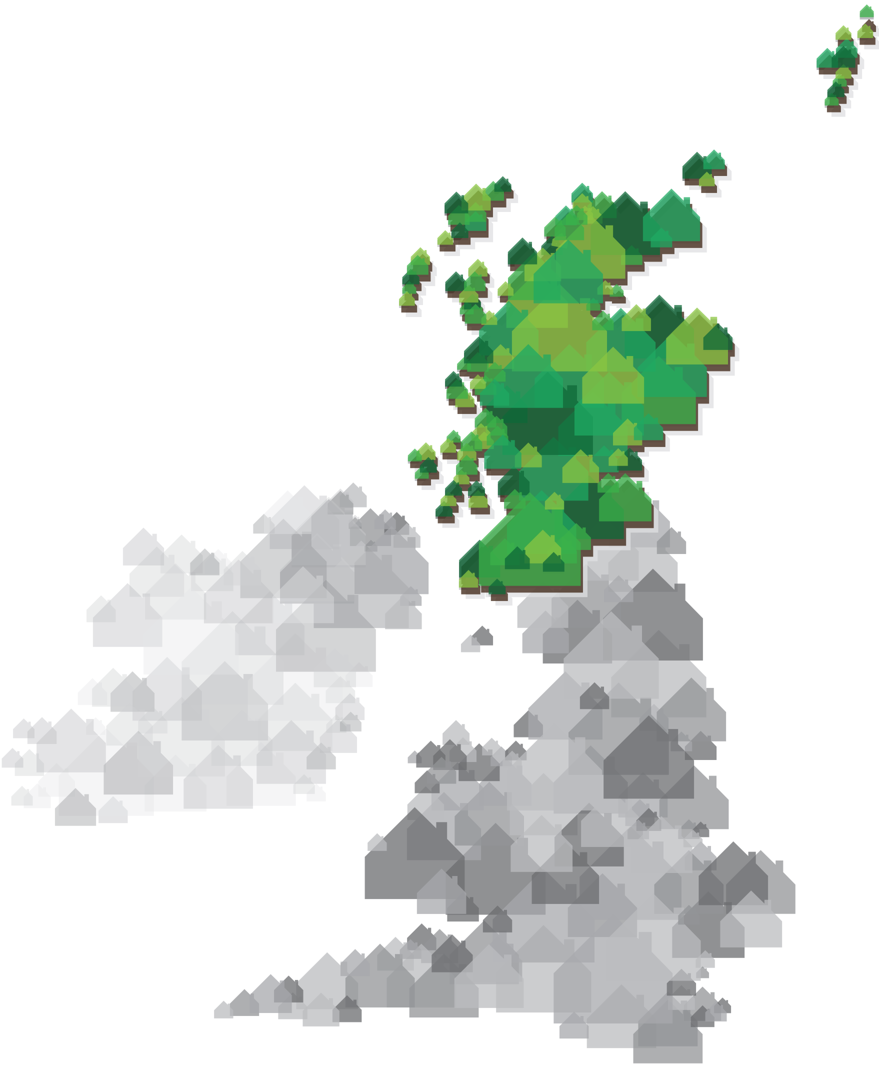
# Economic Impact of Self-Catering Sector to the Scottish Economy



produced by

frontline

curious · committed · smart · proactive

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

August 2021

PASC
www.pascuk.co.uk

Association of Scotland's Self-Caterers
Supporting self-catering in Scotland

supercontrol

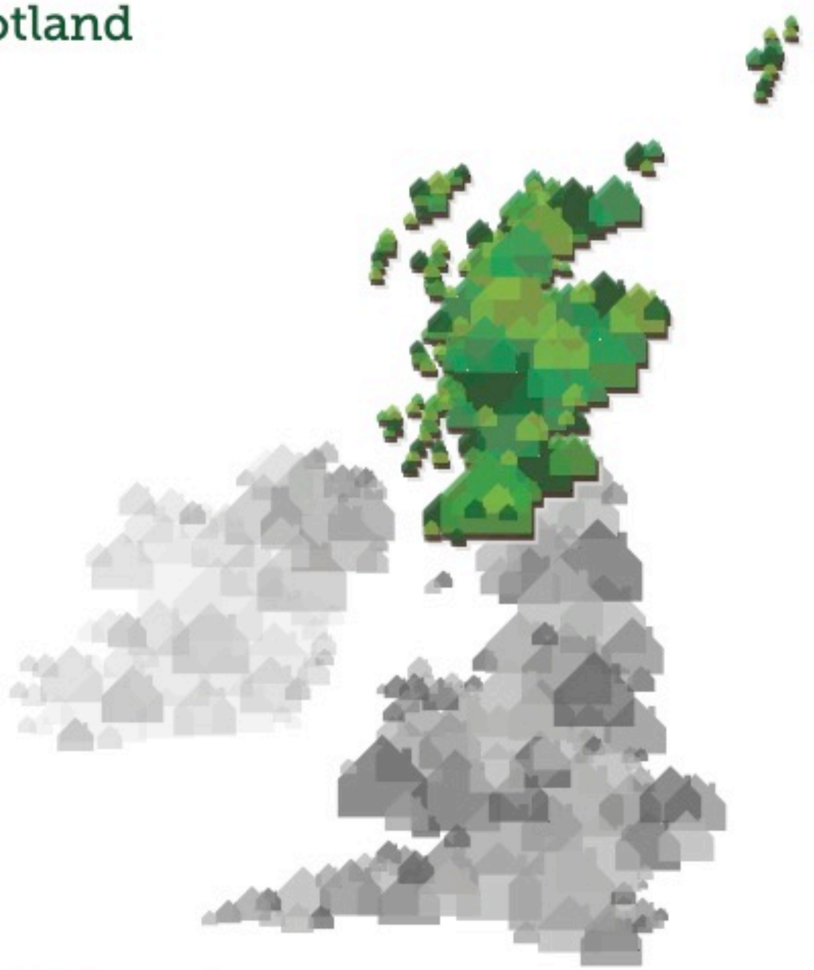
## Contents Page



This economic impact assessment was sponsored by SuperControl

# 1 Executive Summary

## Scotland



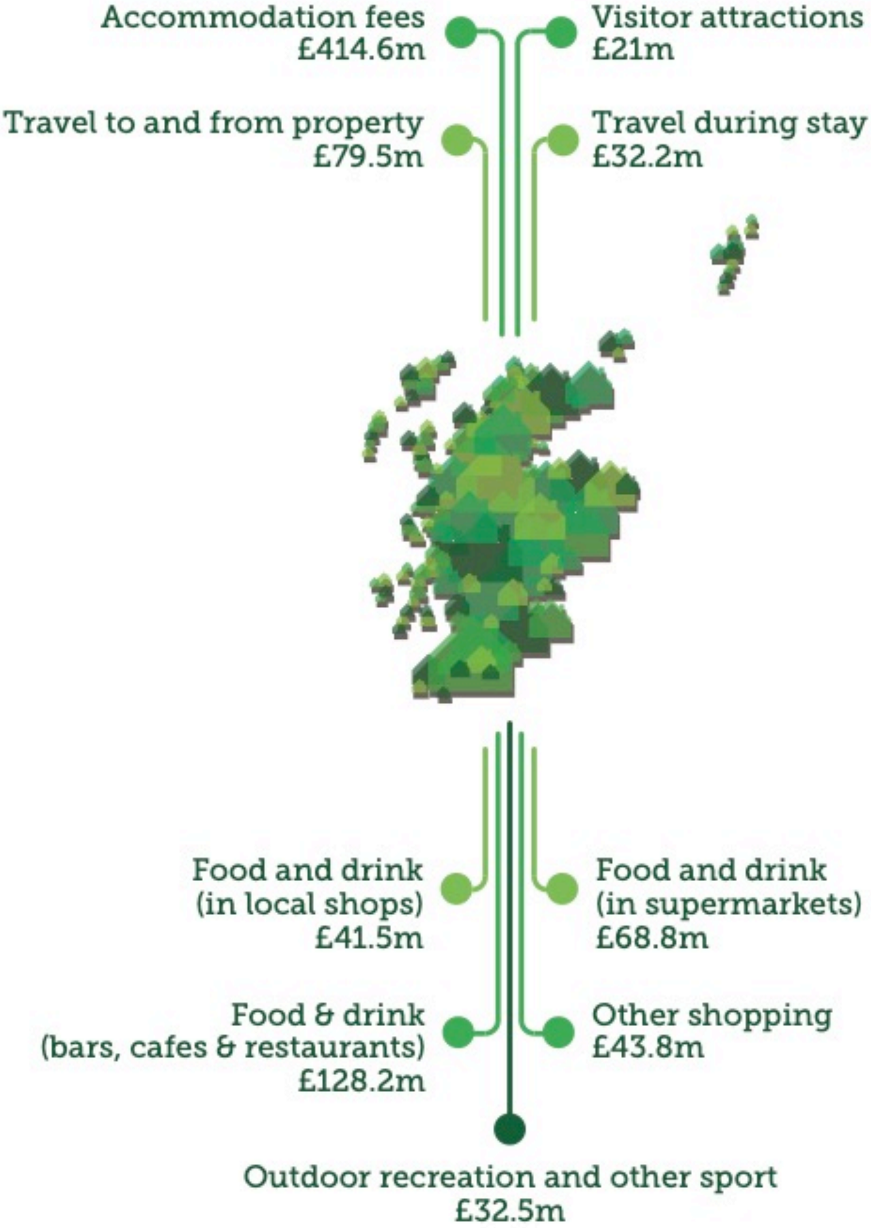
- 17,794 properties
- 2.4 million visitor nights per year
- £867.1 million total visitor spend
- Supports 23,979 FTE jobs
- £672.3 million Contribution to the Scottish economy

---

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 terms[1]. 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[2].

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[3].

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: ASSC[5])

### 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% |

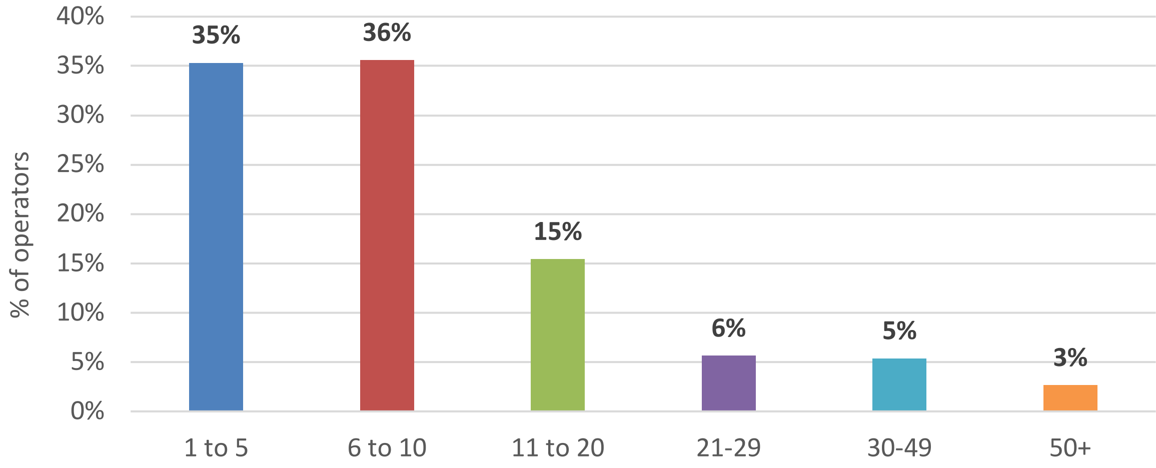
*Source: Frontline Self-Catering Operator Survey, 2021*

## 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**




N=337

[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

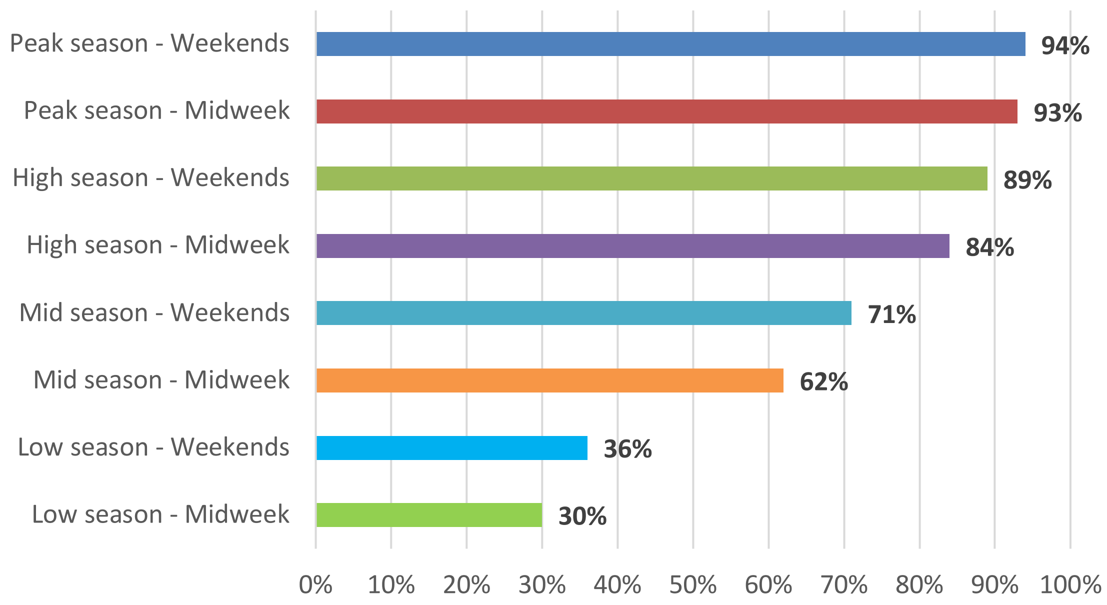
**In 2019 the majority of self-catering properties (93%, 202[7]) operated all year round.** In 2020 this reduced, with only 75% (142) operating all year; this was due to Covid-19 lockdown restrictions.

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**




N=184

**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% (72) | 3% (6) | 17% (32) | 6% (11) | 23% (44) | 22% (40) | 10% (19) | 30% (54) | 7% (13) | 23% (41) | 6% (11) | 15% (26) |

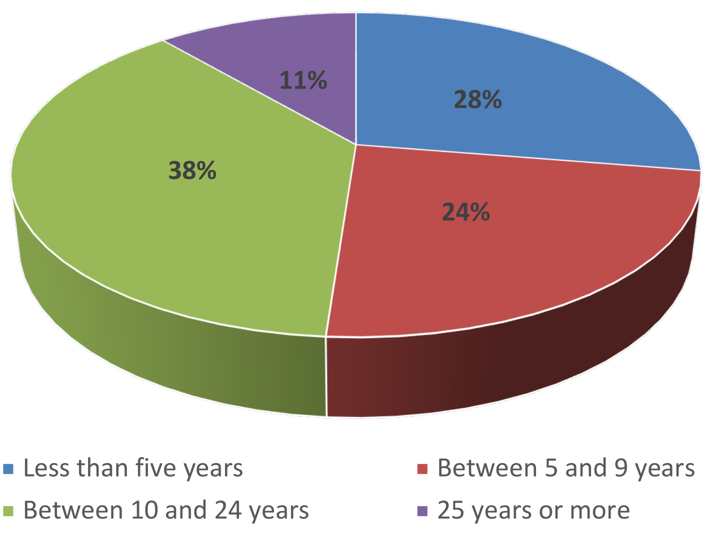
Occupancy levels provided by operators completing the survey were significantly higher than the occupancy levels derived from SuperControl data. The SuperControl data was based on 4,594 properties in Scotland and therefore this data was used to calculate the economic impact. Occupancy data from SuperControl 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

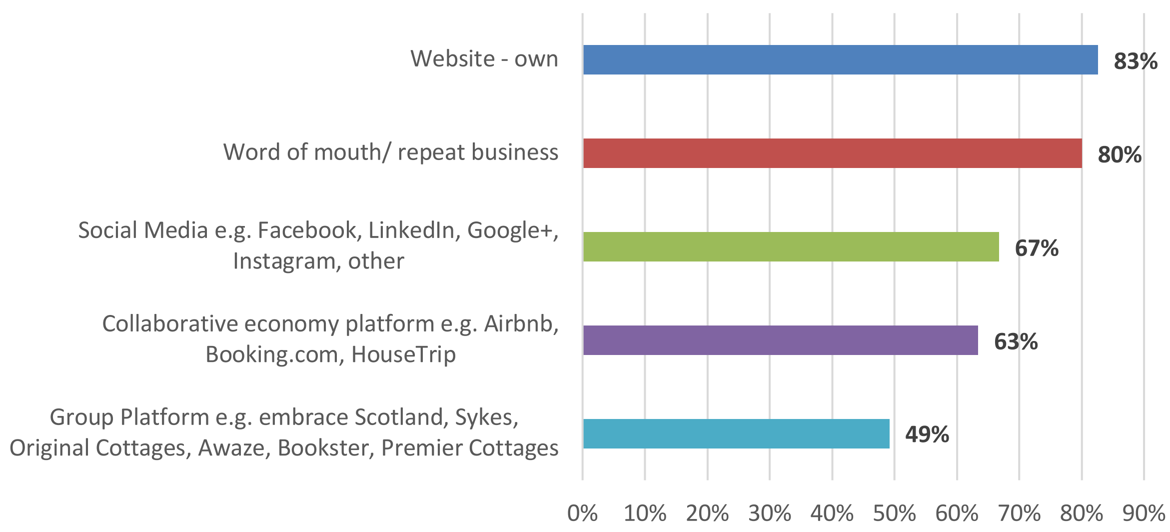
**The majority (85%, 528) of operators stated that their cancellation policies became more flexible during Covid-19** with 12% (77) saying they stayed the same and just 3% (17) said their policy got stricter. Operators responded as follows about their cancellation policy:

- **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**




N=661

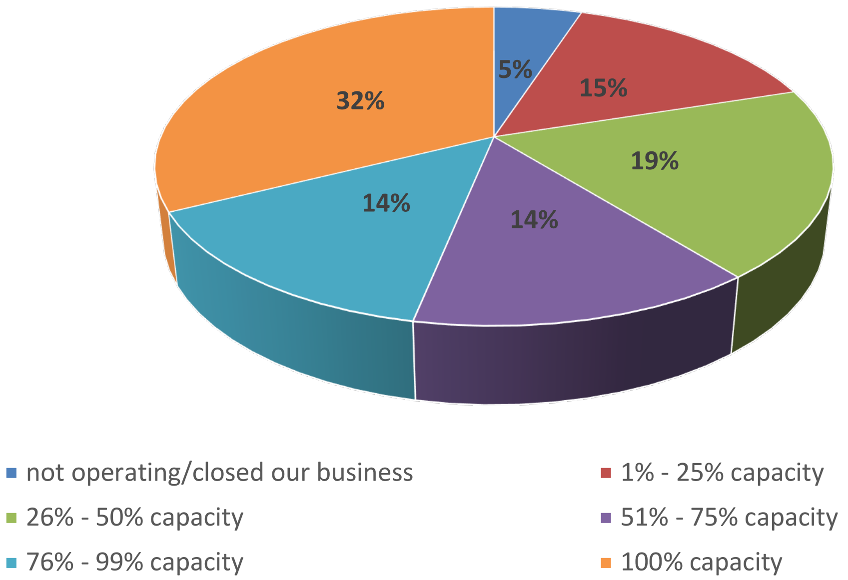
When looking at social media platforms in more detail, operators noted using the following:

- 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

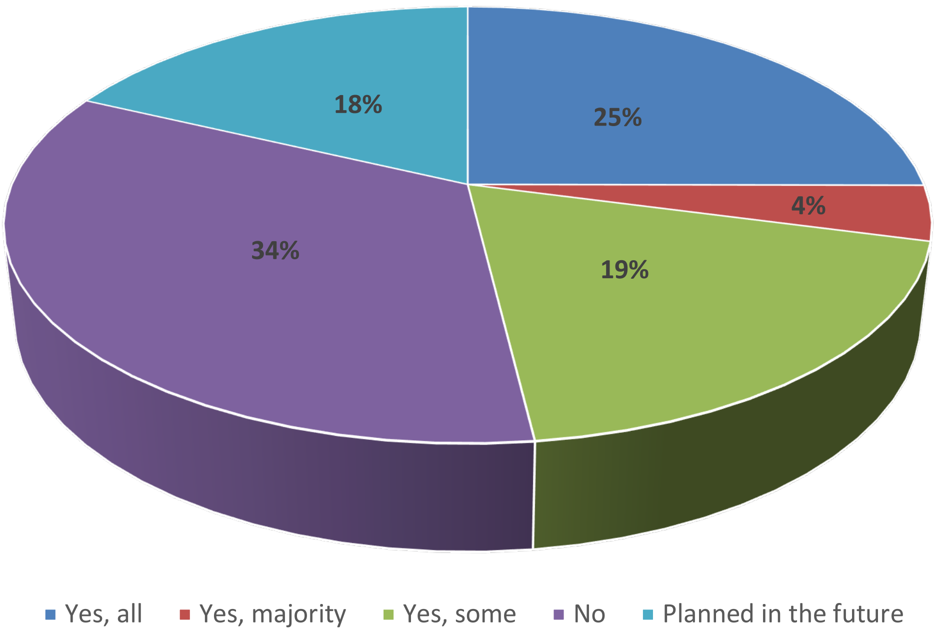
37% (202) of operators have properties that have accessibility features with a further 13% (27) planning for these in the future.

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.

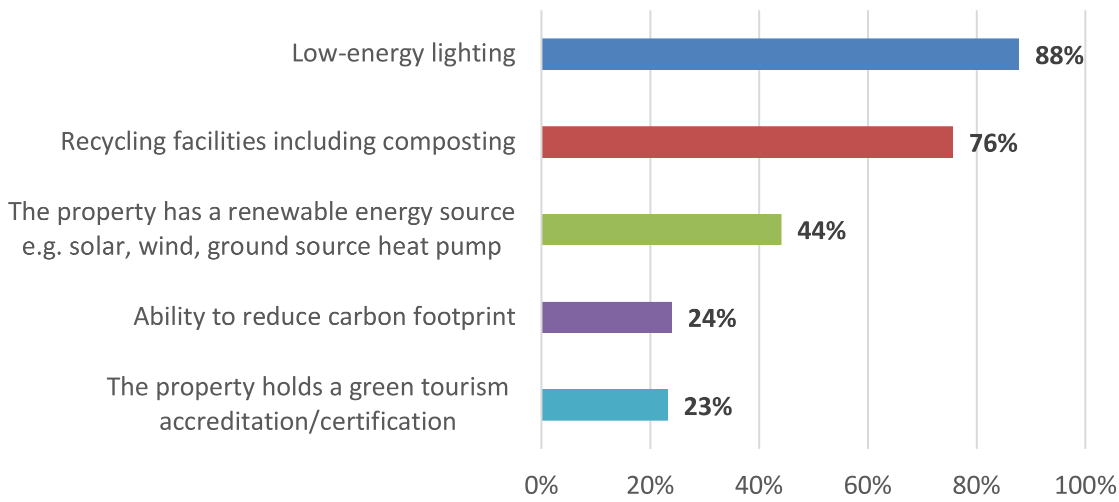
**Figure 2.6: Properties with green credentials**




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.

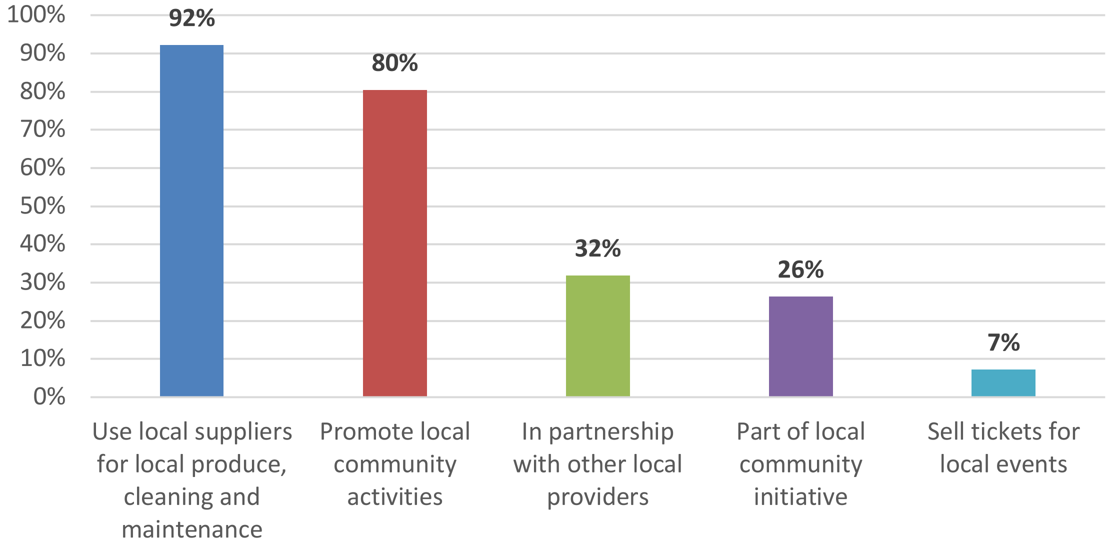
**Figure 2.7: Green credentials held**




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 | | | |
|---|---|---|---|---|---|---|---|---|
| | *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) | 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 2019[8]**

| | 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 2020[9]**

| | 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.

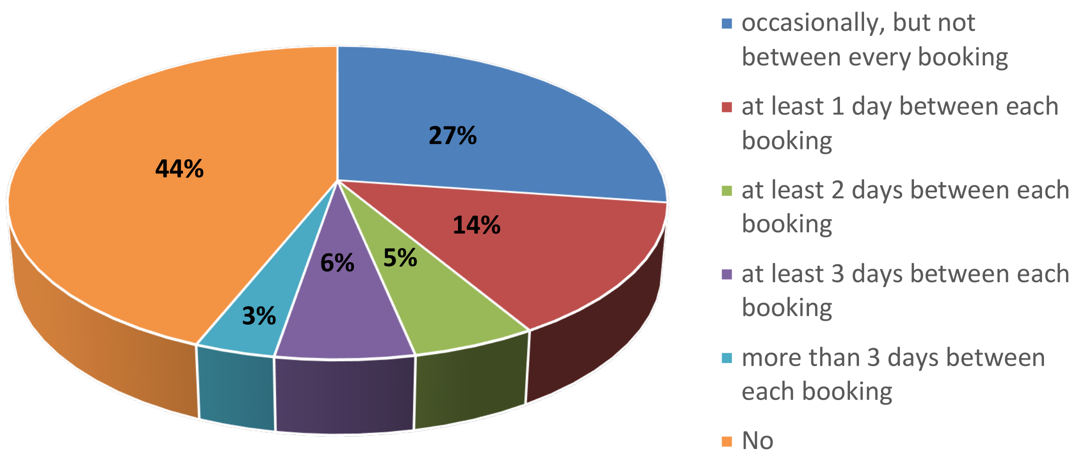
**Table 2.10: Grossed current or future spend on each of the following**

| 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**

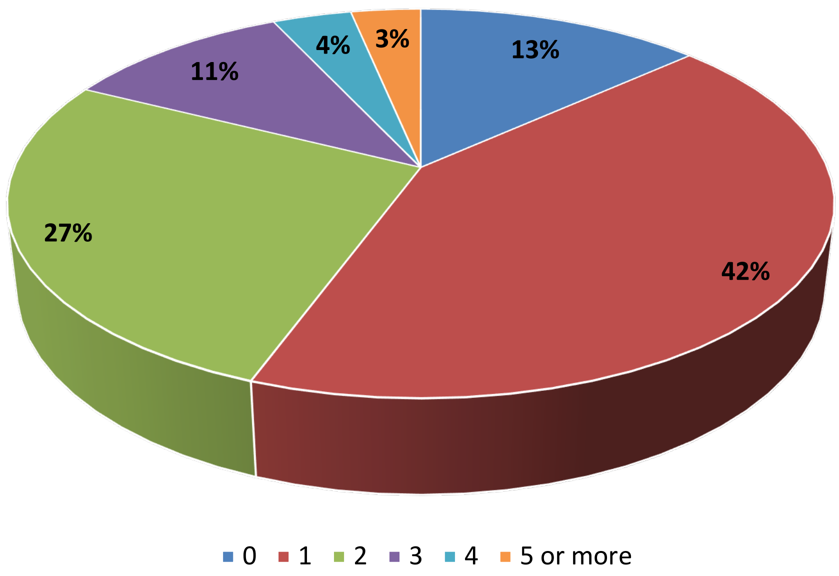
| Location | Visitors |
|---|---|
| Scotland | 60% (433) |
| England | 37% (266) |
| Wales | 1% (5) |
| Northern Ireland | 0.1% (1) |
| Outside the UK[10] | 2% (13) |

*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.

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.

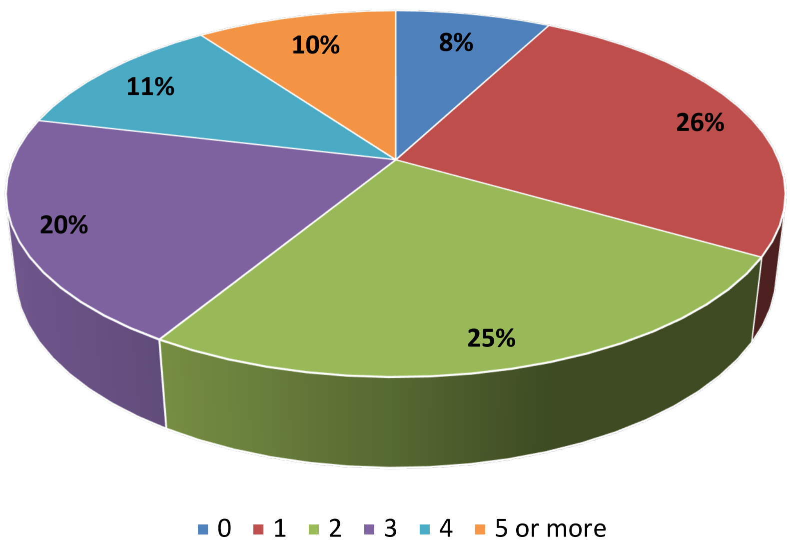
**Figure 3.1: Number of visits to self-catering properties in the past 12 months (up to and including November 2020)**




*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)**



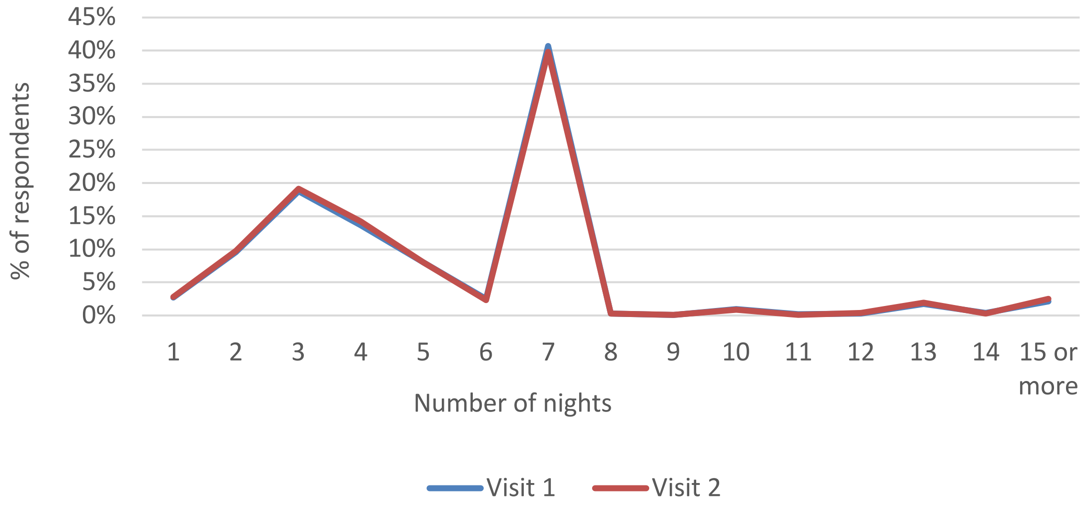

*Source: Frontline Self-Catering Visitor Survey, 2021* N=714

**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**

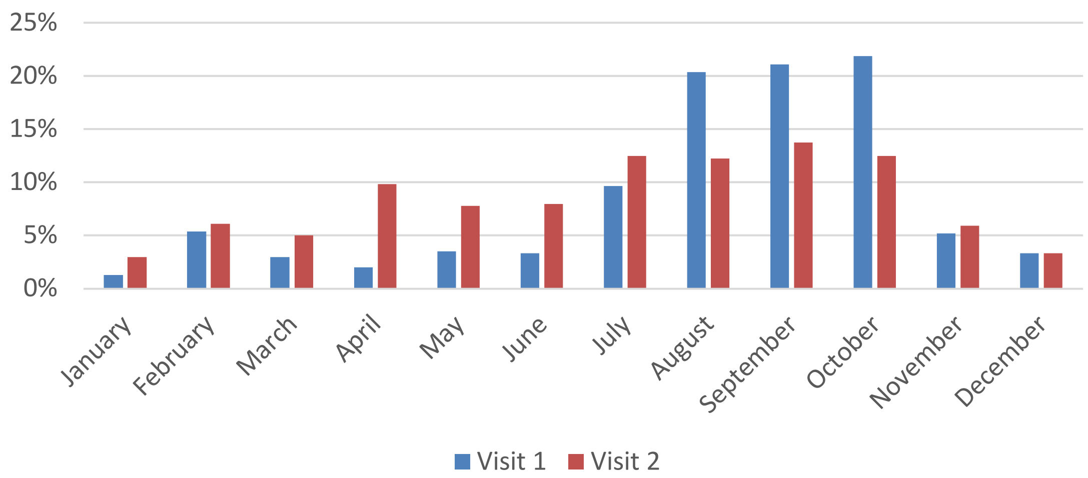



*Source: Frontline Self-Catering Visitor Survey, 2021* N=567

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, **£2,264** during their visit**.** This reduced to **£2,107 for visit 1 (2020).**

**Table 3.5: Average visitor spend per party**

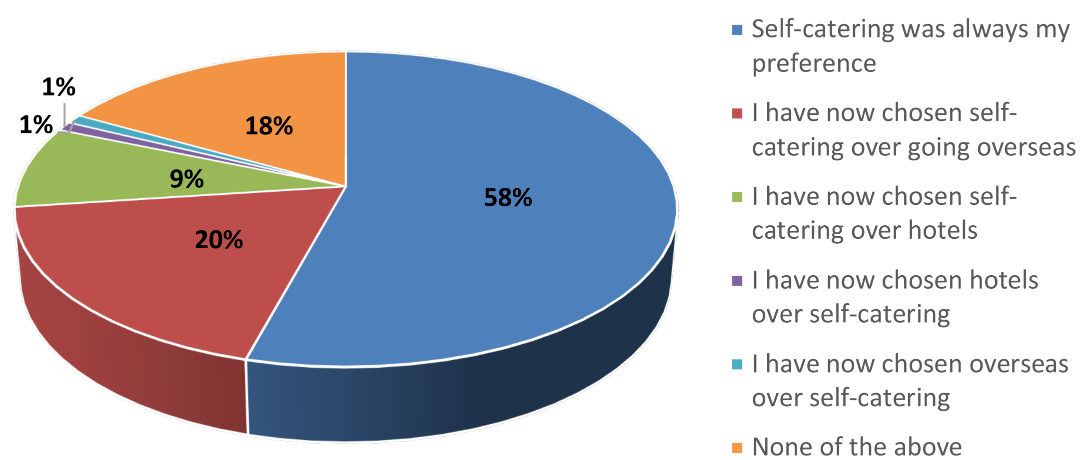
| **Area of expenditure** | **Average spend per party**<br>**Visit 1 (2020)** | <br>**Visit 2 (2019)** | <br>**Change since 2019** |
|---|---|---|---|
| Transport to and from the property | £173 | £208 | -17% |
| Travel during stay | £96 | £84 | 14% |
| Accommodation fees | £1,024 | £1,082 | -5% |
| Food and drink (in supermarkets) | £194 | £180 | 8% |
| Food and drink (in local shops and farmers markets) | £103 | £108 | -5% |
| Food and drink (in bars, cafes, pubs and restaurants) | £295 | £335 | -12% |
| Other shopping (e.g. gifts, clothes, souvenirs) | £111 | £114 | -3% |
| Outdoor recreation (e.g. sailing, surfing, cycling, horse riding) | £46 | £58 | -21% |
| Visitor attractions (e.g. heritage sites, theme parks, gardens) | £39 | £55 | -28% |
| Outdoor sports (shooting, fishing) | £27 | £40 | -33% |
| **Total** | **£2,107** | **£2,264** | **-7%** |

*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**

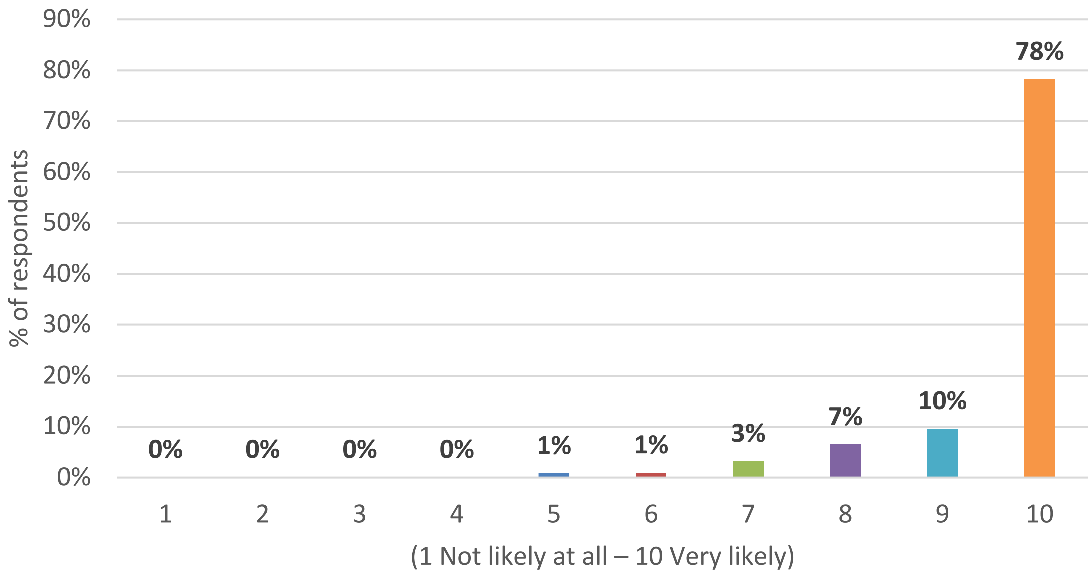



N=717

**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**

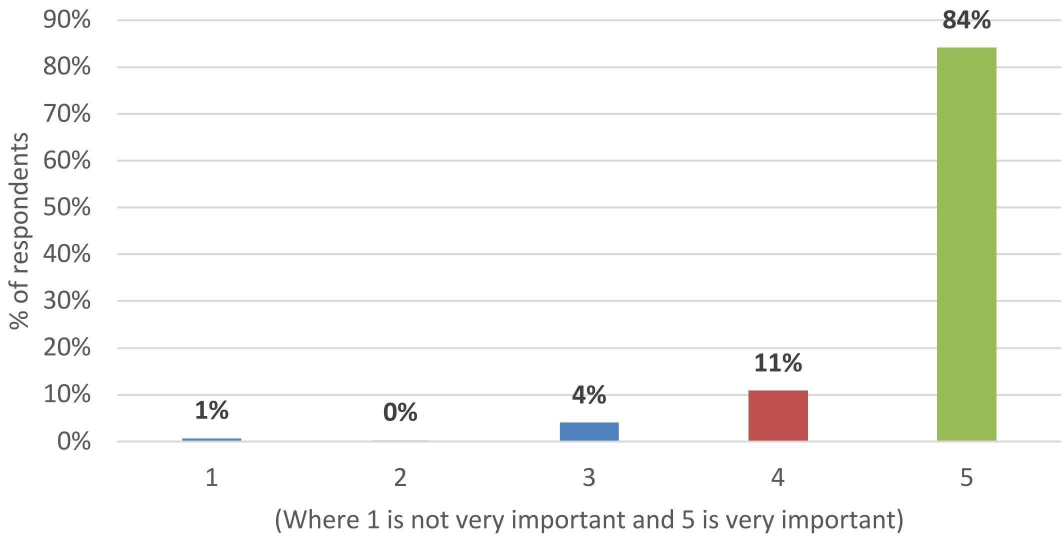



N= 717

**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.**

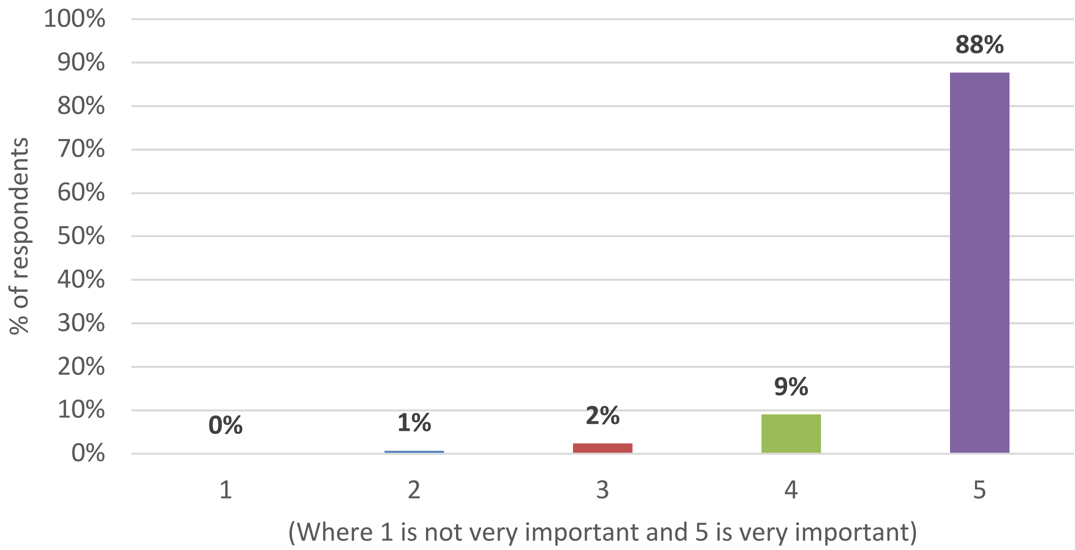
**Figure 3.9: Importance of cleaning standards in choice of self-catering accommodation**




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 supports[11].
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** |

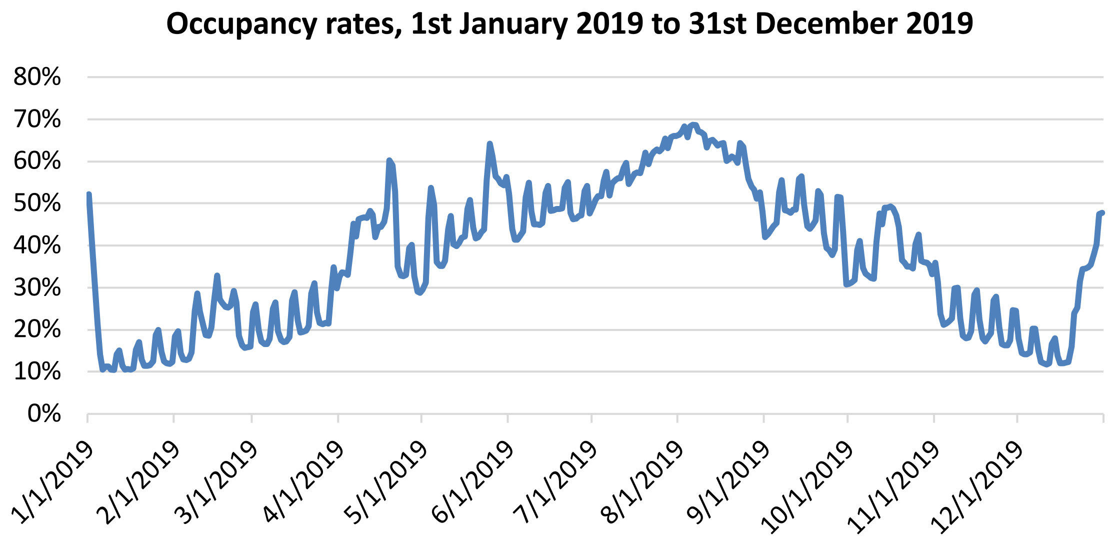
*Source: Frontline, 2021*

## Appendix 1 – SuperControl Occupancy Data

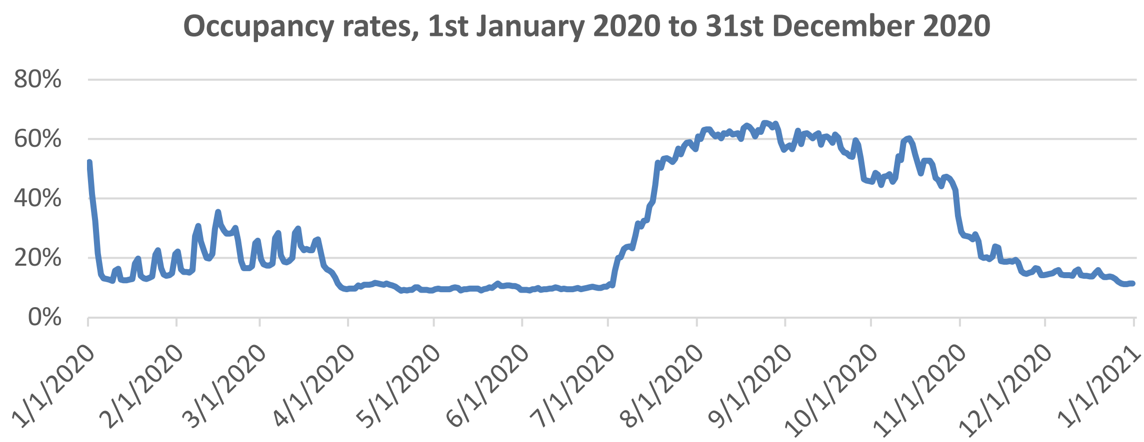
Occupancy figures are likely to underestimate the true occupancy rate as:

- 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




N= 4,594 properties




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