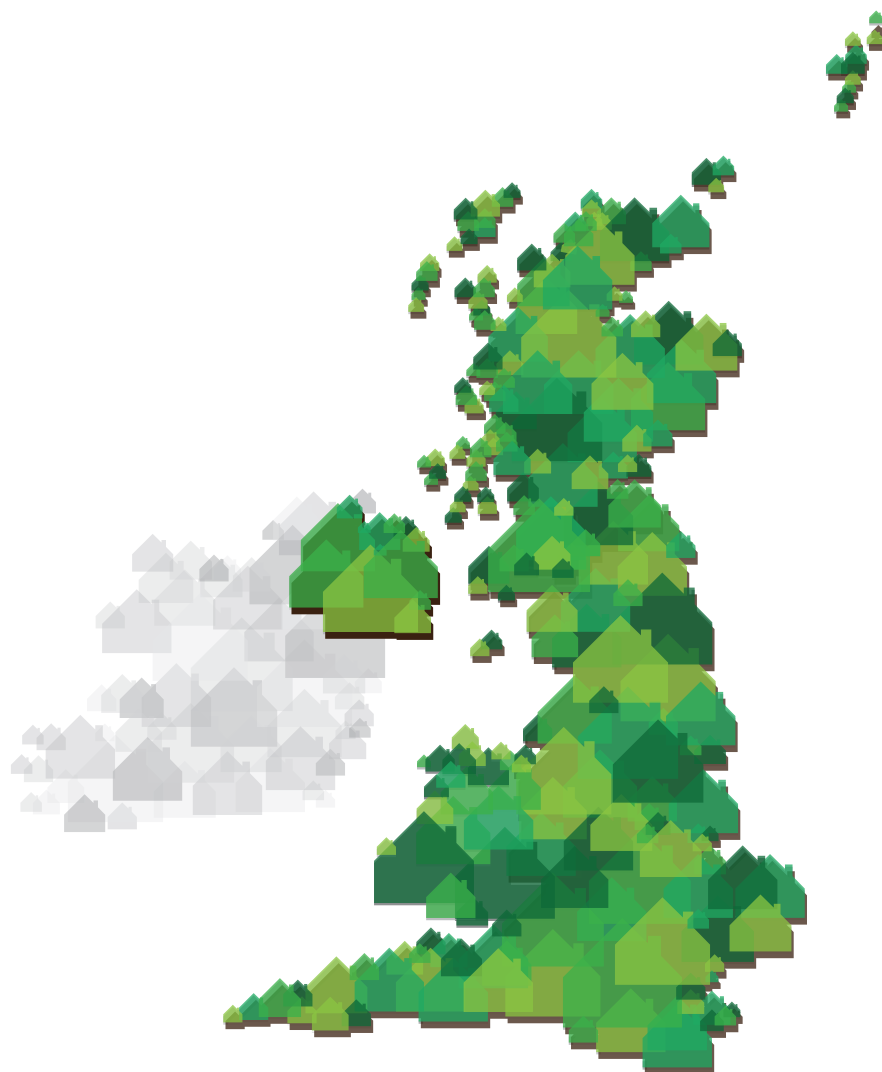


# Economic Impact of Self-Catering Sector to the U.K. Economy



produced by  
**frontline**  
curious · committed · smart · proactive

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

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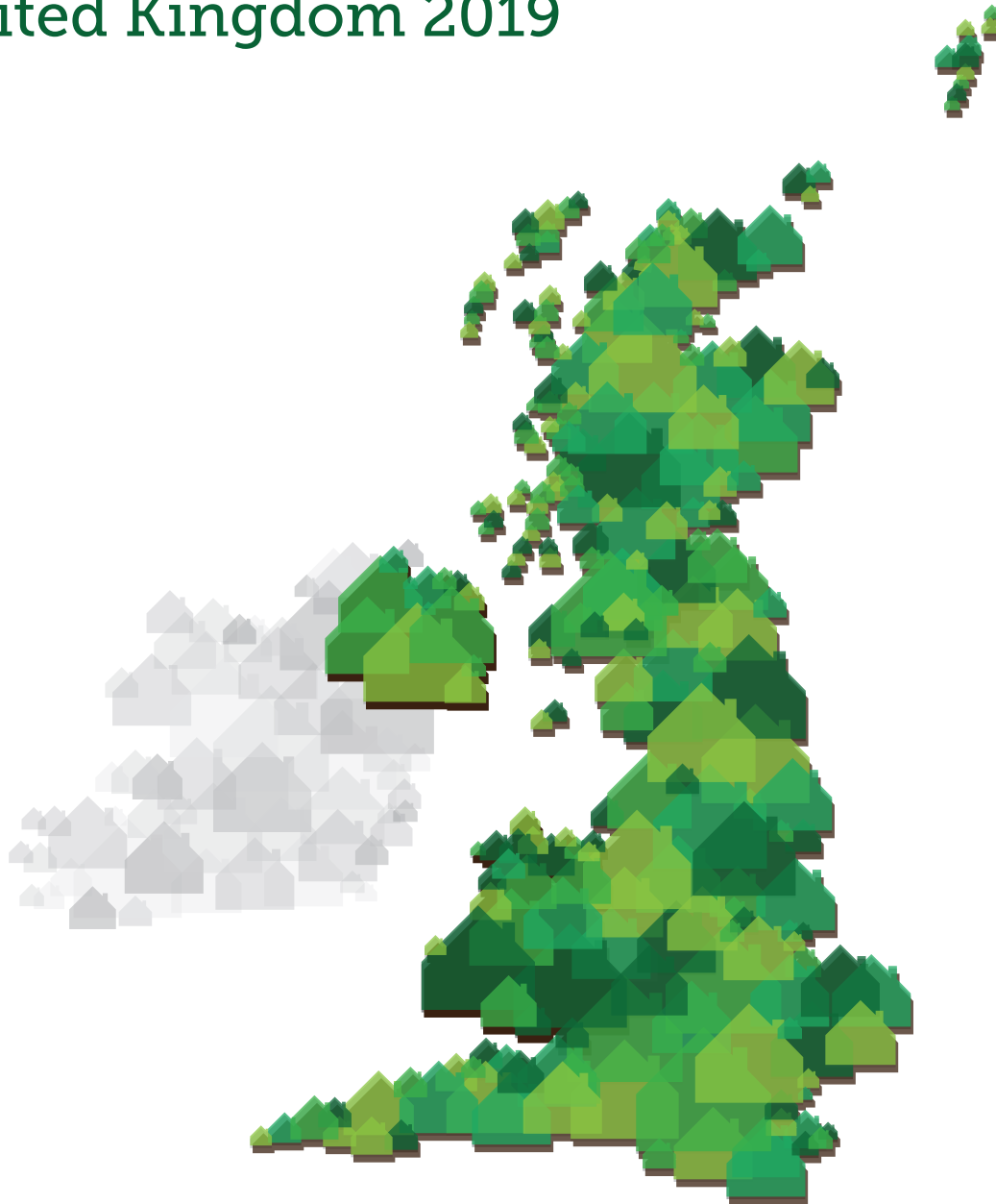
August 2021

## Contents Page

<b>Executive Summary.....</b>	<b>1</b>
<b>1 Introduction.....</b>	<b>2</b>
1.1 Research objectives .....	2
1.2 Methodology .....	2
<b>2 Self-Catering Trends and Developments.....</b>	<b>4</b>
2.1 UK trends over the last year .....	4
2.2 Stakeholder Feedback.....	4
<b>3 Operators Survey .....</b>	<b>6</b>
3.1 Composition of the overall UK self-catering industry .....	6
3.2 Sampling methodology and geographic locations .....	6
3.3 Property summary .....	7
3.4 Length of season and occupancy rates .....	8
3.5 Property ownership and financial data.....	10
3.6 Cancellation policy .....	11
3.7 Property promotion .....	11
3.8 Visitors and tourist season.....	12
3.9 Accessibility, community integration and environment .....	12
3.10 Staffing and expenditure .....	14
<b>4 Visitors Survey .....</b>	<b>18</b>
4.1 Visitor origin and number of trips.....	18
4.2 Visitor characteristics.....	19
4.3 Accommodation requirements.....	22
4.4 Visitor expenditure .....	23
4.5 Impacts of Covid-19 .....	24
<b>5 Findings from Economic Impact Assessment .....</b>	<b>26</b>
5.1 Impact by UK country .....	27
5.2 England summary – 2019.....	28
5.3 Scotland summary – 2019.....	30
5.4 Wales summary – 2019.....	32
5.5 Northern Ireland summary – 2019 .....	34
<b>Appendix 1 – Stakeholder List .....</b>	<b>36</b>
<b>Appendix 2 – SuperControl Occupancy Data .....</b>	<b>37</b>
England.....	37
Scotland.....	38
Wales.....	39
Northern Ireland .....	40
<b>Appendix 3 – Detailed Impact Findings.....</b>	<b>41</b>
<b>Appendix 4 – Glossary of Technical Terms.....</b>	<b>49</b>
<b>Appendix 5 – Economic Impact Methodology.....</b>	<b>50</b>

This economic impact assessment was sponsored by SuperControl.

# United Kingdom 2019



- 86,445 properties
  - 9.4 million visitor nights per year
  - £2.6 billion total visitor spend
  - Supports 69,635 FTE jobs
  - £1.98 billion Contribution to the UK economy
-

## 1 Introduction

Since 2010 tourism has been the fastest growing sector in the UK in employment terms<sup>1</sup>. By 2025, Britain aims to have a tourism industry worth over £257bn, supporting 3.8 million jobs. This is equivalent to almost 10% of UK GDP and around 11% of the total UK jobs<sup>2</sup>.

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 retail<sup>3</sup>.

The Deloitte *Tourism: Jobs and Growth Report*<sup>4</sup> 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 the UK.**

### 1.1 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 England, Scotland, Wales and Northern Ireland
- estimate the full-time equivalent jobs supported by the sector
- assess the impact of Covid-19 – presenting feedback from 2019 and 2020

### 1.2 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.

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

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

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

<sup>4</sup> [https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism\\_Jobs\\_and\\_Growth\\_2013.pdf](https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf)

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

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.**

## 2 Self-Catering Trends and Developments

This section looks at published data on trends and developments in the sector, followed by findings from stakeholder consultations.

### 2.1 UK trends over the last year

Since the implementation of travel restrictions (due to Covid-19) there has been a substantial change in the landscape for self-catering. According to a Country Living report there has been a number of new trends within the sector including<sup>5</sup>:

- a large increase in enquires for stays between January to March (traditionally months of low footfall)
- a wider peak period now including more of spring
- couples being the most prominent type of guests over the whole year rather than the traditional family; although family bookings are still highest in peak, school holiday seasons
- pet-friendly holidays set to become increasingly popular
- almost half of the nation is working from home so it is expected that holidays which allow people to incorporate their work into their holiday will become more popular. A Scotsman article in April 2021 predicted that the sector will lean towards the “*workcation*” trend to help the industry recovery from Covid-19

Self-catering accommodation has also been advised to prepare for Covid-19 restrictions such as social distancing to continue in the future, but they are expected to be able handle this change well due to their ability to control their environment effectively. **Self-catering is essentially ‘self-contained’!**

### 2.2 Stakeholder Feedback

As part of the research, Frontline conducted interviews with stakeholders across the industry. A list of contributors is presented in Appendix 1. The purpose of these interviews was to gather views on the drivers of change and develop an assessment of the strengths, weaknesses, opportunities and threats (SWOT) faced by the UK’s self-catering sector.

#### 2.2.1 Trends and developments

Stakeholders were of the view that:

- premiumisation of the sector has seen a drive towards increased quality and high-end accommodation – **“luxury of a boutique hotel but the private space of self-catering”**
- the internet is pushing up standards as well as highlighting what is on offer – “you can search through properties, street views and more to help make an informed choice”
- people have an appetite for more unique and unusual places to stay – “huge explosion in quirky accommodation, treehouses and cabins etc so new areas of self-catering coming on stream all the time”
- there is a move towards more flexibility in terms and conditions and cancellation policies as well as length of stay – **“no longer the 7 days and fixed arrival day”**
- there has been an increase in environmentally conscious tourism – **“more with vehicle charging points, public transport links”**
- much longer and extended season – “pre-April starts and the season continuing into October and November”

<sup>5</sup> <https://www.countryliving.com/uk/travel-ideas/staycation-uk/a34890619/cottage-trends/>

### 2.2.2 Drivers for change

There was consistency across stakeholders regarding the main drivers for change for the self-catering sector. These were:

- Covid-19 (69%) – not surprisingly this was increasingly driving changes “driving the self-containment and virtual contact that self-catering can easily offer”
- health and wellbeing (38%) – “relaxation and wellness are key”
- environmental awareness (38%) – has become a big influence on change “**general trend towards responsible tourism**”

### 2.2.3 SWOT analysis

The **strengths** of the sector were:

- the quality of the offering – more than just the home comforts
- the individuality of every property and experience
- ability to cater to multi-generational tourism
- accessibility for all family needs, including substantially more pets
- strong network to embrace the increase in “staycations” and “workcations”

The **weaknesses** of the sector were:

- staycations seen as more expensive than overseas destinations
- lack of financial support for operators during Covid-19
- perception of outdated facilities due to a reluctance to upgrade
- capacity restrictions on large accommodation as a result of Covid-19
- variability of UK climate and weather in peak months
- reputation damage from unaffiliated sources

The **opportunities** for the sector were:

- retaining staycation visitors who used self-catering during Covid-19
- activity and theme-based tourism – self-catering being part of the mix
- services to support add-ons – selling more than just the accommodation
- the draw of UK history and culture to foreign visitors
- more direct marketing to the millennial demographic to change their perception of self-catering
- pet tourism

The **threats** for the sector were:

- people not realising self-catering is separate from the wider tourism market
- people desiring a warmer climate during their summer holidays post-Covid-19
- AirBnB becoming a generic term for self-catering accommodation

### 3 Operators Survey

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

#### 3.1 Composition of the overall UK self-catering industry

Based on the information provided on VOA registrations, NDR registrations, Local Authority registrations and data provided by SuperControl, in **2020 there were 86,445 self-catering properties operating in the UK. The majority of these were three bedroom or less properties.** Table 3.1 provides a breakdown of these by country and number of bedrooms.

**Table 3.1: Composition of the industry**

Location	Total number of bedrooms					Total Number of properties
	0-1	2	3	4	5+	
England	17%	34%	26%	12%	11%	56,125
Scotland	16%	37%	27%	10%	11%	17,794
Wales	15%	31%	28%	15%	10%	7,895
Northern Ireland	91%	4%	2%	1%	2%	4,631
<b>Total</b>	<b>20%</b>	<b>33%</b>	<b>25%</b>	<b>11%</b>	<b>11%</b>	<b>86,445</b>

#### 3.2 Sampling methodology and geographic locations

Self-catering properties across the UK 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.

**2,181 operators running a total of 6,389 properties across the UK responded to the survey**, giving a 99% confidence +/- 2% 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 the UK. The geographic location of the surveyed self-catering operators was broadly representative of the sector as a whole.

**Table 3.2: Location of surveyed self-catering operators**

Location	Surveyed operators		Total number of properties across the UK	Percentage of properties consulted
	Number of operators	Number of properties owned		
England	793	3,485 <sup>6</sup>	56,125	6%
Scotland	945	2,173 <sup>7</sup>	17,794	12%
Wales	222	377 <sup>8</sup>	7,895	5%
Northern Ireland	221	354 <sup>9</sup>	4,631	8%
<b>Total</b>	<b>2,181</b>	<b>6,389</b>	<b>86,445</b>	<b>7%</b>

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

<sup>6</sup> Based on 285 responses and an average of 4.4 properties per operator

<sup>7</sup> Based on 329 responses and an average of 2.3 properties per operator

<sup>8</sup> Based on 74 responses and an average of 1.7 properties per operator

<sup>9</sup> Based on 131 responses and an average of 1.6 properties per operator



### 3.3 Property summary

Responding operators ran or owned, on average, 2.8 properties at a UK level. Properties owned, ranged from 1 to 188 with 61% owning just one. Operators were also asked about the **range of amenities offered by properties**. Almost all properties had a shower (99%), a microwave (96%) and WIFI (94%). The vast majority had a washing machine (89%) and a garden (81%).

Only a small proportion of operators were considering additional amenities for their properties in the future. The top three additions included bike storage, hot tub and satellite/cable TV.

**Table 3.3: Amenities Offered by Properties**

	Majority already have		Considering in the future	
	Number of properties	%	Number of properties	%
<b>Shower</b>	<b>865</b>	<b>99%</b>	0	0%
<b>Microwave</b>	<b>837</b>	<b>96%</b>	1	0%
<b>WIFI</b>	<b>824</b>	<b>94%</b>	14	2%
Washing machine	778	89%	8	1%
Garden	712	81%	10	1%
Dishwasher	656	75%	20	2%
DVD player	654	75%	14	2%
Bath	649	74%	12	1%
King size bed	588	67%	24	3%
Tumble dryer	549	63%	22	3%
<b>Satellite/cable TV</b>	493	56%	<b>39</b>	<b>4%</b>
Real fire	483	55%	17	2%
<b>Bike storage</b>	449	51%	<b>68</b>	<b>8%</b>
Games room	135	15%	1	0%
<b>Hot tub</b>	113	13%	<b>66</b>	<b>8%</b>

Source: Frontline Self-Catering Operator Survey, 2021

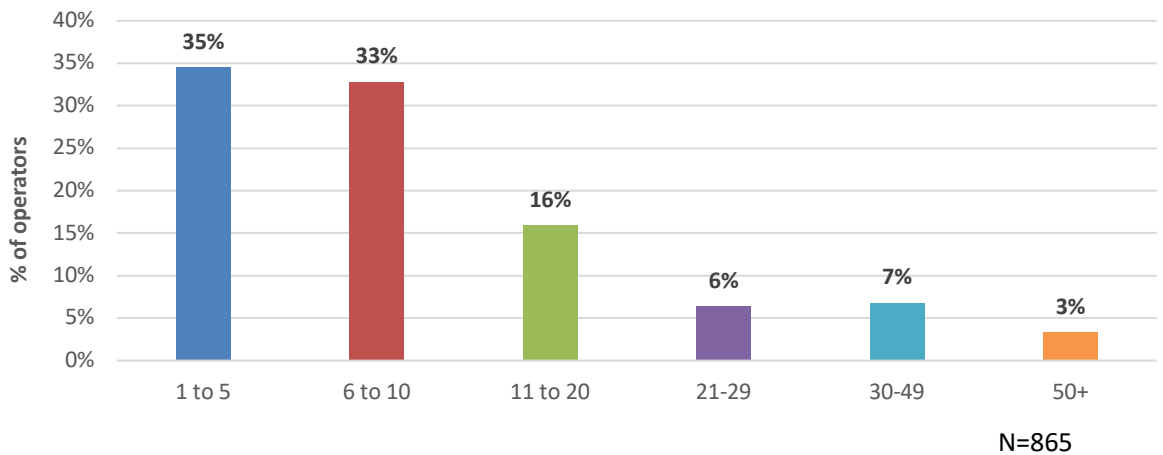
N=874

Other amenities listed included:

- fitness suite
- children's play area
- parking
- sauna
- swimming pool
- BBQ
- trampoline
- electric car charging

Over two-thirds (68%) of properties have capacity for up to ten people. The majority of operators that had capacity for 50 plus guests were located in England with some in Scotland.

**Figure 3.1: Number of Guests**



### 3.4 Length of season and occupancy rates

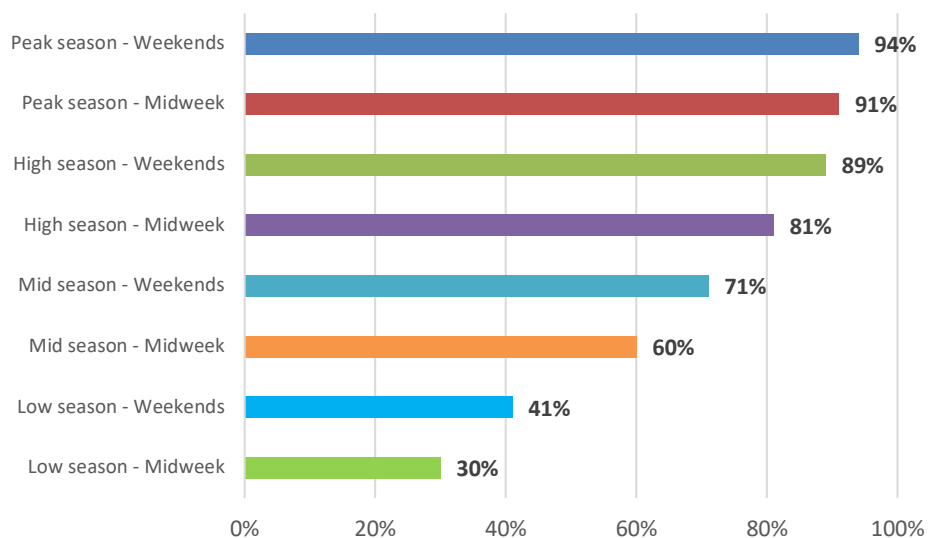
In 2019 the majority of self-catering properties (89%, 500<sup>10</sup>) operated all year round. In 2020 this reduced, with only 72% (346) operating all year; this was due to Covid-19 lockdown restrictions.

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 3.2: Average occupancy rates of self-catering properties**



N=466

<sup>10</sup> The response rate is lower for this question as many respondents opted for us to use the data held by SuperControl.

**At peak, occupancy levels reached an average of 94% at the weekend and 91% midweek.** During high season occupancy was 89% at the weekend and 81% during the week. Mid-season occupancy levels were 71% at the weekend and 60% mid-week with low season dropping to 41% 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. This has been broken down by country to show the varying differences (Table 3.4).

**Table 3.4: Average weekly occupancy level between 3 July and 30 September (2019 and 2020)**

Country	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
England	7% (13)	1% (1)	5% (8)	1% (1)	4% (7)	2% (3)	12% (22)	12% (21)	21% (38)	31% (54)	50% (89)	55% (96)
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)
Wales	5% (2)	0% (0)	5% (2)	0% (0)	9% (4)	2% (1)	16% (7)	5% (2)	16% (7)	22% (9)	49% (21)	71% (29)
Northern Ireland	20% (15)	3% (2)	16% (12)	2% (1)	14% (10)	11% (7)	18% (13)	23% (15)	12% (9)	26% (17)	20% (15)	35% (23)
<b>Total</b>	<b>11%</b> <b>(56)</b>	<b>1%</b> <b>(5)</b>	<b>7%</b> <b>(35)</b>	<b>1%</b> <b>(4)</b>	<b>9%</b> <b>(47)</b>	<b>3%</b> <b>(16)</b>	<b>15%</b> <b>(76)</b>	<b>12%</b> <b>(54)</b>	<b>19%</b> <b>(92)</b>	<b>27%</b> <b>(127)</b>	<b>38%</b> <b>(185)</b>	<b>56%</b> <b>(260)</b>

The same was asked for the period of the 1 October and 30 November 2020 and 2019 as shown in Table 3.5.

**Table 3.5: Average weekly occupancy level between 1 October and 30 November (2019 and 2020)**

Country	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
England	33% (58)	3% (6)	15% (27)	8% (14)	19% (34)	19% (34)	16% (28)	33% (60)	10% (17)	21% (38)	7% (13)	16% (29)
Scotland	38% (72)	3% (6)	17% (32)	6% (11)	23% (44)	22% (40)	10% (19)	30% (54)	7% (13)	23% (41)	6% (11)	15% (26)
Wales	47% (20)	10% (4)	19% (8)	12% (5)	14% (6)	10% (4)	5% (2)	29% (12)	9% (4)	19% (8)	7% (3)	21% (9)
Northern Ireland	65% (48)	17% (11)	11% (8)	22% (14)	12% (9)	31% (20)	7% (5)	19% (12)	1% (1)	8% (5)	4% (3)	3% (2)
<b>Total</b>	<b>41%</b> <b>(198)</b>	<b>6%</b> <b>(27)</b>	<b>16%</b> <b>(76)</b>	<b>10%</b> <b>(45)</b>	<b>19%</b> <b>(94)</b>	<b>21%</b> <b>(98)</b>	<b>11%</b> <b>(54)</b>	<b>30%</b> <b>(141)</b>	<b>7%</b> <b>(35)</b>	<b>20%</b> <b>(92)</b>	<b>6%</b> <b>(30)</b>	<b>14%</b> <b>(66)</b>

Occupancy levels between 3 July and 30 September 2020 and 2019 and the 1 October and 30 November 2020 and 2019 were fairly consistent across each of the four countries with the exception of Northern Ireland who did not have as high a percentage of properties achieving the higher occupancy levels.

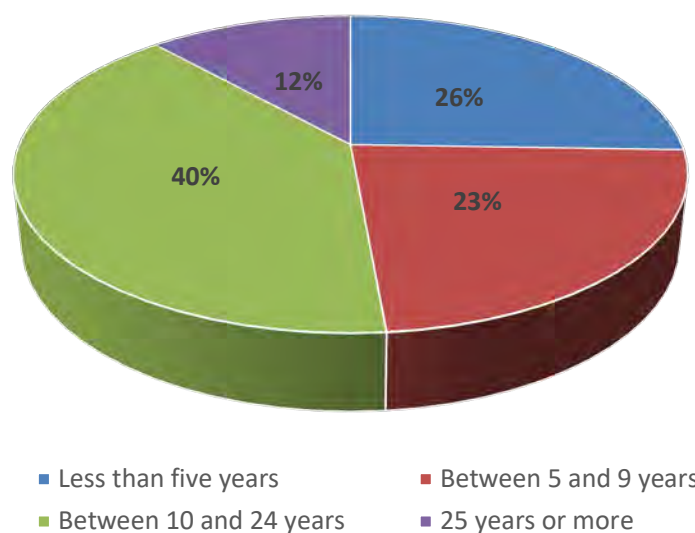
Occupancy levels provided by operators completing the survey were significantly higher than the occupancy levels derived from SuperControl data. The SuperControl data was based on 22,310 properties and therefore this data was used to calculate the economic impact. Occupancy data from SuperControl can be seen in Appendix 2 and is more in line with general tourism occupancy figures.

92% (520) of operators had a minimal length of stay. This was, on average, 3.5 nights.

### 3.5 Property ownership and financial data

In just over half of cases, operators saw their self-catering properties as long-term investments, with over half (52%, 735) noting that they had owned and operated their properties for more than ten years.

**Figure 3.3: Length of time survey participants have owned/operated their self-catering property**



N=1,414

The vast majority of respondents (85%, 1,302) paid business rates for their properties.

Operators were asked to provide details of their turnover across 2017, 2018, 2019 and 2020. Table 3.6 shows the averages as well as total turnover. This demonstrates that until 2020, average operator turnover was increasing (6.5% from 2017 through to 2019). Not surprisingly the turnover drop in 2020 was significant, with a fall of 28% compared to 2019.

**Table 3.6: Operator turnover**

	2017	2018	2019	2020
<b>Number of respondents</b>	481	537	612	632
<b>Average turnover</b>	£95,438	£97,400	£101,652	£72,593
<b>Total turnover</b>	£45,905,613	£52,304,047	£62,211,249	£45,878,893

When asked about their property portfolio, 81% (684) said it remained the same during 2020 with a further 11% (91) saying it decreased and 7% (61) saying it increased. During 2021, 80% (676) expect it to stay the same, 11% (94) expect it to increase while 9% (7) expect it to decrease.

### 3.6 Cancellation policy

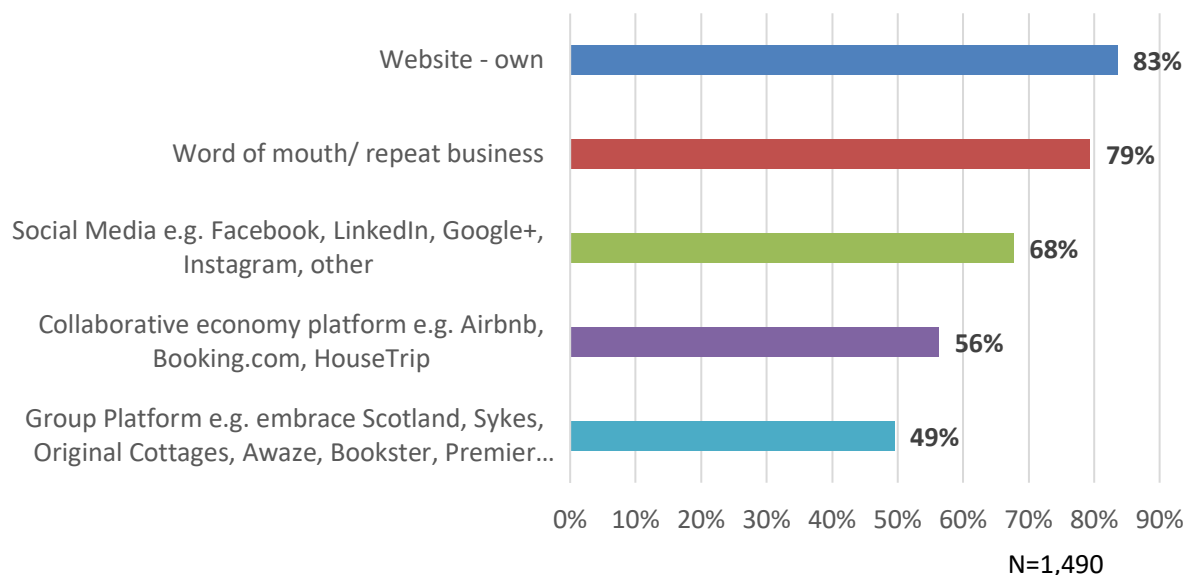
The majority (86%, 1,166) of operators stated that their cancellation policies became more flexible during Covid-19 with 11% (152) saying they stayed the same and just 3% (36) said their policy got stricter. Operators responded as follows about their cancellation policy:

- 34% (461) had bookings fully refundable up to a certain number of days prior to arrival
- 29% (393) provided a partial refund depending on how close to arrival they cancel
- 21% (277) had fully flexible bookings and would refund up to the day of arrival
- 9% (125) had non-refundable bookings unless guests re-book the dates
- 7% (89) stated that anything paid by the guest at the point of cancellation is non-refundable

### 3.7 Property promotion

Operators were asked how they promote and market their properties. Results are shown in Figure 3.4. Operators were asked to tick all that applied. Website (83%) and word of mouth (79%) were the most popular used methods of promotion.

Figure 3.4: Routes to promote and market rental properties



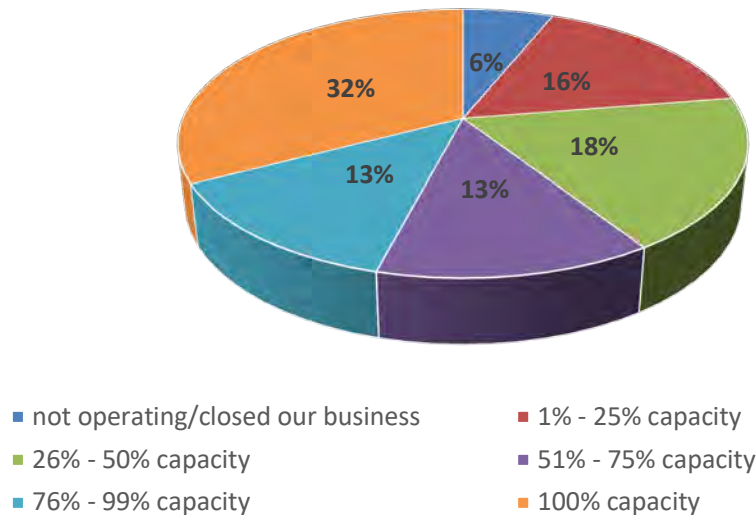
When looking at social media platforms in more detail, operators noted using the following:

- Facebook 93% (1,157)
- Instagram 54% (676)
- LinkedIn 11% (142)

### 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 3.5: Average capacity during Covid-19**



N=1,501

6% (87) were not operating at all while 32% were at 100% capacity.

### 3.9 Accessibility, community integration and environment

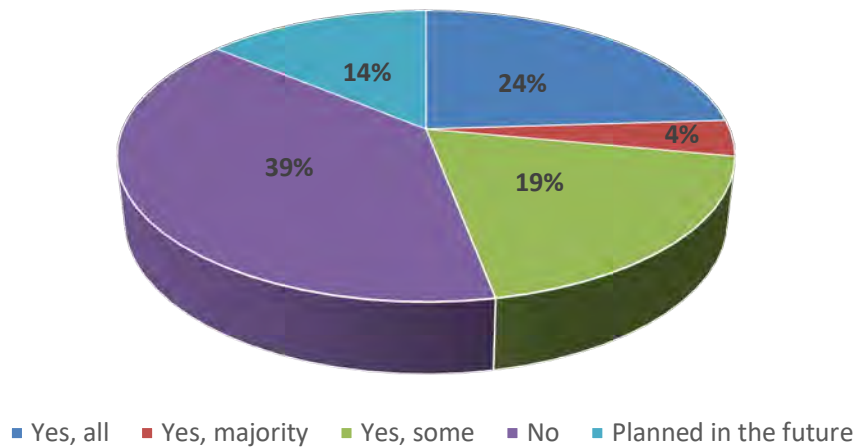
Around one third (34%, 470) of operators have properties that have accessibility features with a further 5% (67) planning for these in the future.

Some of the most common accessibility features included:

- no stairs or steps to enter (82%, 387)
- step-free path to entrance (78%, 366)
- wide entrance for guests (70%, 327)
- well-lit path to entrance (65%, 307)
- wide hallways (58%, 273)
- step-free shower (52%, 246)
- handheld shower head (47%, 223)

Operators were asked if their properties have green credentials. Just under half (47%, 641) said yes to some degree with a further 14% (191) planning for such credentials in the future.

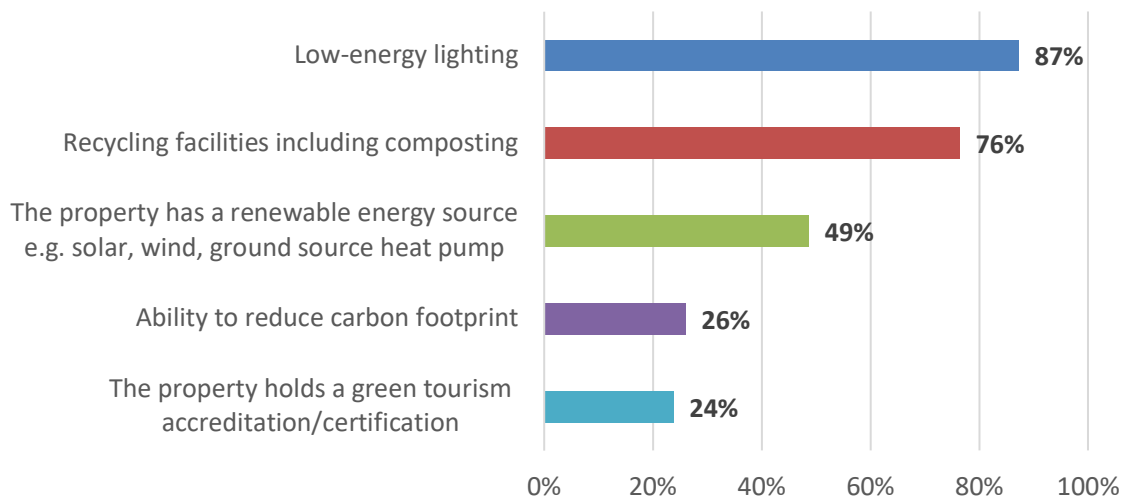
**Figure 3.6: Properties with green credentials**



N=1,364

Green credentials are highlighted in Figure 3.7. 87% of operators had low-energy lighting, 76% recycling facilities and 49% had a renewable energy source.

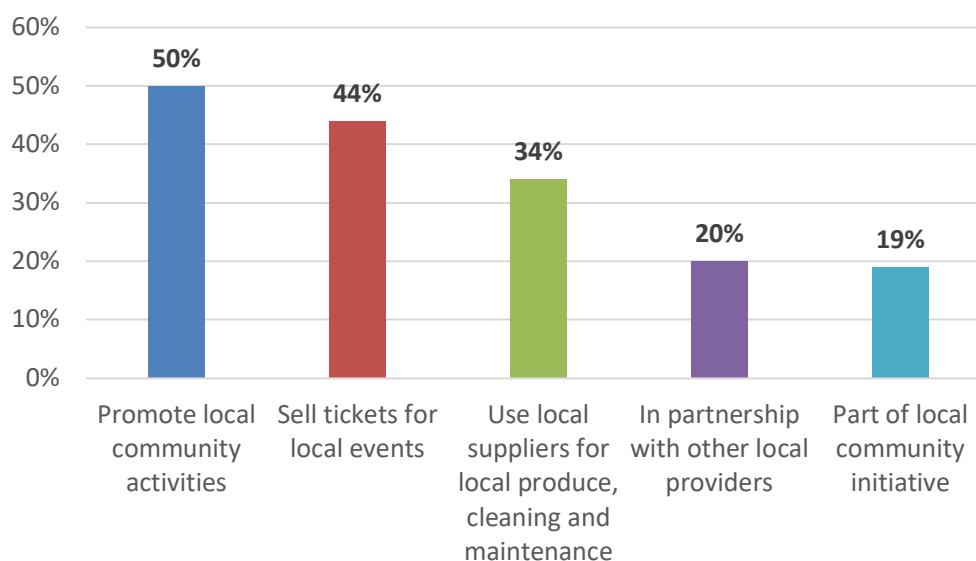
**Figure 3.7: Green credentials held**



N=635

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

**Figure 3.8: Integration with local community**



N=1,292

### 3.10 Staffing and expenditure

Operators were asked about staff numbers in part and full-time roles (Table 3.7). Results show that **during high season operators employed, on average, 1 member of staff fulltime and 2.7 part time (paid staff). During low season fulltime staff remained almost the same while part time staff reduced to 2.1.** Unpaid staff remained fairly consistent during high and low season.

**Table 3.7: Average number of staff in employment 2019**

	High season				Low season			
	Paid employment		Unpaid employment		Paid employment		Unpaid employment	
	Total	Avg. per operator	Total	Avg. per operator	Total	Avg. per operator	Total	Avg. per operator
Full time (35 hours per week or more)	264	1	528	1.7	122	0.6	260	1
Part time (25-35 hours per week)	58	0.3	161	0.7	34	0.2	344	1.2
Part time (15-25 hours per week)	79	0.4	219	1	62	0.4	956	1.9
Part time (5-15 hours per week)	262	0.9	660	1.6	158	0.7	535	1.4
Part time (0-5 hours per week)	249	1.1	447	1.2	158	0.8	158	1.9

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 3.8 and 3.9. Findings show that current or future spend is almost half of spend in 2019.



**Table 3.8: Spend in 2019<sup>11</sup>**

	2019	
	Total expenditure	Avg. per operator
Wages and salaries (including cleaning staff)	£9,856,937	£14,285
Capital expenditure on your property (including extensions and property maintenance)	£10,719,259	£15,558
Agency and OTA fees	£1,737,202	£2,525
Painting and decorating	£1,097,970	£1,591
Food and drink, welcome pack consumables	£790,714	£1,146
Furnishings	£1,249,529	£1,811
Laundry	£1,439,886	£2,087
Business services (e.g. accountancy, web design and booking systems)	£1,199,199	£1,746
Cleaning and cleaning products & equipment (excluding staff salaries)	£640,788	£931
Maintenance (gardening, window cleaning, plumber)	£1,091,581	£1,582
Marketing (online, printed)	£887,044	£1,286
Accessibility features	£100,304	£147
Green credentials	£162,449	£237
Other (specify what)	£891,647	£1,296
<b>Total expenditure</b>	<b>£31,864,509</b>	<b>£46,228</b>

N=693

**Table 3.9: Current or future spend in 2020<sup>12</sup>**

	2020		
	Total expenditure	Avg. per operator	Change since 2019
Wages and salaries (including cleaning staff)	£6,702,049	£9,741	-32%
Capital expenditure on your property (including extensions and property maintenance)	£4,224,957	£6,141	-61%
Agency and OTA fees	£1,072,673	£1,557	-38%
Painting and decorating	£596,037	£864	-46%
Food and drink, welcome pack consumables	£381,347	£553	-52%
Furnishings	£653,268	£947	-48%
Laundry	£889,949	£1,290	-38%
Business services (e.g. accountancy, web design and booking systems)	£895,224	£1,299	-26%
Cleaning and cleaning products & equipment (excluding staff salaries)	£480,258	£698	-25%
Maintenance (gardening, window cleaning, plumber)	£851,577	£1,234	-22%
Marketing (online, printed)	£638,928	£926	-28%
Accessibility features	£11,269	£16	-89%
Green credentials	£37,047	£54	-77%
Other (specify what)	£53,800	£89	-93%
<b>Total expenditure</b>	<b>£17,488,383</b>	<b>£25,409</b>	<b>-45%</b>

N=693

<sup>11</sup> Reporting where the majority of the financial year was in 2019.

<sup>12</sup> Reporting where the majority of the financial year was in 2020.

Per property, expenditure ranged from £9,433 - £20,723 in 2019 reducing to £4,763 - £13,017. Wales saw the highest spend per property with Northern Ireland showing the lowest.

Grossing that spend up to the total population (86,445 self-catering properties across the UK), operators spent a total of £1.2bn in 2019 reducing to £726.1m in 2020.

Table 3.10 shows grossed total expenditure.

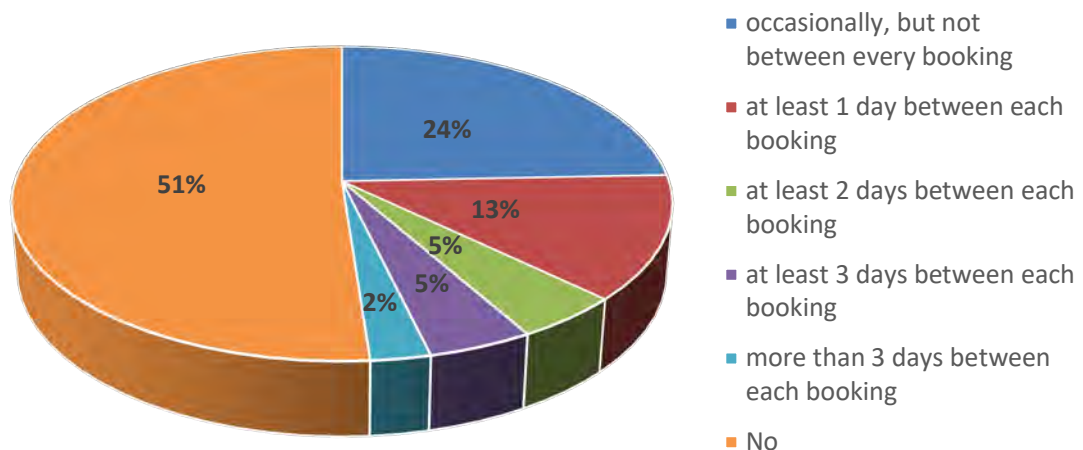
**Table 3.10: Grossed expenditure at a country level – 2019 and 2020**

Country	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
England	£13,788,557	£56,245	£12,783	£717.4m	£7,940,774	£32,576	£7,404	£415.5m
Scotland	£14,679,442	£46,332	£20,144	£358.4	£7,581,813	£24,000	£10,435	£185.7m
Wales	£2,395,833	£35,232	£20,723	£163.6m	£1,538,786	£22,129	£13,017	£102.8m
Northern Ireland	£763,837	£15,093	£9,433	£43.7m	£385,649	£7,621	£4,763	£22.1m

15% (151) 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 2 cleaning staff.

Not surprisingly the majority (85%, 780) noted that **cleaning costs increased as a result of Covid-19**. Almost half (49%) of operators said they were blocking days between bookings for additional cleaning as shown in Figure 3.9. Almost one quarter (24%) said they occasionally blocked for cleaning, but not between every booking while 25% had between 1-3 days blocked for cleaning between each booking.

**Figure 3.9: Additional cleaning days**



N=932

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 3.11 summarises the investment.

**Table 3.11: Operator investment**

	<b>Last financial year (2019/20)</b>	<b>This financial year (2020/21)</b>	<b>Next financial year (2021/22)</b>
Less than £10k	62% (514)	73% (581)	77% (546)
£11k to £25k	23% (191)	19% (148)	15% (109)
£26k up to £50k	8% (65)	5% (38)	4% (28)
Over £51k	7% (58)	4% (32)	4% (28)

When asked what they see as the key opportunities for the self-catering sector within the next three to five years, operators noted the following:

- the increased popularity of staycations due to:
  - safer than travelling abroad
  - more environmentally friendly
- green tourism
- increase in adventure tourism

There were also some concerns noted by operators, mainly:

- lack of funding for the sector from Government
- Covid-19 and short-let regulations being viewed as harmful to the sector

## 4 Visitors Survey

An online visitor survey was open from March - May 2021. The survey was disseminated widely by sponsors and stakeholders. **5,158 visitors completed the survey.** Table 4.1 shows the spread of visitors across the four countries. A number of visitors did not provide location details. Visitors were asked to tell us about a visit in 2020 i.e. during Covid-19 (**Visit 1**) and during 2019 (**Visit 2**).

**Table 4.1: Location of holiday self-catering properties visited**

Location	Visitors	
	Visit during 1 (2020)	Visit during 2 (2019)
England	1,605	1,606
Scotland	718	681
Wales	183	175
Northern Ireland	5	12
Unknown/ not applicable	2,647	2,684
<b>Total consulted</b>	<b>5,158</b>	<b>5,158</b>

Source: Frontline Self-Catering Visitor Survey, 2021

### 4.1 Visitor origin and number of trips

The majority of survey participants lived in England (73%) with 21% from Scotland. 3% were from Wales and 0.5% from Northern Ireland. 3% came from outside the UK.

**Table 4.2: Visitor home country**

Location	Visitors
England	73% (3,768)
Scotland	21% (1,076)
Wales	3% (147)
Northern Ireland	0.5% (24)
Outside the UK <sup>13</sup>	3% (138)

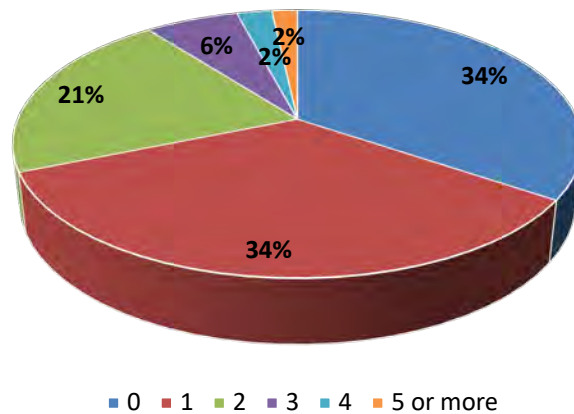
Source: Frontline Self-Catering Visitor Survey, 2021

N=5,153

Around one third (34%) 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 34% staying only once.

<sup>13</sup> 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

**Figure 4.1: Number of visits to self-catering properties in the past 12 months (up to and including November 2020)**

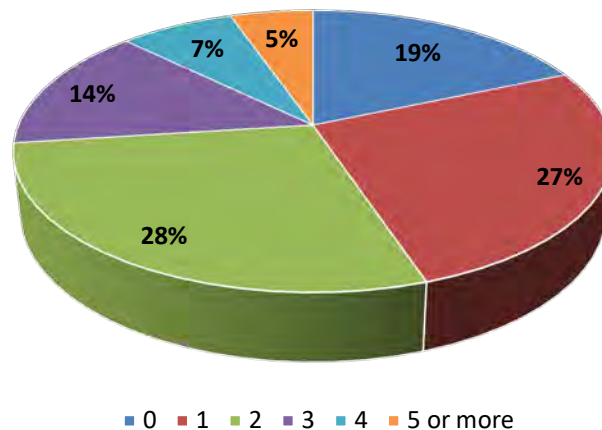


Source: Frontline Self-Catering Visitor Survey, 2021

N=4,603

Looking at the year before (up to November 2019), just over half of respondents (55%) had stayed in a self-catering property once or twice. A further 26% stayed three or more times with just 19% saying they did not stay in a self-catering property during this time.

**Figure 4.2: 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

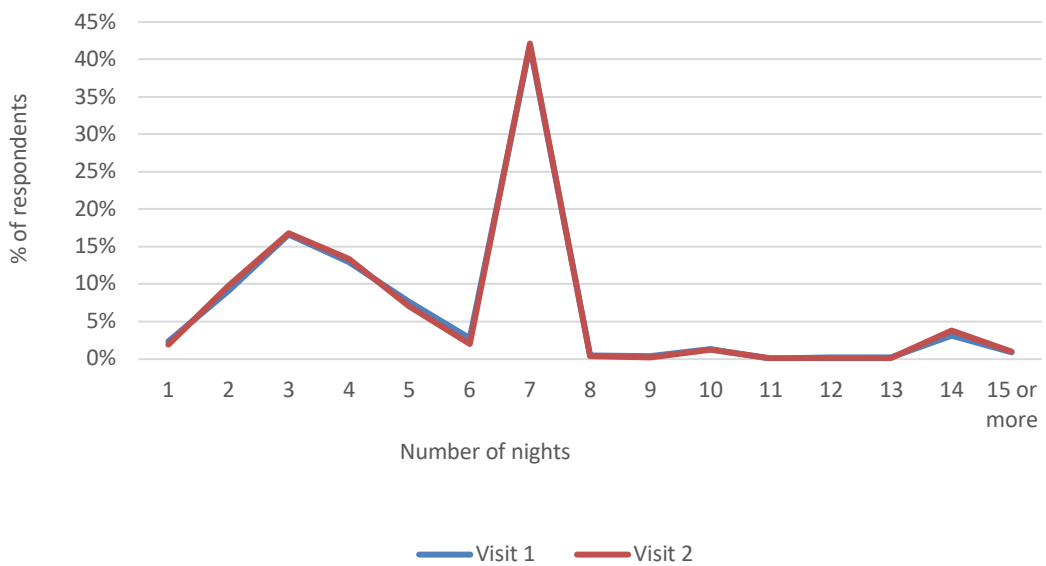
N=4,661

**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 5.5 nights during visit 1 and 5.6 nights in visit 2. The distribution of responses is shown in Figure 4.3 and demonstrates a very consistent trend between visit 1 and 2.

**Figure 4.3: Number of nights stayed per visit**



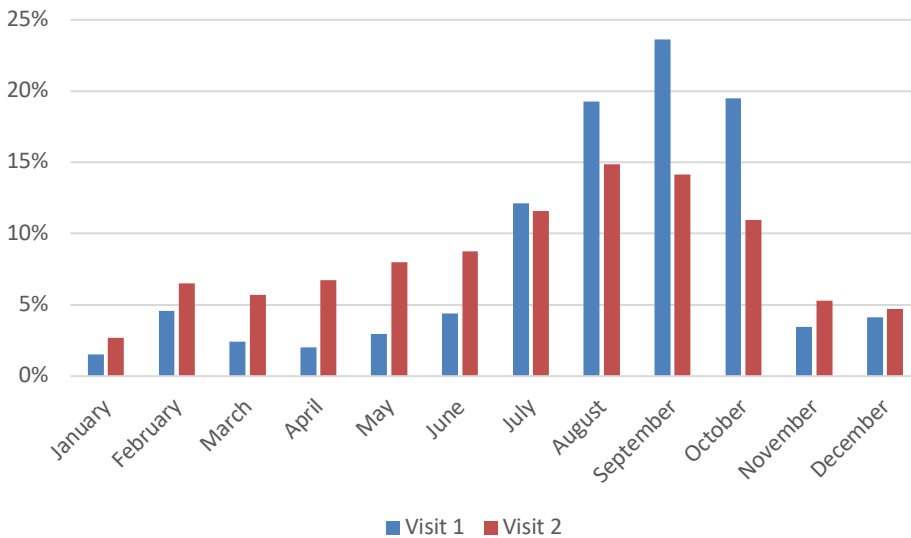
Source: Frontline Self-Catering Visitor Survey, 2021

N=2,072

Figure 4.4 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 4.4: Month during which visit began**



Source: Frontline Self-Catering Visitor Survey, 2021

N= 1,964

Tables 4.3 and 4.4 shows the number of adults, children and pets in each party for visit 1 (2020) and visit 2 (2019).

During visit 1 (2020), 31% of groups included children. Where parties were travelling with children, the average number of children in each group was 1.9. Similarly, 31% of groups brought a pet.

When looking at **visit 2 (2019)**, the average adult group size was three, and 33% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2.2. 30% of groups brought a pet and no groups brought more than three pets.

**Table 4.3: Number of adults, children and pets in each group during visit 1 (2020)**

	Number of adults	Number of children	Number of pets
<b>1</b>	3%	35%	68%
<b>2</b>	62%	44%	26%
<b>3</b>	9%	12%	5%
<b>4</b>	14%	5%	
<b>5</b>	3%	1%	
<b>6</b>	5%	1%	
<b>7</b>	1%	1%	
<b>8</b>	1%	0%	
<b>9</b>	0%	1%	
<b>10+</b>	1%	1%	
<b>Average</b>	<b>2.7</b>	<b>1.9</b>	<b>1.2</b>

Source: Frontline Self-Catering Visitor Survey, 2021

**Table 4.4: Number of adults, children and pets in each group during visit 2 (2019)**

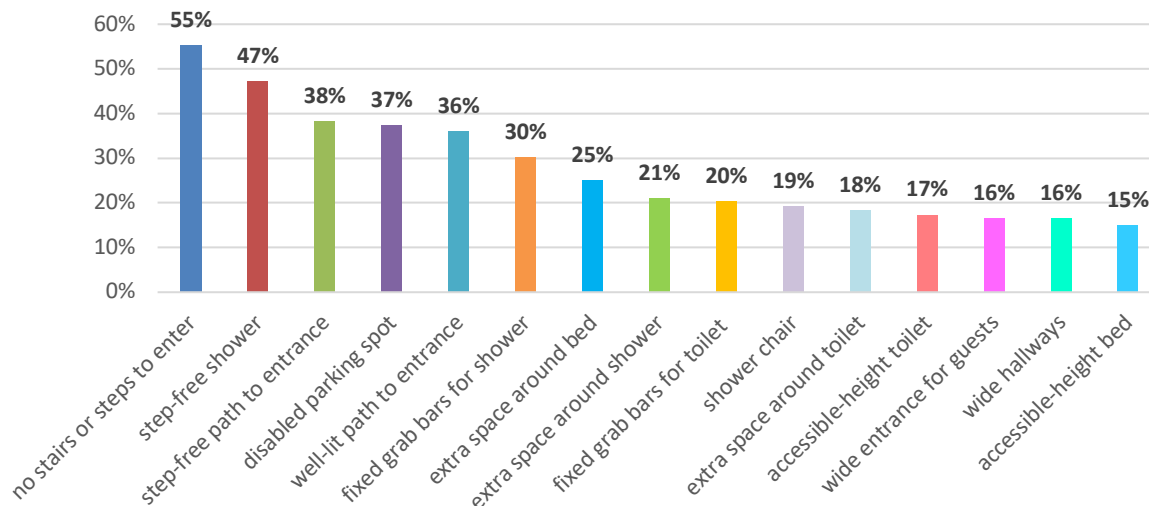
	Number of adults	Number of children	Number of pets
<b>1</b>	3%	32%	64%
<b>2</b>	54%	40%	29%
<b>3</b>	9%	14%	6%
<b>4</b>	16%	8%	
<b>5</b>	5%	3%	
<b>6</b>	6%	1%	
<b>7</b>	2%	0%	
<b>8</b>	2%	1%	
<b>9</b>	1%	1%	
<b>10+</b>	3%	32%	
<b>Average</b>	<b>3</b>	<b>2.2</b>	<b>1.3</b>

Source: Frontline Self-Catering Visitor Survey, 2021

### 4.3 Accommodation requirements

8% (358) of respondents said that they required accessibility features in self-catering accommodation. Those most commonly noted included:

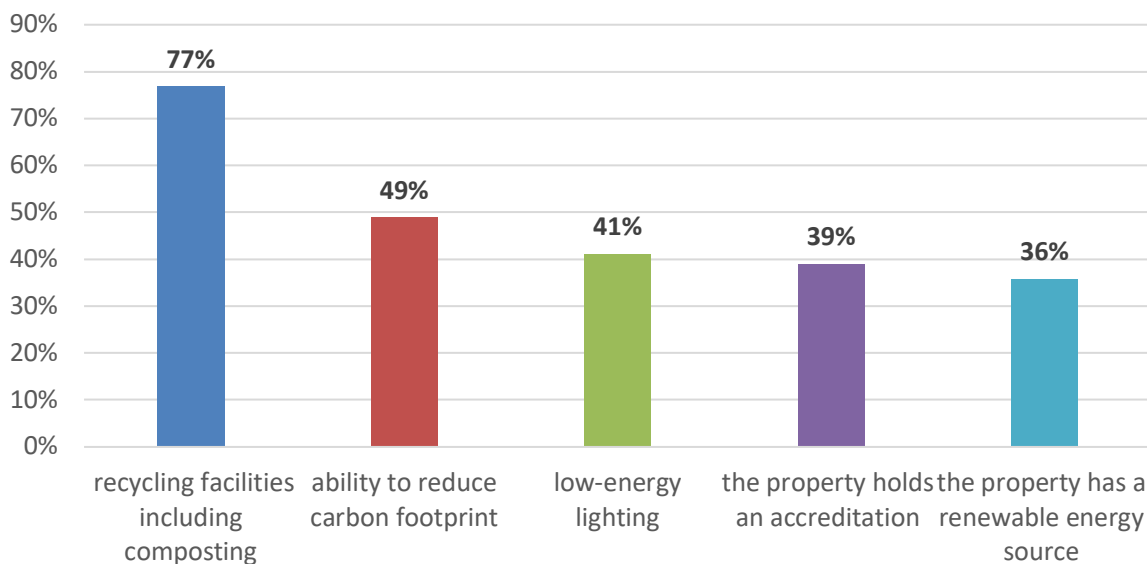
Figure 4.5: Accessibility features



N=358

38% (1,733) consider green/eco-friendly credentials when choosing self-catering accommodation. Feature's respondents look for included:

Figure 4.6: Green credentials



N=1,733



#### 4.4 Visitor expenditure

Visitors who stayed in self-catering property (**visit 2, 2019**), spent, on average, **£1,489** during their visit. This reduced to **£1,255 during visit 1 (2020)**.

**Table 4.5: 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	£91	£115	-21%
Travel during stay	£49	£51	-4%
Accommodation fees	£691	£761	-9%
Food and drink (in supermarkets)	£121	£125	-3%
Food and drink (in local shops and farmers markets)	£58	£67	-13%
Food and drink (in bars, cafes, pubs and restaurants)	£119	£201	-41%
Other shopping (e.g. gifts, clothes, souvenirs)	£61	£76	-20%
Outdoor recreation (e.g. sailing, surfing, cycling, horse riding)	£25	£32	-22%
Visitor attractions (e.g. heritage sites, theme parks, gardens)	£30	£45	-33%
Outdoor sports (shooting, fishing)	£10	£17	-41%
<b>Total</b>	<b>£1,255</b>	<b>£1,489</b>	<b>-16%</b>

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

When looking at country level spend, visitors to Scotland spent more money than any other country. Looking at visit 1 (2020) and visit 2 (2019) spend, visitors to all countries reduced their spend during Covid-19.

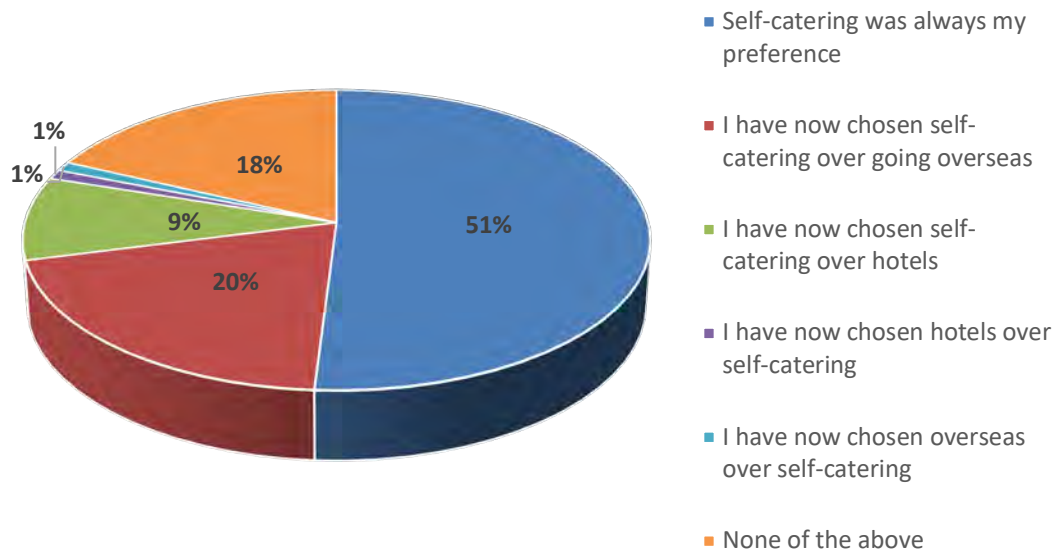
**Table 4.6: Average visitor spend per party by country**

Country	Average spend per party		
	Visit 1 (2020)	Visit 2 (2019)	Change since 2019
England	£1,211	£1,309	-7%
Scotland	£1,500	£1,859	-19%
Northern Ireland	£1,062	£1,343	-21%
Wales	£1,173	£1,334	-12%

#### 4.5 Impacts of Covid-19

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

**Figure 4.7: As a result of Covid-19**

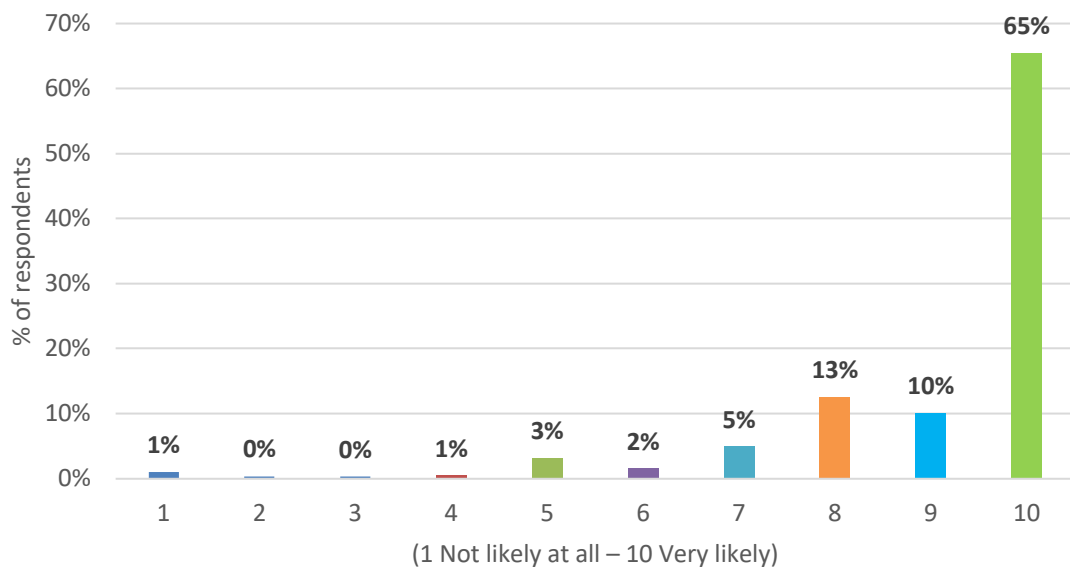


N=4,667

**51% said self-catering in the UK was always their preference followed by 20% now choosing UK 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 UK self-catering in the future. **93% rated their likeliness to stay in self-catering in the future as 7 or more out of 10, with 65% rating 10.**

**Figure 4.8: Extent to which visitors were likely to use UK self-catering in the future**

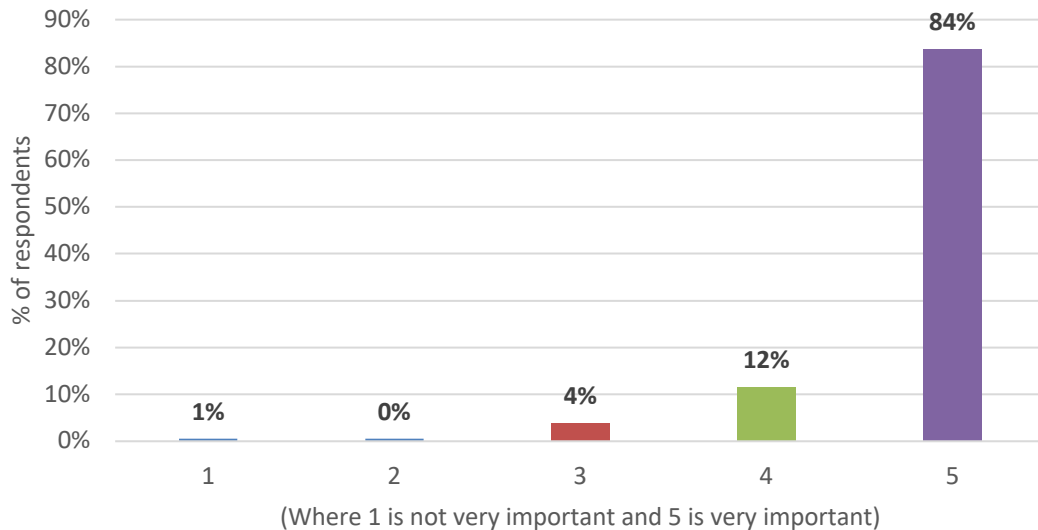


N= 4,629

**Over two-thirds (70%, 2,475) 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.**

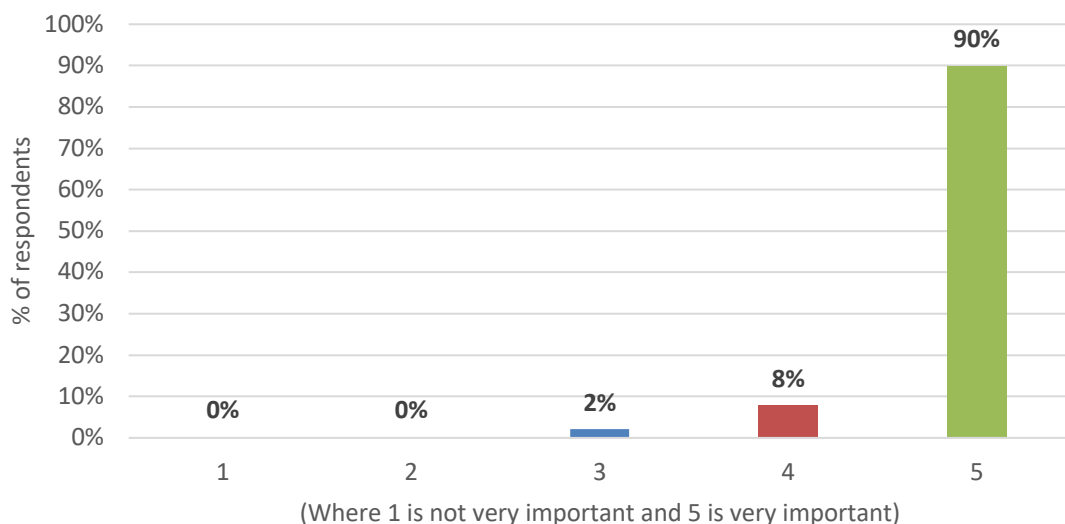
**Figure 4.9: Importance of cleaning standards in choice of self-catering accommodation**



N=3,514

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. **All rated this three or above and 90% said very important.**

**Figure 4.10: How important is having flexible cancellation terms due to Covid-19**



N=4,605

Key features of flexible cancellation terms included:

- a full refund (77%, 3,529)
- ability to rebook with the same terms and conditions (68%, 3,130)
- refundable deposit (51%, 2,337)

## 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 in each of the four countries in the UK, using the following five key indicators to illustrate the sector's economic value:

1. Number of properties: the number of self-catering properties that are available to visitors in each country, using data supplied to us by the ASSC, PASC and Tourism NI.
2. Visitor nights per year: the total number of overnight stays that took place in self-catering properties in each country over the course of 2019 and 2020, based on a review of 1,000,724 transaction records provided to us by SuperControl (see Appendix 2 for occupancy breakdowns).
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 5,158 visitors to UK 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 the country 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 supports<sup>14</sup>.
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 3, a glossary of technical terms in Appendix 4, and a description of the economic impact calculation methodology in Appendix 5.

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

**The impact by region for each country is presented in separate country reports.**

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<sup>14</sup> 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 UK country

It is estimated that in **2019** visitors to UK self-catering properties spent a **total of £2,563m in the UK economy**. This visitor expenditure **supports 69,635 FTE jobs and contributed £1,441m of GVA to the UK economy**. This resulted in a **total economic contribution of £1,980.3m**.

In **2020** visitors to UK self-catering properties spent a **total of £2,054.8m in the UK economy**. This visitor expenditure **supports 56,599 FTE jobs and contributed £1,155.3m of GVA to the UK economy**. This resulted in a **total economic contribution of £1,587m**.

**This was a 20% reduction to the previous year.**

Tables 5.1 and 5.2 summarise the impact at a country level in 2019 and 2020.

**Table 5.1: Economic impacts by UK Country 2019**

	<b>Total visitor nights</b>	<b>Total visitor spend (£m)</b>	<b>Total GVA impact (£m)</b>	<b>Total FTE employment (FTE jobs)</b>	<b>Total economic contribution (£m)</b>
England	5,967,630	1,446.6	816	39,243	1,121.6
Scotland	2,412,382	867.1	489.3	23,979	672.3
Wales	703,962	173.1	97.7	4,787	134.2
Northern Ireland	306,203	76.2	38	1,626	52.2
<b>UK total</b>	<b>9,390,177</b>	<b>2,563</b>	<b>1,441</b>	<b>69,635</b>	<b>1,980.3</b>

Source: Frontline, 2021

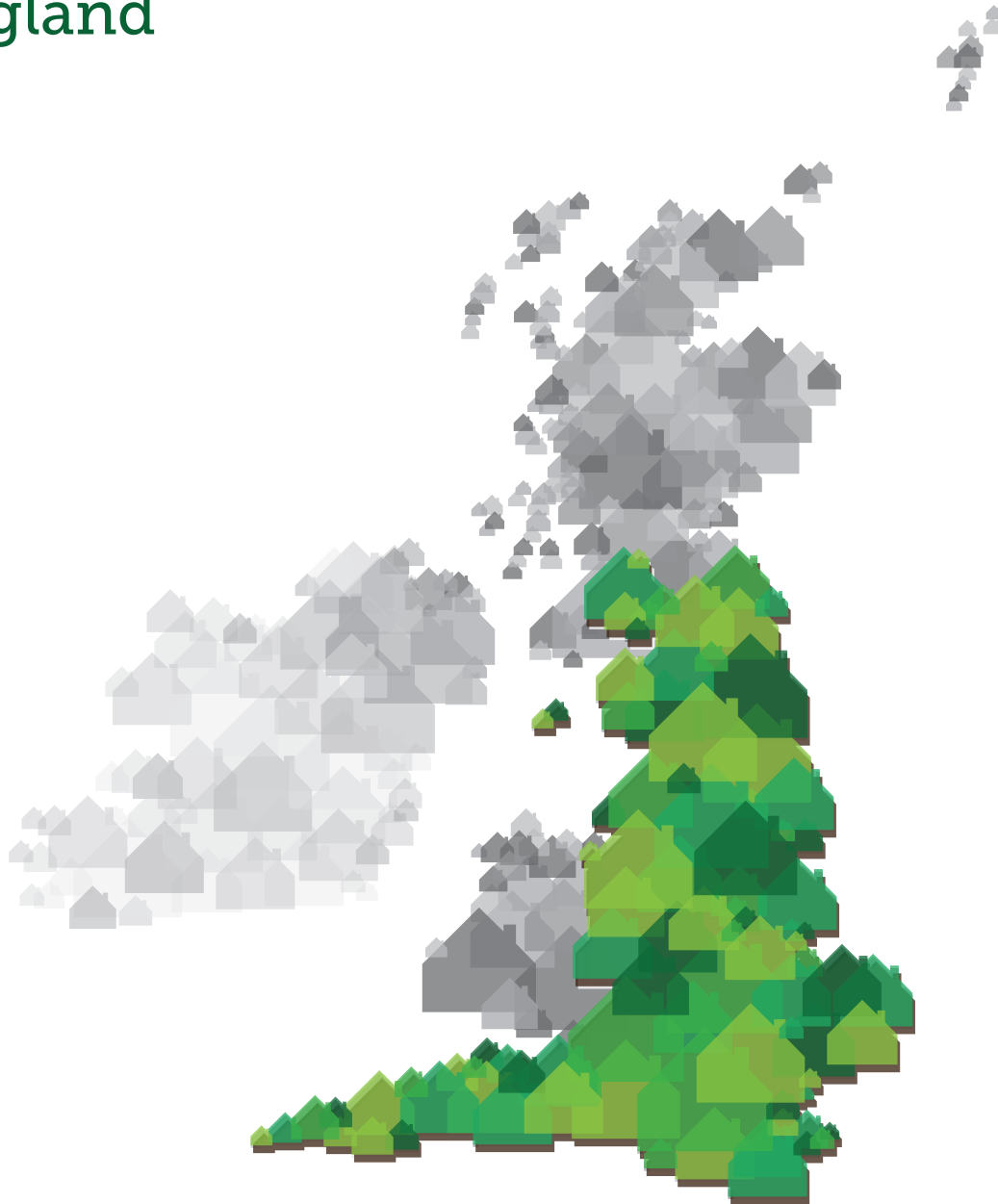
**Table 5.2: Economic impacts by UK Country 2020**

	<b>Total visitor nights</b>	<b>Total visitor spend (£m)</b>	<b>Total GVA impact (£m)</b>	<b>Total FTE employment (FTE jobs)</b>	<b>Total economic contribution (£m)</b>
England	5,545,583	1,243.6	702	34,391	964.3
Scotland	1,812,250	614.8	346.9	17,002	476.7
Wales	621,383	135	76.2	3,733	104.7
Northern Ireland	311,200	61.2	30.1	1,473	41.3
<b>UK total</b>	<b>8,290,416</b>	<b>2,054.8</b>	<b>1,155.3</b>	<b>56,599</b>	<b>1,587</b>

Source: Frontline, 2021

The sections that follow provide an infographic summary of impact findings for each country for 2019 as this was a more 'typical year'.

# England



- 56,125 properties
- 5.9 million visitor nights per year
- £1.4 billion total visitor spend
- Supports 39,243 FTE jobs
- £1.1 billion Contribution to the English economy

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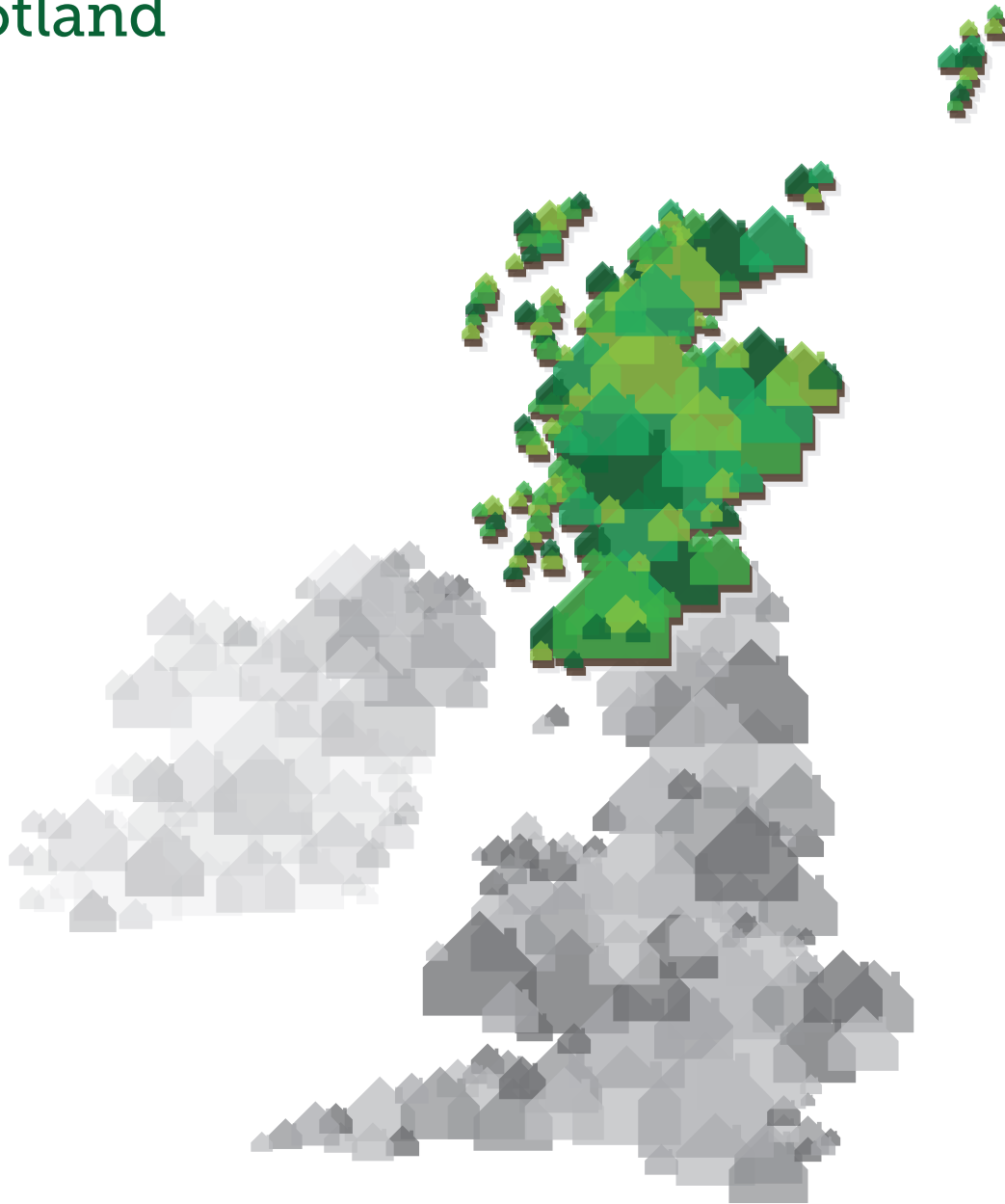
## Areas with the greatest number of properties

1. South West (21,730)
2. East of England (7,345)
3. Yorkshire and Humber (6,540)
4. North West (6,100)
5. South East (5,360)

# Gross Visitor Spend by Item (England)



# 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

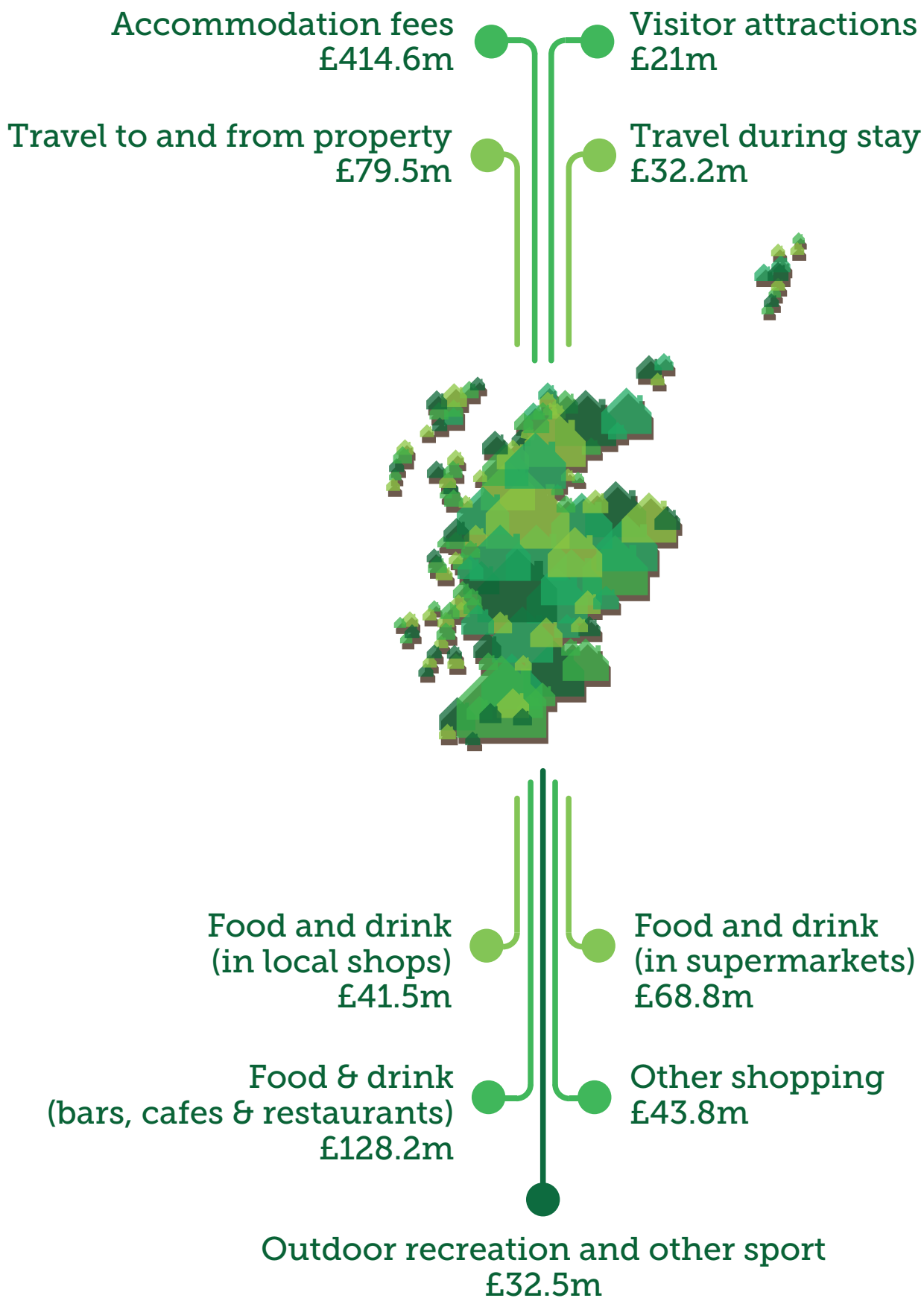
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## Areas with the greatest number of properties

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)



# Wales



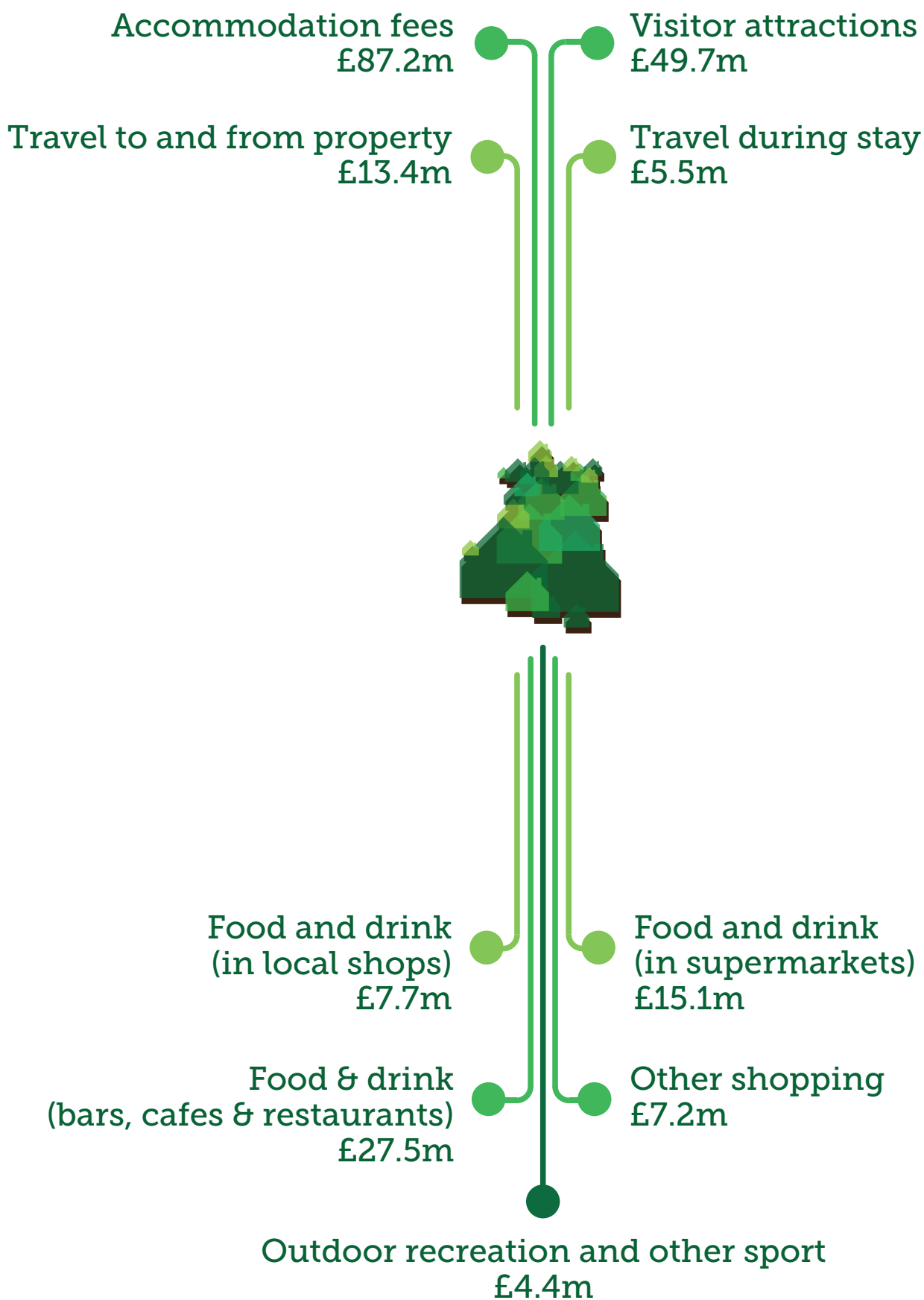
- 7,895 properties
- 0.7 million visitor nights per year
- £173.1 million total visitor spend
- Supports 4,787 FTE jobs
- £134.2 million Contribution to the Welsh economy

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## Areas with the greatest number of properties

1. Dyfed (3,130)
2. Gwynedd incl. Conwy (2,520)
3. Anglessey (735)
4. Powys (690)
5. Clwyd (270) & West Glamorgan (270)

# Gross Visitor Spend by Item (Wales)



# Northern Ireland



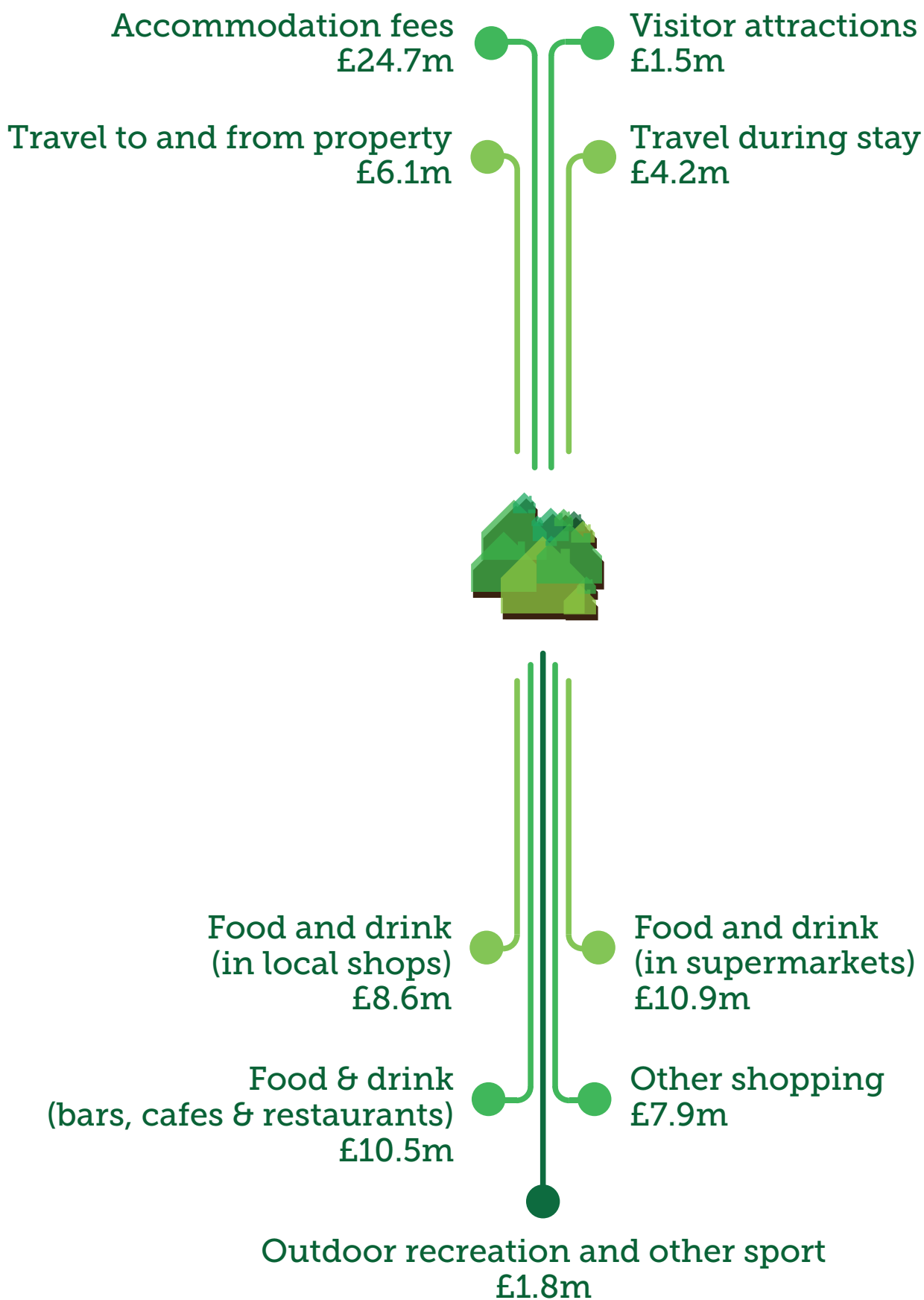
- 4,631 properties
- 0.31 million visitor nights per year
- £76.2 million total visitor spend
- Supports 1,626 FTE jobs
- £52.2 million Contribution to the Northern Irish economy

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## Areas with the greatest number of properties

1. Causeway Coast and Glens (2,346)
2. Belfast (634)
3. Newry, Mourne and Down (420)
4. Fermanagh and Omagh (340)
5. North Down and Ards (213)

# Gross Visitor Spend by Item (Northern Ireland)



## Appendix 1 – Stakeholder List

Jackie Robertson	Best Cottages Scotland
Claire Willis	CoolStays
Nigel Pollard	Discover Scotland
Steve and Sarah Jarvis	Independent Cottages
Val Hawkins	Mid Wales Tourism
Joanne Stuart	NI Tourism Alliance
Beth Bailey	Premier Cottages
Marc Crothall	Scottish Tourism Alliance
James Starkey	The Travel Chapter
Jayne McLure	The Travel Chapter
Kurt Janson	Tourism Alliance, Policy Director
Anie Kearney	Tourism NI
Paul McIvor	Tourism NI
Kate Nicholls	UK Hospitality
Sheila Gilmour	Visit Arran
Mark Tate	Visit Cairngorms
Riddell Graham	VisitScotland
Andrew Campbell	Wales Tourism Alliance
Adrian Greason-Walker	Wales Tourism Alliance

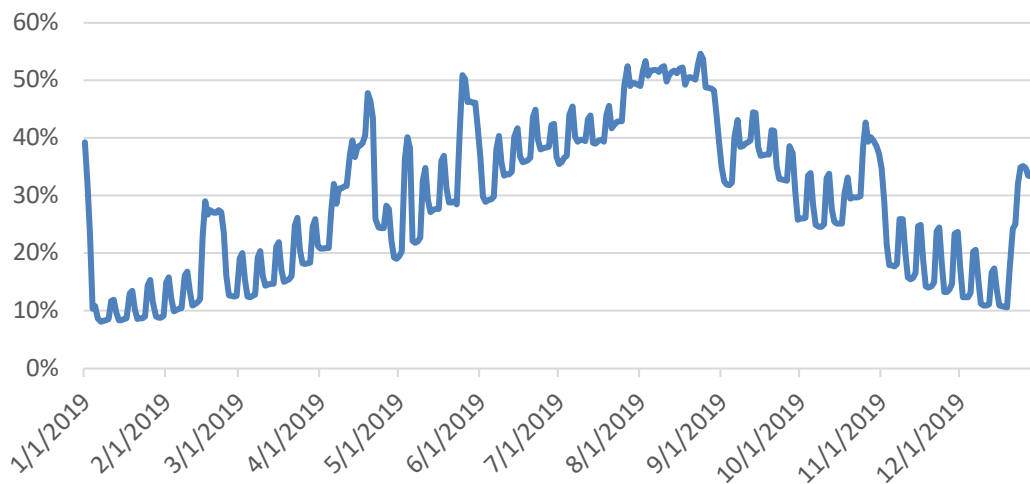
## Appendix 2 – SuperControl Occupancy Data

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

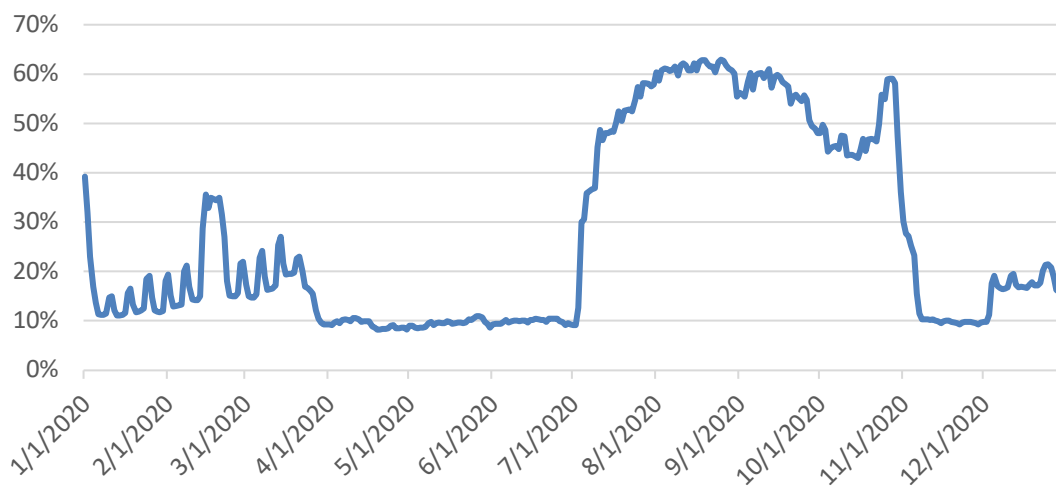
### England

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



N= 15,806 properties

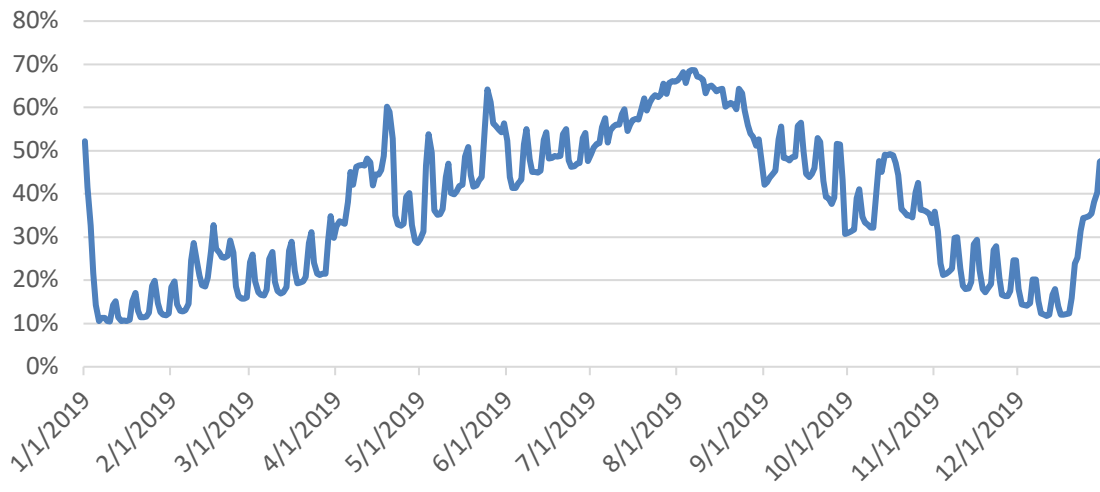
Occupancy rates, 1st January 2020 to 31st December 2020



N= 13,015 properties

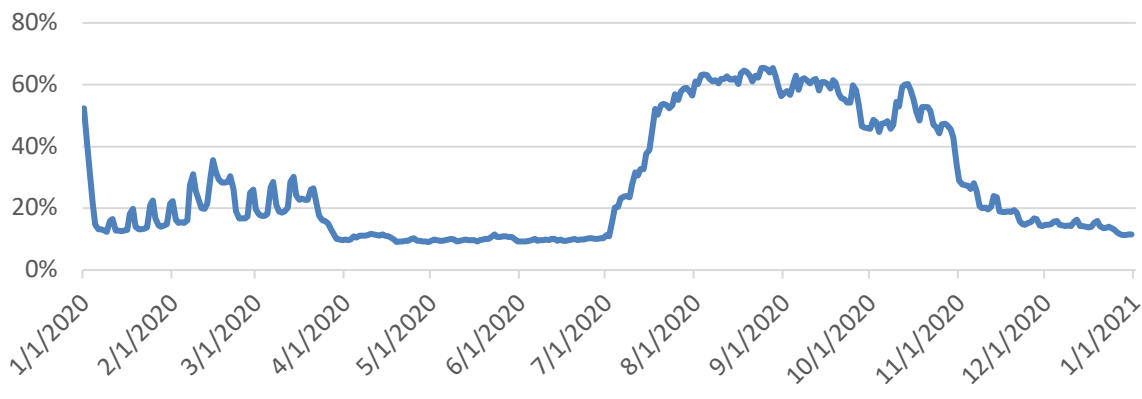
**Scotland**

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



N= 4,594 properties

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

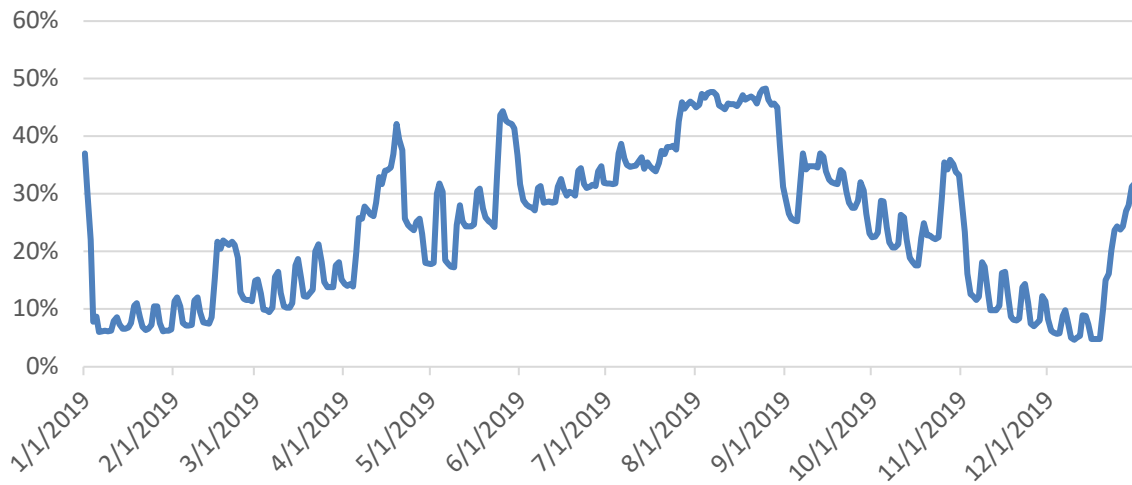


N= 4,867 properties



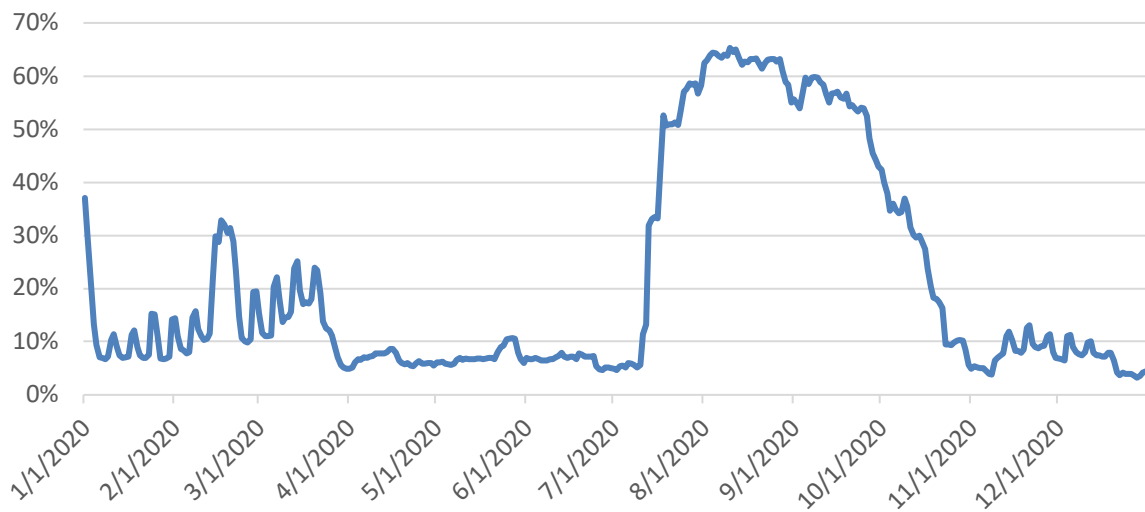
## Wales

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



N= 1,611 properties

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

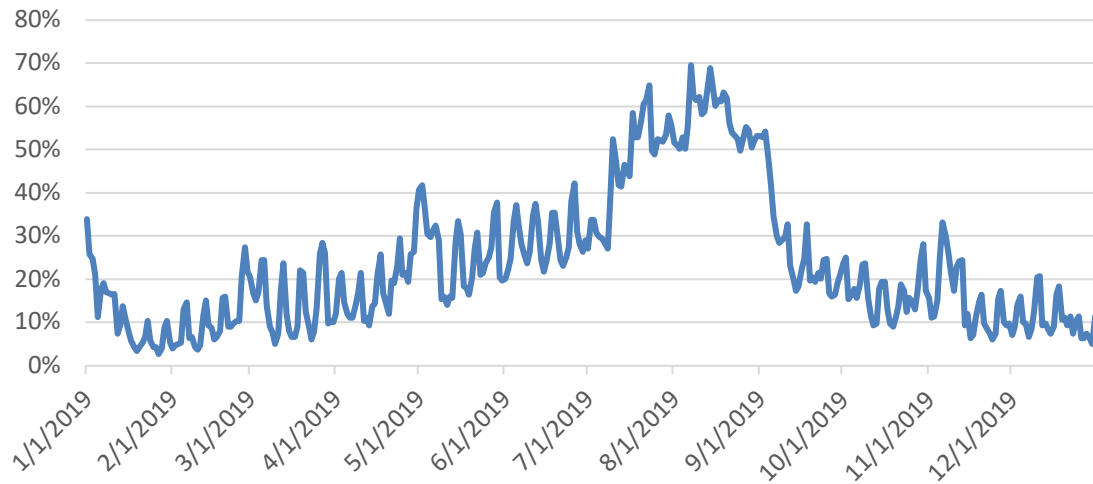


N= 1,219 properties

## Northern Ireland

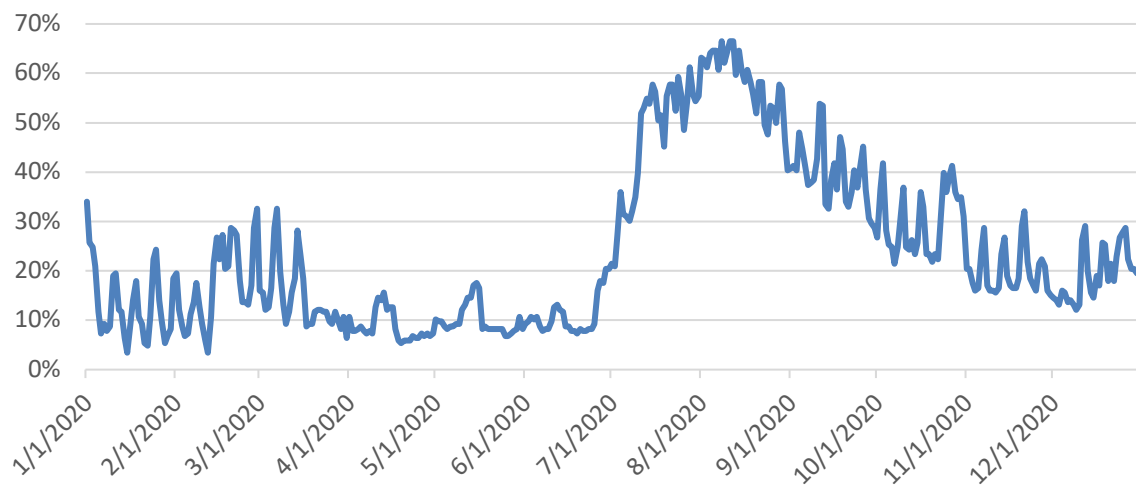
\*Occupancy for Northern Ireland was based on a small sample of properties and may therefore be further underrepresented. When compared to NISRA data collected on occupancy in 2019, the average annual occupancy was 32% compared 24% from our data. As there is no published data for 2020 from NISRA we have kept the data from SuperControl to make it comparable.

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



N= 299 properties

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



N= 206 properties

## Appendix 3 – Detailed Impact Findings

### Total Visitor Nights

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	999,578	2,045,105	1,555,027	691,643	676,277	<b>5,967,630</b>
Scotland	380,866	889,905	640,998	247,295	253,318	<b>2,412,382</b>
Wales	101,051	222,537	183,784	106,921	89,669	<b>703,962</b>
Northern Ireland	277,705	12,647	5,890	3,551	6,410	<b>306,203</b>
<b>UK total</b>	<b>1,759,200</b>	<b>3,170,194</b>	<b>2,385,699</b>	<b>1,049,410</b>	<b>1,025,674</b>	<b>9,390,177</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	928,885	1,900,470	1,445,051	642,728	628,449	<b>5,545,583</b>
Scotland	286,117	668,522	481,536	185,775	190,299	<b>1,812,250</b>
Wales	88,993	195,983	162,541	94,562	79,304	<b>621,383</b>
Northern Ireland	282,237	12,853	5,986	3,609	6,515	<b>311,200</b>
<b>UK total</b>	<b>1,586,232</b>	<b>2,777,828</b>	<b>2,095,114</b>	<b>926,674</b>	<b>904,567</b>	<b>8,290,416</b>

## Total Visitor Spend (£m)

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	242.3	495.7	377.0	167.7	163.9	<b>1,446.6</b>
Scotland	136.9	319.9	230.4	88.9	91.1	<b>867.1</b>
Wales	24.9	54.7	45.2	26.3	22.1	<b>173.1</b>
Northern Ireland	69.1	3.1	1.5	0.9	1.6	<b>76.2</b>
<b>UK total</b>	<b>473</b>	<b>873</b>	<b>654</b>	<b>284</b>	<b>279</b>	<b>2,563</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	208.3	426.2	324.1	144.1	140.9	<b>1,243.6</b>
Scotland	97.1	226.8	163.4	63.0	64.6	<b>614.8</b>
Wales	19.3	42.6	35.3	20.5	17.2	<b>135.0</b>
Northern Ireland	55.5	2.5	1.2	0.7	1.3	<b>61.2</b>
<b>UK total</b>	<b>380</b>	<b>698</b>	<b>524</b>	<b>228</b>	<b>224</b>	<b>2,055</b>

## Direct GVA (£m)

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	136.7	279.7	212.7	94.6	92.5	<b>816</b>
Scotland	77.3	180.5	130.0	50.2	51.4	<b>489.3</b>
Wales	14.0	30.9	25.5	14.8	12.4	<b>97.7</b>
Northern Ireland	34.6	1.5	0.8	0.4	0.8	<b>38.0</b>
<b>UK total</b>	<b>263</b>	<b>493</b>	<b>369</b>	<b>160</b>	<b>157</b>	<b>1,441</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	118	241	183	81	80	<b>702</b>
Scotland	54.8	128.0	92.2	35.6	36.4	<b>346.9</b>
Wales	10.9	24.0	19.9	11.6	9.7	<b>76.2</b>
Northern Ireland	27.4	1.2	0.6	0.3	0.6	<b>30.1</b>
<b>UK total</b>	<b>211</b>	<b>394</b>	<b>296</b>	<b>129</b>	<b>127</b>	<b>1,155</b>

## Direct Multiplier

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	51.1	104.6	79.6	35.4	34.6	<b>305.3</b>
Scotland	28.9	67.5	48.6	18.8	19.2	<b>183.0</b>
Wales	5.2	11.6	9.5	5.5	4.7	<b>36.5</b>
Northern Ireland	12.9	0.6	0.3	0.2	0.3	<b>14.2</b>
<b>UK total</b>	<b>98</b>	<b>184</b>	<b>138</b>	<b>60</b>	<b>59</b>	<b>539</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	44.0	89.9	68.4	30.4	29.7	<b>262.5</b>
Scotland	20.5	47.9	34.5	13.3	13.6	<b>129.8</b>
Wales	4.1	9.0	7.5	4.3	3.6	<b>28.5</b>
Northern Ireland	10.2	0.4	0.2	0.1	0.2	<b>11.2</b>
<b>UK total</b>	<b>79</b>	<b>147</b>	<b>111</b>	<b>48</b>	<b>47</b>	<b>432</b>

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

**2019**

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	187.9	384.4	292.3	130.0	127.1	<b>1,121.6</b>
Scotland	106.1	248.0	178.6	68.9	70.6	<b>672.3</b>
Wales	19.3	42.4	35.0	20.4	17.1	<b>134.2</b>
Northern Ireland	47.5	2.0	1.0	0.6	1.1	<b>52.2</b>
<b>UK total</b>	<b>361</b>	<b>677</b>	<b>507</b>	<b>220</b>	<b>216</b>	<b>1,980</b>

**2020**

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	161.5	330.4	251.3	111.8	109.3	<b>964.3</b>
Scotland	75.3	175.8	126.7	48.9	50.1	<b>476.7</b>
Wales	15.0	33.0	27.4	15.9	13.4	<b>104.7</b>
Northern Ireland	37.6	1.6	0.8	0.4	0.8	<b>41.3</b>
<b>UK total</b>	<b>289</b>	<b>541</b>	<b>406</b>	<b>177</b>	<b>174</b>	<b>1,587</b>

## Direct full time equivalent employment

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	6,701	13,709	10,424	3,876	4,533	<b>39,243</b>
Scotland	3,786	8,846	6,371	2,458	2,518	<b>23,979</b>
Wales	687	1,513	1,250	727	610	<b>4,787</b>
Northern Ireland	1,486	59	33	15	33	<b>1,626</b>
<b>UK total</b>	<b>12,660</b>	<b>24,127</b>	<b>18,078</b>	<b>70,76</b>	<b>7,694</b>	<b>69,635</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	5,761	11,786	8,962	3,986	3,897	<b>34,391</b>
Scotland	2,684	6,272	4,518	1,743	1,785	<b>17,002</b>
Wales	535	1,177	976	568	476	<b>3,733</b>
Northern Ireland	1,341	57	29	16	30	<b>1,473</b>
<b>UK total</b>	<b>10,321</b>	<b>19,292</b>	<b>14,485</b>	<b>63,13</b>	<b>61,88</b>	<b>56,599</b>



## FTE employment multiplier

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	2,506	5,127	3,899	1,450	1,695	<b>14,677</b>
Scotland	1,416	3,308	2,383	919	942	<b>8,968</b>
Wales	257	566	467	272	228	<b>1,791</b>
Northern Ireland	633	27	14	7	14	<b>696</b>
<b>UK total</b>	<b>4,812</b>	<b>9,028</b>	<b>6,763</b>	<b>2,648</b>	<b>2,879</b>	<b>26,132</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	2,154	4,408	3,352	1,491	1,458	<b>12,862</b>
Scotland	1,004	2,346	1,690	652	668	<b>6,359</b>
Wales	200	440	365	212	178	<b>1,396</b>
Northern Ireland	501	21	11	6	11	<b>551</b>
<b>UK total</b>	<b>3,859</b>	<b>7,215</b>	<b>5,418</b>	<b>2,361</b>	<b>2,315</b>	<b>21,168</b>

## Direct, indirect and induced FTE employment impact

2019

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	9,207	18,836	14,323	5,326	6,229	<b>53,920</b>
Scotland	5,202	12,154	8,754	3,377	3,460	<b>32,947</b>
Wales	944	2,079	1,717	999	838	<b>6,578</b>
Northern Ireland	2,327	100	51	27	53	<b>2,557</b>
<b>UK total</b>	<b>17,680</b>	<b>33,169</b>	<b>24,845</b>	<b>9,729</b>	<b>10,580</b>	<b>96,002</b>

2020

Property size	1 bedroom	2 bedrooms	3 bedrooms	4 bedrooms	5+ bedrooms	Total
England	7,915	16,194	12,313	5,477	5,355	<b>47,254</b>
Scotland	3,688	8,618	6,207	2,395	2,453	<b>23,361</b>
Wales	735	1,618	1,342	780	655	<b>5,129</b>
Northern Ireland	1,842	78	40	21	42	<b>2,024</b>
<b>UK total</b>	<b>14,180</b>	<b>26,508</b>	<b>19,902</b>	<b>8,673</b>	<b>8,505</b>	<b>77,768</b>

## Appendix 4 – 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 5 – 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
- country: we applied different average expenditure per visitor group per day to each of the four nations of the UK

In other words, 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.

For each of these combinations of date, and nation, 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