

## **CHAPTER 3**

# **INVENTORY OF COUNTRYSIDE-BASED RECREATION & SPORTS ACTIVITIES & THEIR TOURISM CONTRIBUTIONS IN THE SCOTTISH BORDERS**

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## INVENTORY OF COUNTRYSIDE TOURISM & SPORTS ACTIVITIES IN THE SCOTTISH BORDERS

### Summary of Main Survey Findings

#### Definitions

From the outset **clear definitions were required** for the activities covered by the inventory. These were provided as follows:

- **‘Countryside-based tourism’** is a generic term used to cover the provision of all services and facilities used by visitors with the Scottish Borders local authority area, who engage in ‘countryside-based recreation and sports activities
- The main **‘Countryside-based recreation activities’** include walking, cycling and horse-riding
- The chief **‘Countryside sports activities’** include the traditional field sports (angling, lowland game shooting, grouse shooting, deer stalking, falconry and fox hunting), plus cycling, water sports (e.g. sailing and ski-ing), motor sports, competitive horse-riding, outdoor archery and air sports (e.g. hang-gliding)

#### Survey Sources

**Two principal data sources** were used to compile this inventory, namely:

- **STB statistics plus consultations** with the main authorities involved locally and regionally in rural affairs and tourism services
- **A questionnaire survey of 260 tourism operators/providers** in the Scottish Borders Region. These equated broadly to 25% of the total Scottish Borders Area Tourist Board membership in 1999 and generated an overall response of 22%. However, of those only slightly over two-thirds (15%) were usable for subsequent analysis

The investigations highlighted **a fundamental weakness** in both the level and depth of available published research information concerning countryside-based tourism in the Scottish Borders Region. Consequently such data as has been made available needs to be treated **with appropriate caution**.

The **highlights of the inventory** were as presented below.

#### The Nature of Countryside & Sports Tourism Markets

- Key target markets and revenue generation sources have been **UK domestic visitors** – in line with the general tourism market profile of the Scottish Borders as a visitor destination. Two of the countryside sports

served as important **‘tourism magnets’**: **angling and grouse shooting**. The proportions of the total numbers of participants originating **specifically from the rest of the UK** (i.e. they were domiciled outside of the Scottish Borders) were respectively **59% and 50%**

- The seasonality of market activity has been **concentrated into the April to September period**. Significant year round countryside-based tourism activity is unlikely, although survey findings have suggested that scope exists to extend the ‘shoulder’ season activities
- **Farm-based tourism** Providers appeared to account for only a small fraction of the estimated countryside tourism provider/facilitator marketing expenditure. This perhaps **reflected the “secondary” nature of the business operations as supplementary income sources** and the generally small-scale nature of the sector i.e. the predominance of B+B and Self-Catering accommodation etc.

### **The Employment Impacts**

- Employment, amounting to an estimated **240 FTEs**, was generated/sustained by the countryside-based tourism sector. This represented about **29% of all tourism related employment in the Scottish Borders Region**

### **The Levels of Direct Expenditure**

- **Providers/facilitators spent an estimated average of £4.5 - £5 million annually** on the purchase of supplies directly associated with their countryside tourism business operations. A significant proportion of this trade was retained within both the local Scottish Borders and wider Scottish economies.
- Countryside-based tourism operations accounted for an estimated **12% of all (domestic and overseas) annual tourist expenditure in the Scottish Borders** from domestic and overseas locations

### **The Economic Impacts**

- The “unknown” double counting factor precluded estimation of a reliable/sustainable projection of the overall volume of countryside-based tourism. **One estimate derived with caution from the survey was that countryside-based tourism activities generated on average an annual revenue of £6million**

### **Investment Motivations**

- **The principal motivations** for involvement in countryside-based tourism activity were **to supplement other income and to provide both personal**

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**interest and pleasure.** Involvement was therefore essentially secondary to participant involvement in other commercial sector economic activities

- Some strong indications of intended involvement in future development activity were identified. However, this was less pronounced in the case of farm-based tourism operators. **The principal motivations for future involvement** by farmers and others as tourism providers were identified as **meeting unfulfilled demand, personal interest and the prospect of a viable business opportunity.** There appeared to be little inclination on the part of those farmers, who have already diversified into tourism related enterprises, to do so further.

### **Verification**

- Throughout the Study, the fundamental weaknesses of previous tourism sector research relating to the Borders were noted. These related to both the level and depth of the previously published research results
- As a result the consultants liaised closely with the SBTB Manager and staff, in an attempt to remedy the gaps and to follow-up investigations with members of the survey population, who did not initially respond

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### 3. INVENTORY OF COUNTRYSIDE-BASED RECREATION & SPORTS ACTIVITIES & THEIR TOURISM CONTRIBUTIONS IN THE SCOTTISH BORDERS

#### Introduction

- 3.1 This Chapter records the results obtained from examining the current profile of both *on-farm* and *off-farm* countryside based recreation, activities, attractions and support services. The main purpose in compiling this inventory has been to identify the current - and possible future - relative contributions of these activities to tourism in the Scottish Borders Tourist Board (SBTB). The latter area mirrors the geographic boundaries of the specific study area.
- 3.2 The countryside tourism assessment was only one of several independent strands comprising the overall study. Whilst this Chapter has been written on this basis, the findings also need to be viewed in the context of the results obtained from the inventories of other activities, such as angling, shooting, stalking and hunting, compiled as part of the overall Study. Inevitably there is a degree of overlap in terms of the inter-relationships between such activities and tourism in the Scottish Borders area.

#### Definitions

From the outset clear definitions were required for the activities covered by the inventory. These were provided as follows:

- ‘**Countryside-based tourism**’ is a generic term used to cover the provision of all services and facilities used by visitors with the Scottish Borders local authority area, who engage in ‘countryside-based recreation and sports activities
- The main ‘**Countryside-based recreation activities**’ include walking, cycling and horse-riding
- The chief ‘**Countryside sports activities**’ include the traditional field sports (angling, lowland game shooting, grouse shooting, deer stalking, falconry and fox hunting), plus cycling, water sports (e.g. sailing and ski-ing), motor sports, competitive horse-riding, outdoor archery and air sports (e.g. hang-gliding).

#### Methodology

- 3.3 The preparation of the inventory and related appraisal has entailed undertaking a series of distinct, but related, assessments involving:
- a contextual desk study of Tourism in the Scottish Borders;

- consultations with key tourism interests within the Scottish Borders area, including the SBTB; the Borders Farm Tourism Group, Forest Enterprise, the Scottish Executive Rural Affairs Department (Rural Diversification Programme);
- a Questionnaire survey of those tourism operators/providers (farm and non-farm based) in the Scottish Borders area, *known* to have a direct involvement in countryside-based tourism activities, facilities and support services.
- profiles of the countryside tourism market in terms of stakeholder provision, revenues generated, associated economic benefits, and the motivations of tourism providers/facilitators.

**3.4** The results of these investigations are reported in the subsequent sections of this Chapter.

## Tourism in the Scottish Borders: A General Contextual Summary

### Volume and Value

**3.5** Boxes 3.1 and 3.2 summarise respectively the value and volume of tourism activity in the SBTB area. These are useful in providing background to the scale of the sector, within the context of overall tourism trends in Scotland.

#### Box 3.1: DOMESTIC AND OVERSEAS STAYING VISITOR ACTIVITY

3 Year Average	SBTB (Trips) Million	Scotland (Trips) Million	% of Market Share	SBTB Expenditure £ million	Scotland Expenditure £ million	% of Market Expenditure
1996-1998	0.44	12.57	3.5%	£50.0	£2,410	2.1%
1995-1997	0.45	12.48	3.6%	£51.0	£2,416	2.1%
1992-1997	0.35	10.25	3.4%	£40.3	£2,006	2.0%
<b>TOTAL 1992-1998</b>	<b>1.24</b>	<b>35.3</b>	<b>3.5%</b>	<b>£141.3</b>	<b>£6,832</b>	<b>2.1%</b>

Source : Scottish Tourist Board

(Note : \* A 3 Year average figure was used, in order to reduce the margin of error in individual year data results)

**3.6** The key findings that emerged from the surveys were as follows:

- total Domestic & Overseas staying visitor trips to the SBTB area have fluctuated in past 6 years, although overall growth during the period (+26%) has been slightly higher than the national growth during the same period (+23%);

- ❑ the overall staying visitor spend between 1992 and 1998 increased by 24%. This again was slightly higher than the national expenditure increase of 20% during the same period;
- ❑ the average staying visitor spend per trip in the Scottish Borders during the period 1996-1998 was c£114 compared to the national average for Scotland of c£192 during the same period. Given that the average length of visitor stay in the Scottish Borders is the same as the national average for Scotland (5 nights) it is likely that this low average visitor spend is due to a combination of factors e.g.
  - the use of lower cost accommodation types used (almost half of all overseas visitors to the Scottish Borders stay with friends and relatives whilst almost 60% of all domestic visitors stay in self-catering accommodation or with friends and relatives);
  - more limited spend on visiting attractions, eating out, leisure retail purchases etc;
- ❑ the Scottish Borders retained a relatively limited (and static) share of both the national staying visitor volume and value - accounting for only c3.5% of all staying visitors to Scotland and c2% of all staying visitor expenditure.

**BOX 3.2: VOLUME OF DAY TRIP ACTIVITY**

Year	SBTB All Day Visits Million	Scotland All Day Visits Million	Market Share
1998	10.1	420	2.4%
1996	7.4	432	1.7%

Source : Scottish Tourist Board, Leisure Day Visits to Scottish Borders, 1996 and 1998

**3.7** The key findings in relation to Day Trip Activities were as highlighted in **Box 3.2** and summarised below:

- ❑ in 1998 leisure day trips in the Scottish Borders accounted for only 2.4% of all day visits undertaken in Scotland. This represented a slight increase from the percentage share in 1996;
- ❑ the STB data suggested that in real terms, day visit activity in the Scottish Borders increased by 36% in the period between 1996 and 1998.

**3.8** Despite this growth, day visit activity within the Scottish Borders area continued to be dominated by visits taken from residents of the Scottish Borders (67% of all day trips undertaken). Despite the relative accessibility of the Scottish Borders to the resident populations of Edinburgh and Glasgow, these locations accounted for just 19% of all day trips to the Scottish Borders in 1996 and only 12% in 1998. A partial explanation for this pattern may be that the most popular day trip activities in both Edinburgh and Glasgow (which was dominated by

residents of these respective areas) included leisure shopping, eating/drinking out, entertainment, visiting friends and relatives etc as opposed to the outdoor recreation and historical/heritage activity resource strengths of the Scottish Borders area.

**3.9** Furthermore, in 1998 total day trip expenditure in the Scottish Borders was £152 million, although this represented only 3% of the total day visitor expenditure in Scotland.

**3.10** Based upon the preceding information, the total annual tourist expenditure (staying and day visitors) within the Scottish Borders was estimated to be c£200 million. This compared with the estimated £98 million generated by agriculture activity, (Scottish Executive figure for 1996, adjusted to 1999 prices); approximately £24 million from forestry activity (Borders Enterprise, 1999; pers comm) and the estimated £22million to £30million derived from countryside sports activity within the Scottish Borders area.

### Activity-Based Tourism Profile

**3.11** Whilst the two Boxes above provide an “over-arching” profile and comparative context for the overall value and volume of tourism in the Scottish Borders area, this section focuses upon the published performance trends of activity-based tourism for Domestic staying visitors. Unfortunately there is no annual survey of activity-based tourism for overseas staying visitors. The last survey of this sector was conducted in 1996 and was based on the national (Scotland) level. This was discussed with the Research Department of the STB, which advised that the small sample size used at the national level precluded any “sustainable analysis” at the sub-national level.

**3.12** The available published data is summarised in **Boxes 3.3 and 3.4**.

### Domestic Staying Visitor Activity Holiday Profile

**Box 3.3: VOLUME AND VALUE OF DOMESTIC STAYING VISITORS**

Year	SBTB Activity Holiday Trips Million	Scotland Activity Trips Million	% of Market Share	SBTB Activity Holiday Expenditure £ million	Scotland Activity Holiday Expenditure £ million	% of Market Expenditure £ million
1998	0.072	1.2	6%	*22.00	£284	8%
1996	0.065	1.3	5%	12.75	£255	5%

Source : UK Tourism Activity Holidays in Scotland 1996 and 1998

(Note: \* Figure based upon STB extrapolation of data relating to estimated visitor spend on “any activity” in the Scottish Borders)

**BOX 3.4: ACTIVITY HOLIDAY BY DESTINATION OF TRIP**

Year	SBTB area as % of all Activity based Domestic Holiday Trips in Scotland
1998	6%
1995-1997 (3 Year Average)	4%
1993-1995 (3 Year Average)	5%

Source : Scottish Tourist Board UK Tourism Activity Holidays in Scotland 1995; 1997 and 1998

**3.13** The key features of this sector of the tourism market were found to be as follows:

- the Scottish Borders' share of national domestic staying visitor activity holiday trips demonstrated limited growth in the past three years, although this occurred at a time when the number of annual activity holiday trips in Scotland experienced a slight decline during the same period;
- the Scottish Borders' share of market expenditure on activity holidays in Scotland increased from 5% in 1996 to an estimated 8% in 1998, (although the small sample size used by the STB Research section in this extrapolation exercise requires that this figure should be treated with caution);
- the overall scale of activity based holiday trips (main purpose for holiday) in the Scottish Borders remained relatively limited in scale (c72,000 annual trips). This represented only 18% of all domestic tourism trips to the Scottish Borders in 1998.

### Countryside-Based Tourism Recreation Activities Profile

#### Staying Visitors

**3.14** Published research for countryside tourism recreation and other rural based activities was only provided at the national (Scotland) level for domestic visitors. A summary of the profile of such activities is illustrated in **Box 3.5**.

**BOX 3.5: DOMESTIC STAYING VISITOR RURAL RECREATION AND ASSOCIATED ACTIVITY PROFILE (BY MAIN PURPOSE OF TRIP)**

Activity	Scotland Trips Million 1997	Scotland Trips Million 1998	Expenditure £ Million 1997	Expenditure £ Million 1998
Walking/Hiking/Rambling	0.3	0.3	£74	£68
Fishing	0.1	<0.1	£18	£13
Golf	0.1	0.1	£26	£23
Cycling	0.1	<0.1	£13	£31
Shooting/Stalking/Hunting	<0.1	0.1	NA	£31
Field/Nature	0.1	<0.1	£12	£1
Water Sports	0.1	<0.1	£23	£10

Source: Scottish Tourist Board UK Tourism Activity in Scotland 1997 and 1998 surveys

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- 3.15** No apparent key trends in domestic visitor activity participation emerged from this Study. This undoubtedly reflected the limited sample size used at the national level and the rounding of the participation figures.
- 3.16** Based on the 1998 data, the most “valuable” activities in terms of average expenditure per trip were (in descending order), as shown below. The estimates were derived from the data presented in Box 3.5 (Expenditure divided by Trips, 1998).
- Shooting/Stalking/Hunting (£310)
  - Golf (£230)
  - Walking (£227)
  - Fishing (£130)
  - Water Sports (>£10)
- 3.17** The apparent variations in the survey data, relating to fishing, cycling and field/nature studies (the latter included residential courses, bird-watching, nature package trips etc), remained relatively static in terms of participation levels. However, the expenditure impacts declined out of proportion, suggesting that the survey findings should be treated with extreme caution.
- 3.18** As part of the Scott Wilson research programme for this study, a request was made to the STB Research Department to extrapolate, from the national survey data, the relevant activity participation profile information for the Scottish Borders region. However the resultant information proved to be unusable, due to the limited size of the national sample. The latter effectively nullified the desired estimation process.
- 3.19** In the absence of such usable data at the sub-national level, it is nevertheless worth referring to the Seasonality Research programmes undertaken by the SBTB. This was published in 1998. It covered both SBTB members and also visitors. Whilst this research was qualitative rather than quantitative, the following findings nevertheless provided interesting indicators:
- only 10% of SBTB members responding to the survey identified outdoor activities in the Borders as a strength. This compared with the more positive responses of staying visitors, who identified walking (38% of respondents); fishing (11%) and golf (11%) as key activities during a stay in the SBTB area;
  - of all outdoor activities, cycling; horse riding and the “Freedom of the Fairways” golf package were identified by both visitors and members as activity “strengths” of the Borders. Golf emerged from the visitor survey as a potential development activity worthy of particular promotion.
- 3.20** These main research findings were also echoed in the Scottish Borders Tourism Strategy Working Document covering the period 1999-2004. The strong sporting traditions of the Scottish Borders (e.g. field sports, horse riding & trekking, fishing etc) and the increasing activity participation opportunities

offered particularly by walking, cycling and golf, were amongst main strengths identified. In terms of specific future development opportunities the Strategy highlighted the continued development of niche markets such as walking, cycling and fishing.

### Leisure Day Visits

**3.21** **Box 3.6** highlights the trend in those main activities undertaken on day visits in the Scottish Borders that are pertinent to this Study.

**BOX 3.6: MAIN ACTIVITIES UNDERTAKEN ON A DAY VISIT  
(AS A PERCENTAGE OF ALL DAY VISITS)**

Activity	SBTB area (1996)	Scotland (1996)	SBTB area (1998)	Scotland (1998)
Walking/Rambling etc	9%	12%	20%	15%
Cycling/Mountain Biking	2%	1%	1%	2%
Other Outdoor Sports	4%	3%	3%	5%
Sport in Countryside	<1%	2%	4%	3%

Source: STB - Leisure Day Visits to Scottish Borders 1996 and 1998

**3.22** The main pointers that emerged from this research were as follows:

- walking/rambling remained as the most popular countryside/rural recreational activity in the Scottish Borders – and indeed, in both the 1996 and 1998 surveys, was the third most popular activity undertaken on a day trip in the Scottish Borders (after Visiting Friends & Relatives and Eating or Drinking Out);
- day visit participation in other countryside/rural activities was much less pronounced, although it was encouraging to note that the overall day trip participation in sports in the countryside (including water-based sports, fishing, shooting, skiing etc) in general appeared to have increased between 1996 and 1998.

**3.23** The preceding sections of this Chapter have highlighted a fundamental weakness in both the level and depth of the available published research information relevant to this Study, which sought to establish a profile of the contributions of countryside-based recreation, sports activities and support services to the tourism sector in the Scottish Borders. Thus, whilst the pointers and conclusions presented above provide useful general performance indicators, it was recognised that there are distinct limitations in the accuracy and robustness of the information applicable to the Scottish Borders. Accordingly it was appropriate caution was essential when interpreting and applying the available data.

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## Primary Market Research Survey & Results

**3.24** The consultants, in recognition of the above and in seeking to expand the market intelligence available at the Scottish Borders level, undertook additional primary research of the tourism sector in the Scottish Borders. This research, based on the use of a postal questionnaire survey, was conducted in close consultation with the Borders Foundation for Rural Sustainability and the co-operation of the SBTB. Its main objectives were:

- to obtain a more complete picture of the nature and extent of those tourism interests directly involved in providing both traditional and evolving countryside-based recreation facilities, activities and services; as well as
- to identify any future development opportunities that might enhance the involvement of farmers and other regional stakeholders in developing both the tourism appeal and performance of the Scottish Borders region.

### Primary Research Approach

**3.25** The survey was based upon a universal sample of those tourism providers/facilitators in the Scottish Borders, who were *known* to have an involvement in the provision/management of countryside-based recreation/sports and visitor attractions, and the supply of support services (e.g. visitor accommodation). The survey sample was based upon:

- obtaining assistance from the SBTB Development Manager and Research Officer in identifying providers/facilitators;
- seeking responses to an advertisement placed by the consultants in the September 1999 edition of the SBTB members' Newsletter;
- undertaking a review and analysis of SBTB brochures and other relevant national brochures e.g. Blakes and Country Cottages self-catering publications.

**3.26** In total, almost 260 questionnaires were issued (broadly equating to 25% of the total current SBTB membership). The sample base was categorised as shown in **Box 3.7**.

**BOX 3.7: COMPOSITION OF THE SAMPLE SURVEY POPULATION**

Category	Questionnaire Database Sample Size	Total SBTB Base	Sample as % of Total SBTB Base
Hotel	21	80	26%
B&B + Guest House	85	246	35%
Self Catering Operators	67	162	41%
Visitor Attractions (Rural Theme)	22	50	44%
Cycling Holiday/Tour Operators	6	8	75%
Golf Courses	21	21	100%
Fishing Facilities	7	n/a	n/a
Walking Holiday Tour Operators	7	7	100%
Equestrian Centres	12	12	100%
Other Miscellaneous Countryside based Providers	9	n/a	n/a

**3.27** The overall response rate to the questionnaire survey (including two follow-up exercises conducted in partnership with the SBTB) totalled 22%. However, of these responses, only two thirds were deemed to be usable for analysis purposes.

**3.28** This was a disappointing outcome, given that the survey base was selected specifically to include countryside-based tourism providers/facilitators relevant to the Study. It possibly reflected a perception of many members of the survey population that the level of information sought was too comprehensive and time-consuming. On reflection, it might be considered that a streamlined questionnaire would perhaps have been more “user friendly”. However, it was also recognised that a detailed “questioning process” was essential, in order to generate market and economic data capable of supplementing the type of general published survey information presented above in **Boxes 3.1 to 3.6** inclusive.

**3.29** A summary of the questionnaire responses is summarised in **Box 3.8**.

**BOX 3.8: RESPONSE RATES TO THE SURVEY**

	Sample Size	No of Usable Responses	Response Rate
Total Survey Recipients	260	40	15%
<i>Farm Based Recipients</i>	90	16	18%

**3.30** Before presenting the survey results it is important that several points are noted concerning conduct and analysis of the survey, namely:

- on the advice of the Study Team’s Statistical Adviser, analysis of the voluntary questionnaire responses (i.e. those returned “unprompted” following initial despatch of the questionnaires) and analysis of the responses obtained from the targeted questionnaire recipient “follow up” exercises (undertaken by the SBTB) have been undertaken separately.

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This was based on recognition of the element of bias that the latter would have had on any aggregated results;

- ❑ due to the comprehensive nature of the survey, not all questions were answered by respondents. Accordingly the analysis was conducted by adopting a “pair-wise deletion” approach, whereby only respondents with complete answers for a particular question were included in the analysis;
- ❑ where possible, relevant information relating specifically to the farm based questionnaire respondents has been extrapolated and expressed separately;
- ❑ in some Boxes the total number of survey results reported exceeded the total number of the usable questionnaire responses. This was due to the fact that some respondents completed questionnaires for more than one provider/facilitator category
- ❑ where there was a particularly low response rate, this has been specifically highlighted, so that caution is exercised before drawing any wider conclusions for the Scottish Borders region;
- ❑ percentage figures were rounded and therefore did not always total 100%.

**3.31** For ease of reference, analysis of the Scottish Borders tourism survey results are presented under the following headings:

- ❑ Countryside Tourism Market Profile;
- ❑ Countryside Tourism Revenue Profile;
- ❑ Associated Economic Impacts;
- ❑ Countryside Tourism Provider/Facilitator Involvement Profile.

### **Countryside Tourism Market Profile**

#### Visitor Profile

**3.32** Assessment of the profile of the countryside-based tourism market sector was undertaken under three key headings:

- ❑ Visitor accommodation providers (e.g. Hotels B&B, Guesthouses and Self-Catering establishments);
- ❑ Countryside recreation and sports activity providers/facilitators (e.g. golf courses, equestrian centres, activity holiday operators providing walking, cycling etc);
- ❑ Countryside visitor attraction operators (e.g. historic houses, farm parks, arts & crafts and food produce attractions etc);

In addition the assessment has been broken down into three categories:

- “Farm Based Responses”: Questionnaire returns from farm-based providers;
- “Voluntary Responses: Questionnaires returned to Scott Wilson unprompted by recipients;
- “Follow-Up Responses: Telephone follow-up by the SBTB (sub-contracted by Scott Wilson) of a cross-section of questionnaire recipients, who had not returned completed questionnaires.

These are covered in the following three Boxes.

<b>BOX 3.9: VISITOR ACCOMMODATION PROVIDERS</b>			
<b>Area of Origin of Visitors</b>	<b>Farm based responses (%)</b>	<b>Voluntary responses (%)</b>	<b>Follow up responses (%)</b>
Scottish Borders	4	4	22
Rest of Scotland	33	23	22
Rest of UK	51	51	38
Europe	7	14	9
N. America	2	5	4
Rest of World	3	3	4
<i>Usable Questionnaire response i.e. Base Number</i>	6	12	2

<b>BOX 3.10: COUNTRYSIDE RECREATION AND SPORTS ACTIVITY PROVIDERS/FACILITATORS</b>			
<b>Area of Origin</b>	<b>Farm based responses (%)</b>	<b>Voluntary responses (%)</b>	<b>Follow up responses (%)</b>
Scottish Borders	4	17	11
Rest of Scotland	23	13	18
Rest of UK	52	44	52
Europe	11	9	10
N. America	4	4	8
Rest of World	6	13	1
<i>Usable Questionnaire response i.e. Base Number</i>	10	14	9

<b>BOX 3.11: COUNTRYSIDE VISITOR ATTRACTION OPERATORS</b>		
<b>Area of Origin</b>	<b>Voluntary responses (%)</b>	<b>Follow Up responses (%)</b>
Scottish Borders	43	19
Rest of Scotland	23	21
Rest of UK	24	29
Europe	6	15
N. America	2	11
Rest of World	3	11
<i>Usable Questionnaire response i.e. Base Number</i>	6	2

**3.33** The preceding three Boxes highlight the importance of the domestic market (Scotland and the UK) to countryside tourism activity in the Scottish Borders

with the overseas market accounting for only a small proportion of market sector activity. Whilst the Scottish market provides an important source of business for countryside tourism activity in the Scottish Borders area, it is the remaining UK market sector which provides the largest proportion of business in all three categories. These findings were broadly in line with the published STB domestic and overseas visitor market profiles for the SBTB area. For the 3 year period 1996 to 1998, domestic visitors to the Scottish Borders accounted for around 90% of all tourist visits (Source: STB – “Tourism in Scottish Borders 1998” Facts Sheet). In the case of angling and grouse shooting, these findings were borne out by the surveys conducted into countryside sports’ participation during this Study. The proportions of the total numbers of participants located in the rest of the UK (i.e. outside of the Scottish Borders) were as follows: angling (59%); grouse shooting (50%).

#### Seasonality of Market Activity

- 3.34** The seasonality of the countryside tourism market sector activity detailed above is summarised in the following three Boxes: **Boxes 3.12, 3.13 and 3.14.**

#### **BOX 3.12: VISITOR ACCOMMODATION PROVIDERS**

Season	Farm based responses (%)	Voluntary responses (%)	Follow-Up responses (%)
Jan – March	6	6	15
April – June	31	28	18
July – Sept	51	54	30
Oct – Dec	11	11	37
<i>Usable Questionnaire response i.e. Base Number</i>	6	12	2

#### **BOX 3.13: COUNTRYSIDE RECREATION AND SPORTS ACTIVITY PROVIDERS/FACILITATORS**

Season	Farm based responses (%)	Voluntary responses (%)	Follow-Up responses (%)
Jan – March	8	13	12
April – June	28	29	23
July – Sept	49	38	32
Oct – Dec	15	21	33
<i>Usable Questionnaire response i.e. Base Number</i>	10	14	9

#### **BOX 3.14: COUNTRYSIDE VISITOR ATTRACTION OPERATORS**

Season	Voluntary responses (%)	Follow-Up responses (%)
Jan – March	6	10
April – June	39	31
July – Sept	49	50
Oct – Dec	10	10
<i>Usable Questionnaire response i.e. Base Number</i>	6	2

- 3.35** The survey confirmed that the seasonality of countryside tourism market activity in the Scottish Borders was heavily concentrated into the April to September period with the peak activity coinciding with the traditional July to September main summer holiday season when the Scottish Borders attracts the majority of its annual domestic and overseas visitor numbers. Whilst there was visitor activity in the off-peak season (October to March), the decline from the main April to September period was significant. The latter was undoubtedly linked to a combination of factors such as the impact of climate upon the natural environment and outdoor activity resources of the Scottish Borders during the winter months; the seasonal availability of visitor accommodation e.g. self-catering stock; and the seasonal opening of countryside-based visitor attractions e.g. historic houses etc.
- 3.36** This raised the issue as to whether, and how, countryside tourism activity in the Scottish Borders might realistically be extended much beyond the shoulder months of the main visitor season towards a more developed pattern of year round activity. Furthermore, the peaked seasonality of the countryside tourism market activity coincides with the busiest period in the farming calendar which places additional pressures on the resource capacities and the service requirements of farm based providers – particularly when many of the farm based tourist service providers operate with minimal staff resources. This calls for a significant commitment in terms of time and energy invested in delivering services to countryside tourists whilst, in many cases, the same people can be heavily involved in the mainstream farm operation.
- 3.37** At the same time the winter-time concentration of the countryside sports component of countryside tourism needs to be more widely recognised. The employment and economic contributions made by countryside sports activities have been particularly valuable, because of their out of normal season characteristics. This has applied in the case of the providers of both sporting and associated facilities (e.g. accommodation).

#### Volume of Market Activity

- 3.38** The estimate of the volume of “countryside tourists” within the Scottish Borders area is based upon business performance response averages extrapolated from the usable countryside tourism provider questionnaire returns and then applied to the respective categories within the overall questionnaire recipient data-base. However, as **Box 3.15** shows, the usable response base for each category is limited in number (figures in brackets) and therefore the accuracy of the ‘grossed-up’ estimates should be treated with due caution. In acknowledging this caveat, it is suggested that the estimates should be treated as “indicative” rather than “actual” projections. The visitor attraction estimate excludes the estimated c. 100,000 annual visitors recorded by Forest Enterprise to its principal recreation resources in the Scottish Borders - Glentress Forest and Cardrona Forest.

**BOX 3.15: AVERAGE & GROSSED-UP VOLUME OF COUNTRYSIDE TOURISTS**

Countryside Tourism Provider/Facilitator Type	Average No of Annual Tourists (Response Base)	No in Overall Survey Database Categories	Grosses-Up Estimates of Total Number of Annual Tourists	
			Lower Estimate	Upper Estimate
Visitor Accommodation	1,200 (7)	173	108,000	207,600
Recreation & Sports	1,500 (8)	62	52,500	93,000
Visitor Attraction	10,700 (3)	22	133,750	235,400

**3.39** Furthermore, it would be unrealistic to aggregate these annual total estimates to produce an overall total figure, as it is known that there is a significant element of "double-counting". This is associated with visitors staying in countryside-based visitor accommodation within the Scottish Borders who also participate in recreation and sports activities and/or visit attractions etc in the Scottish Borders during their holiday visit stay, i.e. the types of 'Provider'/ 'Facilitator' listed in **Box 3.15** are not mutually exclusive.

Countryside Tourism Marketing Expenditure

**3.40** The level of provider/facilitator marketing expenditure that is incurred in the Scottish Borders on promoting countryside-based tourism facilities, activities and services was estimated to amount to approximately £960,000 annually. This is illustrated in **Box 3.16**. The same caveats made with respect to the estimates provided in the previous Box apply in this case.

**BOX 3.16: AVERAGE & GROSSED-UP COUNTRYSIDE TOURISM MARKETING EXPENDITURE**

Countryside Tourism Provider/Facilitator Type	Average Annual Marketing Spend (Response Base)	No in Overall Survey Database Categories	Grosses-Up Estimates of Total Number of Annual Marketing Spend	
			Lower Estimate	Upper Estimate
Visitor Accommodation	£3,500 (10)	173	£336,000	£605,500
Recreation & Sports	£3,000 (21)	62	£124,500	£186,000
Visitor Attraction	£7,800 (3)	22	£ 97,500	£171,600

**3.41** It is estimated that farm-based tourism providers in the Scottish Borders accounted for less than 10% of the total projected marketing expenditure in the Borders region. This was based on extrapolation of the farm-based tourism provider marketing response data and "grossing-up" to take account of the total number of farm-based providers in the overall survey database.

## Countryside Tourism Revenue Profile

### Annual Revenue

**3.42** Box 3.17 presents estimates of the average total revenue, generated by countryside tourism providers/facilitators in the Scottish Borders area.

<b>BOX 3.17: AVERAGE ANNUAL REVENUE GENERATED BY PROVIDERS</b>				
Countryside Tourism Provider/Facilitator Type	Average Annual Income per Provider/Facilitator ( <i>Response Base</i> )	No in Overall Survey Database Categories	Annual Revenue Estimate	
			Lower Estimate	Upper Estimate
Visitor Accommodation	£17,000 (7)	173	<b>£1,530,000</b>	<b>£2,941,000</b>
Recreation & Sports	£34,200 (14)	62	<b>£1,299,600</b>	<b>£2,120,400</b>
Visitor Attraction	£55,000 (2)	22	<b>£660,000</b>	<b>£1,210,000</b>
<b>TOTAL</b>			<b>3,489,600</b>	<b>6,271,400</b>

**3.43** Based upon the above (and taking into account the extremely small visitor attraction response base), it was estimated that countryside-based tourism providers/facilitators in the Scottish Borders generate c. £6million annually. This equated to c.12% of the total annual average domestic and overseas visitor expenditure in the Scottish Borders for the three year period 1996 to 1998. Of this £6 million estimate, farm-based providers were estimated to account for around 23% of the annual total (*NB. This has been calculated from a base of only 6 usable questionnaire responses*).

**3.44** Furthermore, annual income directly attributable to the provision of countryside-based tourism facilities, activities and services accounted, on average, for almost 50% of the total annual tourism/business income (*NB. This has been based on the average of 12 usable questionnaire responses*). This indicates the ‘supplementary’ nature of countryside-based tourism business operation within the Scottish Borders area. Further comment on this follows later in the chapter.

### Annual Tourist Revenue by Visitor Origin

**3.45** The following three Boxes 3.18 to 3.20 inclusive illustrate the profile of the annual countryside-based tourism revenue by location of visitor origin.

**BOX 3.18: VISITOR ACCOMMODATION PROVIDERS**

Area of Origin of Visitors	Farm Based responses (%)	All Survey responses (%)
Scottish Borders	5	4
Rest of Scotland	19	19
Rest of UK	64	59
Europe	6	10
N. America	3	4
Rest of World	4	4
<i>Usable Questionnaire response i.e. Base Number</i>	6	26

**BOX 3.19: COUNTRYSIDE RECREATION AND SPORTS PROVIDERS/FACILITATORS**

Area of Origin of Visitors	Farm Based responses (%)	All Survey responses (%)
Scottish Borders	8	24
Rest of Scotland	14	13
Rest of UK	55	41
Europe	15	8
N. America	3	2
Rest of World	6	12
<i>Usable Questionnaire response i.e. Base Number</i>	10	14

**BOX 3.20: COUNTRYSIDE VISITOR ATTRACTION OPERATORS**

Area of Origin of Visitors	All Survey Responses (%)
Scottish Borders	20
Rest of Scotland	25
Rest of UK	47
Europe	3
N. America	2
Rest of World	2
<i>Usable Questionnaire response i.e. Base Number</i>	6

- 3.46** The key sources of countryside-based tourism revenue generation have been the Scottish and, in particular, the remaining UK domestic visitor markets, which in broad terms, would appear to have accounted for c. 80% to c. 90% of the total annual revenue (with little difference between the segregated Farm Based and “All Survey” respondents.) This is not a surprising finding, given the predominance of domestic market tourism activity in the Scottish Borders. This was illustrated previously in **Boxes 3.9 – 3.11** inclusive and was confirmed by the published STB data for tourism in the Scottish Borders area; (in the three year period 1996 to 1998 total domestic visitor expenditure accounted for almost 80% of the total tourist spend).

## Associated Economic Impacts

### Employment

- 3.47** **Box 3.21** provides an estimate of the direct employment by countryside tourism providers/facilitators in the Scottish Borders based upon the questionnaire responses to the request for actual employment details.

Countryside Tourism Provider/Facilitator Type	Average Full Time (Response Base)	Average Part Time staff – FTEs	Average Seasonal staff – FTEs (Response Base)
Visitor Accommodation	2.4 (4)	1.1 (3)	1.1 (2)
Recreation & Sports	2.8 (6)	2.1 (4)	0.7 (4) to 0.9 (5)
Visitor attraction	2.3 (3)	0.8 (2)	0.6 (2)

- 3.48** Applying these estimates to the overall questionnaire survey database suggested that in 1999 c. 1,200 FTEs were sustained by countryside tourism providers/facilitators in the Scottish Borders area – including the 4 FTEs that Forest Enterprise estimate are directly supported by their forest recreation activities in the Scottish Borders area. This employment estimate equates to c. 29% of all tourism related employment in the Scottish Borders – 4,100 FTEs - (Source – The Scottish Borders Tourism Strategy 1999 – 2004). However, it is considered that this estimate should be treated with extreme caution for two main reasons:

- first, the very small survey response base across all categories; and
- secondly, when the tourism industry benchmark of 1 FTE created (or sustained) by c. £25,000 of visitor expenditure was applied to the projected annual revenue estimate of c. £6million, presented in **Box 3.17**, the resultant estimate was 240 FTEs. This estimate seemed to be more realistic than the 1,200 FTEs cited above.

### Supply Purchases

- 3.49** The questionnaire survey also sought to identify the value and location of supply purchases made by the countryside tourism providers/facilitators. The survey findings are summarised in **Boxes 3.22 and 3.23**.

Countryside Tourism Provider/Facilitator Type	Average Annual Supplies Expenditure (Survey Base)	No in Overall Survey Database Categories	Annual Expenditure	Annual Expenditure
Visitor accommodation	£20,200 (3)	173	£1.76 million	£3.46 million
Recreation and Sports	£9,500 (7) to £17,000 (9)	62	£0.33 million to £0.60 million	£0.59 million to £1.05 million
Visitor attraction	£21,800 (3)	22	£0.27 million	£0.48 million

- 3.50** Based upon the above, it was estimated that countryside tourism providers/facilitators in the Scottish Borders spent c. £2.36 million to c. £4.99 million annually on supplies, directly associated with their tourism business operations. Extrapolation of the farm-based responses (*base of 8 responses*) indicated that this sector accounted for c16% of the total annual purchases associated with all forms of countryside tourism in 1999.

**BOX 3.23: LOCATION OF PURCHASES BY COUNTRYSIDE TOURISM PROVIDERS**

Area in Which Purchases Were Made	Visitor Accommodation Providers (%)	Countryside Recreation & Sports Providers (%)	Visitor Attraction Providers (%)
Scottish Borders	33	58	53
Rest of Scotland	25	16	30
Rest of UK	39	27	13
Rest of World	5	0	4

- 3.51** **Box 3.23** suggests that both the Scottish Borders area and the rest of Scotland benefited significantly from supply purchases made by countryside tourism providers/facilitators in the Scottish Borders. However, there was still a notable level of economic leakage to suppliers located out-with Scotland.

### **Countryside Tourism Provider/Facilitator Involvement Profile**

#### Countryside Tourism Provider/Facilitator Involvement Motives

- 3.52** **Box 3.24** summarises the main motives/reasons for the respondents' current involvement in providing/facilitating countryside tourism facilities, activities and services in the Scottish Borders Region.

**BOX 3.24: CURRENT PARTICIPATION MOTIVES**

Current Motive	Farm based responses (%)	All survey responses (%)
Sole source of business income	4	18
Supplementary to other/overall business	50	36
Response to demand	18	18
Personal interest and pleasure	27	29
<i>Usable Questionnaire response i.e. Base Number</i>	16	33

- 3.53** The analysis indicated that for both the farm-based tourism and total survey respondents, the key participation motives were based on:

- supplementing wider business and other income; and
- satisfying personal interest and providing pleasure.

The responses further indicated that involvement was linked to a ‘pluralistic’ business economy and that a strong framework did not exist whereby countryside-based tourism business operations in the Scottish Borders provided sufficient income for providers as “stand-alone” commercial ventures. In effect, this suggested that for the clear majority of countryside tourism providers in the Scottish Borders, their operations were secondary to other commercial sector economic activity.

## Future Potential

### Future Development and Diversification Intentions

**3.54** The questionnaire survey sought to identify the future potential involvement in countryside tourism and a summary of the indicated proposed intentions is shown below.

<b>BOX 3.25: FUTURE POTENTIAL INVOLVEMENT IN COUNTRYSIDE TOURISM</b>		
<b>Proposed Intention to develop tourism facilities</b>	<b>Farm based responses (%)</b>	<b>All survey responses (%)</b>
“YES”	44	71
“NO”	56	29
<i>Usable Questionnaire response i.e. Base Number</i>	<i>16</i>	<i>31</i>

**3.55** The main points of interest were that:

- ❑ there was a strong indication of the intention to develop further and/or to diversify business involvement as a countryside tourism provider/facilitator from the overall survey response base; however,
- ❑ this was not replicated when the farm-based responses were extrapolated: 56% of the latter expressed the intention of no further or future involvement in the provision, diversification or development of tourism facilities/services.

**3.56** Further analysis of the latter responses did not reveal any single dominant reason. Rather many factors were mentioned, including there being:

- ❑ no apparent market demand to justify the investment of time and money;
- ❑ no desire to expand the existing scale of countryside tourism business operation(s), due to increased capital outlay and ongoing enhanced revenue cost implications;
- ❑ insufficient physical space to accommodate business expansion;

- inadequate time available for planning and implementing development activity;

An added factor was the “mature” age of some of the business operators. This tended to diminish both the desire to be involved in development/diversification projects as well as the attractiveness of any potential return on new investment.

### Future Participation Motives

- 3.57** For those respondents indicating a positive intention to develop/diversify further their countryside tourism business involvement, their key motives are summarised in **Box 3.26**.

<b>BOX 3.26: MOTIVES FOR DEVELOPING COUNTRYSIDE TOURISM BUSINESS ENTERPRISES</b>		
<b>Future Motives</b>	<b>Farm based responds (%)</b>	<b>All survey responses (%)</b>
Meet existing unfulfilled demand	38	30
New researched market target opportunity	13	15
Identified product/service “gap”	13	26
Personal interest	37	20
Speculative venture	0	9
<i>Usable Questionnaire response i.e. Base Number</i>	<i>16</i>	<i>33</i>

- 3.58** The most popular motives for future business development and/or diversification were satisfying existing unfulfilled demand, personal interest and the identification of a business “gap” or opportunity.
- 3.59** Analysis of the outline proposals of those survey respondents, indicating a positive future development intention, provided practical insights into the types of identified initiatives that would fulfil these key business development motives. These initiatives included:
- development of sport and crafts-based holiday packages, led by accommodation providers;
  - upgrading and expansion of en-suite serviced visitor accommodation;
  - development of new self-catering and caravan/camping accommodation with associated on-site leisure facilities;
  - development of activities, capitalising upon the environmental and historical “strengths” of the Scottish Borders;
  - development of sporting/recreational visitor participation opportunities e.g. riding, fishing, shooting, archery, off-road cycling etc;

- development of visitor attraction and events programmes and enhanced visitor infrastructure facilities e.g. catering provision.

**3.60** Countryside and farm-based tourism have not been panaceas for the business problems confronting farmers. However, the survey results, reported in the previous paragraph, provided some grounds for optimism. These stemmed from the positive responses received, concerning the breadth of thematic development proposals which would be entertained in future.

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Roslin Aitchison	Chair ( <i>the Borders Farm Tourism Group</i> )
Carol Howden	TIC Officer ( <i>Scottish Borders Tourist Board</i> )
Mr G McInnes	Borders Forestry Action Group/SBE
Peter Middleton	Officer ( <i>the Scottish Executive Rural Affairs Department (Rural Diversification Programme)</i> )
Marion Oates	Partnership Development Manager ( <i>Scottish Borders Tourist Board</i> )
Jeremy Thompson	Recreation Officer ( <i>Forest Enterprise – Scottish Borders District</i> )
Linda Walker	Research Officer ( <i>Scottish Borders Tourist Board</i> )

In addition the contributions of all of the countryside based tourism and recreation providers/operators in the Scottish Borders, who:

- took the time to complete and return the questionnaire issued to them; or who
- co-operated in the follow-up telephone interview programme, conducted by the Scottish Borders Tourist Board, on behalf of Scott Wilson.

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