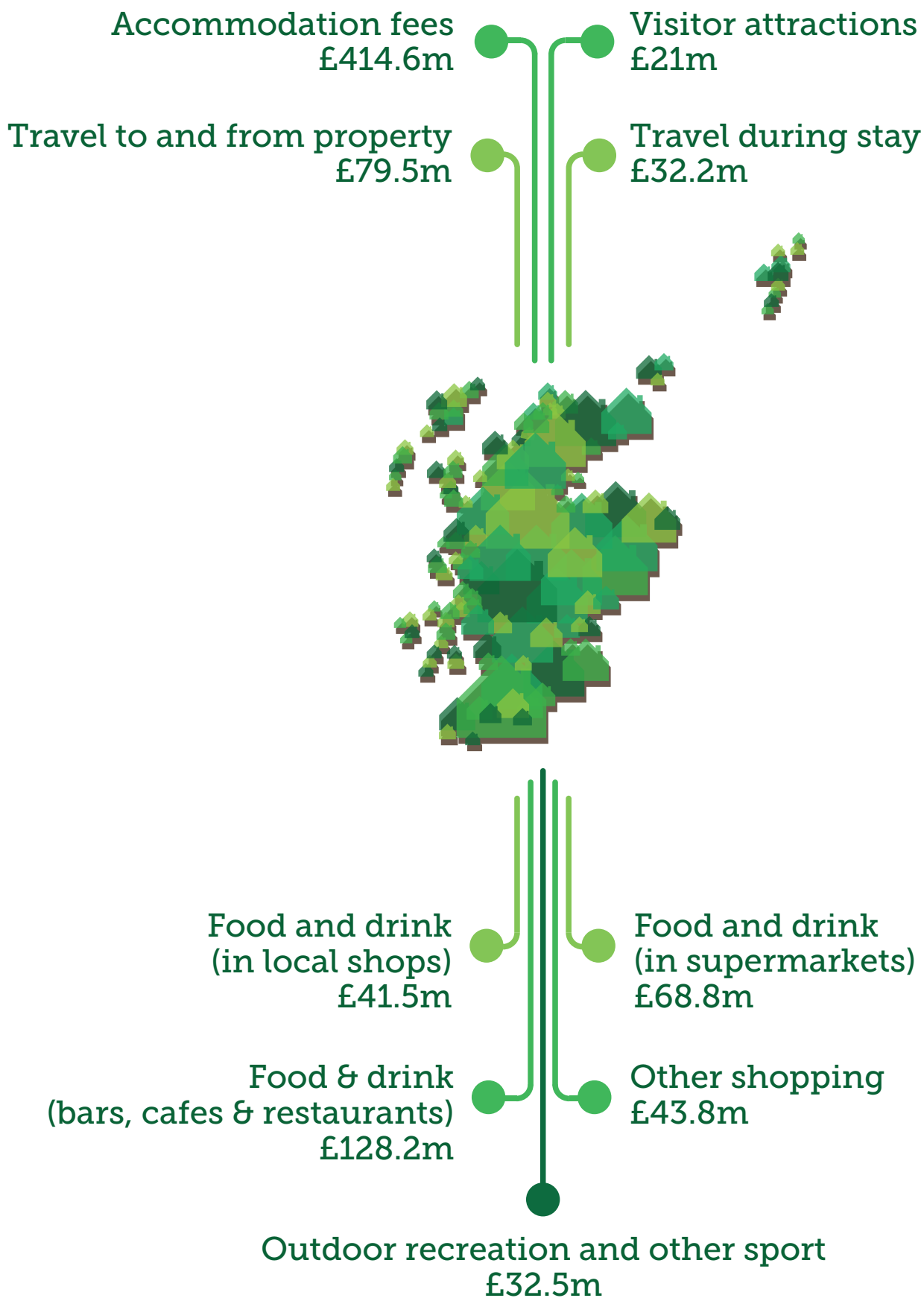


- 17,794 properties
- 2.4 million visitor nights per year
- £867.1 million total visitor spend
- Supports 23,979 FTE jobs
- £672.3 million Contribution to the Scottish economy

Areas with the greatest number of properties

1. Highland & Western Isles (5,580)
2. Dunbartonshire / Argyll & Bute (2,343)
3. Lothian (1,870)
4. Tayside (1,432)
5. Dumfries & Galloway (1,386)

Gross Visitor Spend by Item (Scotland)



2 Introduction

Since 2010 tourism has been the fastest growing sector in the UK in employment terms¹. By 2025, Britain aims to have a tourism industry worth over £257bn, supporting 3.8 million jobs. This is equivalent to almost 10% of UK GDP and around 11% of the total UK jobs².

The sector is predicted to grow at an annual rate of 3.8% through to 2025 – faster than the overall UK economy (with a predicted annual rate of 3% per annum) and much faster than sectors such as manufacturing, construction and retail³.

The Deloitte *Tourism: Jobs and Growth Report*⁴ found that the marginal revenue required to create a job in UK tourism is estimated to be around £54,000. For every 1% increase in total expenditure in UK tourism, it might be expected that full-time equivalent employment will increase by 0.9%.

Self-catering is an important component of the tourism industry. In order to fully understand its contribution, the Association of Scotland's Self-Caterers (ASSC) and the Professional Association of Self-Caterers UK (PASC UK) commissioned Frontline Consultants (Frontline) to carry out an independent Economic Impact Assessment of the self-catering industry 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.

2.1 Research objectives

The **objectives of the economic impact assessment** were to:

- assess expenditure by property-owners and managers, and visitors in the local economy
- provide an independent, evidence-based, understanding of the direct and indirect economic impact/contribution of the self-catering sector in Scotland
- estimate the full-time equivalent jobs supported by the sector
- assess the impact of Covid-19 – presenting feedback from 2019 and 2020

2.2 Methodology

The UK self-catering sector is diverse and made up of a number of small businesses. It is inherently difficult to gather a complete data set on the sector. In order to develop the economic model an 8-month data gathering exercise was undertaken to understand the number and make-up of self-catering properties across the UK.

The **number of self-catering properties** in each country was determined as follows:

- England and Wales – VOA registrations
- Scotland – NDR registrations
- Northern Ireland – Local Authority registrations

¹ <https://www.visitbritain.org/visitor-economy-facts>

² <https://www.visitbritain.org/visitor-economy-facts>

³ <https://www.visitbritain.org/visitor-economy-facts>

⁴ https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf

The **make-up of those self-catering properties** was based on a review of 1,000,724 transaction records provided to us by SuperControl to understand:

- property size
- occupancy levels for each property on each day of the year

The model includes over a million separate economic impact calculations, which were then reaggregated to produce as accurate as possible an estimate of the true economic impact of the sector.

This is a comprehensive approach that avoids any double counting and uses only verified data.

While these datasets are not 100% of the UK market, they are substantial, and provide the most comprehensive assessment of the sector to date. Findings therefore provide a conservative estimate of the scale of the self-catering sector.

3 Operators Survey

This section provides evidence from an e-survey of self-catering operators across Scotland. The survey was open from February-April 2021 and distributed by key partners.

3.1 Composition of the overall Scotland self-catering industry

Based on the information provided by NDR registrations and data provided by SuperControl, in **2020 there were 17,794 self-catering properties operating in Scotland. The majority of these were three bedroom or less properties.** Table 2.1 provides a breakdown of these by region and number of bedrooms.

Table 2.1: Composition of the industry

Location	Total number of bedrooms					Total Number of properties
	0-1	2	3	4	5+	
Ayrshire	16%	50%	16%	10%	9%	840
Central Scotland	14%	34%	26%	14%	11%	621
Dumfries & Galloway	13%	34%	34%	9%	11%	1,386
Dunbartonshire / Argyll & Bute	14%	32%	27%	13%	14%	2,343
Fife	8%	34%	31%	11%	16%	704
Glasgow City	22%	34%	22%	13%	10%	200
Grampian	17%	39%	28%	10%	7%	1,153
Highland & Western Isles	17%	39%	27%	9%	8%	5,580
Lanarkshire	11%	61%	11%	11%	6%	123
Lothian	20%	38%	28%	5%	9%	1,870
Orkney & Shetland	7%	57%	29%	0%	7%	672
Renfrewshire	30%	30%	20%	0%	20%	78
Scottish Borders	14%	38%	23%	13%	12%	792
Tayside	20%	20%	20%	20%	20%	1,432
Total	16%	37%	27%	10%	11%	17,794

(Source: ASSC⁵)

3.2 Sampling methodology and geographic locations

Self-catering properties across Scotland were invited to participate in the research. This was done by the various sponsor groups reaching out to operators, encouraging them to complete an e-survey.

The Steering Group and Frontline came together at various stages throughout the project to review the response rates, identifying which geographic areas were under-represented and those were targeted accordingly.

945 operators running a total of 2,173 properties across Scotland responded to the survey, giving a 99% confidence +/- 3% margin of error. This means that there is a 99% probability that the sample accurately reflects the wider population and is therefore representative of the self-catering sector in Scotland.

⁵ ASSC provided data on the total number of self-catering properties in Scotland based on units on non-domestic business rates (NDR). The breakdown by number of bedrooms is based on data provided by SuperControl

The geographic location of the surveyed self-catering operators was broadly representative of the sector as a whole with most regions having a minimum of 10% response rate with the exception of Glasgow City, Lothian and Renfrewshire.

Table 2.2: Location of surveyed self-catering operators

Location	Surveyed operators		Total number of properties across Scotland	Percentage of properties consulted
	Number of operators	Number of properties ⁶		
Ayrshire	48	110	840	13%
Central Scotland	27	62	621	10%
Dumfries & Galloway	58	133	1,386	10%
Dunbartonshire / Argyll & Bute	103	237	2,343	10%
Fife	49	113	704	16%
Glasgow City	7	16	200	8%
Grampian	56	129	1,153	11%
Highland & Western Isles	239	550	5,580	10%
Lanarkshire	10	23	123	19%
Lothian	57	129	1,870	7%
Orkney & Shetland	25	58	672	10%
Renfrewshire	2	5	78	6%
Scottish Borders	43	99	792	13%
Tayside	205	472	1,432	33%
Unknown	16	37	-	
Total	945	2,173	17,794	12%

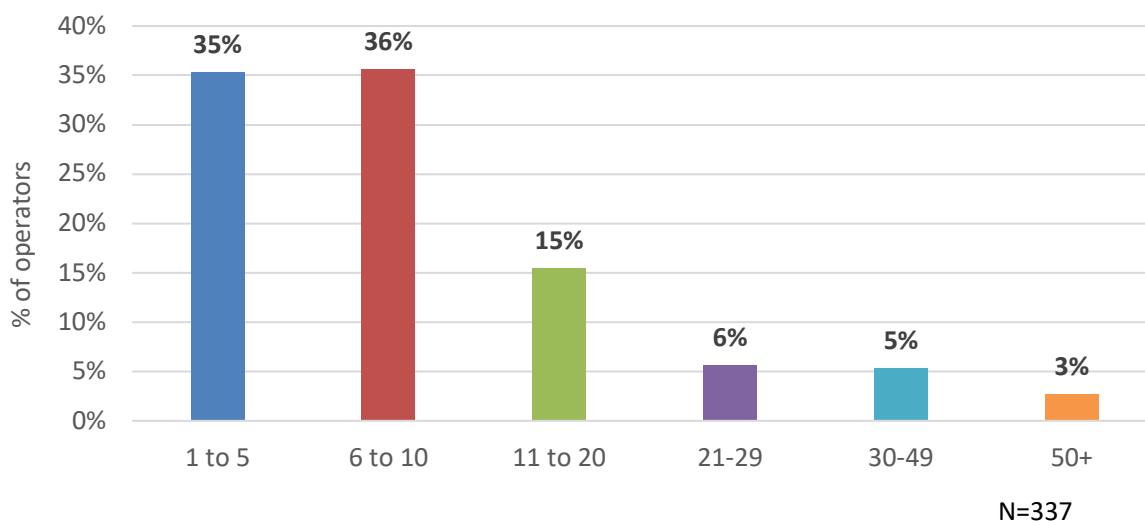
Source: Frontline Self-Catering Operator Survey, 2021

3.3 Property summary

Operators ran or owned, on average, 2.3 properties. Properties owned, ranged from one to 60 with 60% owning just one.

Over two-thirds (71%) of properties have capacity for up to ten people.

Figure 2.1: Number of Guests



⁶ We only had a response from 329 operators on number of properties owned/run and have therefore used the average (2.3) and factored this up to total operators responding

3.4 Length of season and occupancy rates

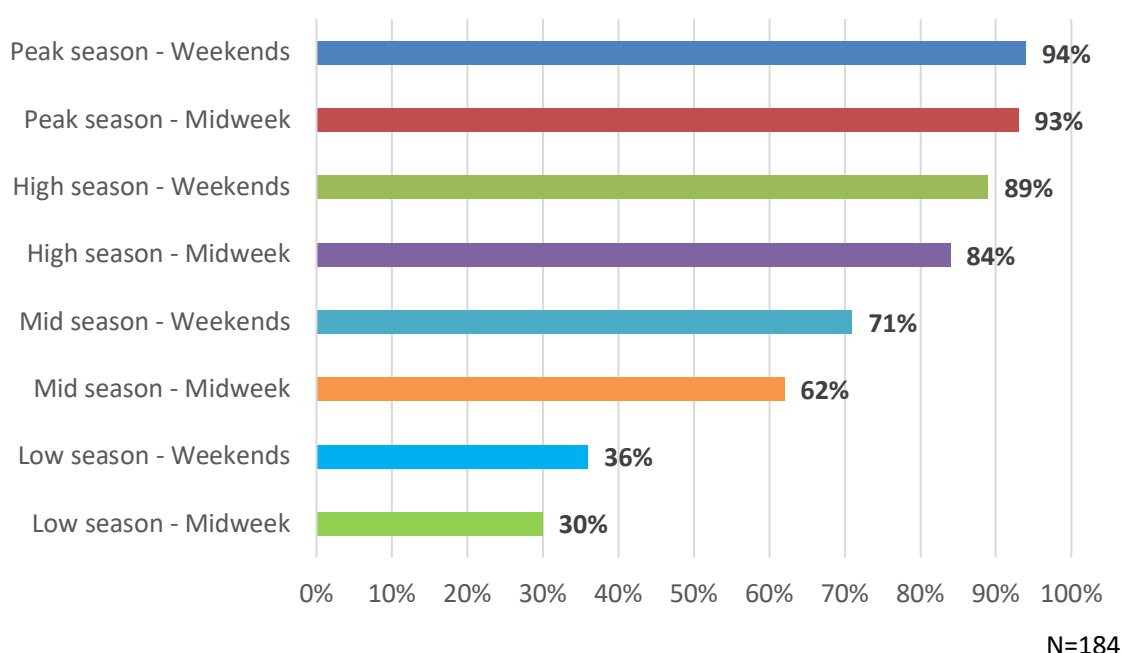
In 2019 the majority of self-catering properties (93%, 202⁷) operated all year round. In 2020 this reduced, with only 75% (142) operating all year; this was due to Covid-19 lockdown restrictions.

Surveyed operators were asked what they considered to be their peak, high, mid and low seasons during a standard operating year. Generally their responses were:

- peak = July, August, Christmas and New Year
- high = May, June and September
- mid = April and October
- low = January, February, March, November and December

Operators were also asked to report their typical occupancy rates for the following:

Figure 2.2: Average occupancy rates of self-catering properties



At peak, occupancy levels reached an average of 94% at the weekend and 93% midweek. During high season occupancy was 89% at the weekend and 84% during the week. Mid-season occupancy levels were 71% at the weekend and 62% mid-week with low season dropping to 36% at the weekend and 30% mid-week.

Operators were also asked about their average weekly occupancy level between 3 July and 30 September 2020 and the same period in 2019.

Table 2.4: Average weekly occupancy level between 3 July and 30 September (2019 and 2020)

	Under 10%		11-25%		26-50%		51-75%		76-90%		91% or above	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Scotland	12% (23)	1% (2)	7% (13)	1% (2)	14% (26)	3% (5)	18% (34)	9% (16)	19% (37)	25% (44)	30% (58)	61% (110)

⁷ The response rate is lower for this question as many respondents opted for us to use the data held by SuperControl.

The same was asked for the period of the 1 October and 30 November 2020 and 2019 as shown below.

Table 2.5: Average weekly occupancy level between 1 October and 30 November (2019 and 2020)

	Under 10%		11-25%		26-50%		51-75%		76-90%		91% or above	
	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020	2019	2020
Scotland	38%	3%	17%	6%	23%	22%	10%	30%	7%	23%	6%	15%
	(72)	(6)	(32)	(11)	(44)	(40)	(19)	(54)	(13)	(41)	(11)	(26)

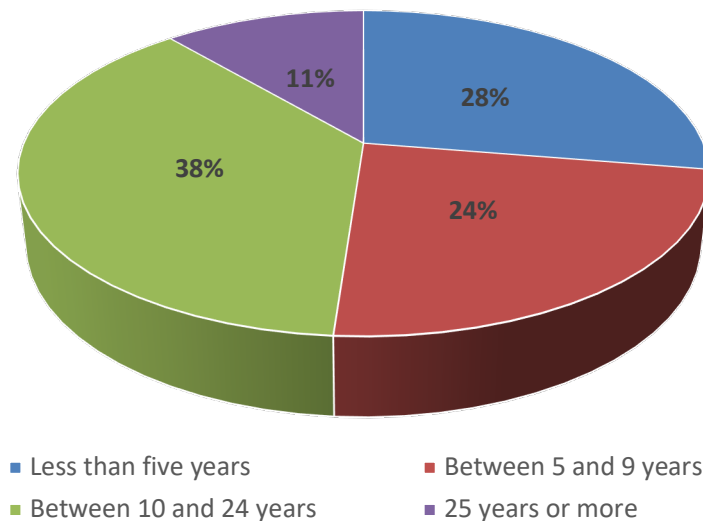
Occupancy levels provided by operators completing the survey were significantly higher than the occupancy levels derived from SuperControl data. The SuperControl data was based on 4,594 properties in Scotland and therefore this data was used to calculate the economic impact. Occupancy data from SuperControl can be seen in Appendix 1 and is more in line with general tourism occupancy figures.

92% (199) of operators had a minimal length of stay. This was, on average, 3.6 nights.

3.5 Property ownership and financial data

In just under half of cases, operators saw their self-catering properties as long-term investments, with 49% (317) of operators noting that they had owned and operated their properties for more than ten years.

Figure 2.3: Length of time survey participants have owned/operated their self-catering property



N=649

The vast majority of respondents (88%, 589) paid business rates for their properties.

Operators were asked to provide details of their turnover across 2017, 2018, 2019 and 2020. Table 2.6 shows the averages as well as total turnover across surveyed operators. This demonstrates that until 2020, average operator turnover was increasing (15% from 2017 through to 2019). **Not surprisingly the turnover drop in 2020 was significant, with a fall of 45% compared to 2019.**

Table 2.6: Operator turnover

	2017	2018	2019	2020
Number of respondents	204	224	253	256
Average turnover	£41,037	£43,379	£47,318	£26,114
Total turnover	£8,371,632	£9,716,897	£11,971,447	£6,685,061

When asked about their property portfolio, **80% (259)** said it remained the same during 2020 with a further 13% (43) saying it decreased and 7% (22) saying it increased. **During 2021, 77% (250) expect it to stay the same**, 13% (4) expect it to decrease while 10% (32) expect it to increase.

3.6 Cancellation policy

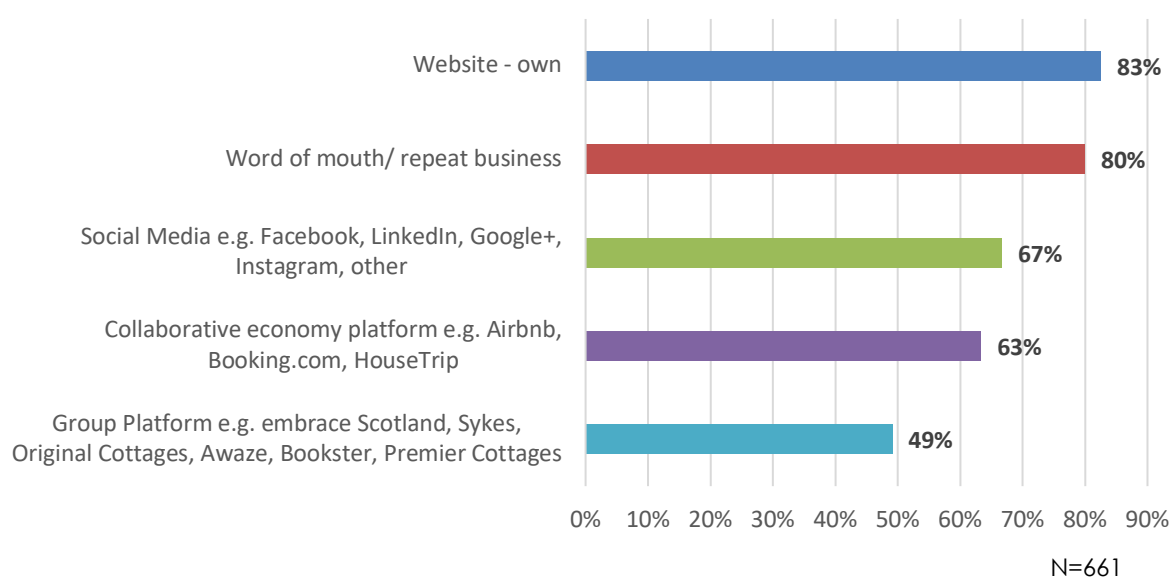
The majority (**85%, 528**) of operators stated that their cancellation policies became more flexible during Covid-19 with 12% (77) saying they stayed the same and just 3% (17) said their policy got stricter. Operators responded as follows about their cancellation policy:

- **38%** (235) had bookings **fully refundable up to a certain number of days** prior to arrival
- **25%** (155) provided a **partial refund depending on how close to arrival** they cancel
- **24%** (151) had **fully flexible bookings and would refund up to the day** of arrival
- **7%** (42) stated that **anything paid by the guest at the point of cancellation is non-refundable**
- **6%** (37) had **non-refundable bookings unless guests re-book** the dates

3.7 Property promotion

Operators were asked how they promote and market their properties. Results are shown in Figure 2.4. Operators were asked to tick all that applied. **Website (83%)** and **word of mouth (80%)** were the most popular used methods of promotion.

Figure 2.4: Routes to promote and market rental properties



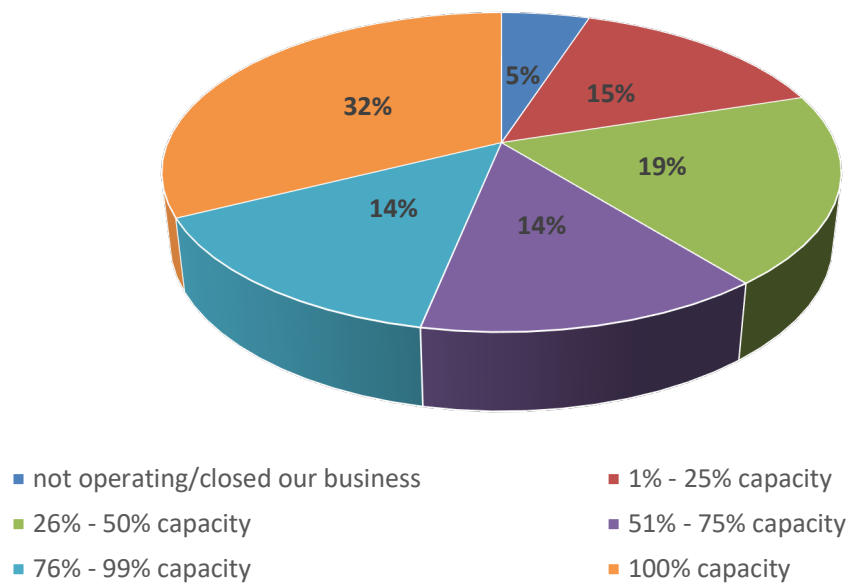
When looking at social media platforms in more detail, operators noted using the following:

- Facebook 95% (515)
- Instagram 52% (280)
- LinkedIn 13% (70)

3.8 Visitors and tourist season

Operators were asked what was the average capacity that their business was open during 2020 (this excludes periods of lockdown or when properties were in the highest tiers and could not open). Findings were as follows:

Figure 2.5: Average capacity during Covid-19



N=660

5% (33) were not operating at all while 32% (214) were at 100% capacity.

3.9 Accessibility, community integration and environment

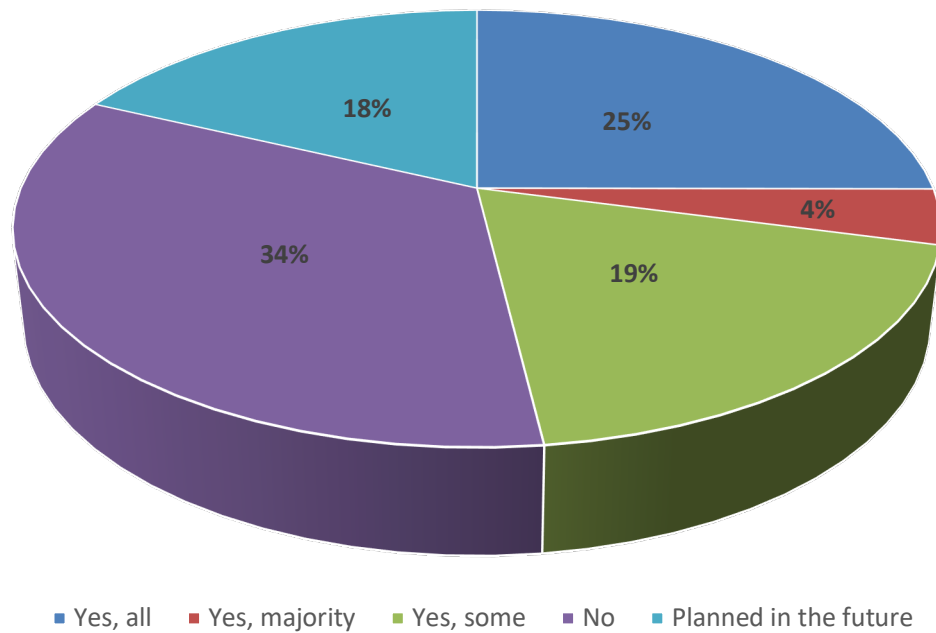
37% (202) of operators have properties that have accessibility features with a further 13% (27) planning for these in the future.

Some of the most common accessibility features included:

- no stairs or steps to enter (87%, 175)
- step-free path to entrance (79%, 169)
- wide entrance for guests (67%, 136)
- well-lit path to entrance (64%, 130)
- wide hallways (56%, 113)
- step-free shower (47%, 96)
- handheld shower head (42%, 85)

Operators were asked if their properties have green credentials. Just under half (48%, 259) said yes to some degree with a further 18% (95) planning for such credentials in the future.

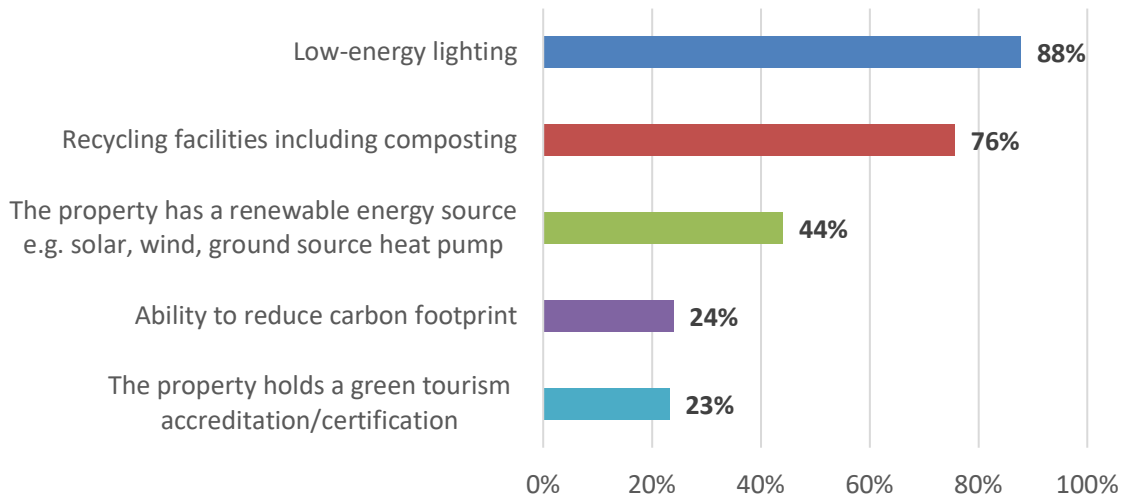
Figure 2.6: Properties with green credentials



N=537

Green credentials are highlighted in Figure 2.7. 88% of operators had low-energy lighting, 76% recycling facilities and 44% had a renewable energy source.

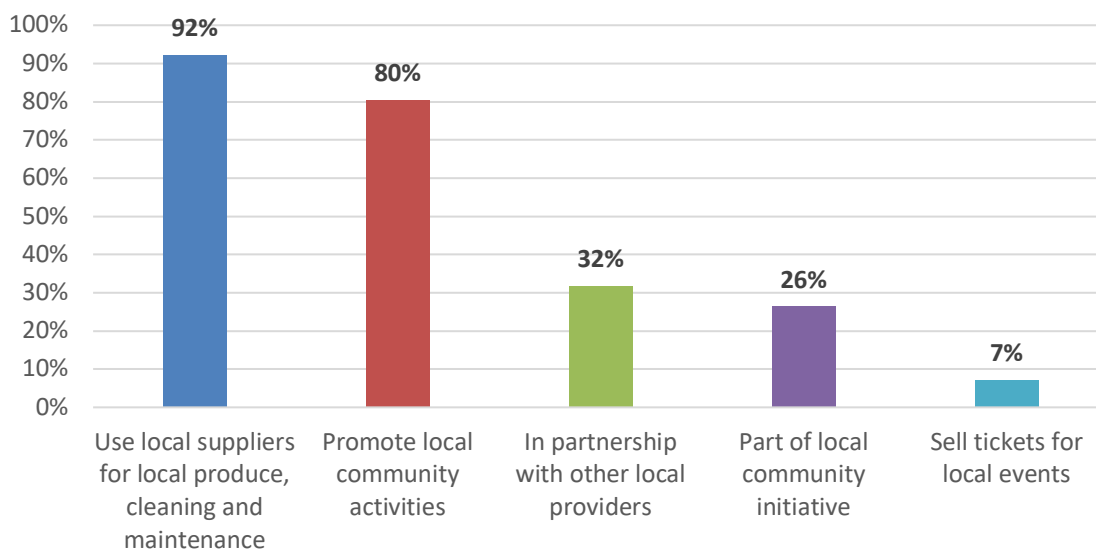
Figure 2.7: Green credentials held



N=263

Operators noted the following ways in which their business integrates with the local community.

Figure 2.8: Integration with local community



N=515

3.10 Staffing and expenditure

Surveyed operators were asked about staff numbers in part and full-time roles (Table 2.7). Results show that **during high season operators employed, on average, 1.5 staff fulltime and 3.3 part time (paid staff). During low season, fulltime staff dropped to 0.6 while part time staff reduced to 2.2.** Unpaid staff dropped from 2.1 fulltime in high season to 0.8 in low season. While part time went from 4.1 in high season to 6.7 in low season.

Table 2.7: Average number of staff in employment 2019

	High season				Low season			
	<i>Paid employment</i>		<i>Unpaid employment</i>		<i>Paid employment</i>		<i>Unpaid employment</i>	
	Total	Avg. per operator	Total	Avg. per operator	Total	Avg. per operator	Total	Avg. per operator
Full time (35 hours per week or more)	163	1.5	269	2.1	55	0.6	83	0.8
Part time (25-35 hours per week)	30	0.4	56	0.6	13	0.2	157	1.3
Part time (15-25 hours per week)	38	0.4	75	0.8	33	0.5	296	1.5
Part time (5-15 hours per week)	92	0.8	219	1.3	55	0.6	260	1.8
Part time (0-5 hours per week)	164	1.7	213	1.4	82	0.9	82	2.1

Surveyed operators were asked to provide details of their expenditure, for a range of areas in the last full financial year (2019) and then future expenditure in 2020. The total expenditure for each is presented in Tables 2.8 and 2.9. Findings show that current and or future spend is almost half of spend in 2019.

Table 2.8: Spend in 2019⁸

	2019	
	Total expenditure	Avg. per operator
Wages and salaries (including cleaning staff)	£4,218,798	£13,293
Capital expenditure on your property (including extensions and property maintenance)	£5,783,930	£18,245
Agency and OTA fees	£820,829	£2,589
Painting and decorating	£848,202	£1,527
Food and drink, welcome pack consumables	£269,142	£849
Furnishings	£538,984	£1,700
Laundry	£566,346	£1,786
Business services (e.g. accountancy, web design and booking systems)	£511,911	£1,630
Cleaning and cleaning products & equipment (excluding staff salaries)	£300,156	£953
Maintenance (gardening, window cleaning, plumber)	£399,347	£1,260
Marketing (online, printed)	£236,849	£1,031
Accessibility features	£8,440	£27
Green credentials	£45,969	£146
Other (specify what)	£409,456	£1,296
Total expenditure	£14,137,530	£46,332

N=318

Table 2.9: Current or future spend in 2020⁹

	2020		
	Total expenditure	Avg. per operator	Change since 2019
Wages and salaries (including cleaning staff)	£2,283,985	£7,228	-46%
Capital expenditure on your property (including extensions and property maintenance)	£2,364,821	£7,507	-59%
Agency and OTA fees	£428,568	£1,352	-48%
Painting and decorating	£291,647	£920	-66%
Food and drink, welcome pack consumables	£138,499	£437	-49%
Furnishings	£349,985	£1,104	-35%
Laundry	£393,150	£1,240	-31%
Business services (e.g. accountancy, web design and booking systems)	£399,904	£1,261	-22%
Cleaning and cleaning products & equipment (excluding staff salaries)	£218,298	£691	-27%
Maintenance (gardening, window cleaning, plumber)	£422,535	£1,333	+6%
Marketing (online, printed)	£243,537	£768	+3%
Accessibility features	£2,790	£8	-67%
Green credentials	£13,294	£42	-71%
Other (specify what)	£30,800	£109	-92%
Total expenditure	£7,581,813	£24,000	-49%

N=318

⁸ Reporting where the majority of the financial year was in 2019.

⁹ Reporting where the majority of the financial year was in 2020.

Per property, expenditure was £20,144 in 2019 reducing to £10,435 in 2020. This is based on operators owning, on average, 2.3 properties.

Grossing that spend up to the total population (17,794 self-catering properties across Scotland), operators spent a total of £358.4m in 2019 reducing to £185.7m in 2020. Table 2.10 shows grossed total expenditure.

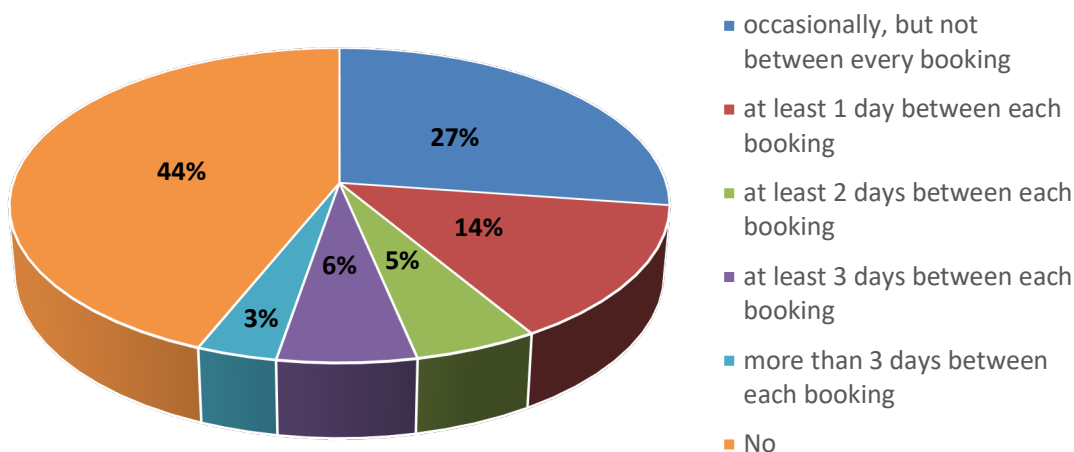
Table 2.10: Grossed current or future spend on each of the following

2019				2020			
Total expenditure	Avg. per operator	Avg. per property	Grossed to total population	Total expenditure	Avg. per operator	Avg. per property	Grossed to total population
£14,679,442	£46,332	£20,144	£358.4	£7,581,813	£24,000	£10,435	£185.7m

12% (49) of operators stated that they had taken on additional staff (full time or part-time) to assist with the government endorsed cleaning protocols and reopening guidelines. **On average operators employed an additional 1.5 cleaning staff.**

Furthermore, 87% (322) noted that **cleaning costs increased as a result of Covid-19**. Over half (56%) said that they were blocking days between bookings for additional cleaning as shown in Figure 2.9. Over one quarter (27%) said they occasionally blocked for cleaning, but not between every booking while 28% had between 1-3 days blocked for cleaning between each booking. 44% did not block for cleaning.

Figure 2.9: Additional cleaning days



N=319

Thinking about now and in the future, operators were asked how much they have or will have invested in their properties last year, this year and next year. Table 2.11 summarises the investment.

Table 2.11: Operator investment

	Last financial year (2019/20)	This financial year (2020/21)	Next financial year (2021/22)
Less than £10k	61% (212)	81% (261)	85% (247)
£11k to £25k	25% (87)	16% (52)	12% (36)
£26k up to £50k	8% (28)	2% (8)	2% (5)
Over £51k	6% (22)	3% (11)	1.5% (4)

4 Visitors Survey

An online visitor survey was open from March - May 2021. The survey was disseminated widely by sponsors and stakeholders. **718 visitors completed the survey.** Table 3.1 shows the spread of visitors across the Scottish regions. Visitors were asked to tell us about a visit in 2020 i.e., during Covid-19 (**Visit 1**) and during 2019 (**Visit 2**).

Table 3.1: Location of holiday self-catering properties visited

Location	Visitors	
	Visit during 1 (2020)	Visit during 2 (2019)
Ayrshire	62	79
Central Scotland	33	26
Dumfries & Galloway	48	40
Dunbartonshire / Argyll & Bute	68	72
Fife	26	32
Glasgow City	3	10
Grampian	32	25
Highland & Western Isles	256	223
Lanarkshire	-	2
Lothian	38	48
Orkney & Shetland	12	10
Renfrewshire	1	1
Scottish Borders	26	25
Tayside	113	88
Total consulted	718	681

Source: *Frontline Self-Catering Visitor Survey, 2021*

4.1 Visitor origin and number of trips

The majority of survey participants lived in Scotland (60%) with 37% from England. 1% were from Wales and 0.1% from Northern Ireland. 2% came from outside the UK.

Table 3.2: Visitor home country

Location	Visitors
Scotland	60% (433)
England	37% (266)
Wales	1% (5)
Northern Ireland	0.1% (1)
Outside the UK ¹⁰	2% (13)

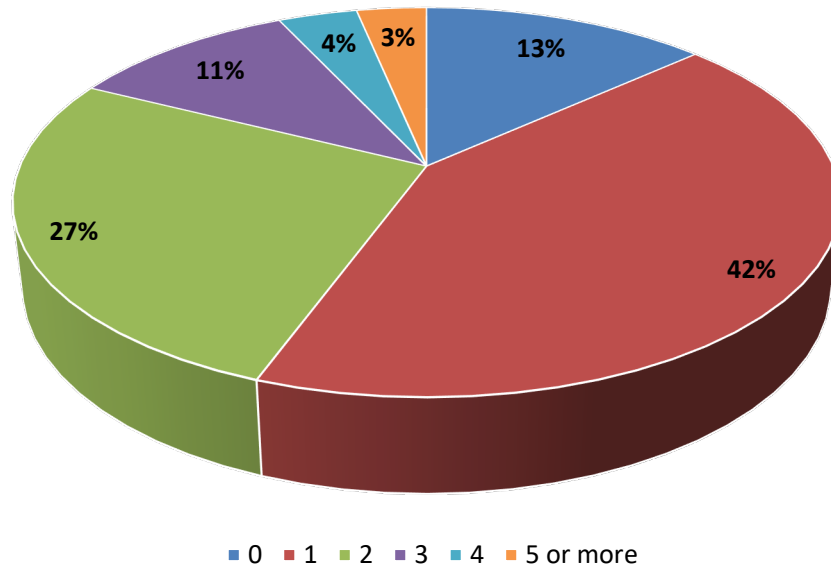
Source: *Frontline Self-Catering Visitor Survey, 2021*

N=718

¹⁰ This is an underrepresentation of actual overseas numbers and is a result of difficulty in engaging this group to participate in the study.
AS1006-00 Scotland

13% of respondents had not stayed in a self-catering property in the UK during the last 12 months (up until November 2020) with a further 42% staying only once. 27% stayed twice.

Figure 3.1: Number of visits to self-catering properties in the past 12 months (up to and including November 2020)

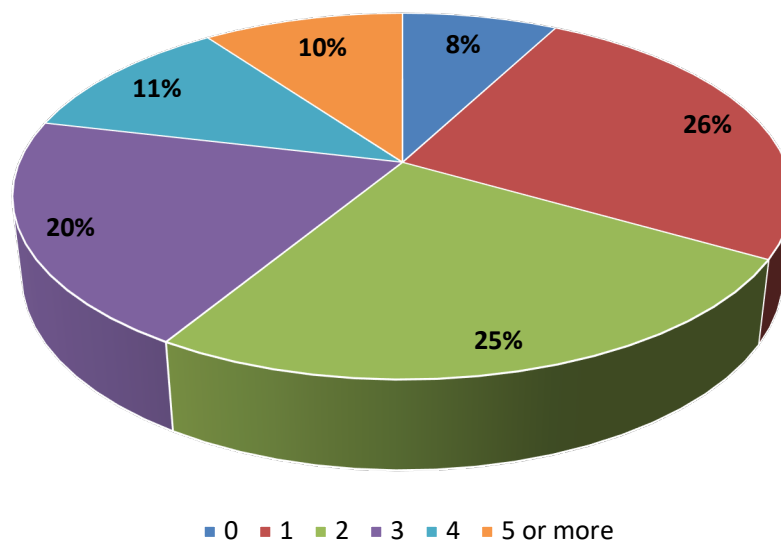


Source: Frontline Self-Catering Visitor Survey, 2021

N=705

Looking at the year before (up to November 2019), just over half of respondents (51%) had stayed in a self-catering property once or twice. A further 41% stayed three or more times with just 8% saying they did not stay in a self-catering property during this time.

Figure 3.2: Number of visits to self-catering properties in the past 12 months (up to and including November 2019)



Source: Frontline Self-Catering Visitor Survey, 2021

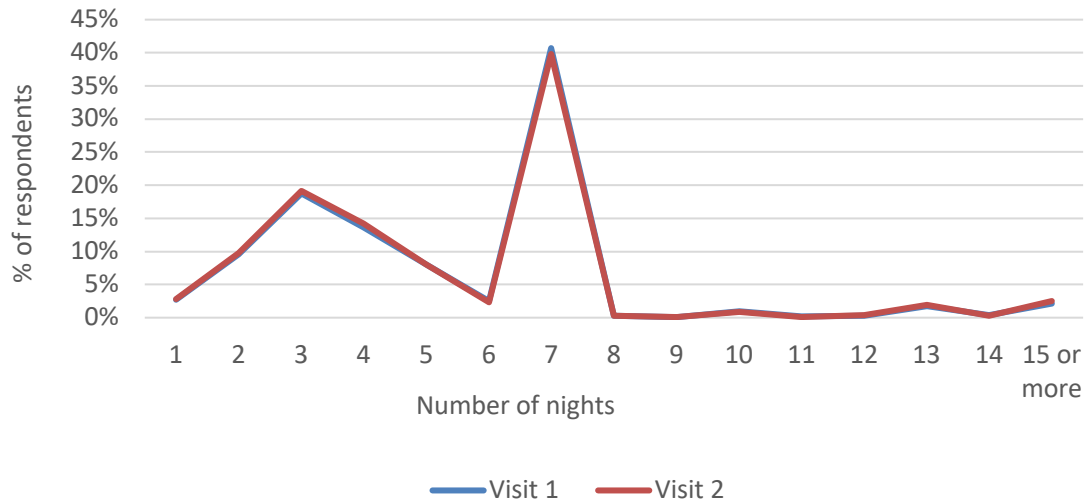
N=714

Covid-19 was the main reason for the decrease in stays during 2020.

4.2 Visitor characteristics

This section looks at findings from visitors for up to two visits to a self-catering property. Visit 1 is the most recent visit i.e., 2020 and visit 2 is pre-Covid-19 i.e. 2019. On average visitors spent 6.2 nights during visit 1 and 6.3 nights in visit 2. The distribution of responses is shown in Figure 3.3 and demonstrates a very consistent trend between visit 1 and 2.

Figure 3.3: Number of nights stayed per visit



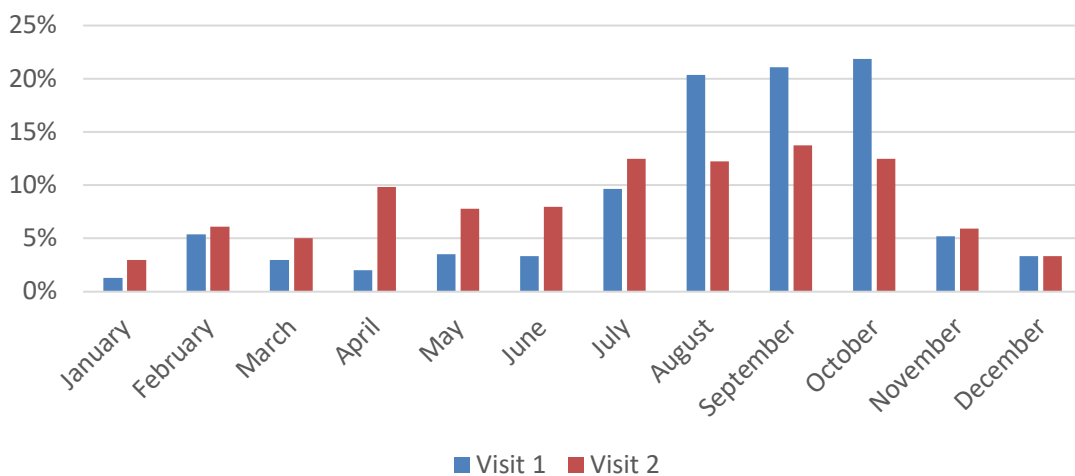
Source: Frontline Self-Catering Visitor Survey, 2021

N=567

Figure 3.4 shows the month in which the visits began. For visit 1 (2020) August, September and October were the most popular with significantly fewer visiting in March – June (compared with visit 2 (2019)). This was due to the lockdown measures imposed in March last year followed by the easing over the summer.

Looking at visit 2 (2019) there is a more even distribution across the months with a slight peak over July to October.

Figure 3.4: Month during which visit began



Source: Frontline Self-Catering Visitor Survey, 2021

N= 540

Tables 3.3 and 3.4 shows the number of adults, children and pets in each party for visit 1 (2020) and visit 2 (2019).

During visit 1 (2020), the average adult group size was 2.7 and 29% of groups included children. Where parties were travelling with children, the average number of children in each group was 2. 37% of groups brought a pet.

Table 3.3: Number of adults, children and pets in each group during visit 1 (2020)

	Number of adults	Number of children	Number of pets
1	3%	28%	67%
2	65%	50%	26%
3	11%	15%	7%
4	12%	5%	
5	3%	1%	
6	3%	0%	
7	1%	0%	
8	1%	0%	
9	0%	0%	
10+	1%	0%	
Average	2.7	2	1.3

Source: Frontline Self-Catering Visitor Survey, 2021

When looking at visit 2 (2019), the average adult group size was 3.1, and 26% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2.3. 34% of groups brought a pet and no groups brought more than 3 pets.

Table 3.4: Number of adults, children and pets in each group during visit 2 (2019)

	Number of adults	Number of children	Number of pets
1	1%	27%	59%
2	49%	41%	31%
3	12%	14%	10%
4	19%	8%	
5	6%	6%	
6	6%	2%	
7	2%	0%	
8	2%	1%	
9	1%	0%	
10+	3%	0%	
Average	3.1	2.3	1.3

Source: Frontline Self-Catering Visitor Survey, 2021

4.3 Visitor expenditure

Visitors who stayed in self-catering property (**during visit 2, 2019**), spent, on average, **£1,8595** during their visit. This reduced to **£1,500** for visit 1 (2020).

Table 3.5: Average visitor spend per party

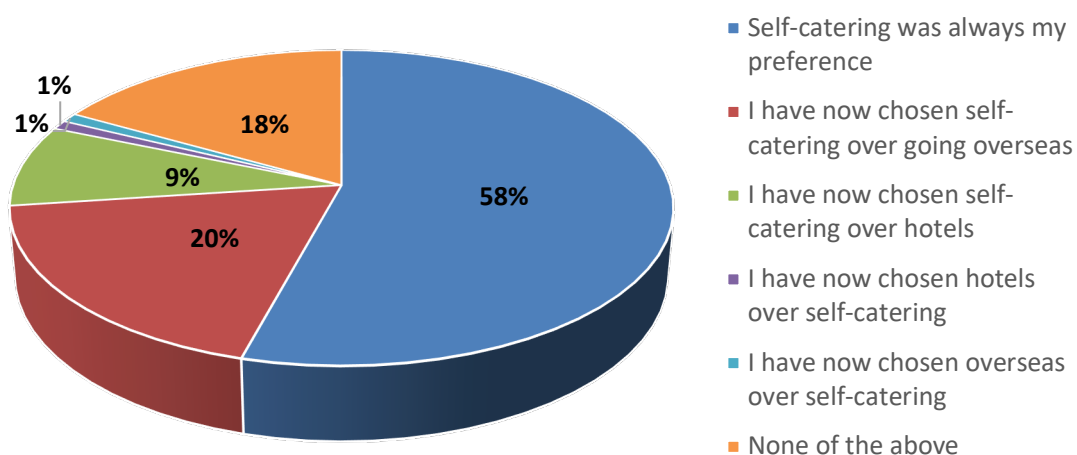
Area of expenditure	Average spend per party		
	Visit 1 (2020)	Visit 2 (2019)	Change since 2019
Transport to and from the property	£123	£180	-32%
Travel during stay	£68	£73	-7%
Accommodation fees	£729	£925	-21%
Food and drink (in supermarkets)	£138	£156	-12%
Food and drink (in local shops and farmers markets)	£73	£93	-22%
Food and drink (in bars, cafes, pubs and restaurants)	£210	£198	6%
Other shopping (e.g. gifts, clothes, souvenirs)	£79	£98	-19%
Outdoor recreation (e.g. sailing, surfing, cycling, horse riding)	£33	£50	-34%
Visitor attractions (e.g. heritage sites, theme parks, gardens)	£28	£46	-39%
Outdoor sports (shooting, fishing)	£19	£40	-53%
Total	£1,500	£1,859	-19%

Source: Frontline Self-Catering Visitor Survey, 2021

4.4 Impacts of Covid-19

Respondents were asked, as a result of Covid-19, which statement best applies:

Figure 3.7: As a result of Covid-19

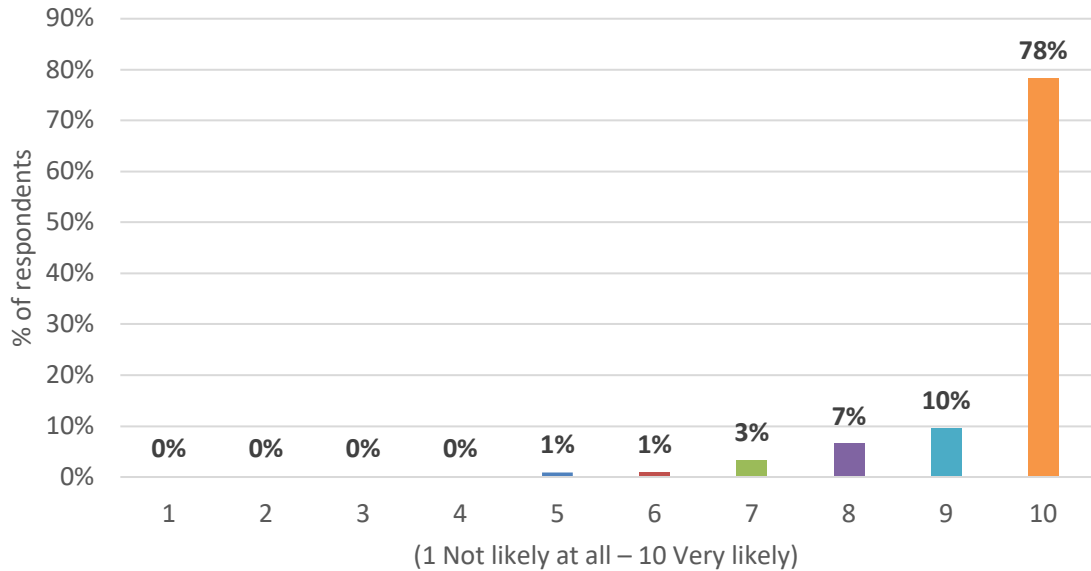


N=717

58% said self-catering in the UK was always my preference followed by 18% now choosing self-catering over going overseas.

On a scale of 1 (not likely at all) to 10 (very likely), visitors were asked to what extent they were likely to continue using self-catering in the future. **95% rated their likeliness to stay in self-catering in the future as 7 or more out of 10, with 78% rating 10.**

Figure 3.8: Extent to which visitors were likely to use self-catering in the future

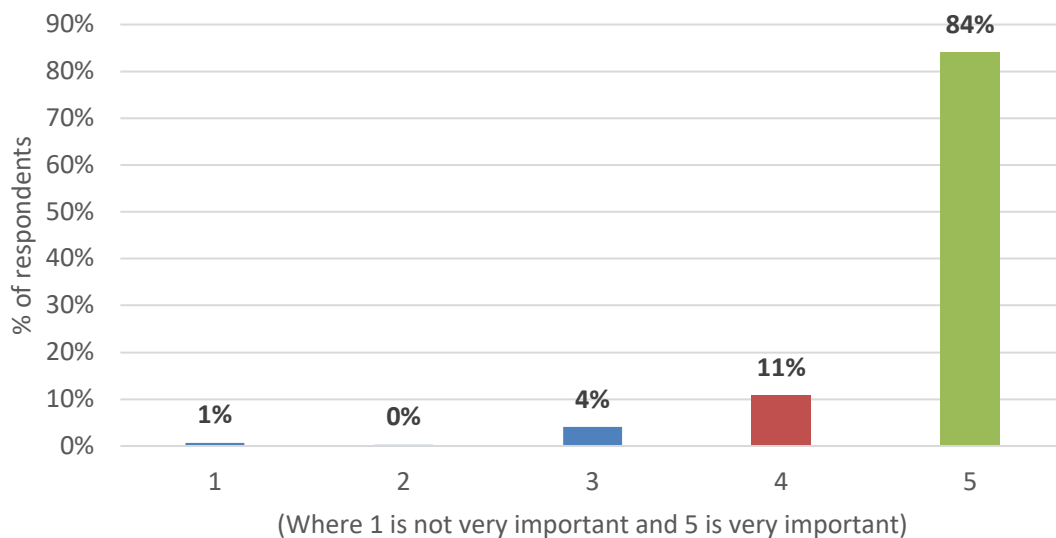


N= 717

Over two-thirds (74%, 406) of respondents said that they have had to cancel plans to holiday with people from outside of their household due to Covid-19.

On a scale of 1 (not very important) to 5 (very important), visitors were asked, as a direct result of Covid-19, how important the cleaning standards are in their choice of self-catering accommodation. **Almost all (99%) rated this 3 or more, with 84% saying very important.**

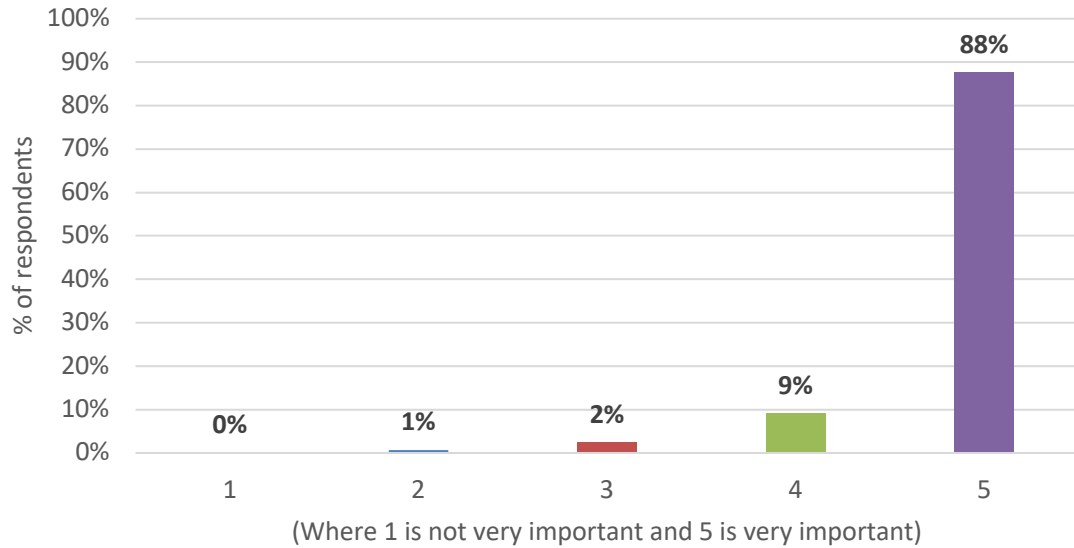
Figure 3.9: Importance of cleaning standards in choice of self-catering accommodation



N=718

Using the same rating scale of 1 (not very important) to 5 (very important), visitors were then asked, how important is having flexible cancellation terms due to Covid-19. **Almost all rated this 3 or above (99%) and 88% said very important.**

Figure 3.10: How important is having flexible cancellation terms due to Covid-19



N=717

Key features of flexible cancellation terms included:

- a full refund (73%, 518)
- ability to rebook with the same terms and conditions (69%, 497)
- refundable deposit (48%, 342)

5 Findings from Economic Impact Assessment

This section highlights the economic impacts that have occurred as a result of visitors use of self-catering properties in the UK in 2019 and 2020. This assessment was conducted in accordance with HM Treasury *Green Book* appraisal and evaluation guidance.

As part of this analysis, we measured the economic value of the sector, using the following five key indicators:

1. **Number of properties:** the number of self-catering properties that are available in Scotland, using data supplied to us by the ASSC.
2. **Visitor nights per year:** the total number of overnight stays that took place in self-catering properties in Scotland over the course of 2019 and 2020, based on a review of transaction records provided to us by SuperControl (see Appendix 1 for occupancy breakdown).
3. **Total visitor spend:** the total combined value of all expenditure made by visitors to the country during the course of 2019 and 2020, including the money that they spent on accommodation fees, travel to and from the properties, travel during their stay, food and drink (in shops, supermarkets pubs and bars), other shopping, outdoor recreation and trips to visitor attractions, based on evidence of visitor spending patterns acquired through our survey of visitors to Scottish self-catering properties.
4. **Total full time equivalent (FTE) jobs supported:** the total number of full-time equivalent jobs that the self-catering sector support in the local economy, through money spent in Scotland by visitors to self-catering properties. A full-time equivalent job can be defined as the number of full time (35 hour per week) permanent (52 week per year) jobs that this expenditure supports¹¹.
5. **Total economic contribution:** the total amount of Gross Value Added (GVA) in each area that can be attributed to expenditure by visitors to self-catering properties. The term GVA can be defined as the total amount of extra value that visitor expenditure contributes to the economy. This is broadly equivalent to either wages plus profit (i.e. the proportion of value added that goes to the company's employees and the proportion that goes to the company's owners) or to turnover minus cost of sale. For example, if a company were to buy enough coffee beans to make 100 cups of coffee for £40, and sell each cup for £1 each, the turnover impact of these transactions would be £100, the cost of sale would be £40, and the value added would be £60.

In the case of FTE jobs supported, and total economic contribution, the analysis includes indirect and induced expenditure that has occurred as a result of the multiplier effect, such as money spent by the employees of self-catering businesses, and by the business itself in the local economy.

Detailed results tables are provided in Appendix 2, a glossary of technical terms in Appendix 3, and a description of the economic impact calculation methodology in Appendix 4.

This section presents a summary of the visitor expenditure, GVA and full-time equivalent (FTE) employment impacts of the self-catering sector in Scotland, broken down by region.

¹¹ As some people work part time or seasonally, and as some workers spend part of their time providing services to tourist visitors and some of their time providing services to local residents, the total number of workers who jobs are at least partially dependent on self-catering visitors will be higher than this figure.

5.1 Impact by Scottish region

It is estimated that in **2019** visitors to Scottish self-catering properties spent a **total of £867.1m in the economy**. This visitor expenditure **supports 23,979 FTE jobs and contributed £489.3m of GVA to the Scottish economy**. This resulted in a **total economic contribution of £672.3m**.

In **2020** visitors spent a **total of £614.8m in the economy**. This visitor expenditure **supports 17,002 FTE jobs and contributed £346.9m of GVA to the Scottish economy**. This resulted in a **total economic contribution of £476.7m**. This was a **29% reduction to the previous year**. Tables 5.1 and 5.2 summarise the impact at a regional level in 2019 and 2020. The section that follows provides an infographic summary of impact findings for Scotland for 2019 as this was a more 'typical year'.

Table 5.1: Economic impacts by Scottish region 2019

	Total visitor nights	Total visitor spend (£m)	Total GVA impact (£m)	Total FTE employment	Total economic contribution (£m)
Ayrshire	114,084	41.0	23.1	1,134	31.8
Central Scotland	84,340	30.3	17.1	838	23.5
Dumfries & Galloway	188,238	67.7	38.2	1,871	52.5
Dunbartonshire / Argyll & Bute	318,212	114.4	64.5	3,163	88.7
Fife	91,325	32.8	18.5	908	25.5
Glasgow City	27,163	9.8	5.5	270	7.6
Grampian	156,593	56.3	31.8	1,557	43.6
Highland & Western Isles	757,841	272.4	153.7	7,533	211.2
Lanarkshire	16,705	6.0	3.4	166	4.7
Lothian	253,972	91.3	51.5	2,524	70.8
Orkney & Shetland	91,267	32.8	18.5	907	25.4
Renfrewshire	10,593	3.8	2.1	105	3.0
Scottish Borders	107,564	38.7	21.8	1,069	30.0
Tayside	194,485	69.9	39.4	1,933	54.2
Scotland total	2,412,382	867.1	489.3	23,979	672.3

Source: Frontline, 2021

Table 5.2: Economic impacts by Scottish region 2020

	Total visitor nights	Total visitor spend (£m)	Total GVA impact (£m)	Total FTE employment	Total economic contribution (£m)
Ayrshire	85,703	29.1	16.4	804	22.5
Central Scotland	63,359	21.5	12.1	594	16.7
Dumfries & Galloway	141,410	48.0	27.1	1,327	37.2
Dunbartonshire / Argyll & Bute	239,050	81.1	45.8	2,243	62.9
Fife	68,606	23.3	13.1	644	18.0
Glasgow City	20,405	6.9	3.9	191	5.4
Grampian	117,637	39.9	22.5	1,104	30.9
Highland & Western Isles	569,311	193.1	109.0	5,341	149.8
Lanarkshire	12,549	4.3	2.4	118	3.3
Lothian	190,791	64.7	36.5	1,790	50.2
Orkney & Shetland	68,562	23.3	13.1	643	18.0
Renfrewshire	7,958	2.7	1.5	75	2.1
Scottish Borders	80,805	27.4	15.5	758	21.3
Tayside	146,103	49.6	28.0	1,371	38.4
Scotland total	1,812,250	614.8	346.9	17,002	476.7

Source: Frontline, 2021

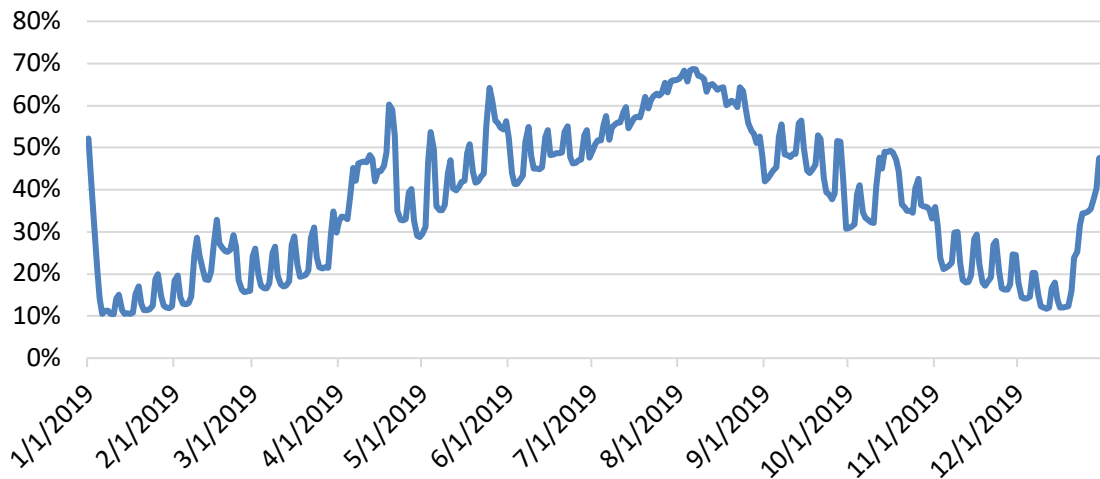
Appendix 1 – SuperControl Occupancy Data

Occupancy figures are likely to underestimate the true occupancy rate as:

- there were some days in 2020 when each property was not available for occupancy due to Covid-19 restrictions (though some of the unfulfilled bookings for these nights will still be in the database)
- some properties may have been available for booking through a range of different platforms, and therefore there may be some bookings that are not captured in this database
- some owners may have only made their properties available for booking some of the time, and either occupied them themselves, rented them on a tenancy basis, or closed them for maintenance or for the off-season at other times of the year

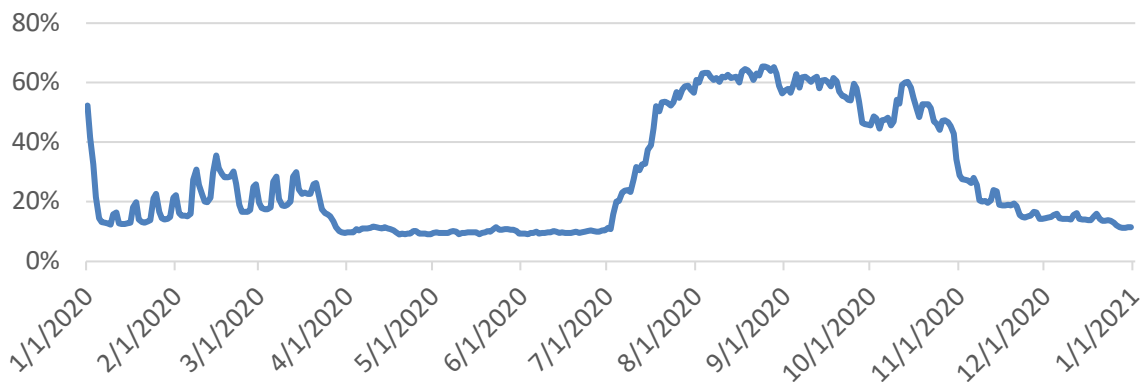
Scotland

Occupancy rates, 1st January 2019 to 31st December 2019



N= 4,594 properties

Occupancy rates, 1st January 2020 to 31st December 2020



N= 4,867 properties

Appendix 2 – Detailed Impact Findings

Total Visitor Nights

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	17,703	57,042	17,703	11,802	9,835	114,084
Central Scotland	12,049	28,917	21,688	12,049	9,639	84,340
Dumfries & Galloway	24,010	63,386	63,386	17,287	20,168	188,238
Dunbartonshire / Argyll & Bute	45,459	101,020	85,867	40,408	45,459	318,212
Fife	7,718	32,157	30,013	10,719	10,719	91,325
Glasgow City	5,891	9,163	5,891	3,600	2,618	27,163
Grampian	26,413	60,373	43,393	15,093	11,320	156,593
Highland & Western Isles	126,564	294,802	208,368	69,456	58,652	757,841
Lanarkshire	1,856	10,209	1,856	1,856	928	16,705
Lothian	49,907	97,596	70,979	12,200	23,290	253,972
Orkney & Shetland	6,519	52,152	26,076	0	6,519	91,267
Renfrewshire	3,178	3,178	2,119	0	2,119	10,593
Scottish Borders	14,703	41,014	24,763	13,929	13,155	107,564
Tayside	38,897	38,897	38,897	38,897	38,897	194,485
Scotland total	380,866	889,905	640,998	247,295	253,318	2,412,382

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	13,299	42,851	13,299	8,866	7,388	85,703
Central Scotland	9,051	21,723	16,292	9,051	7,241	63,359
Dumfries & Galloway	18,037	47,618	47,618	12,987	15,151	141,410
Dunbartonshire / Argyll & Bute	34,150	75,889	64,505	30,355	34,150	239,050
Fife	5,798	24,157	22,547	8,052	8,052	68,606
Glasgow City	4,425	6,884	4,425	2,704	1,967	20,405
Grampian	19,842	45,354	32,598	11,339	8,504	117,637
Highland & Western Isles	95,078	221,463	156,532	52,177	44,061	569,311
Lanarkshire	1,394	7,669	1,394	1,394	697	12,549
Lothian	37,492	73,317	53,321	9,165	17,496	190,791
Orkney & Shetland	4,897	39,178	19,589	0	4,897	68,562
Renfrewshire	2,387	2,387	1,592	0	1,592	7,958
Scottish Borders	11,045	30,811	18,603	10,464	9,883	80,805
Tayside	29,221	29,221	29,221	29,221	29,221	146,103
Scotland total	286,117	668,522	481,536	185,775	190,299	1,812,250

Total Visitor Spend (£m)

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	6.4	20.5	6.4	4.2	3.5	41.0
Central Scotland	4.3	10.4	7.8	4.3	3.5	30.3
Dumfries & Galloway	8.6	22.8	22.8	6.2	7.2	67.7
Dunbartonshire/Argyll & Bute	16.3	36.3	30.9	14.5	16.3	114.4
Fife	2.8	11.6	10.8	3.9	3.9	32.8
Glasgow City	2.1	3.3	2.1	1.3	0.9	9.8
Grampian	9.5	21.7	15.6	5.4	4.1	56.3
Highland & Western Isles	45.5	106.0	74.9	25.0	21.1	272.4
Lanarkshire	0.7	3.7	0.7	0.7	0.3	6.0
Lothian	17.9	35.1	25.5	4.4	8.4	91.3
Orkney & Shetland	2.3	18.7	9.4	0.0	2.3	32.8
Renfrewshire	1.1	1.1	0.8	0.0	0.8	3.8
Scottish Borders	5.3	14.7	8.9	5.0	4.7	38.7
Tayside	14.0	14.0	14.0	14.0	14.0	69.9
Scotland total	136.9	319.9	230.4	88.9	91.1	867.1

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	4.5	14.5	4.5	3.0	2.5	29.1
Central Scotland	3.1	7.4	5.5	3.1	2.5	21.5
Dumfries & Galloway	6.1	16.2	16.2	4.4	5.1	48.0
Dunbartonshire/Argyll & Bute	11.6	25.7	21.9	10.3	11.6	81.1
Fife	2.0	8.2	7.6	2.7	2.7	23.3
Glasgow City	1.5	2.3	1.5	0.9	0.7	6.9
Grampian	6.7	15.4	11.1	3.8	2.9	39.9
Highland & Western Isles	32.3	75.1	53.1	17.7	14.9	193.1
Lanarkshire	0.5	2.6	0.5	0.5	0.2	4.3
Lothian	12.7	24.9	18.1	3.1	5.9	64.7
Orkney & Shetland	1.7	13.3	6.6	0.0	1.7	23.3
Renfrewshire	0.8	0.8	0.5	0.0	0.5	2.7
Scottish Borders	3.7	10.5	6.3	3.6	3.4	27.4
Tayside	9.9	9.9	9.9	9.9	9.9	49.6
Scotland total	97.1	226.8	163.4	63.0	64.6	614.8

Direct GVA (£m)

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	3.6	11.6	3.6	2.4	2.0	23.1
Central Scotland	2.4	5.9	4.4	2.4	2.0	17.1
Dumfries & Galloway	4.9	12.9	12.9	3.5	4.1	38.2
Dunbartonshire / Argyll & Bute	9.2	20.5	17.4	8.2	9.2	64.5
Fife	1.6	6.5	6.1	2.2	2.2	18.5
Glasgow City	1.2	1.9	1.2	0.7	0.5	5.5
Grampian	5.4	12.2	8.8	3.1	2.3	31.8
Highland & Western Isles	25.7	59.8	42.3	14.1	11.9	153.7
Lanarkshire	0.4	2.1	0.4	0.4	0.2	3.4
Lothian	10.1	19.8	14.4	2.5	4.7	51.5
Orkney & Shetland	1.3	10.6	5.3	0.0	1.3	18.5
Renfrewshire	0.6	0.6	0.4	0.0	0.4	2.1
Scottish Borders	3.0	8.3	5.0	2.8	2.7	21.8
Tayside	7.9	7.9	7.9	7.9	7.9	39.4
Scotland total	77.3	180.5	130.0	50.2	51.4	489.3

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	2.5	8.2	2.5	1.7	1.4	16.4
Central Scotland	1.7	4.2	3.1	1.7	1.4	12.1
Dumfries & Galloway	3.5	9.1	9.1	2.5	2.9	27.1
Dunbartonshire/Argyll & Bute	6.5	14.5	12.3	5.8	6.5	45.8
Fife	1.1	4.6	4.3	1.5	1.5	13.1
Glasgow City	0.8	1.3	0.8	0.5	0.4	3.9
Grampian	3.8	8.7	6.2	2.2	1.6	22.5
Highland & Western Isles	18.2	42.4	30.0	10.0	8.4	109.0
Lanarkshire	0.3	1.5	0.3	0.3	0.1	2.4
Lothian	7.2	14.0	10.2	1.8	3.3	36.5
Orkney & Shetland	0.9	7.5	3.8	0.0	0.9	13.1
Renfrewshire	0.5	0.5	0.3	0.0	0.3	1.5
Scottish Borders	2.1	5.9	3.6	2.0	1.9	15.5
Tayside	5.6	5.6	5.6	5.6	5.6	28.0
Scotland total	54.8	128.0	92.2	35.6	36.4	346.9

Direct Multiplier

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	1.3	4.3	1.3	0.9	0.7	8.7
Central Scotland	0.9	2.2	1.6	0.9	0.7	6.4
Dumfries & Galloway	1.8	4.8	4.8	1.3	1.5	14.3
Dunbartonshire / Argyll & Bute	3.4	7.7	6.5	3.1	3.4	24.1
Fife	0.6	2.4	2.3	0.8	0.8	6.9
Glasgow City	0.4	0.7	0.4	0.3	0.2	2.1
Grampian	2.0	4.6	3.3	1.1	0.9	11.9
Highland & Western Isles	9.6	22.4	15.8	5.3	4.4	57.5
Lanarkshire	0.1	0.8	0.1	0.1	0.1	1.3
Lothian	3.8	7.4	5.4	0.9	1.8	19.3
Orkney & Shetland	0.5	4.0	2.0	0.0	0.5	6.9
Renfrewshire	0.2	0.2	0.2	0.0	0.2	0.8
Scottish Borders	1.1	3.1	1.9	1.1	1.0	8.2
Tayside	3.0	3.0	3.0	3.0	3.0	14.8
Scotland total	28.9	67.5	48.6	18.8	19.2	183.0

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	1.0	3.1	1.0	0.6	0.5	6.1
Central Scotland	0.6	1.6	1.2	0.6	0.5	4.5
Dumfries & Galloway	1.3	3.4	3.4	0.9	1.1	10.1
Dunbartonshire/Argyll & Bute	2.4	5.4	4.6	2.2	2.4	17.1
Fife	0.4	1.7	1.6	0.6	0.6	4.9
Glasgow City	0.3	0.5	0.3	0.2	0.1	1.5
Grampian	1.4	3.2	2.3	0.8	0.6	8.4
Highland & Western Isles	6.8	15.9	11.2	3.7	3.2	40.8
Lanarkshire	0.1	0.5	0.1	0.1	0.0	0.9
Lothian	2.7	5.2	3.8	0.7	1.3	13.7
Orkney & Shetland	0.4	2.8	1.4	0.0	0.4	4.9
Renfrewshire	0.2	0.2	0.1	0.0	0.1	0.6
Scottish Borders	0.8	2.2	1.3	0.7	0.7	5.8
Tayside	2.1	2.1	2.1	2.1	2.1	10.5
Scotland total	20.5	47.9	34.5	13.3	13.6	129.8

Total Economic Contribution – Direct, indirect and Induced GVA (£m)

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	4.9	15.9	4.9	3.3	2.7	31.8
Central Scotland	3.4	8.1	6.0	3.4	2.7	23.5
Dumfries & Galloway	6.7	17.7	17.7	4.8	5.6	52.5
Dunbartonshire/Argyll & Bute	12.7	28.2	23.9	11.3	12.7	88.7
Fife	2.2	9.0	8.4	3.0	3.0	25.5
Glasgow City	1.6	2.6	1.6	1.0	0.7	7.6
Grampian	7.4	16.8	12.1	4.2	3.2	43.6
Highland & Western Isles	35.3	82.2	58.1	19.4	16.3	211.2
Lanarkshire	0.5	2.8	0.5	0.5	0.3	4.7
Lothian	13.9	27.2	19.8	3.4	6.5	70.8
Orkney & Shetland	1.8	14.5	7.3	0.0	1.8	25.4
Renfrewshire	0.9	0.9	0.6	0.0	0.6	3.0
Scottish Borders	4.1	11.4	6.9	3.9	3.7	30.0
Tayside	10.8	10.8	10.8	10.8	10.8	54.2
Scotland total	106.1	248.0	178.6	68.9	70.6	672.3

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	3.5	11.3	3.5	2.3	1.9	22.5
Central Scotland	2.4	5.7	4.3	2.4	1.9	16.7
Dumfries & Galloway	4.7	12.5	12.5	3.4	4.0	37.2
Dunbartonshire / Argyll & Bute	9.0	20.0	17.0	8.0	9.0	62.9
Fife	1.5	6.4	5.9	2.1	2.1	18.0
Glasgow City	1.2	1.8	1.2	0.7	0.5	5.4
Grampian	5.2	11.9	8.6	3.0	2.2	30.9
Highland & Western Isles	25.0	58.3	41.2	13.7	11.6	149.8
Lanarkshire	0.4	2.0	0.4	0.4	0.2	3.3
Lothian	9.9	19.3	14.0	2.4	4.6	50.2
Orkney & Shetland	1.3	10.3	5.2	0.0	1.3	18.0
Renfrewshire	0.6	0.6	0.4	0.0	0.4	2.1
Scottish Borders	2.9	8.1	4.9	2.8	2.6	21.3
Tayside	7.7	7.7	7.7	7.7	7.7	38.4
Scotland total	75.3	175.8	126.7	48.9	50.1	476.7

Direct full time equivalent employment

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	176	567	176	117	98	1,134
Central Scotland	120	287	216	120	96	838
Dumfries & Galloway	239	630	630	172	200	1,871
Dunbartonshire / Argyll & Bute	452	1,004	854	402	452	3,163
Fife	77	320	298	107	107	908
Glasgow City	59	91	59	36	26	270
Grampian	263	600	431	150	113	1,557
Highland & Western Isles	1,258	2,930	2,071	690	583	7,533
Lanarkshire	18	101	18	18	9	166
Lothian	496	970	706	121	232	2,524
Orkney & Shetland	65	518	259	0	65	907
Renfrewshire	32	32	21	0	21	105
Scottish Borders	146	408	246	138	131	1,069
Tayside	387	387	387	387	387	1,933
Scotland total	3,786	8,846	6,371	2,458	2,518	23,979

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	125	402	125	83	69	804
Central Scotland	85	204	153	85	68	594
Dumfries & Galloway	169	447	447	122	142	1,327
Dunbartonshire / Argyll & Bute	320	712	605	285	320	2,243
Fife	54	227	212	76	76	644
Glasgow City	42	65	42	25	18	191
Grampian	186	426	306	106	80	1,104
Highland & Western Isles	892	2,078	1,469	490	413	5,341
Lanarkshire	13	72	13	13	7	118
Lothian	352	688	500	86	164	1,790
Orkney & Shetland	46	368	184	0	46	643
Renfrewshire	22	22	15	0	15	75
Scottish Borders	104	289	175	98	93	758
Tayside	274	274	274	274	274	1,371
Scotland total	2,684	6,272	4,518	1,743	1,785	17,002

FTE employment multiplier

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	66	212	66	44	37	424
Central Scotland	45	107	81	45	36	314
Dumfries & Galloway	89	236	236	64	75	700
Dunbartonshire/Argyll & Bute	169	376	319	150	169	1,183
Fife	29	120	112	40	40	340
Glasgow City	22	34	22	13	10	101
Grampian	98	224	161	56	42	582
Highland & Western Isles	471	1,096	775	258	218	2,817
Lanarkshire	7	38	7	7	3	62
Lothian	186	363	264	45	87	944
Orkney & Shetland	24	194	97	0	24	339
Renfrewshire	12	12	8	0	8	39
Scottish Borders	55	152	92	52	49	400
Tayside	145	145	145	145	145	723
Scotland total	1,416	3,308	2,383	919	942	8,968

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	47	150	47	31	26	301
Central Scotland	32	76	57	32	25	222
Dumfries & Galloway	63	167	167	46	53	496
Dunbartonshire/Argyll & Bute	120	266	226	107	120	839
Fife	20	85	79	28	28	241
Glasgow City	16	24	16	9	7	72
Grampian	70	159	114	40	30	413
Highland & Western Isles	334	777	549	183	155	1,998
Lanarkshire	5	27	5	5	2	44
Lothian	132	257	187	32	61	669
Orkney & Shetland	17	137	69	0	17	241
Renfrewshire	8	8	6	0	6	28
Scottish Borders	39	108	65	37	35	284
Tayside	103	103	103	103	103	513
Scotland total	1,004	2,346	1,690	652	668	6,359

Direct, indirect and induced FTE employment impact

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	242	779	242	161	134	1,558
Central Scotland	165	395	296	165	132	1,152
Dumfries & Galloway	328	866	866	236	275	2,571
Dunbartonshire/Argyll & Bute	621	1,380	1,173	552	621	4,346
Fife	105	439	410	146	146	1,247
Glasgow City	80	125	80	49	36	371
Grampian	361	825	593	206	155	2,139
Highland & Western Isles	1,729	4,026	2,846	949	801	10,350
Lanarkshire	25	139	25	25	13	228
Lothian	682	1,333	969	167	318	3,469
Orkney & Shetland	89	712	356	0	89	1,246
Renfrewshire	43	43	29	0	29	145
Scottish Borders	201	560	338	190	180	1,469
Tayside	531	531	531	531	531	2,656
Scotland total	5,202	12,154	8,754	3,377	3,460	32,947

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
Ayrshire	171	552	171	114	95	1,105
Central Scotland	117	280	210	117	93	817
Dumfries & Galloway	233	614	614	167	195	1,823
Dunbartonshire/Argyll & Bute	440	978	832	391	440	3,081
Fife	75	311	291	104	104	884
Glasgow City	57	89	57	35	25	263
Grampian	256	585	420	146	110	1,516
Highland & Western Isles	1,226	2,855	2,018	673	568	7,339
Lanarkshire	18	99	18	18	9	162
Lothian	483	945	687	118	226	2,459
Orkney & Shetland	63	505	253	0	63	884
Renfrewshire	31	31	21	0	21	103
Scottish Borders	142	397	240	135	127	1,042
Tayside	377	377	377	377	377	1,883
Scotland total	3,688	8,618	6,207	2,395	2,453	23,361

Appendix 3 – Glossary of Technical Terms

Total visitor spend: money spent by visitors to the area (this does not include any money spent further down the supply chain through multiplier effects).

Full time equivalent (FTE) employment impacts: the number of full time (35 hour per week) permanent (52 week per year) jobs that this expenditure supports. Note that as some people work part time or seasonally, and as some workers spend part of their time providing services to tourist visitors and some of their time providing services to local residents, the total number of workers who jobs are at least partially dependent on self-catering visitors will be higher than this figure.

Gross value added (GVA): the total amount of extra value that visitor spend contributes to the economy. This is broadly equivalent to either wages plus profit (i.e. the proportion of value added that goes to the company's employees and the proportion that goes to the company's owners) or to turnover minus cost of sale. For example, if a company were to buy enough coffee beans to make 100 cups of coffee for £40, and sell each cup for £1 each, the turnover impact of these transactions would be £100, the cost of sale would be £40, and the value added would be £60.

Indirect multiplier (or Type I multiplier): additional knock-on benefits that take place as a result of payments made further down the supply chain. Examples may include money that the owner pays to a local accountant to do produce their accounts, or to a local tradesperson to fix any plumbing or electrical problems that might occur in the property.

Induced multiplier: additional knock on benefits caused by the expenditure of salaries by property owners and staff. An example may include the expenditure of people who work at the property in a local shop.

(the) Multiplier effect (or Type II multiplier): this term relates to the combined impacts of the indirect and induced multipliers.

Occupancy rate: the proportion off properties that have a paying visitor staying in them on any particular day of the year.

Turnover: the total value of all sales made by a business.

Appendix 4 – Economic Impact Methodology

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

- **day of the year:** we applied different occupancy rate assumptions to each of the days in 2019 and 2020, based on evidence from our analysis of SuperControl data

In other words, the model includes over a separate economic impact calculation, which were then reaggregated to produce as accurate as possible an estimate of the true economic impact of the sector.

For each of these combinations of date, we calculate our impact based on the following equation:

Economic impact calculation summary

	Total number of visitor nights
<i>Times</i>	Average expenditure per head per night
<i>Equals</i>	Direct visitor spend
<i>Times</i>	Type II Multiplier (source: UK Input Output Tables)
<i>Equals</i>	Direct, indirect and induced visitor spend
<i>Divided by</i>	Turnover per FTE member of staff in accommodation sector
<i>Equals</i>	Direct, indirect & induced employment impact
<i>Multiplied by</i>	GVA per FTE employee in accommodation sector
<i>Equals</i>	Direct, indirect and induced GVA impacts