



Business Centre G.2 Waverley Court 4 East Market Street Edinburgh EH8 8BG Email: planning.support@edinburgh.gov.uk

Applications cannot be validated until all the necessary documentation has been submitted and the required fee has been paid.

Thank you for completing this application form:

ONLINE REFERENCE 100635119-001

The online reference is the unique reference for your online form only. The Planning Authority will allocate an Application Number when your form is validated. Please quote this reference if you need to contact the planning Authority about this application.

Applicant or Agent Details

Are you an applicant or an agent? * (An agent is an architect, consultant or someone else acting on behalf of the applicant in connection with this application)

Applicant Agent

Applicant Details

Please enter Applicant details

Title:	<input type="text" value="Mr"/>	You must enter a Building Name or Number, or both: *	
Other Title:	<input type="text"/>	Building Name:	<input type="text" value="10"/>
First Name: *	<input type="text" value="John"/>	Building Number:	<input type="text" value="1"/>
Last Name: *	<input type="text" value="Wylie"/>	Address 1 (Street): *	<input type="text" value="Hillcoat Loan"/>
Company/Organisation	<input type="text"/>	Address 2:	<input type="text"/>
Telephone Number: *	<input type="text" value="REDACTED"/>	Town/City: *	<input type="text" value="Portobello"/>
Extension Number:	<input type="text"/>	Country: *	<input type="text" value="Scotland"/>
Mobile Number:	<input type="text"/>	Postcode: *	<input type="text" value="EH15 1UA"/>
Fax Number:	<input type="text"/>		
Email Address: *	<input type="text" value="REDACTED"/>		

Site Address Details

Planning Authority:

City of Edinburgh Council

Full postal address of the site (including postcode where available):

Address 1:

FLAT 3

Address 2:

6 GREAT CANNON BANK

Address 3:

PORTOBELLO WEST

Address 4:

Address 5:

Town/City/Settlement:

EDINBURGH

Post Code:

EH15 1TN

Please identify/describe the location of the site or sites

Northing

674407

Easting

330298

Description of Proposal

Please provide a description of your proposal to which your review relates. The description should be the same as given in the application form, or as amended with the agreement of the planning authority: *
(Max 500 characters)

Appeal against Planning Application No: 22/05551/FULSTL Refusal I appeal against the decision reached by Edinburgh City Council on the basis that a Change of Use was refused wholly based on a policy which was ruled to be unlawful by Lord Braid in the Outer House of the Court of Session. In particular Lord Braid, ruled that a 'rebuttable presumption' against granting licenses for secondary lets – an entire property that is not an operator's principal home – within tenement blocks was unlawful.

Type of Application

What type of application did you submit to the planning authority? *

- Application for planning permission (including householder application but excluding application to work minerals).
- Application for planning permission in principle.
- Further application.
- Application for approval of matters specified in conditions.

What does your review relate to? *

- Refusal Notice.
- Grant of permission with Conditions imposed.
- No decision reached within the prescribed period (two months after validation date or any agreed extension) – deemed refusal.

Statement of reasons for seeking review

You must state in full, why you are seeking a review of the planning authority's decision (or failure to make a decision). Your statement must set out all matters you consider require to be taken into account in determining your review. If necessary this can be provided as a separate document in the 'Supporting Documents' section: * (Max 500 characters)

Note: you are unlikely to have a further opportunity to add to your statement of appeal at a later date, so it is essential that you produce all of the information you want the decision-maker to take into account.

You should not however raise any new matter which was not before the planning authority at the time it decided your application (or at the time expiry of the period of determination), unless you can demonstrate that the new matter could not have been raised before that time or that it not being raised before that time is a consequence of exceptional circumstances.

Firstly, the refusal rights, 'Plan Policy Hou 7' which in fact relates to Affordable Housing. This apartment would be too expensive by the policy definition to qualify as affordable housing. Secondly, the refusal rights, use of this dwelling as a short stay let will result in an unacceptable impact on local amenity and the loss of a residential property has not been justified. It is my fundamental right to earn a living. The attached reports justify the use of this property.

Have you raised any matters which were not before the appointed officer at the time the Determination on your application was made? *

Yes No

If yes, you should explain in the box below, why you are raising the new matter, why it was not raised with the appointed officer before your application was determined and why you consider it should be considered in your review: * (Max 500 characters)

I broke no laws. When I started this business nine years ago none of this was in place. It is shoddy, illegal and underhand, to constructively destroy the lawful income of honest hard working tax payers like me. Lord Braid, ruled that a 'rebuttable presumption' against granting licenses for secondary lets – an entire property that is not an operator's principal home – within tenement blocks was unlawful. The council deliberately delayed my application until NPF4 Policy 30(e) had been enacted.

Please provide a list of all supporting documents, materials and evidence which you wish to submit with your notice of review and intend to rely on in support of your review. You can attach these documents electronically later in the process: * (Max 500 characters)

Economic-Impact-Study-Scotland - 2021 The Professional Association of Self Caterers UK published a report entitled 'Economic Impact of the Self-Catering Sector'. <https://assc.mysites.io/wp-content/uploads/2021/09/Economic-Impact-Study%E2%80%93Scotland.pdf> Appeal_PlanApp22_05551_FULSTL_Refusal - Appeal against Planning Application No: 22/05551/FULSTL Refusal

Application Details

Please provide the application reference no. given to you by your planning authority for your previous application.

22/05551/FULSTL Proposal

What date was the application submitted to the planning authority? *

06/10/2022

What date was the decision issued by the planning authority? *

11/05/2023

Review Procedure

The Local Review Body will decide on the procedure to be used to determine your review and may at any time during the review process require that further information or representations be made to enable them to determine the review. Further information may be required by one or a combination of procedures, such as: written submissions; the holding of one or more hearing sessions and/or inspecting the land which is the subject of the review case.

Can this review continue to a conclusion, in your opinion, based on a review of the relevant information provided by yourself and other parties only, without any further procedures? For example, written submission, hearing session, site inspection. *

Yes No

In the event that the Local Review Body appointed to consider your application decides to inspect the site, in your opinion:

Can the site be clearly seen from a road or public land? *

Yes No

Is it possible for the site to be accessed safely and without barriers to entry? *

Yes No

Checklist – Application for Notice of Review

Please complete the following checklist to make sure you have provided all the necessary information in support of your appeal. Failure to submit all this information may result in your appeal being deemed invalid.

Have you provided the name and address of the applicant?. *

Yes No

Have you provided the date and reference number of the application which is the subject of this review? *

Yes No

If you are the agent, acting on behalf of the applicant, have you provided details of your name and address and indicated whether any notice or correspondence required in connection with the review should be sent to you or the applicant? *

Yes No N/A

Have you provided a statement setting out your reasons for requiring a review and by what procedure (or combination of procedures) you wish the review to be conducted? *

Yes No

Note: You must state, in full, why you are seeking a review on your application. Your statement must set out all matters you consider require to be taken into account in determining your review. You may not have a further opportunity to add to your statement of review at a later date. It is therefore essential that you submit with your notice of review, all necessary information and evidence that you rely on and wish the Local Review Body to consider as part of your review.

Please attach a copy of all documents, material and evidence which you intend to rely on (e.g. plans and Drawings) which are now the subject of this review *

Yes No

Note: Where the review relates to a further application e.g. renewal of planning permission or modification, variation or removal of a planning condition or where it relates to an application for approval of matters specified in conditions, it is advisable to provide the application reference number, approved plans and decision notice (if any) from the earlier consent.

Declare – Notice of Review

I/We the applicant/agent certify that this is an application for review on the grounds stated.

Declaration Name: Mr John Wylie

Declaration Date: 10/07/2023

Proposal Details

Proposal Name	100635119
Proposal Description	I appeal against the decision reached by Edinburgh City Council on the basis that a Change of Use was refused wholly based on a policy which was ruled to be unlawful by Lord Braid in the Outer House of the Court of Session. Nine trouble free years!
Address	FLAT 3, 6 GREAT CANNON BANK, PORTOBELLO WEST, EDINBURGH, EH15 1TN
Local Authority	City of Edinburgh Council
Application Online Reference	100635119-001

Application Status

Form	complete
Main Details	complete
Checklist	complete
Declaration	complete
Supporting Documentation	complete
Email Notification	complete

Attachment Details

Notice of Review	System	A4
Appeal_PlanApp22_05551_FULSTL_Refusal	Attached	A4
Economic Impact of the Self-Catering Sector	Attached	A4
Notice_of_Review-2.pdf	Attached	A0
Application_Summary.pdf	Attached	A0
Notice of Review-001.xml	Attached	A0

Appeal against Planning Application No: 22/05551/FULSTL Refusal

I appeal against the decision reached by Edinburgh City Council on the basis that a Change of Use was refused wholly based on a policy which was ruled to be unlawful by Lord Braid in the Outer House of the Court of Session. In particular Lord Braid, ruled that a 'rebuttable presumption' against granting licenses for secondary lets – an entire property that is not an operator's principal home – within tenement blocks was unlawful.

It is also worth pointing out that this apartment has been in operation for nine years and that the owner operator lives about 100 metres away. The applicant can assure The City of Edinburgh Council that visitors have no more impact than permanent residents. I have a good relationship with the other residents and it is significant that none of them makes any comment about this application. The impact of visitors, is in truth, less than permanent residents because they visit to be out and about and enjoy all that the area has to offer. I have 6 years actual experience of living next door to and sharing access with this holiday rental (STL).

The Decision Notice relating to Application No: 22/05551/FULSTL states:

Reason for Refusal: -

1. The proposal is contrary to Local Development Plan Policy Hou 7 in respect of Inappropriate Uses in Residential Areas, as the use of this dwelling as a short stay let will have a materially detrimental effect on the living conditions and amenity of nearby residents.
2. The proposal is contrary to National Planning Framework Policy 30(e) in respect of Local Amenity and Loss of Residential Accommodation, as the use of this dwelling as a short stay let will result in an unacceptable impact on local amenity and the loss of a residential property has not been justified.

The change of use of this property to a short term let (STL) will have an unacceptable impact on neighbouring amenity. The loss of the residential accommodation has not been justified. Whilst it is recognised that there is an economic benefit to the City as a whole from the provision of tourist accommodation, in this case it does not outweigh the adverse impact on residential amenity. The proposal does not comply with the Development Plan policy NPF 4 policy 30(e) and LDP policy Hou 7. There are no material considerations that outweigh this conclusion. The proposal is unacceptable.

Refusal Reason 1

Firstly, the refusal cites, 'Plan Policy Hou 7' which in fact relates to Affordable Housing. Plan Policy Hou 7 defines affordable housing as ~

'Housing that is available for rent or for sale to meet the needs of people who cannot afford to buy or rent the housing generally available on the open market. Affordable housing is important in ensuring that key workers can afford to live in the city as well as helping meet the needs of people on low incomes'

I find it entirely spurious and misleading to make reference to, Plan Policy Hou 7 Affordable Housing. If placed on the housing market, the apartment which is the subject of this application would be too expensive by this definition to be purchased by those in need of affordable housing. Similarly, if placed on the rental market, the apartment which is the subject of this application would be too expensive by this definition to be within the budget of those in need of affordable housing.

For some reason our elected representatives are determined to constructively destroy the lawful income of honest hard working tax payers like me. My pension income is in need of subsidy and I am working into retirement providing holiday homes for visitors to the *seaside town of Portobello*. The City of Edinburgh Council are constructively pushing myself towards being one of those in need of affordable housing. It is entirely acceptable for elected politicians to rent apartments in London and Edinburgh so that they can attend parliament. Those who do so are operating a second home. So, politicians can operate a second home to support their lawful employment but I am not allowed to operate a second home as my lawful employment. This seems unfair and smacks of one rule them and another rule for the rest.

Examining in detail, Policy Hou 7 - Affordable Housing, paragraphs or clauses 6.23 through to the end of 6.30, there is no mention whatsoever of, Inappropriate Uses in Residential Areas, short stay lets and no definition of what a, 'materially detrimental effect on the living conditions and amenity of nearby residents ', might be. Is The City of Edinburgh Council simply quoting any old clause and byelaw, any means to an end? Policy Hou 7 covers affordable housing and quoting it is entirely spurious and inappropriate.

'the use of this dwelling as a short stay let will have a materially detrimental effect on the living conditions and amenity of nearby residents' This statement is not supported in practice. The phrase 'short stay let **will have** a materially detrimental' signifies certainty, it will be so, that it is an inescapable fact. The reality is that, The City of Edinburgh Council saw fit to notify 43 neighbours with regard to this application. It is my understanding that they did not receive a single objection or comment.

Material considerations are often considered to be the sort of things that appear on the following list. I have placed in brackets a status comment against each.

- Overlooking/loss of privacy (no impact/change)
- Loss of light or overshadowing (no impact/change)
- Parking (no impact/change - resident/guest parking is provided)
- Highway safety (no impact/change)
- Traffic (no impact/change)
- Noise (no impact/change)
- Effect on listed building and conservation area (not applicable)
- Layout and density of building (not applicable)
- Design, appearance and materials (not applicable)
- Government policy (found to be unlawful)
- Disabled persons' access (not applicable)
- Proposals in the Development Plan (not applicable)
- Previous planning decisions (including appeal decisions) (not applicable)
- Nature conservation (not applicable)

Refusal Reason 2

Secondly, the refusal sights, National Planning Framework Policy 30(e). Saying that the proposal is contrary to this framework policy in respect of Local Amenity and Loss of Residential Accommodation, as the use of this dwelling as a short stay let will result in an unacceptable impact on local amenity and the loss of a residential property has not been justified.

The policy is as follows

30 (e) Development proposals for the reuse of existing buildings for short term holiday letting will not be supported where the proposal will result in:

- i. An unacceptable impact on local amenity or the character of a neighbourhood or area; or
- ii. The loss of residential accommodation where such loss is not outweighed by demonstrable local economic benefits.

So, for clarity a fairly generic list of things that may appear on a list of local amenities could reasonably include ~

Transport links, car parking, health centres, schools, shopping centres, post offices, hotels, guest houses, caravan parks, cycle routes, hotels, guest houses, caravan parks, restaurants, public houses, carry out food retailers, parks, community centers, swimming pools, golf courses, play parks, cinemas, theatres, health club facilities.

While I accept that guests at my holiday home may use and support any number of the facilities and services listed above, I find it hard to imagine that they would have a detrimental impact on any of them. I would contend that in many instances that they would support and improve the viability of many of them. Available short-term accommodation benefits local residents who have visitors or who's own dwellings are undergoing improvement and refurbishment (this is a significant source of income) and is in that case a local amenity.

In that case let's consider the impact that guests and visitors will have to the character of the neighbourhood or area. So, to be clear the proposal is that an apartment generally designed to house four human beings, is used to house up to four human beings. The only difference is that rather than the persons being permanent residents they will be visitors. In what possible way can the City of Edinburgh Council justify any suggestion that the impact is anything other than pretty well neutral? The apartment is situated on a development that includes resident parking.

The proximity of neighbouring flats and shared facilities? I alone live next door to it and know that the impact is neutral. Are the City of Edinburgh Council and the Scottish government proud and comfortable with the various statements that appear or are implicit in policy and consultation papers.

Inclusive Scotland. Have a read what some of the pressure groups, The City of Edinburgh Council and Scottish Government have written and published regarding tourists in the context of this policy and the consultation process. It reads like, only tourists would be so inconsiderate as to, tourists make an unacceptable noise and cause disturbance Much of it reads and sounds like, tourists by their very presence pull the character of an area down..... It is as well that tourists are not an ethnic or religious grouping or there could accusations of non-inclusive attitudes, speech and published materials.

The demonstrable local economic benefits can be dealt with as follows:

In 2021 The Professional Association of Self Caterers UK published a report entitled 'Economic Impact of the Self-Catering Sector'.

<https://assc.mysites.io/wp-content/uploads/2021/09/Economic-Impact-Study%E2%80%93Scotland.pdf>

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.

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.

This report finds ~

Numbers of self-catering 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)

Economic Impact (Scotland)

- Spend on accommodation 414.6 million
- Travel to and from property £79.5 million
- Local Shops - food and drink £41.5 million
- Supermarkets - food and drink £68.8 million
- Bars Cafés and restaurants £128.2 million
- Outdoor recreation and other sport £32.5 million
- Visitor attractions £21 million
- Travel during stay £32.2 million
- Other Shopping £43.8 million

Clearly it can be deduced from the above that visitors to self-catering establishments in Lothian make the following contributions to the local economy:

- Spend on all items £68.4 million
- Spend on items other than accommodation £127.8 million
- Spend on accommodation £61.5 million

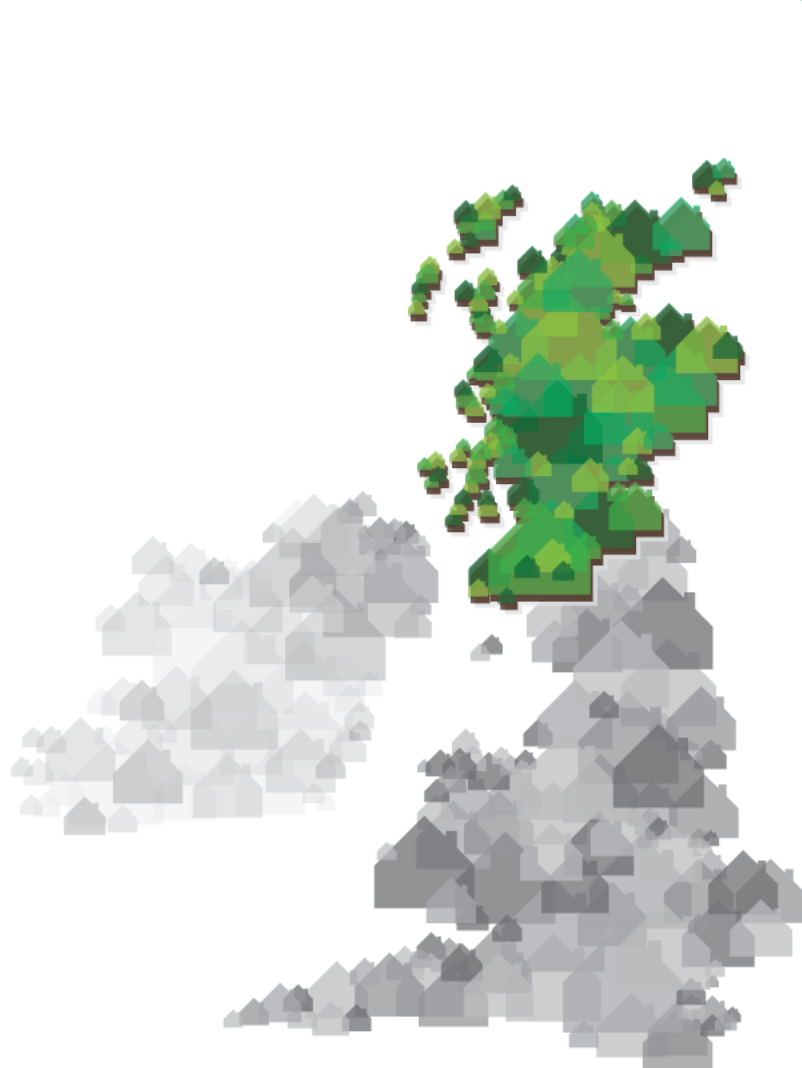
Therefore, each accommodation unit will be at the heart of generating in excess of £68,000 worth of economic activity in Lothian or Edinburgh. In my experience 40%-60% of this comes from overseas visitors.

Clearly from the foregoing the demonstrable local economic benefits to be derived from this application outweigh any loss of residential accommodation. In addition, the applicant's income will be lost with the likely outcome being that he would start taking from the public purse rather than contributing to it in taxes and other governmental burdens.

‘There are no material considerations that outweigh this conclusion’ is a statement used in the refusal decision letter. Taking into account the report published by The Professional Association of Self Caterers UK, published in 2021, entitled ‘Economic Impact of the Self-Catering Sector’ and the fact that, The City of Edinburgh Council notified 43 neighbours with regard to this application and received zero comments or objections it seems that there is absolutely no evidence that local people and neighbours find that ongoing operation of this STL impacts them in any way.

If this application is refused then I feel that it would be reasonable of me to expect to see a complete end to the provision of short-term self-catering holiday accommodation in Edinburgh. I shall expect to find that it is not possible to rent a serviced apartment in Edinburgh. All of this to the detriment of the local economy. If this application is unacceptable then no STL application could be.

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

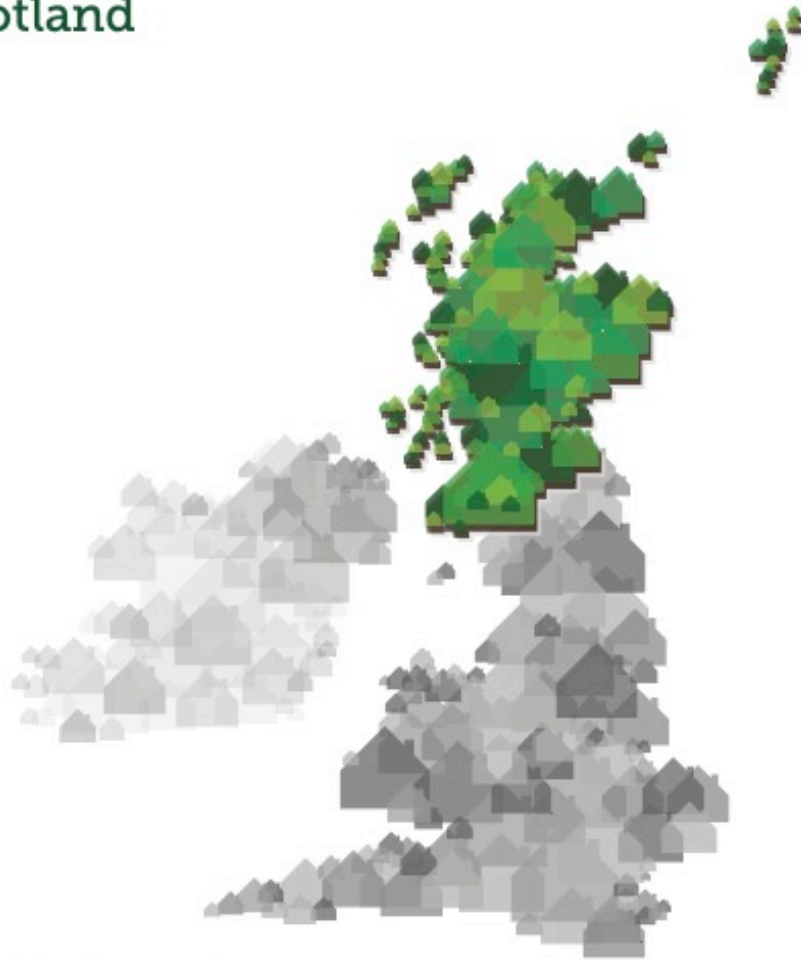
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This economic impact assessment was sponsored by SuperControl

1 Executive Summary

Scotland

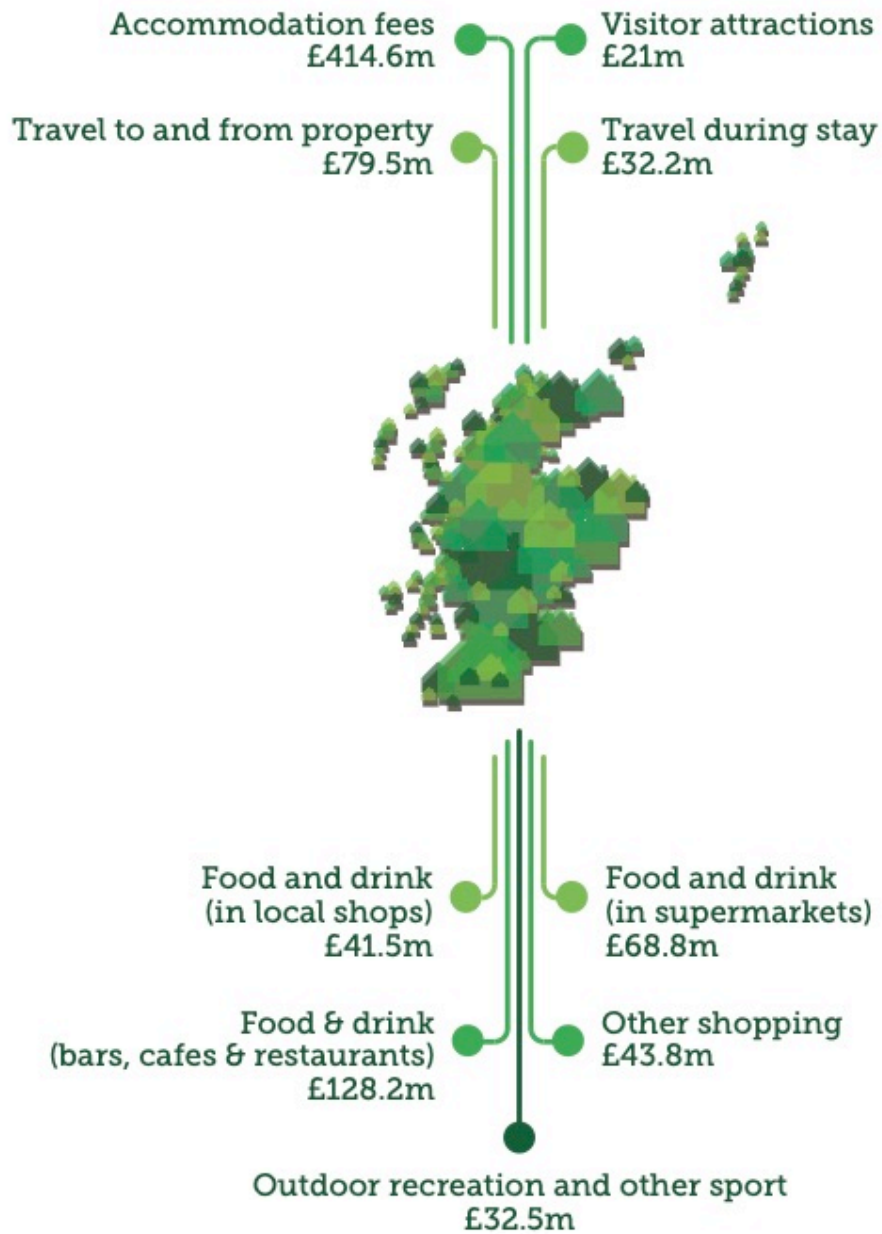


- 17,794 properties
- 2.4 million visitor nights per year
- £867.1 million total visitor spend
- Supports 23,979 FTE jobs
- £672.3 million Contribution to the Scottish economy

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

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

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

Self-catering is an important component of the tourism industry. In order to fully understand its contribution, the Association of Scotland's Self-Caterers (ASSC) and the Professional Association of Self-Caterers UK (PASC UK) commissioned Frontline Consultants (Frontline) to carry out an independent Economic Impact Assessment of the self-catering industry in the UK. This includes an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland.

This report is for Scotland.

2.1 Research objectives

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

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

2.2 Methodology

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

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

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

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

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

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

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

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

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

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

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

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

3 Operators Survey

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

3.1 Composition of the overall Scotland self-catering industry

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

Table 2.1: Composition of the industry

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

(Source: ASSC⁵)

3.2 Sampling methodology and geographic locations

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

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

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

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

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

Table 2.2: Location of surveyed self-catering operators

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

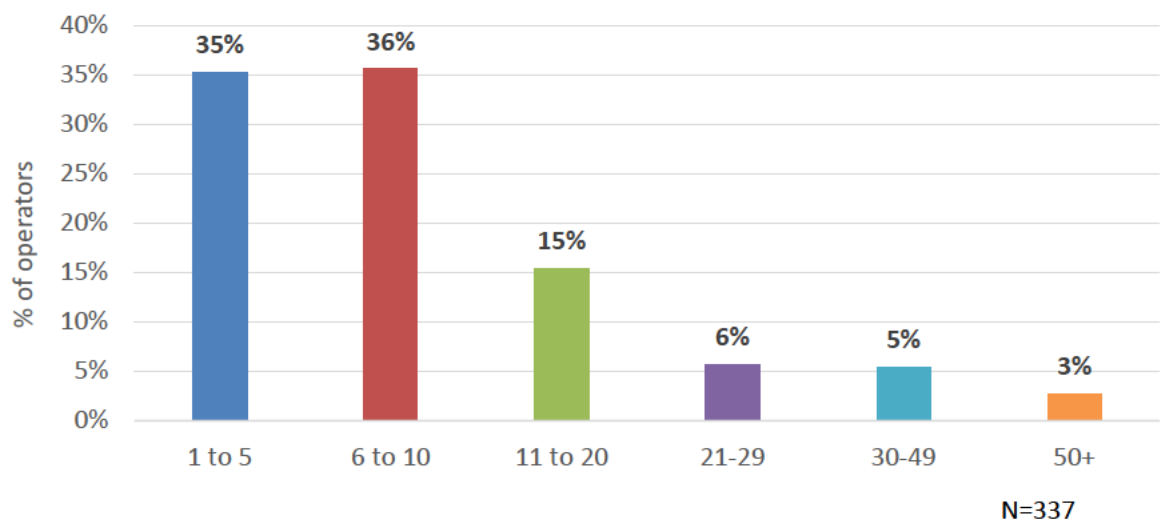
Source: Frontline Self-Catering Operator Survey, 2021

3.3 Property summary

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

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

Figure 2.1: Number of Guests



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

3.4 Length of season and occupancy rates

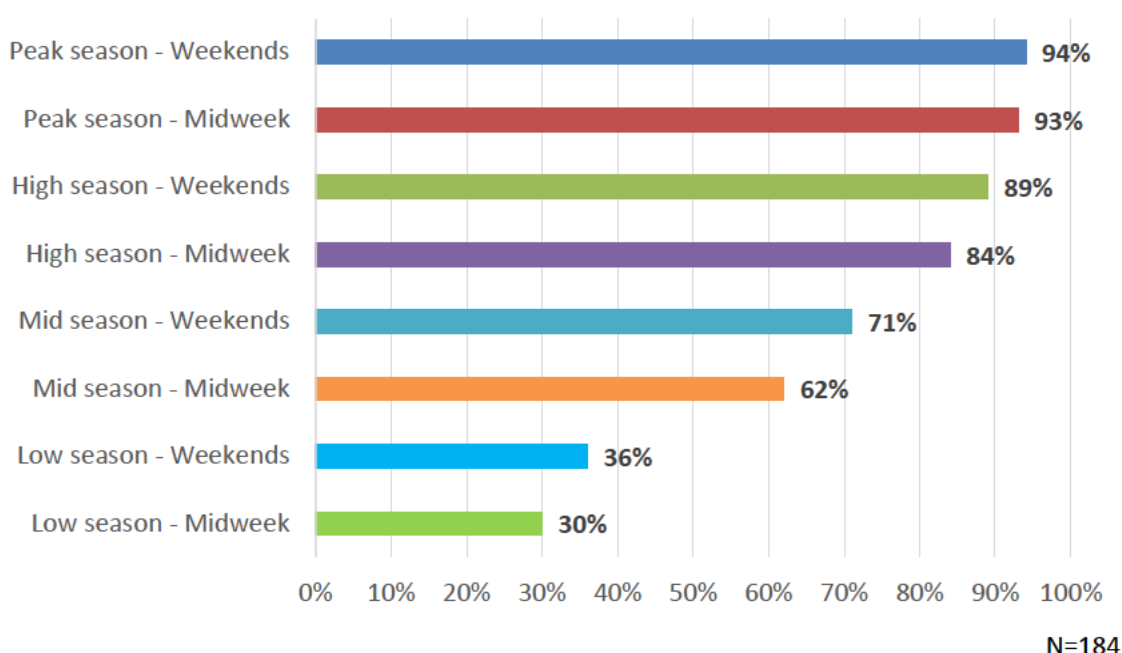
In 2019 the majority of self-catering properties (93%, 202⁷) operated all year round. In 2020 this reduced, with only 75% (142) operating all year; this was due to Covid-19 lockdown restrictions.

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

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

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

Figure 2.2: Average occupancy rates of self-catering properties



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

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

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

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

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

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

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

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

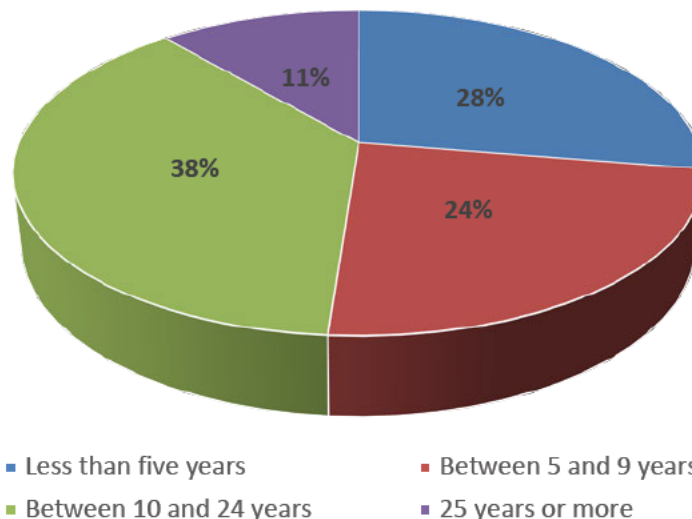
Occupancy levels provided by operators completing the survey were significantly higher than the occupancy levels derived from SuperControl data. The SuperControl data was based on 4,594 properties in Scotland and therefore this data was used to calculate the economic impact. Occupancy data from SuperControl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

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

3.5 Property ownership and financial data

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

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



N=649

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

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

Table 2.6: Operator turnover

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

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

3.6 Cancellation policy

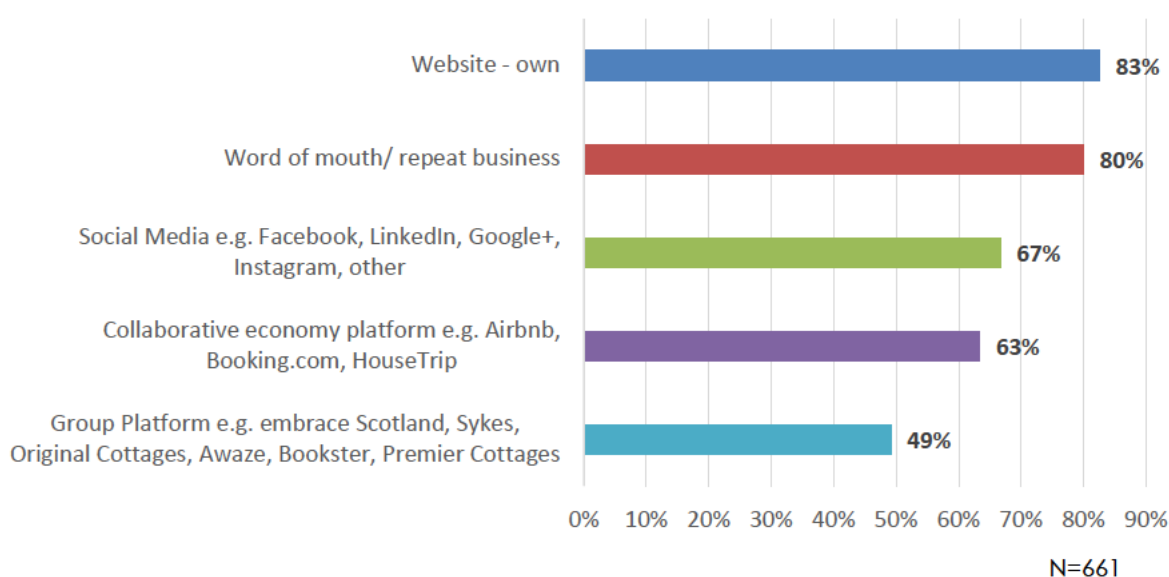
The majority (**85%, 528**) of operators stated that their cancellation policies became more flexible during Covid-19 with 12% (77) saying they stayed the same and just 3% (17) said their policy got stricter. Operators responded as follows about their cancellation policy:

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

3.7 Property promotion

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

Figure 2.4: Routes to promote and market rental properties



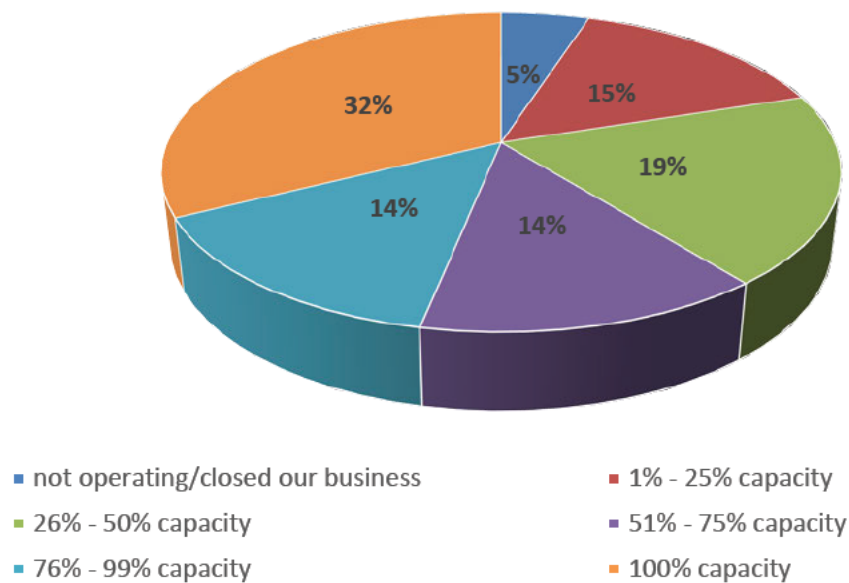
When looking at social media platforms in more detail, operators noted using the following:

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

3.8 Visitors and tourist season

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

Figure 2.5: Average capacity during Covid-19



N=660

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

3.9 Accessibility, community integration and environment

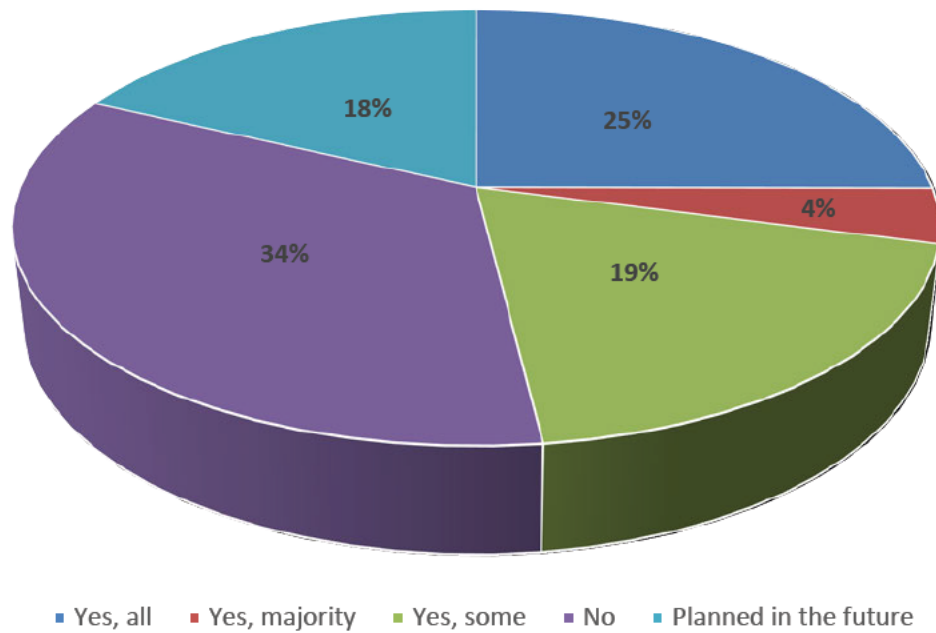
37% (202) of operators have properties that have accessibility features with a further 13% (27) planning for these in the future.

Some of the most common accessibility features included:

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

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

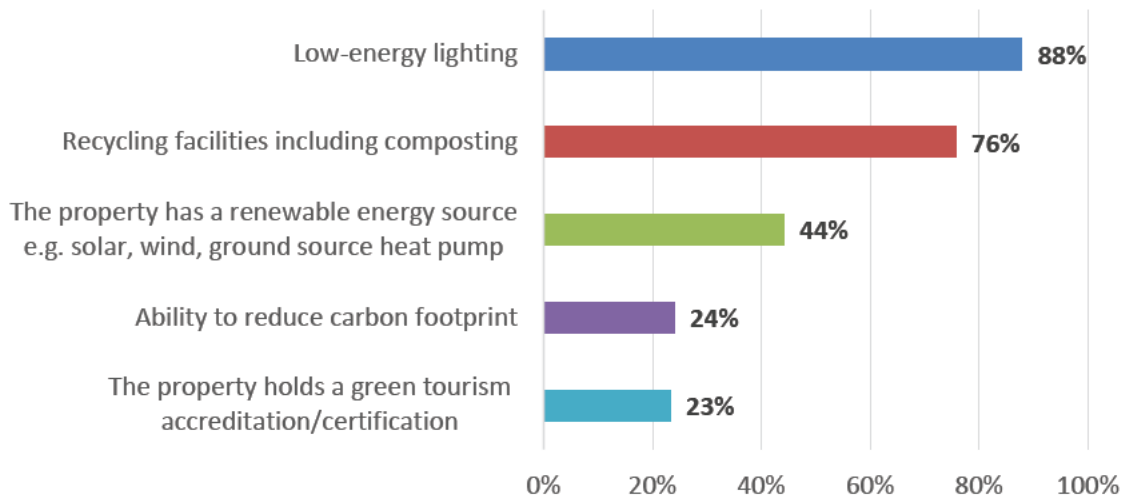
Figure 2.6: Properties with green credentials



N=537

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

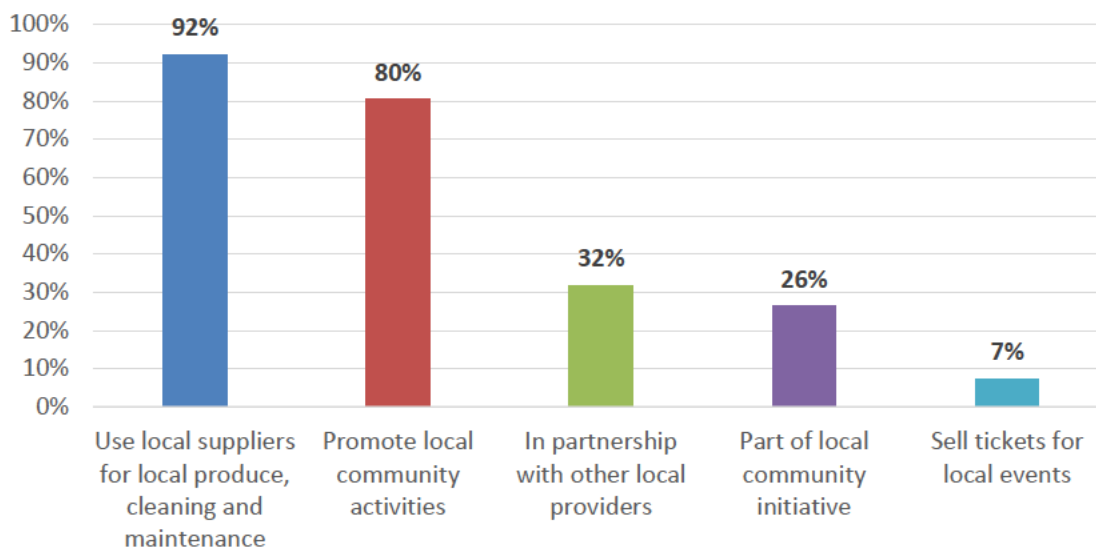
Figure 2.7: Green credentials held



N=263

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

Figure 2.8: Integration with local community



N=515

3.10 Staffing and expenditure

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

Table 2.7: Average number of staff in employment 2019

	High season				Low season			
	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 2019⁸

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

N=318

Table 2.9: Current or future spend in 2020⁹

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

N=318

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

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

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

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

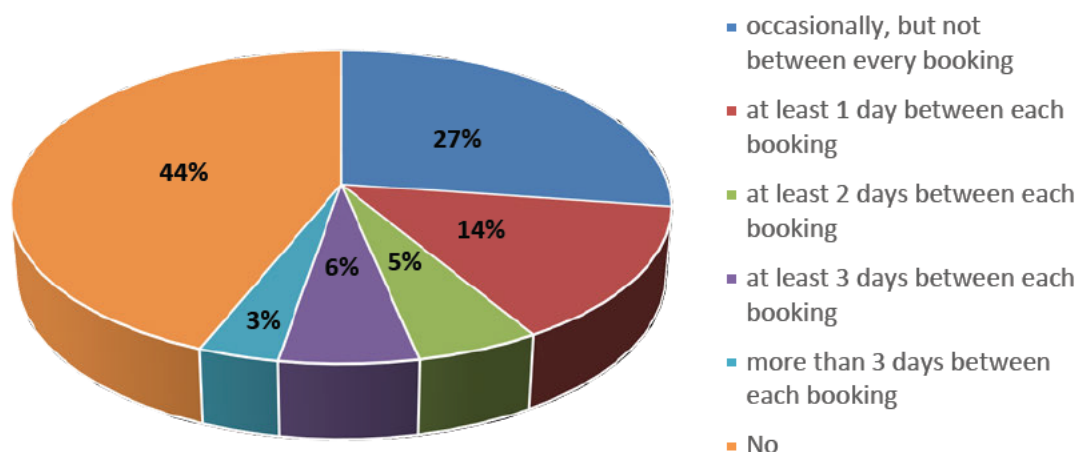
Table 2.10: Grossed current or future spend on each of the following

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

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

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

Figure 2.9: Additional cleaning days



N=319

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

Table 2.11: Operator investment

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

4 Visitors Survey

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

Table 3.1: Location of holiday self-catering properties visited

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

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

4.1 Visitor origin and number of trips

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

Table 3.2: Visitor home country

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

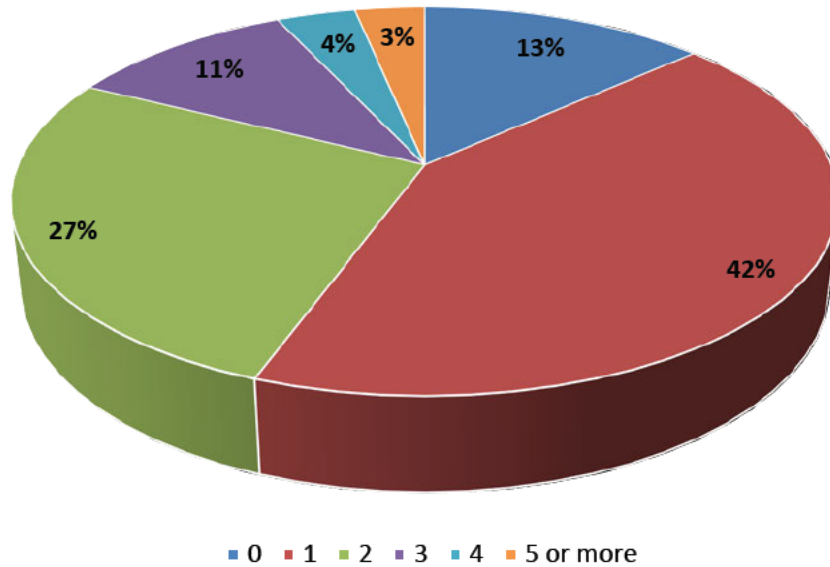
Source: *Frontline Self-Catering Visitor Survey, 2021*

N=718

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

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

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

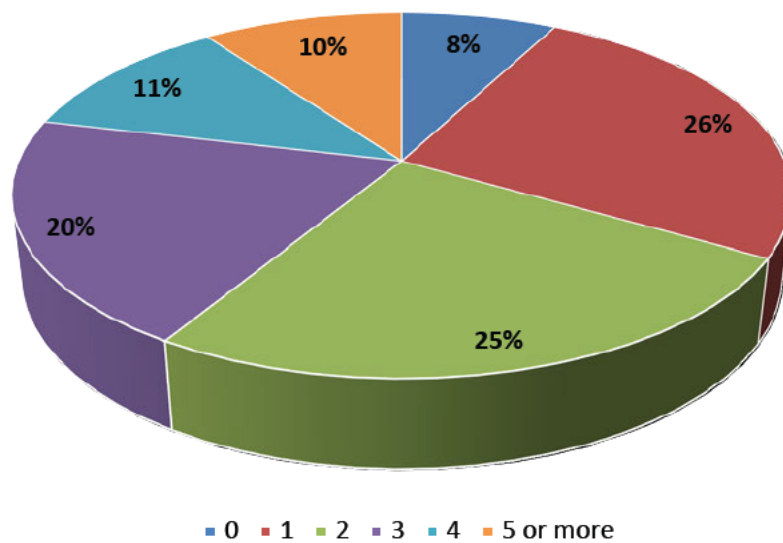


Source: Frontline Self-Catering Visitor Survey, 2021

N=705

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

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



Source: Frontline Self-Catering Visitor Survey, 2021

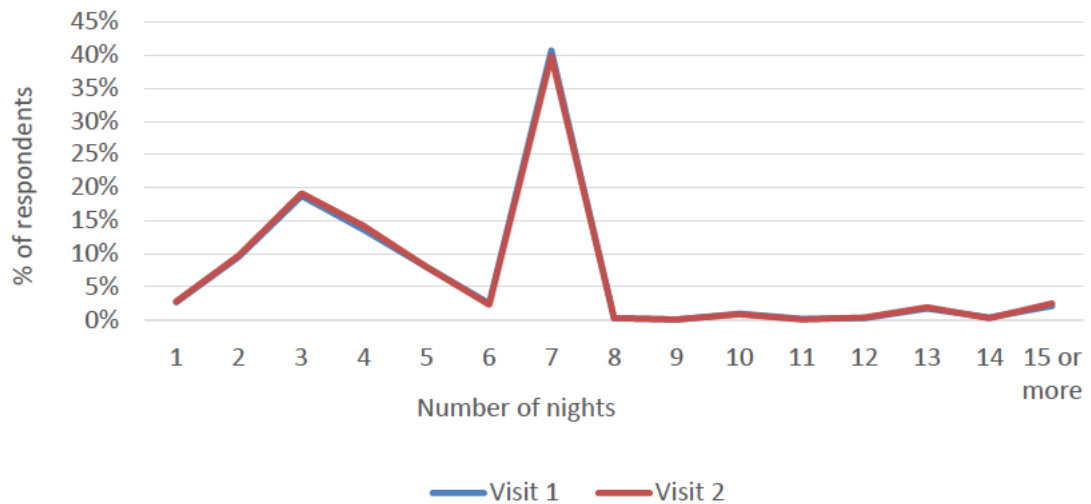
N=714

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

4.2 Visitor characteristics

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

Figure 3.3: Number of nights stayed per visit



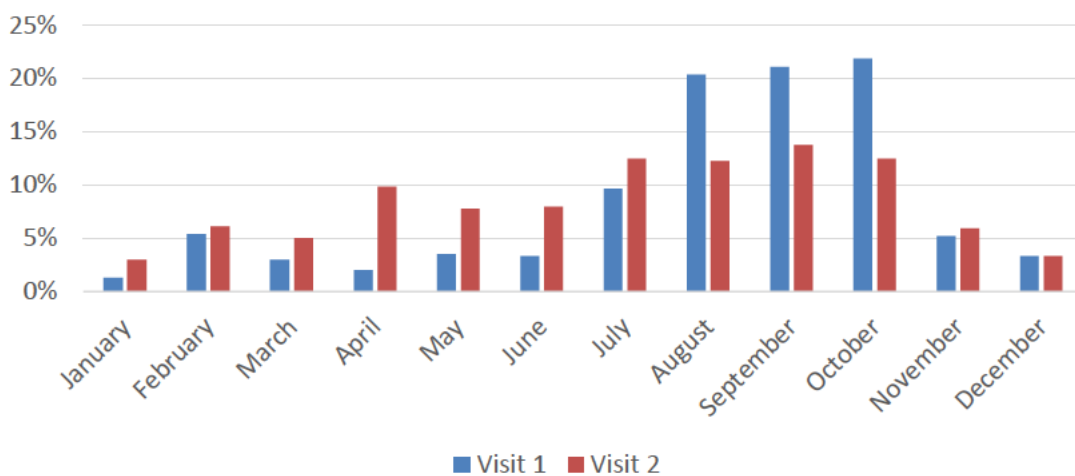
Source: Frontline Self-Catering Visitor Survey, 2021

N=567

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

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

Figure 3.4: Month during which visit began



Source: Frontline Self-Catering Visitor Survey, 2021

N= 540

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

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

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

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

Source: Frontline Self-Catering Visitor Survey, 2021

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

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

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

Source: Frontline Self-Catering Visitor Survey, 2021

4.3 Visitor expenditure

Visitors who stayed in self-catering property (during visit 2, 2019), spent, on average, **£2,264** during their visit. This reduced to **£2,107** for visit 1 (2020).

Table 3.5: Average visitor spend per party

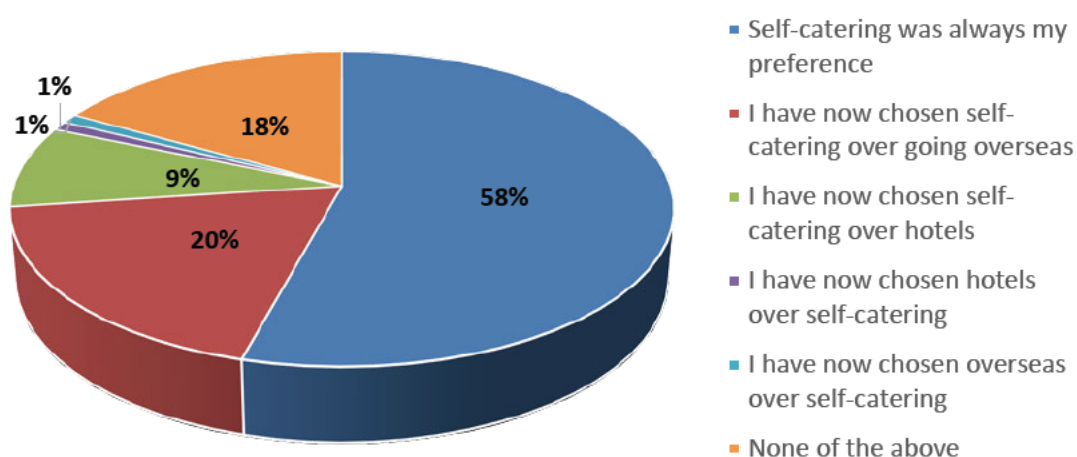
Area of expenditure	Average spend per party		
	Visit 1 (2020)	Visit 2 (2019)	Change since 2019
Transport to and from the property	£173	£208	-17%
Travel during stay	£96	£84	14%
Accommodation fees	£1,024	£1,082	-5%
Food and drink (in supermarkets)	£194	£180	8%
Food and drink (in local shops and farmers 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

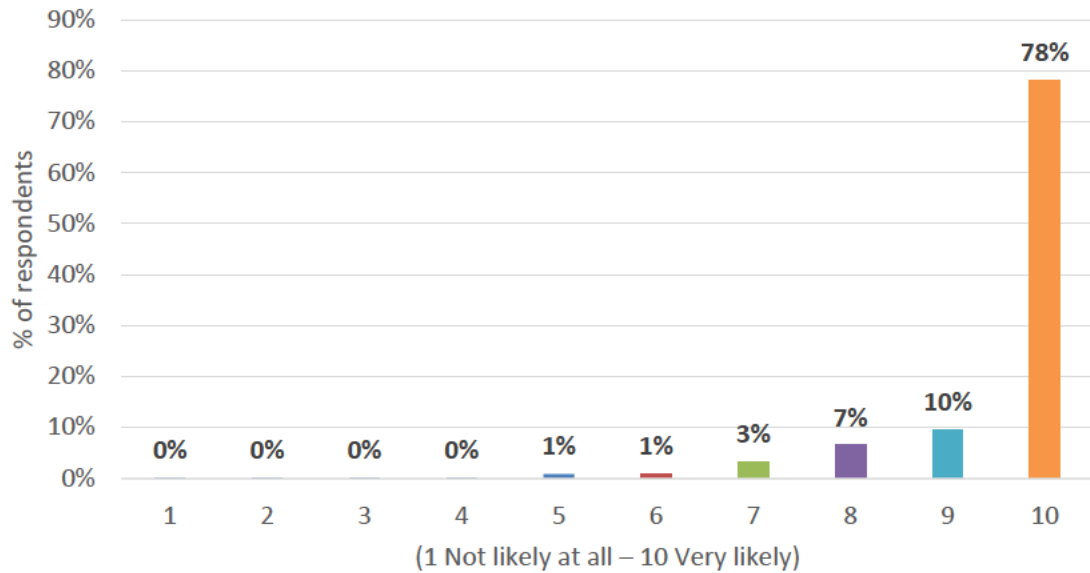


N=717

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

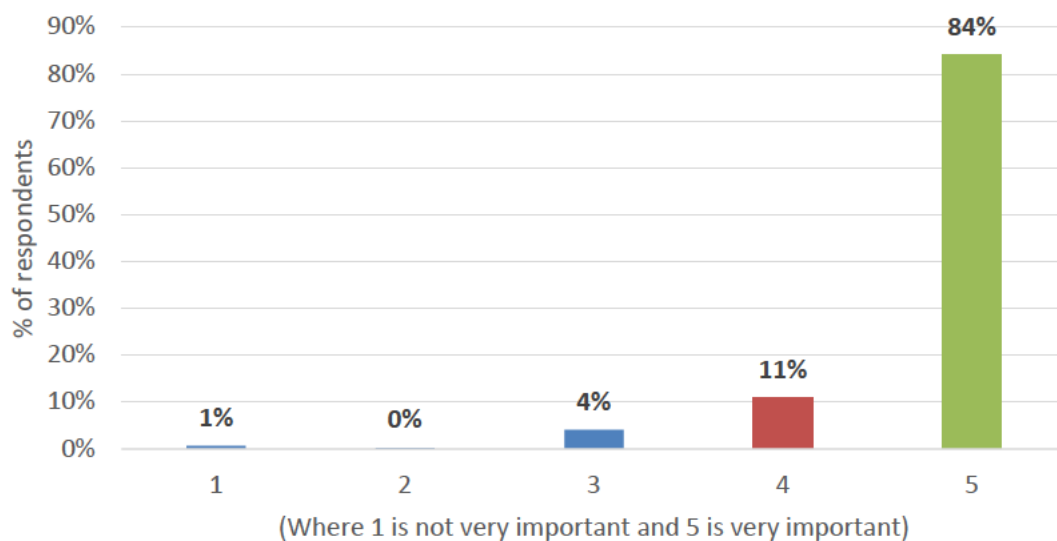


N= 717

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.**

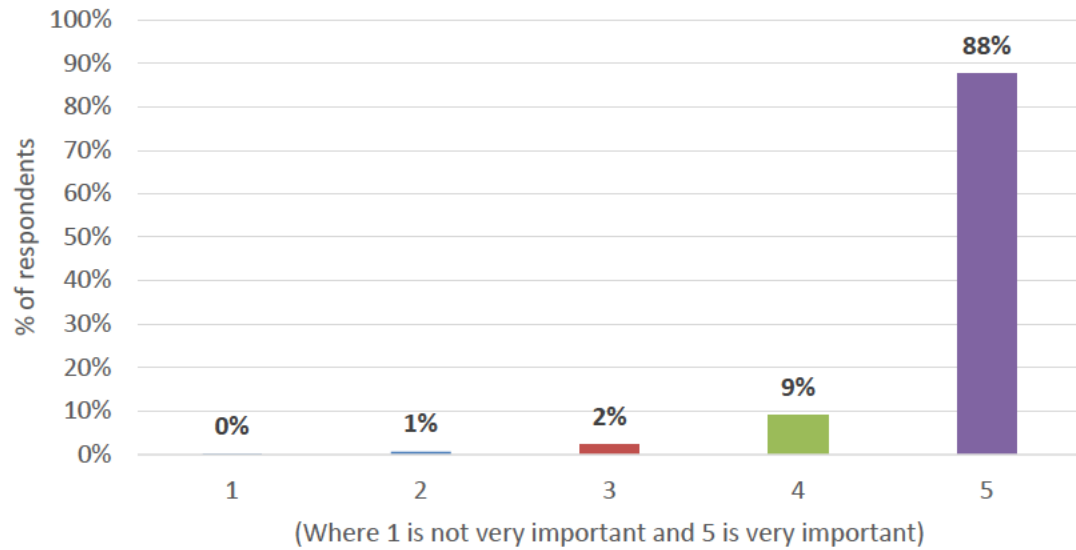
Figure 3.9: Importance of cleaning standards in choice of self-catering accommodation



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 supports¹¹.
5. **Total economic contribution:** the total amount of Gross Value Added (GVA) in each area that can be attributed to expenditure by visitors to self-catering properties. The term GVA can be defined as the total amount of extra value that visitor expenditure contributes to the economy. This is broadly equivalent to either wages plus profit (i.e. the proportion of value added that goes to the company's employees and the proportion that goes to the company's owners) or to turnover minus cost of sale. For example, if a company were to buy enough coffee beans to make 100 cups of coffee for £40, and sell each cup for £1 each, the turnover impact of these transactions would be £100, the cost of sale would be £40, and the value added would be £60.

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

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

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

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

5.1 Impact by Scottish region

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

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

Table 5.1: Economic impacts by Scottish region 2019

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

Source: Frontline, 2021

Table 5.2: Economic impacts by Scottish region 2020

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

Source: Frontline, 2021

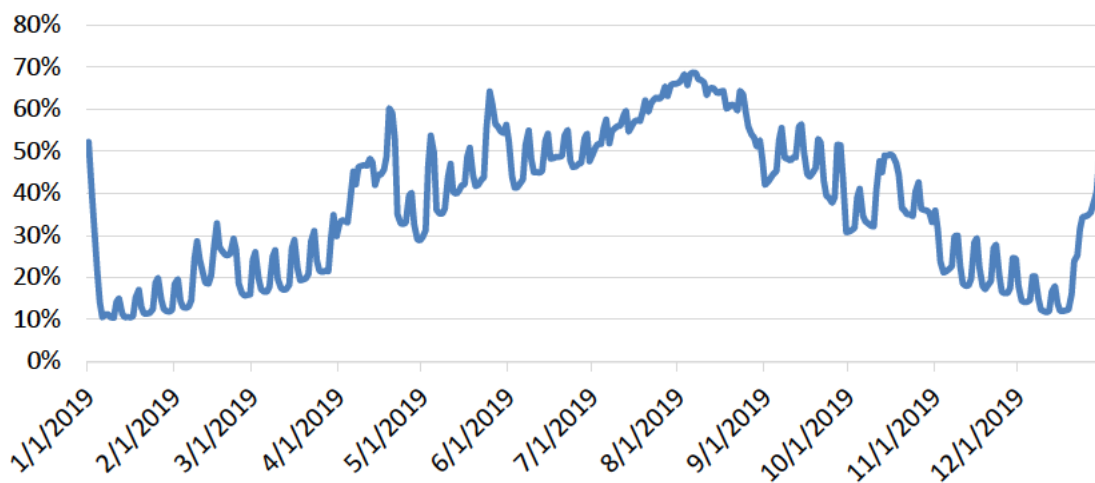
Appendix 1 – SuperControl Occupancy Data

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

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

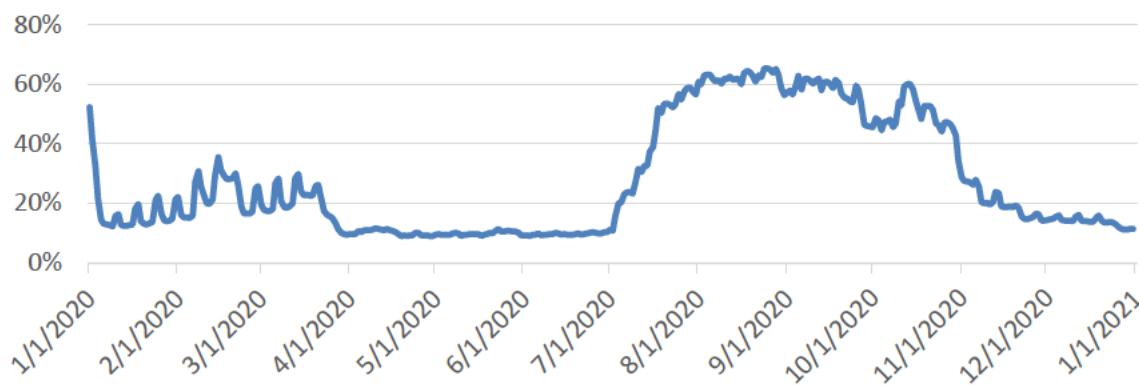
Scotland

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



N= 4,594 properties

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



N= 4,867 properties

Appendix 2 – Detailed Impact Findings

Total Visitor Nights

2019

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

2020

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

Total Visitor Spend (£m)

2019

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

2020

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

Direct GVA (£m)

2019

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

2020

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

Direct Multiplier

2019

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

2020

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

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

2019

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

2020

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

Direct full time equivalent employment

2019

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

2020

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

FTE employment multiplier

2019

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

2020

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

Direct, indirect and induced FTE employment impact

2019

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

2020

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

Appendix 3 – Glossary of Technical Terms

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

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

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

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

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

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

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

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

Appendix 4 – Economic Impact Methodology

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

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

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

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

Economic impact calculation summary

