

## Motorhome and Camping Trips in Scotland (2023)

An insight into visitor motivation,  
behaviour and need

Published March 2024

 Visit  
Scotland | Alba™



# Welcome

In recent years, many areas in Scotland have experienced a large growth in the number of visitors using a motorhome, campervan, caravan or tent. While the benefits of tourism spending is very welcome, many places have also experienced challenges, including issues around waste, and inappropriate parking and overnight stops, conflicting with the needs of local communities.

In an effort to better understand the drivers behind these kinds of trips and to help consider what solutions may be appropriate, VisitScotland undertook new research on these markets, during the summer of 2023. The is paper summarises the findings and provides useful insight on the characteristics of this group of visitors, their level of knowledge and awareness, their behaviour during their trips and activities undertaken and their views on the type of visitor infrastructure available in Scotland to support these kinds of trips.

This paper concentrates exclusively on visitors who have recent experience of holidaying in Scotland using a motorhome, campervan, caravan or tent. We talk about these groups collectively using the term 'trips' and at various points in the report we will break down our analysis to make observations about specific groups.

The purpose of this paper is to outline the nature of these markets in Scotland. It is hoped that the market insight in this report will be useful to Local Authorities, Businesses, Community Organisations, tourism groups and other public bodies who have an interest in these markets and are considering ways to manage and work with these markets or to provide additional services and infrastructure.

This work sits under the auspices of a [National Visitor Management Group](#) and is one of three specific strands of activity alongside work to coordinate visitor management messaging to visitors, and another strand looking at the policy and enforcement landscape.

It is hoped that this research into motorhomes, campervans, caravans and tents will specifically help inform consideration on possible infrastructure that may be required across Scotland in order to better provide for these markets and to create economic opportunities for a range of public and private businesses and organisations.



## **Contents**

<b>Definitions</b>	<b>3</b>
<b>Background</b>	<b>4</b>
<b>The picture in other countries</b>	<b>5</b>
<b>Taking a deeper look at the situation in Scotland</b>	<b>7</b>
<b>Who takes trips in Scotland?</b>	<b>8</b>
<b>What do these trips look like?</b>	<b>10</b>
<b>What do people know about taking trips in Scotland?</b>	<b>14</b>
<b>What do people do on trips in Scotland?</b>	<b>15</b>
<b>Additionally, what are they willing to pay for?</b>	<b>15</b>
<b>What is their general perception of taking trips in Scotland?</b>	<b>21</b>
<b>Summary</b>	<b>27</b>
<b>Appendix 1</b>	<b>29</b>
<b>Appendix 2</b>	<b>30</b>



# Definitions

## Trips

Please note that “trips” were used throughout the survey as a catch-all term for all relevant trips taken in Scotland. This applies to those taken in a motorhome, campervan, caravan or tent.

## Vehicle types

- Motorhome: A motor vehicle designed and purpose built on a truck or bus chassis (‘coach built’), to serve as self-contained living quarters for recreational travel.
- Campervan: A motor vehicle, often derived from a van, adapted at manufacture or later converted to provide largely self-contained living quarters for recreational travel.
- Caravan: A separate vehicle equipped for living in that is designed to be lightweight so it can be towed. Caravans contain no motor engine or driveshaft, so therefore are not a functional vehicle.

## Types of camping

- “Camping” is defined throughout this research as an outdoor activity that involves staying the night/ more than one night in a protective shelter out in nature. For the purposes of this survey, camping included both the use of formal campsites and informal places, including by roadsides. Camping was also defined as an activity that could be done in a vehicle (car or van) or tent and should be undertaken in line with the Scottish Outdoor Access Code.

## Aire

Short for “Aires de Service”, these are stopping places specifically designed for Motorcaravans or camping cars as the French call them. In many European countries, they are run by the local town council, but there are also private Aires, auto route Aires, Aires within the proximity of campsites, Aires de Stationnement (an Aire for parking, but no facilities). Aire de Service normally provide a range of services such as facilities to empty waste, dispose of rubbish and replenish fresh water. Some will also provide electricity. Services such as waste disposal are normally free, but modest charges are often levied for fresh water and electricity.

## Types of water waste

Camping vehicles produce two main types of water waste: grey and black.

Grey waste: water from non-toilet plumbing systems such as sinks and showers which collects in an onboard waste water tank in the vehicle. Grey waste should be emptied at a campsite disposal area to go into the sewage system for proper treatment.

Black waste: this is chemical toilet waste. Toilet waste should not be emptied anywhere other than a designated area at a campsite, a motorhome service point, or home sewage systems. This waste should also not be disposed of at grey waste sites.

## Background

Trips, (in a campervan, motorhome, caravan, tent or other structure) are a popular holiday choice and contribute significantly to the UK tourism economy. An estimated 755,000 touring caravans and motorhomes are regularly in use in the UK, with estimated expenditure for touring holidays reaching £2.6 billion (Cover4Caravans, 2023). For domestic overnight tourism in Scotland, 1.58 million trips were described as caravanning, camping or glamping in 2022. These trips equate to 4.95 million nights with £355 million spent on these trips in Scotland alone (Great Britain Tourism Survey, 2022).

The interest in these types of holidays is anticipated to grow. According to Find My Leisure Vehicle (referenced by the National Caravan Council), there were 84,000 searches for new motor caravans and 44,000 for new campervans in September 2022. Research for the Caravan and Motorhome Club by the Centre for Economics and Business Research (Cebr) in 2022 showed an increase in number of people predicted to buy leisure vehicles in the next five years, with 8% of UK adults likely to buy a campervan, 7% of UK adults likely to buy a motor caravan and 7% of UK adults likely to buy a motorhome.

Scotland is a popular destination for visitors who wish to stay in multiple places during a trip. In 2022, 2.94 million overnight trips included a stay in two or more places, representing 22% of all overnight trips to Scotland that year (Great Britain Tourism Survey, 2022). Scotland is described as having the best infrastructure in the UK for motorcaravan tourism (CAMpRA's Strategy for Sustainable Motorcaravan Tourism, 2021).



## The picture in other countries

Direct comparison with international examples can be difficult due to differing approaches to access legislation, land ownership, planning, and different roles of national and local government. There are however some interesting approaches, with many other countries also experiencing a growth in these markets in recent years. Some examples include:

### France

France in particular is praised for its Aires, which are present in most large towns and cities and are beneficial for motorhome users. These Aires can be run by the local municipality as well as commercial companies, offering a potential boost to the local economy and helping reduce any negative impacts of inappropriate parking.



### Sweden

Sweden has been running the Motor Caravan Destination Sweden project for some years now. The project is run by the Swedish Camping Association in co-operation with West Sweden Tourist Board, some other Swedish regions and a couple of other private sector organisations. It is aimed more at improving the visitor experience in this sector, but there's also a wider element of reducing negative pressure on communities and the environment through a more considered approach to development and management.



### Denmark

In Denmark, camping is formalised in campsites regulated by national law. Campsites are areas that are rented out for day and night stays for a period of more than 6 weeks a year. Usually, campers stay at a campsite for a week or so. Although motorhomes and campervans are regulated by the same law, the segment is entirely different and has the possibility of staying for one night at designated parking lots, just as truck drivers can. The campervan segment does not want to stay at regular campsites as the gates, that usually are at campsites, undermine their sense of freedom. Some campsites have made some spaces for campervans outside of the gates, in order to accommodate these visitors. There isn't a fixed solution for campervans and motorhomes yet, but some municipalities are working on allowing for satellite campervan spaces on municipal grounds, which are managed by campsites. In the satellite model there is not necessarily wastewater management onsite, so visitors will have to go to the campsite for that.





## Iceland

The Icelandic Tourist Board introduced new conservation legislation in November 2015.

This means it is now illegal to spend the night in 'tent trailers, tent campers, caravans, camper vans or similar' outside organised campsites unless the landowner or rightholder has given their permission. This also applies to urban areas - most towns have set similar rules, so in general visitors of any kind must use campsites for those types of vehicles in Iceland.



## New Zealand

New Zealand is similar to Scotland in terms of both its offering and visitor management challenges. There is also a need to protect areas of natural and cultural heritage. As a result, Tourism New Zealand has prioritised a range of measures to responsibly manage tourism. One of these measures was the introduction of camping regulations. In August 2022, the Freedom Camping Bill was introduced to Parliament. The Bill is intended to reduce the negative impacts of freedom camping. The major changes the Bill makes are:



1. Require vehicle-based freedom campers to use a certified self-contained vehicle when they stay on council land. This is unless the council designates the site as suitable for non-self-contained vehicles.
2. Establish a regulated system for the certification and registration of self-contained vehicles.
3. Require vehicles to have a fixed toilet to be certified self-contained.
4. Strengthen the infringement system
5. Extend the Freedom Camping Act to include land managed by Waka Kotahi New Zealand Transport Agency and Toitū Te Whenua Land Information New Zealand.



# Taking a deeper look at the situation in Scotland

It was decided by the National Visitor Management Group, and its subgroup, that a research project was required to help to understand the needs of motorhome and camping users and their infrastructure and facility requirements. As one of visitor management group partners, and with in-house expertise in conducting similar research, VisitScotland was determined as best placed to lead in the development, hosting and analysis of an online survey.

## Research Objectives:

- To identify the defining characteristics of camping vehicle users and campers in Scotland
- To understand the level of knowledge that these audiences have regarding use of infrastructure and facilities (including parking, waste disposal, outdoor access rights, etc.)
- To determine behaviours around current infrastructure and facilities during trips in Scotland
- To identify additional activities undertaken by these audiences during trips in Scotland
- To identify user infrastructure and facility needs for these audiences in Scotland

Each of the research objectives can be mapped to a key question of these user groups. The diagram below denotes which of the following report sections align to each objective.

**1. Who takes trips in Scotland?** Defining characteristics of camping vehicle users and campers in Scotland

---

**2. What do these trips look like?** Defining characteristics of camping vehicle users and campers in Scotland

---

**3. What do people know about taking trips in Scotland?** Level of knowledge regarding use of infrastructure and facilities

---

**4. What do people do on trips in Scotland?** Behaviours around current infrastructure and facilities  
Additional activities undertaken

---

**5. What is their general experience of taking trips in Scotland?** Infrastructure and facility need





# 1. Who takes trips in Scotland?

## Key Findings

- Respondents were mostly domestic visitors, older and with no children.
- Responses were mostly collected by owners rather than renters of vehicles.
- The most common vehicle used on trips in Scotland was a campervan.
- More than a third had been using some form of camping vehicle for over ten years.

## Demographic Information

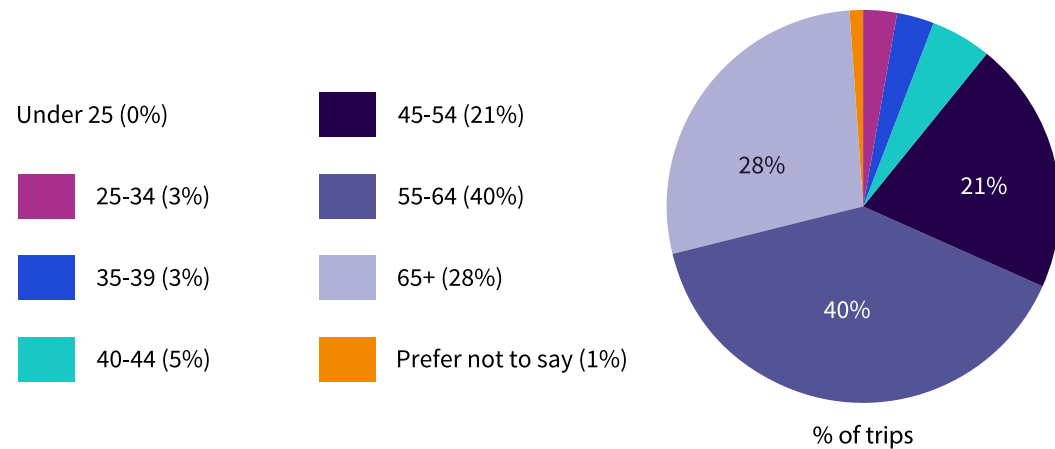
### Survey respondents' home location

The majority of respondents that had taken trips within Scotland in the last five years were from places in the UK (98%). Over half of respondents were from Scotland.

<b>54%</b>	Scotland	<b>0%</b>	Republic of Ireland
<b>40%</b>	England	<b>1%</b>	Mainland Europe
<b>3%</b>	Wales	<b>1%</b>	Other
<b>1%</b>	Northern Ireland	<b>0%</b>	Prefer not to say

### Survey respondents' age group

Respondents were most likely to be between 55 and 64 years old. The majority (88%) were over the age of 45.



### Children in household

The majority of respondents did not have a child in their household (87%).

Source: Motorhoming, Caravanning and Camping Survey (2023)

Please see appendix 2 for full graph data

## User Types

### Owners and/or renters of vehicles

Respondents to this survey were more likely to have owned a camping vehicle of some sort rather than rented one. The most common type of vehicle used was a campervan, followed by motorhome and caravan.

Vehicle Type	Owned	Rented*
Motorhome	36%	3%
Campervan	50%	2%
Touring caravan	4%	0%

\*Rental period was specified as within the last five years.

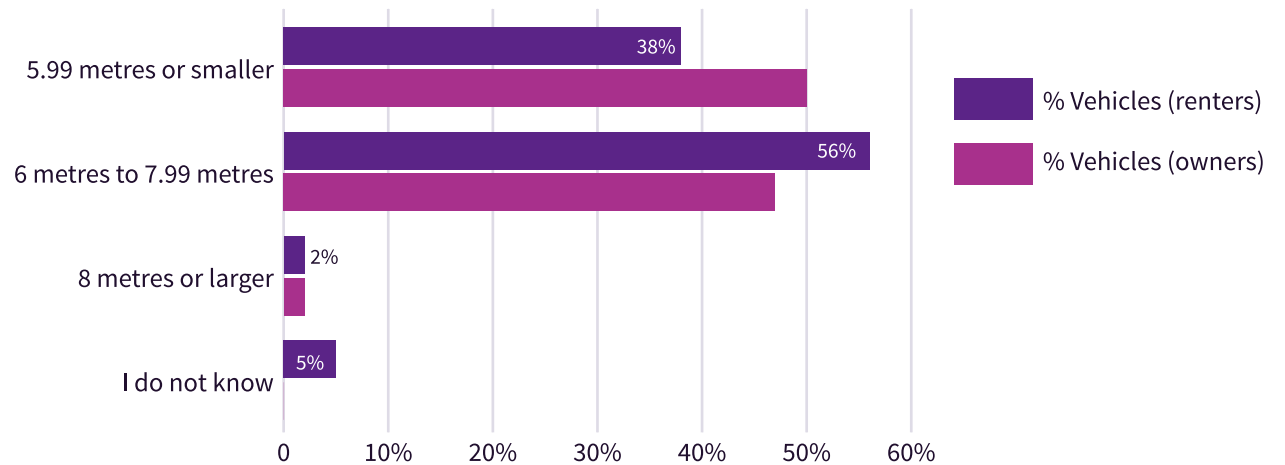
### Club or association membership

Of those who owned their camping vehicle, over half (64%) stated that they belonged to a motorhome, campervan or caravanning club / association.

Please see appendix 2 for full graph data

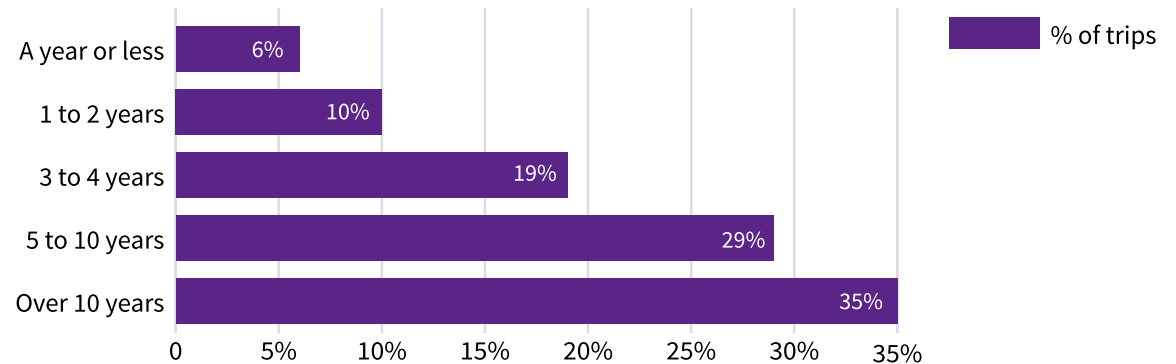
## Size of camping vehicle

Owned vehicles were more likely to be 5.99 metres or smaller whereas rented vehicles were more likely to be between 6 and 7.99 metres.



## Length of time using a camping vehicle

The majority of respondents who had been on a trip in a vehicle within the last 5 years had used them for over a year (94%), and more than a third (35%) had been using them for over ten years.



Source: Motorhoming, Caravanning and Camping Survey (2023)

## 2. What do these trips look like?

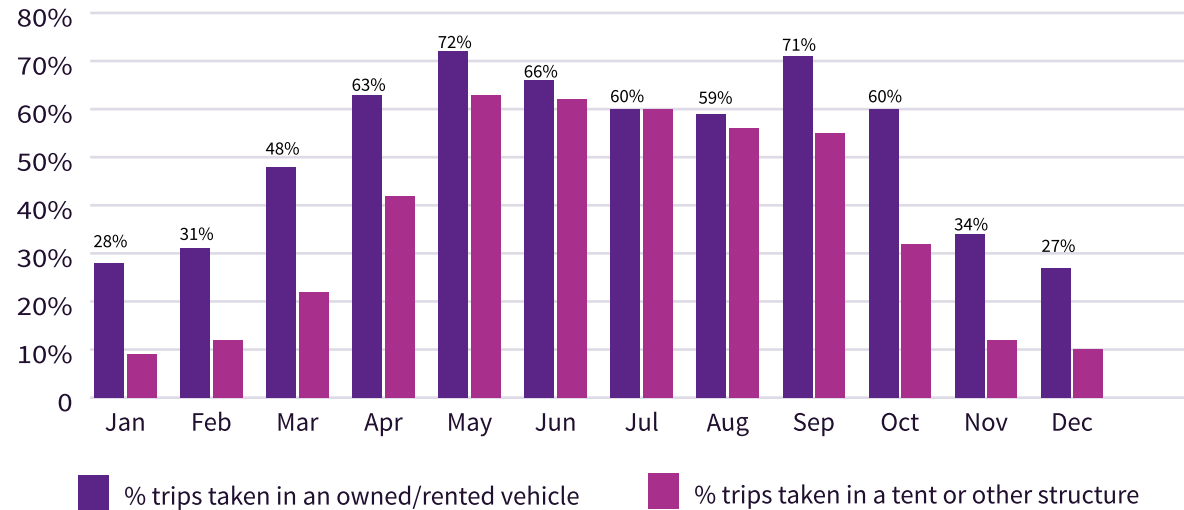
### Key Findings

- The season lasts from spring to autumn, offering potential for off-season trips.
- Respondents tended to either stay in one place, or travel to many.
- Access to facilities is important as part of an overall trip.
- While managed campsites were popular with all user groups, some respondents preferred a more flexible experience.

### Trip Characteristics

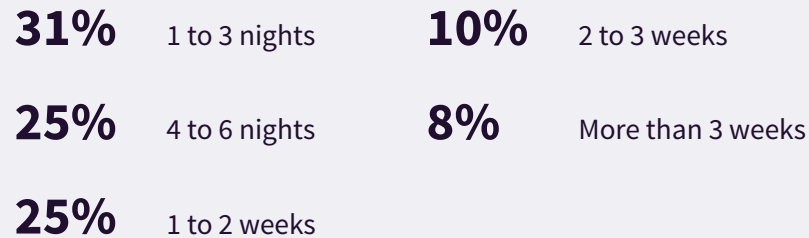
#### Trip seasonality

Respondents were asked to state what month of the year that they had taken trips in within the last five years. Respondents who had been camping in a tent or other structure were more likely to have gone on a trip in the summer due to weather constraints, whereas those in a vehicle were more able to be flexible. Therefore, the season for taking such trips is relatively long.



#### Length of trip

The majority of trips lasted less than two weeks, with almost a third taking a trip between one and three nights.



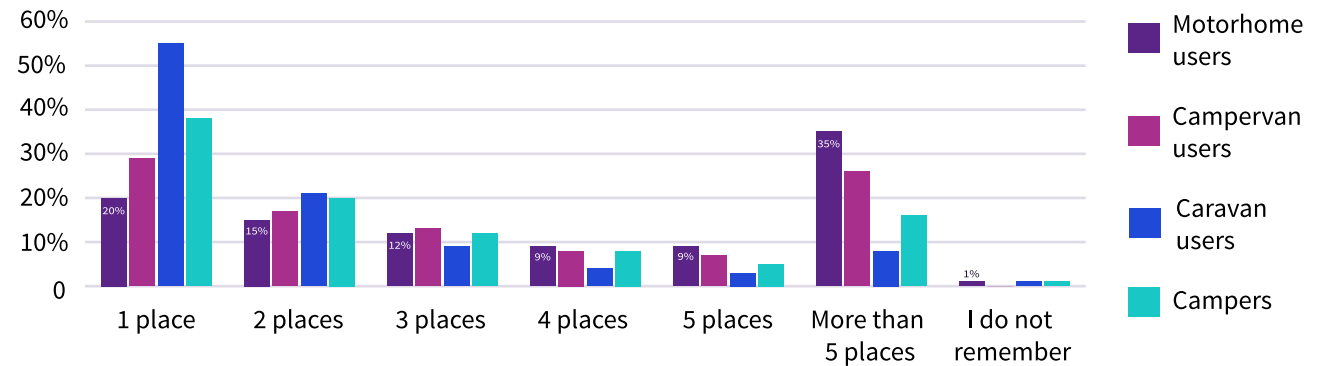
Please see appendix 2 for full graph data

Source: Motorhoming, Caravanning and Camping Survey (2023)



## Number of places

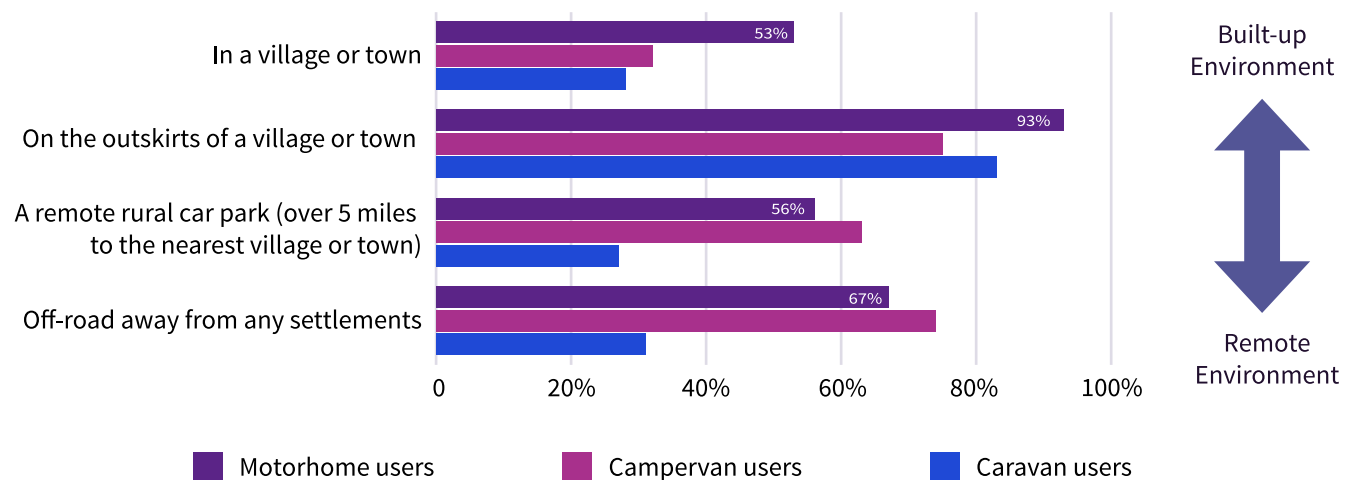
Around a quarter of campervan users and over a third of motorhome users had stayed in more than 5 locations on their most recent trip in Scotland. Caravan users were most likely to have stayed in one location, but around a fifth stayed in two places. This pattern was the same for those who had camped in a tent or other structure.



## Preferences for where to stay overnight

### Preferred location type (vehicle users)

While the majority of respondents wanted easy access to facilities by staying on the outskirts of a village or town, there was also an appetite for staying in more rural locations. Two thirds of respondents who were motorhome users and around three quarters of campervan users stated that they would like to stay off-road (away from any settlements).



Please see appendix 2 for full graph data

Source: Motorhoming, Caravanning and Camping Survey (2023)

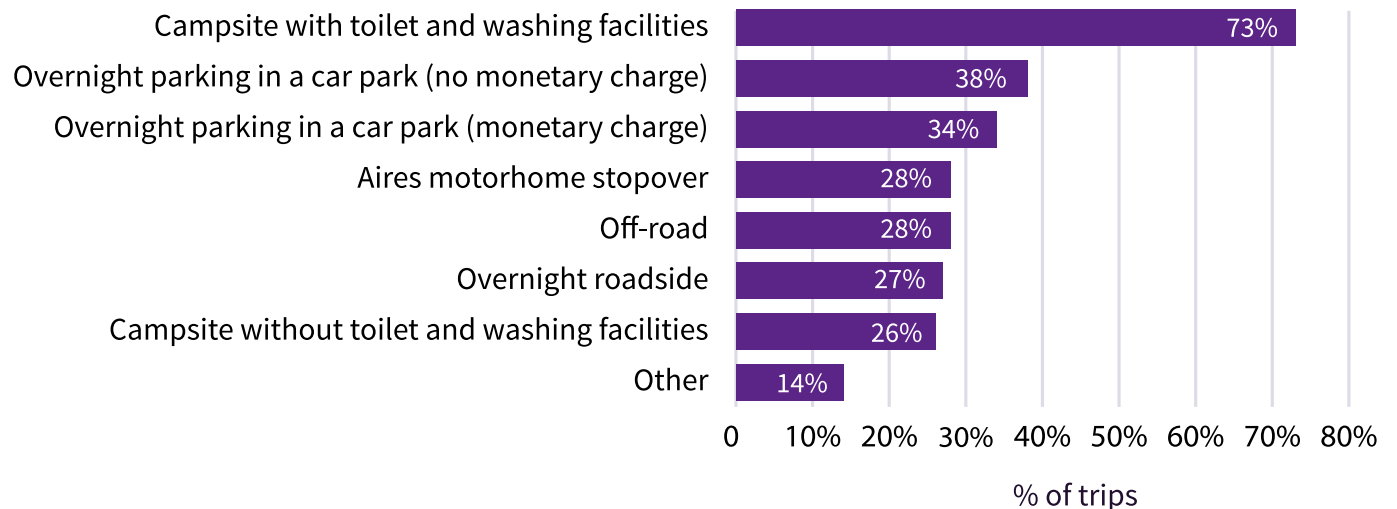
### Preferred location type (campers)

Respondents who had been camping in a tent or other structure in the last five years were more likely to prefer to stay away from settlements in Scotland, with coastal, mountainous and remote rural locations being the most popular selections.

<b>72%</b>	Coastal	<b>51%</b>	National park
<b>71%</b>	Mountainous	<b>36%</b>	On the outskirts of a village, town or city centre
<b>62%</b>	Remote rural	<b>8%</b>	In the centre of a village, town or city centre
<b>53%</b>	Forest	<b>4%</b>	Other

### Types of sites for overnight stays (vehicle users)

The majority of respondents who owned or had rented a camping vehicle had stayed overnight on campsites with toilet and washing facilities during their most recent trip in Scotland (73%). Other popular choices were in a car park, with or without a monetary charge.

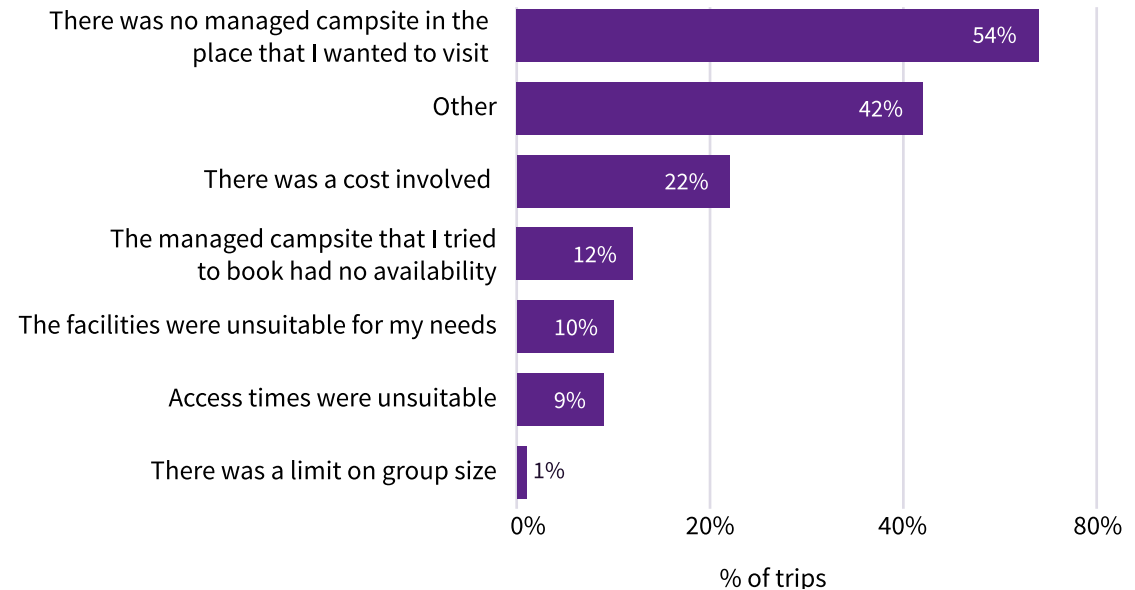


Please see appendix 2 for full graph data

Source: Motorhoming, Caravanning and Camping Survey (2023)

## Campers' usage of managed campsites

Almost a third of respondents (32%) stated that they had chosen not to stay on a managed campsite on their most recent trip in the last twelve months. When asked why, over half stated it was due to lack of availability in the place they wanted to visit.



When interrogating the “other” reasons, the most common finding was that respondents were not looking for the managed campsite experience. Some respondents described not wanting to stay on a managed campsite as they camped as part of another activity, for example hillwalking. Others stated that they desired more flexibility on their trip.

Source: Motorhoming, Caravanning and Camping Survey (2023)

*“The reason we camp is to be immersed in nature, extremely low impact experience, away from roads, vehicles, and other respondents. The experience of camping at a managed campsite is completely different”*

*“Just wanted to arrive late and sleep, leave early, no point in paying for campsite. Also wanted to start the day on the hill from the van so we were parked already and had a space”*

Please see appendix 2 for full graph data



### 3. What do people know about taking trips in Scotland?

#### Key Findings

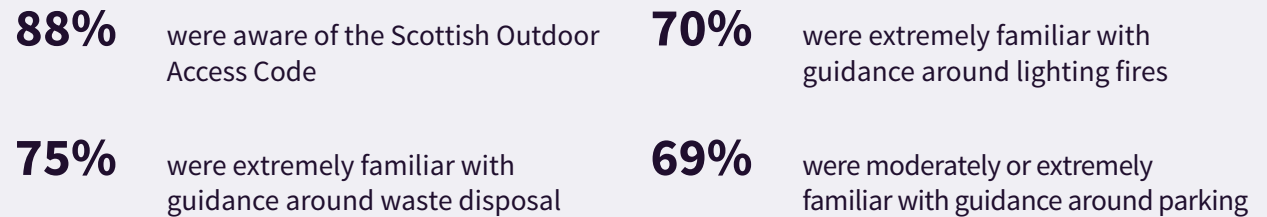
- This audience self-report to have a good level of awareness on key issues.
- Visitors are looking for more information and seem keen to “do the right thing”.
- There are key opportunities to inform visitors, particularly regarding parking and waste disposal.

**Please note:** We acknowledge that the responses to this section of the survey may be subject to respondent bias. Please see appendix 1 for more details.

Please see appendix 2 for full graph data

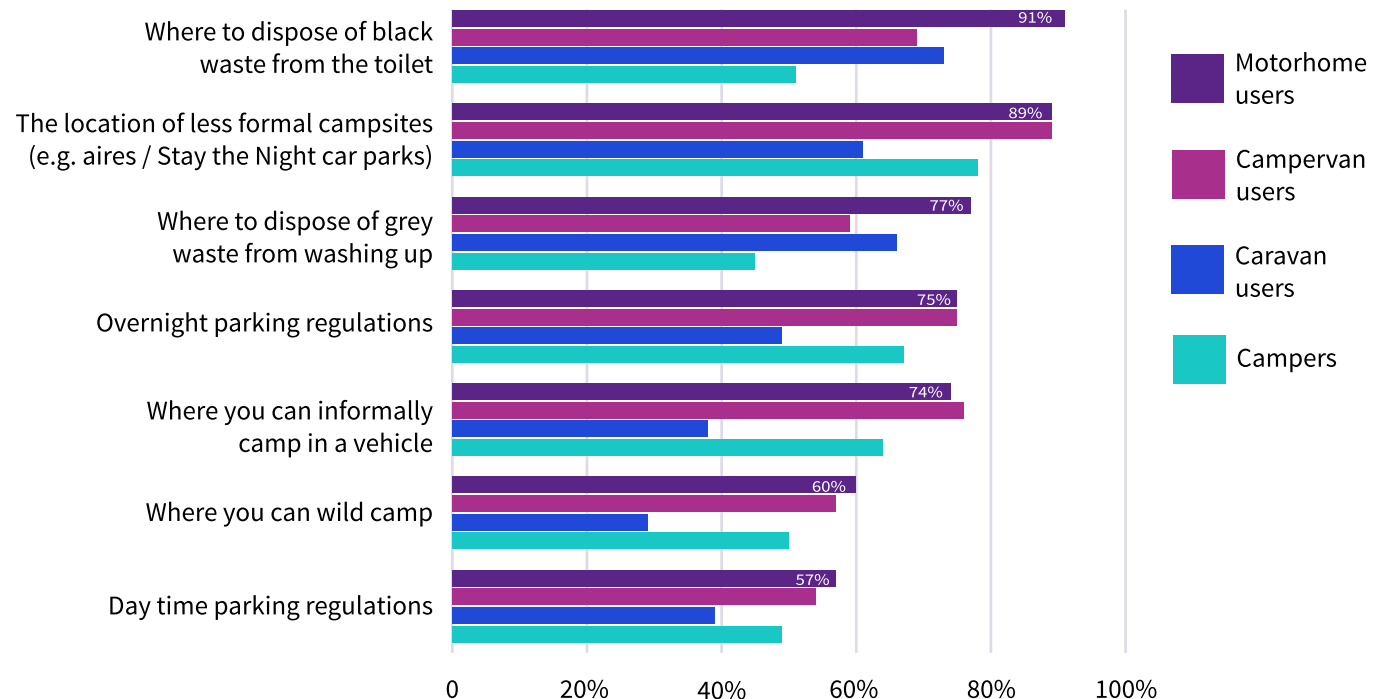
#### Awareness of guidance or best practice

Respondents were asked about their level of knowledge regarding guidance or best practice on a variety of issues.



#### Topics of interest

When asked what topics they would like to be able to access information about during a trip, respondents were most interested in learning about how they could dispose of waste and where they are able to park.



Source: Motorhoming, Caravanning and Camping Survey (2023)

## 4. What do people do on trips in Scotland?

Additionally, what are they willing to pay for?

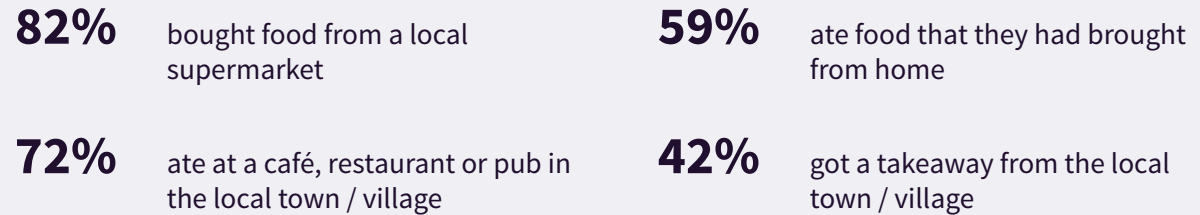
### Key Findings

- Visitors spend money on a range of activities in destinations on their trip(s).
- Respondents indicate a willingness to pay for facilities during their trip(s).
- There appears to be demand for 'basic' overnight provision, which could lend itself to many possible models (private, public and community provision).

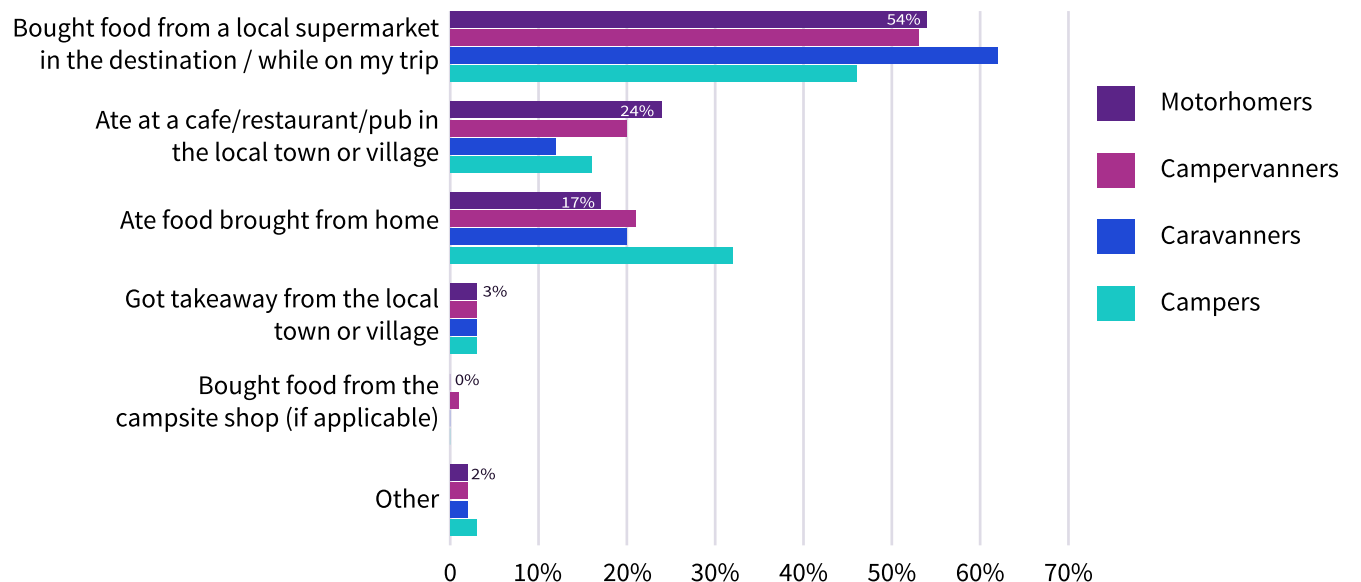
### Accessing food and drink

The majority of respondents stated that they had bought locally produced food or drink on their most recent trip (86%).

When asked what they did at mealtimes on their most recent trip:



When asked which of their selected options they did most often, the most common option for all groups was that they bought food from a local supermarket. Around a quarter of respondents who travelled in motorhomes and a fifth in campervans ate at a café, restaurant or pub in the local town or village. A third of campers selected that they mostly brought food from home for their trip.

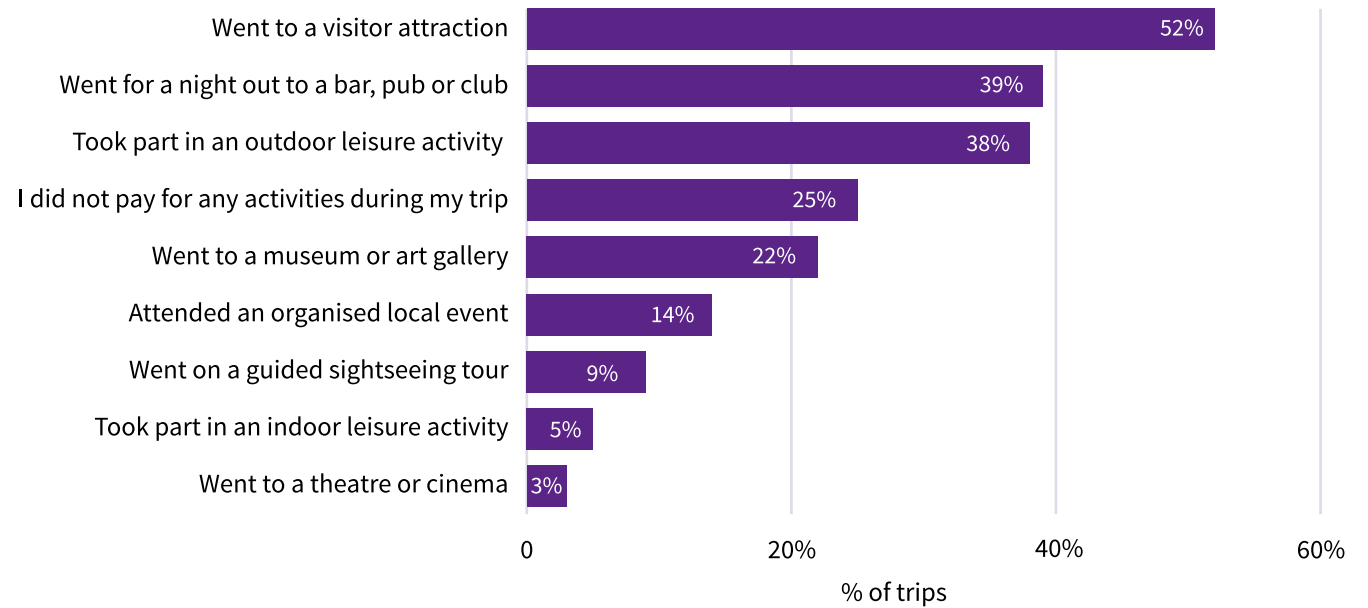


Please see appendix 2 for full graph data

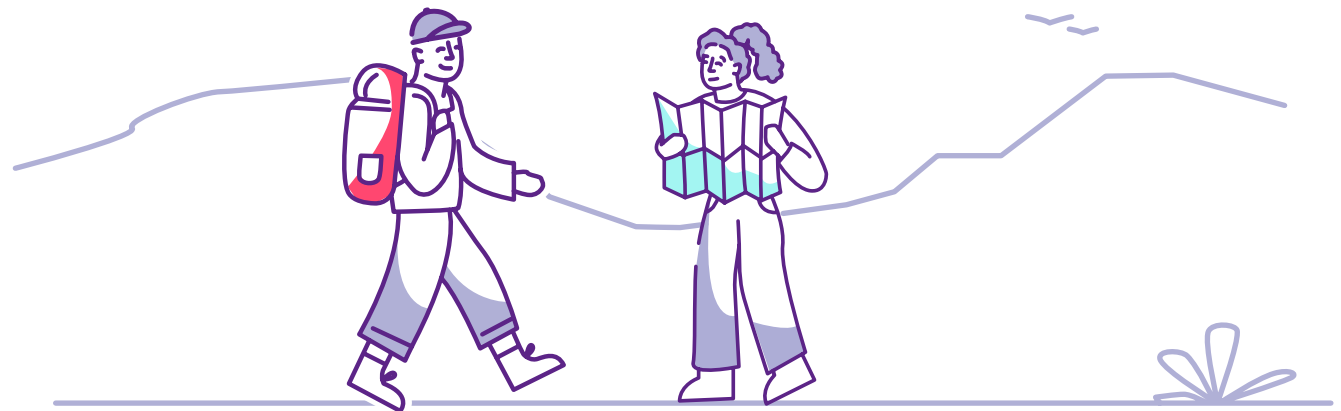
Source: Motorhoming, Caravanning and Camping Survey (2023)

## Activities undertaken

On their most recent trip taken in Scotland, 75% of respondents took part in some form of activity that they had paid for. Popular activities during a trip were visiting an attraction, going for a night out to a bar, pub or club and taking part in outdoor leisure activities.



Around two fifths (39%) of respondents who had been camping in Scotland in the last 5 years did not pay for any activities on their trip. This highlights the unique nature of this type of trip, suggesting that certain visitors choose Scotland to “get away from it all” (as mirrored in the reasons for not staying on a managed camp site).



Please see appendix 2 for full graph data

Source: Motorhoming, Caravanning and Camping Survey (2023)



## Facilities used

### Motorhome users

On their most recent trip in Scotland, motorhome users were most likely to access facilities for waste disposal, including black waste, grey waste and rubbish. Fresh water taps were the most commonly used cleaning facilities.

**84%**

Waste disposal: black waste from the toilet

**76%**

Waste disposal: recyclable rubbish

**81%**

Fresh water tap

**73%**

Waste disposal: non-recyclable rubbish

**77%**

Waste disposal: grey waste from washing up



### Campervan users

The most commonly used facilities by those who owned or rented a campervan were for hygiene purposes, followed by waste disposal methods.

**80%**

Toilet block

**66%**

Waste disposal: non-recyclable rubbish

**73%**

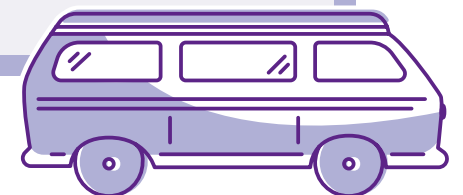
Fresh water tap

**75%**

Waste disposal: recyclable rubbish

**67%**

Shower block

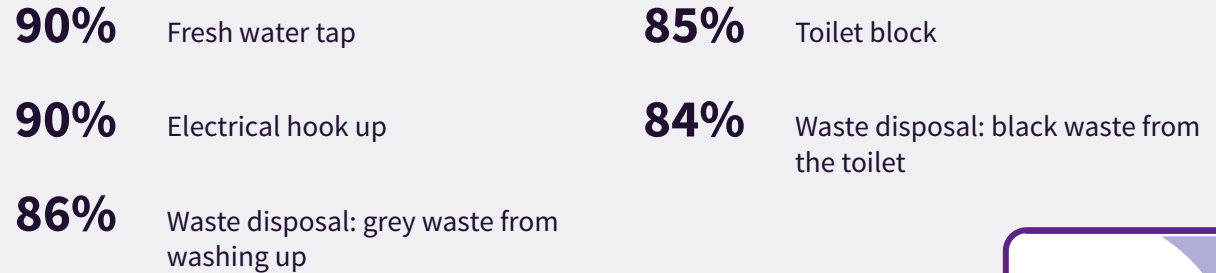


Source: Motorhoming, Caravanning and Camping Survey (2023)

## Facilities used

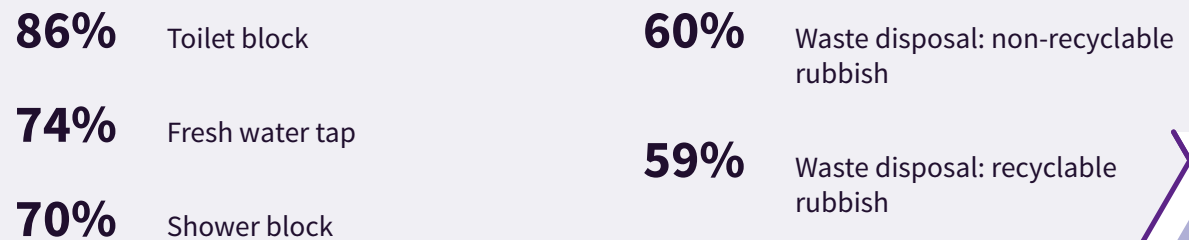
### Caravan users

The most commonly used facilities on their most recent trip by those who owned or rented a caravan were fresh water taps, electrical hook ups, toilets and waste disposal methods.



### Campers

The most commonly used facilities by those who had been camping were for hygiene purposes, followed by waste disposal methods.

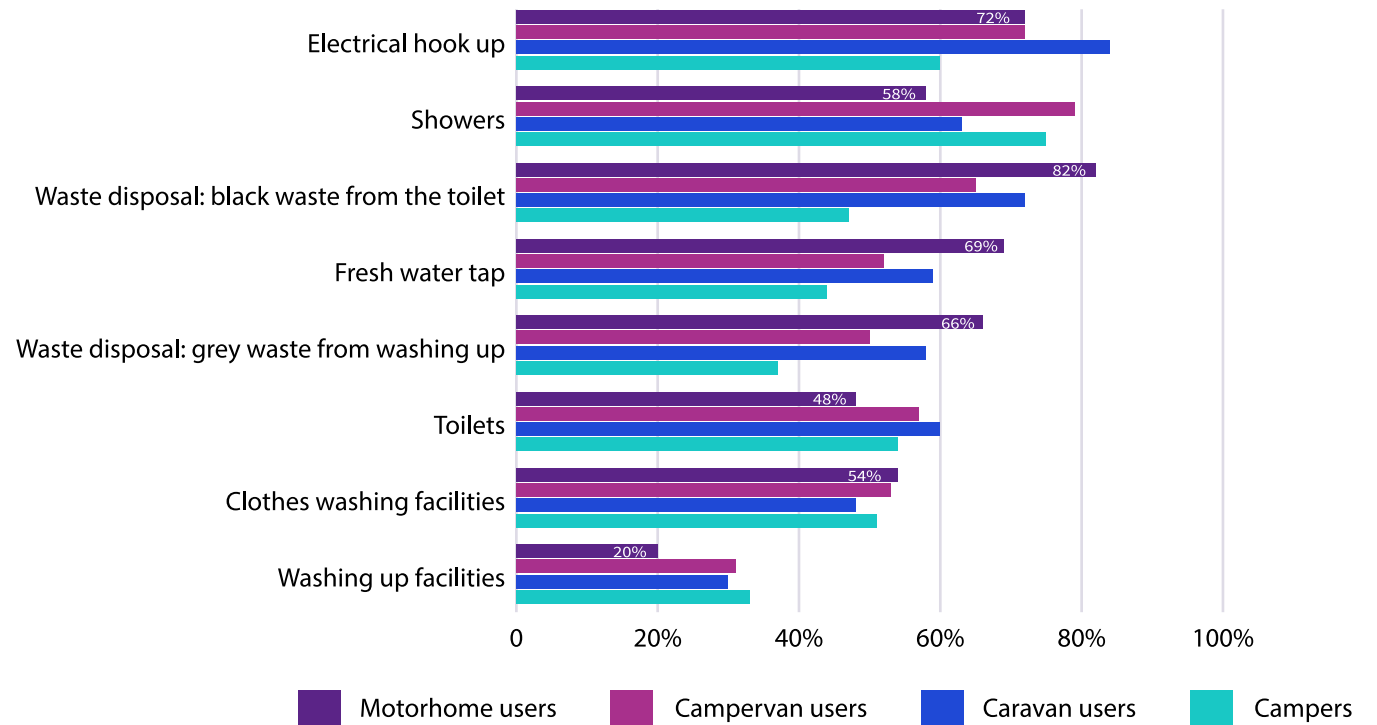


Source: Motorhoming, Caravanning and Camping Survey (2023)

## Willingness to pay for facilities

All respondents who had been on a trip in Scotland in the last five years were asked which facilities that they would be willing to pay for during their trip. Different user groups answered this question in different ways, with the most popular facility for each group being:

<b>82%</b>	Motorhome users: black waste disposal	<b>84%</b>	Caravan users: electrical hook ups
<b>79%</b>	Campervan users: showers	<b>75%</b>	Campers: showers

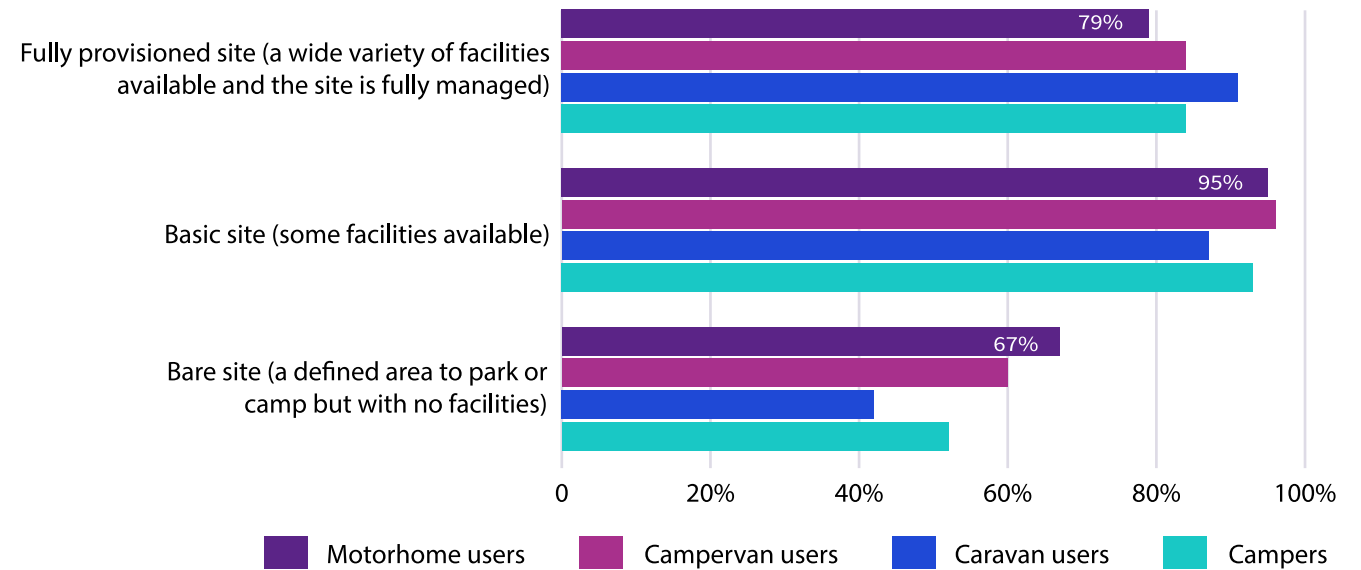


Please see appendix 2 for full graph data

Source: Motorhoming, Caravanning and Camping Survey (2023)

## Willingness to pay for types of site

The large majority of respondents indicated that they were willing to pay for a basic site. Respondents who used caravans were slightly more likely to pay for a fully provisioned site than a basic site.



Source: Motorhoming, Caravanning and Camping Survey (2023)



Please see appendix 2 for full graph data

## 5. What is their general perception of taking trips in Scotland?

### Key Findings

- Overall satisfaction levels for trips in Scotland are very high.
- However, visitors experience mixed attitudes towards campers and motorhome users.
- There are also clear areas for improvement of their experience, mainly waste disposal and parking.
- Looking at options on parking and waste could drive more income to local communities and reduce negative impacts.

Please see appendix 2 for full graph data

### Overall experience of taking trips in Scotland

The large majority of respondents demonstrated satisfaction with their most recent trip in Scotland. They were also very motivated to return to Scotland and to recommend to others as a destination.

- 90% of respondents were satisfied or very satisfied with their most recent trip in Scotland
- 90% stated that they would be very likely to take a trip of some kind in Scotland in the next five years
- 74% were very likely to recommend Scotland to friends and family as a destination for trips

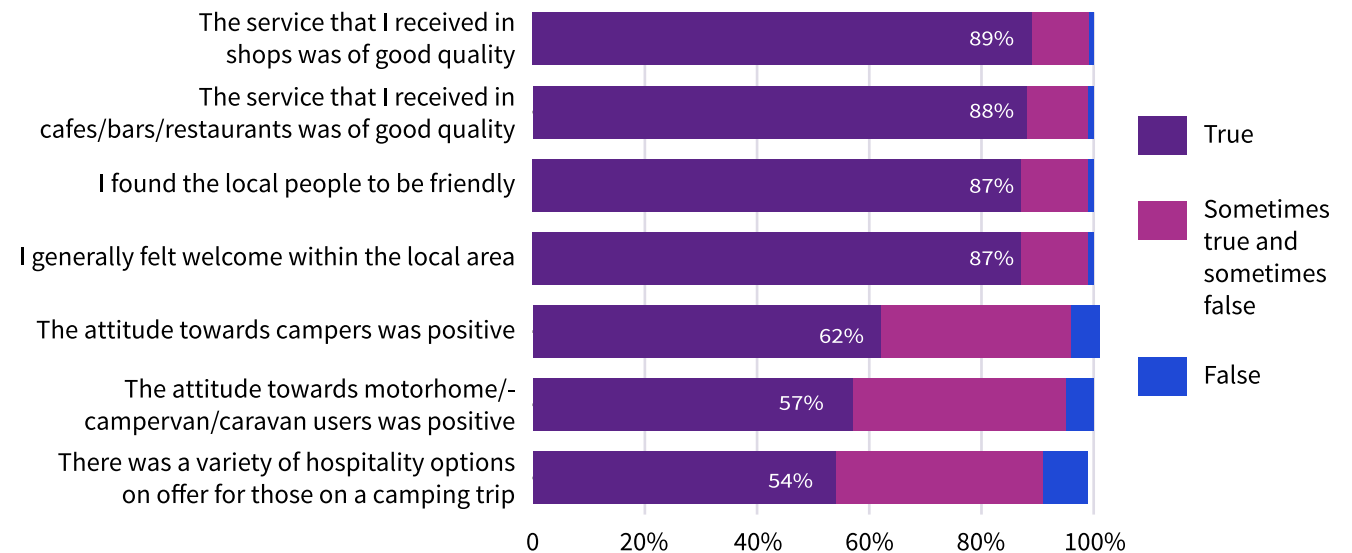
*We felt very welcome and have already arranged a return trip to your lovely country”*

*“Scotland is a fantastic location for motorhomers. Give to the local economy you get loads back.”*

*“Scotland is a very beautiful country and is top of our places in the UK to tour in our campervan”*

### Experiences with local communities

The majority of people agreed that during their trip they felt welcome in the local area, local people were friendly towards them, and that service received in shops, café, bars and/or restaurants was of good quality. However, the attitudes towards visitors was more mixed, as was the variety of hospitality options on offer for such visitors.



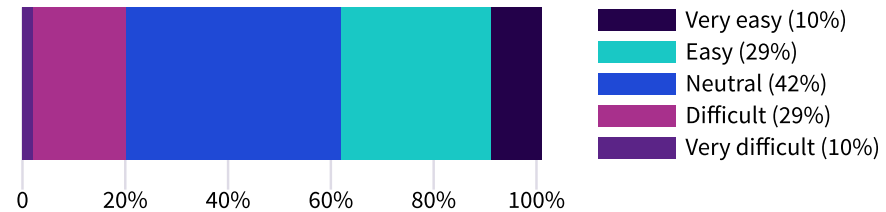
Source: Motorhoming, Caravanning and Camping Survey (2023)



## Areas for improvement

### Making sustainable choices

When asked how easy it was for respondents to make sustainable or “green” choices on their holidays, around a fifth (19%) found making these choices difficult, whereas around two fifths (39%) found it easy. This pattern was demonstrable across all user groups.



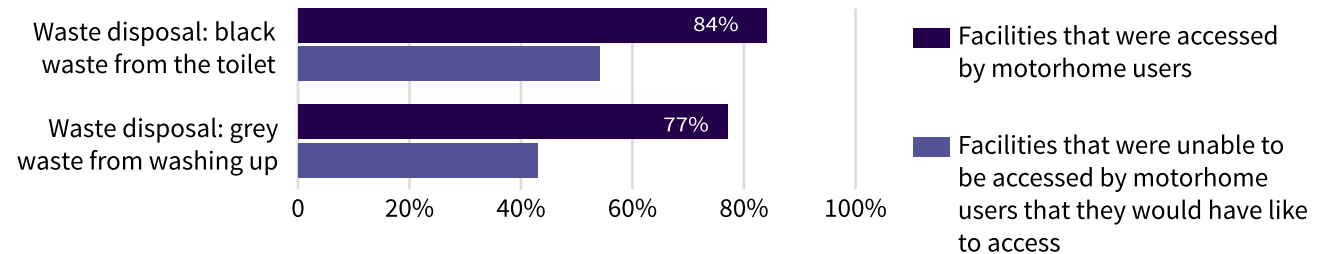
### Making sustainable choices: disposal of black and/or grey waste

Of those who found it difficult to make sustainable choices, a key area of concern was the disposal of black or grey waste.

*“There are too few black and grey waste dumping points. So we have to drive further to dump (not green, clutters roads and is frustrating)”*

*“Not enough locations for disposal of black/grey waste, especially on busy tourist areas”*

Disposal of black and/or grey waste was a key area of concern for motorhome users in particular. Over half (54%) had not been able to access black waste disposal facilities when needed on their most recent trip in Scotland.



Please see appendix 2 for full graph data

Source: Motorhoming, Caravanning and Camping Survey (2023)

## Making sustainable choices: recycling

The majority of those who found it difficult to make sustainable choices on their trip(s) described issues with recycling. Respondents described a lack of bin availability or suitability, including:

- Being unable to find recycling bins generally
- Difficulty accessing recycling bins on camp sites
- Difficulty in separating waste where facilities were available, particularly food waste



Some respondents stated that they tried to store recycling in their vehicle until reaching a viable recycling point, with this becoming a difficulty during the length of their trip due to lack of space. There was also some confusion around recycling guidance as the “rules” were sometimes seen as different in different areas of Scotland.

*“Recycling often absent at campsites, and rare in car parks, streets”*

*“Finding places in rural areas to recycle is difficult - bins in lay-bys are usually overflowing and are for universal rubbish collection. Dependent on storing recyclables until attending a supermarket or recycling centre which takes up space in the van”*

*“Separating and storing waste until it can be responsibly disposed of is harder with limited water to wash cans and jars and limited storage space. It’s easier to find bulk bins to take general waste than recyclable and as the rules for what can be put into recycling bins change by local authority most waste goes in a general waste bin.”*

*“We separate waste, including food waste in our Motorhome. However, as different councils have such varied recycling rules, we can’t always dispose of recycling properly”*

## Parking

A third (33%) of respondents stated that they experienced issues with parking during their most recent trip in Scotland.

Those that had had issues with overnight parking described a lack of sufficient facilities. Some stated that there was a lack of access to spaces that could have been viable, due to signage or height barriers. Existing spaces were also described as too full or expensive. One of the impacts of the lack of overnight parking was that some respondents felt unwelcome in the local area.

*“Often difficult to find anywhere to stay if not booked into a campsite, very few other options”*

*“Most camper van sites full up or charging extortionate prices for basic parking without electrical hook up. Often overcrowded and noisy which is the opposite idea of heading North to get away from it all. So much land and yet nowhere to park freely without being moved on or harassed”*

*“Recently installed plethora of ‘no overnight parking’ signs are not welcoming and make finding somewhere to stop somewhat difficult and crowds motorhomes and vans into the fewer places that allow”*

*“Height and width barriers are far too frequent. Also no longer spaces for longer vehicles. Sometimes we only need another half a metre or so in length or a couple of inches wider, but parking outwith the lines can be costly”*



Source: Motorhoming, Caravanning and Camping Survey (2023)

Respondents who suggested improvements to help with overnight parking issues mostly called for “Aires” style facilities. There were also some who suggested that local people could charge money for unused or empty spaces.

*“Many places had good spaces for overnight parking and could give opportunities and use as income generator rather than just ban overnight parking”*

*“It is difficult to find overnight park ups that are not prohibited or over-crowded. More aires are needed”*

*“It’d be great to have designated spaces within car parks for overnight sleeping. I’m more than happy to pay for this. There are a few car parks in Yorkshire that offer this and it’s fantastic”*

*“In my opinion don’t stop people parking overnight. Instead charge them to stay and if possible provide black waste (at a cost)”*

*“No overnight parking signs. Would be good to provide AIRES, like they do in Europe for camper vans and motorhomes”*



Source: Motorhoming, Caravanning and Camping Survey (2023)

## Issues with daytime parking

Those that had had issues with daytime parking described a lack of access to parking spaces during the day due to the size of their vehicle or height barriers. They also stated that parking spaces were prioritised for or used by other vehicle types e.g. cars or coaches, with some respondents noting an increase in no parking signs. Parking was seen as particularly difficult in busy locations such as town centres, supermarkets or near visitor attractions and in remote or rural areas. Some respondents described not being able to visit certain areas that they had planned to. There were also some people who stated that they were unable to spend in the local area in places such as shops and restaurants as a result.

*“Height and width barriers are far too frequent. Also no longer spaces for longer vehicles. Sometimes we only need another half a metre or so in length or a couple of inches wider, but parking outwith the lines can be costly”*

*“On [Location], there was hardly anywhere to park in the main villages, which meant we couldn't stop and have a look around. We had planned to visit and buy from several shops, but lack of parking made it impossible”*

*“Often when visiting places there is nowhere to park due to height restrictions. In this case we do not stop and hence don't spend money locally. [Location] for instance has now become so campervan unfriendly that we no longer visit. It used to be a favourite, parking by the sailing club and spending the evening in the local pubs for food and drink”*



Source: Motorhoming, Caravanning and Camping Survey (2023)





## Summary

### Overall summary of research results

#### **Trips taken in Scotland have a unique audience and can take different forms**

People who tended to take these kind of trips were mostly from within the UK, older and with no children. There is a longer trip seasonality and often more than one place is visited in a single trip. Facilities are important, but some visitors are keen to “get away” from the traditional campsite experience.

#### **Respondents who took these trips were well-informed about guidance and regulations, and eager to know more**

While respondents rated themselves as familiar with most existing guidance, the majority of respondents indicated an interest in receiving information about at least one provided topic. Topics that respondents wanted to know more about included: where they could dispose waste (black, grey, recyclable and/or non-recyclable rubbish); locations of less formal overnight parking sites, and parking regulations.

#### **Survey respondents spend money on a range of activities while in the destination and would be willing to pay for infrastructure and facilities that meet their needs**

Overall, three quarters of respondents took part in some form of activity that they had paid for during their most recent trip. They also spend money on accessing food while in the destination. Respondents indicated a willingness to pay for facilities (mainly waste disposal, hygiene and electrical hook up services) and different types of overnight site (basic and bare as well as fully provisioned).

#### **The visitor experience in Scotland was very positive, with some areas of improvement identified**

Respondents were very satisfied with their experience in Scotland and were likely to take a similar trip in the next five years. Around three quarters were very likely to recommend Scotland as a destination to their friends and family. Broadly, their experiences with local communities were positive, although some visitors noted more mixed attitudes. The main areas suggested for further improvement include information about and access to waste disposal and parking facilities.



## Next Steps

- The final report has been published in full in the Research and Insights section of [VisitScotland.org](https://www.visitScotland.org)
- Consideration of any new visitor infrastructure to support these markets needs to be based on a sound understanding of demand and potential benefits and impact locally. Local land managers, businesses and communities based placed to consider what solutions, if any are best placed for them and options for funding.
- Scotland's visitor management group will continue to work together to share national insights and promote responsible tourism. Updates will continue to be shared as they become available on [VisitScotland.org](https://www.visitScotland.org)



# Appendix 1

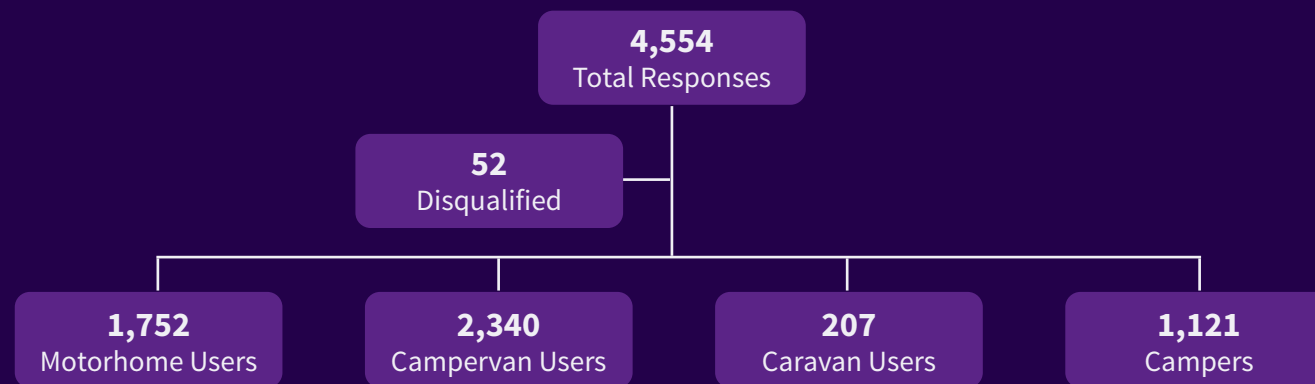
## Survey methodology and notes

### Distribution

- The survey was created and hosted on Qualtrics. A link was made live between 28th July and 1st September 2023.
- The survey link was shared with members of the Visitor Management subgroup for distribution online. Through this “open” distribution method, it is not possible to fully track the reach of the survey. Demographic questions were asked regarding where respondents lived rather than targeting a specific sample of people e.g. UK visitors.

### Sampling

- A total of 4,554 responses were received. 52 respondents answered that “none” of the provided options described them and were therefore disqualified from the remainder of the survey. This resulted in 4,502 viable responses. Please see breakdown of user type samples in the diagram below.
- Due to the differences in sample sizing, responses from different groups were not directly compared to another during research analysis.
- Some questions were answered in reference to their overall experience over the last 5 years, whereas others were asked to recall their experience of the most recent trip that they had taken within the last 12 months. Therefore, base sizes varied throughout the survey.



Please note that the final row of this diagram will not total 4,502 as respondents could choose multiple options when answering this question.

### Respondent bias

- VisitScotland acknowledges that there may be an element of social desirability bias present in the questions regarding behaviour on trips and knowledge of guidelines.
- Social desirability bias describes where respondents do not answer a question honestly by providing a socially desirable response, either by overreporting ‘good behaviour’ or underreporting ‘bad behaviour’.

## Appendix 2

### 1. Who takes trips in Scotland?

#### Survey respondents' age group

Age group	% of trips
Under 25	0%
25-34	3%
35-39	3%
40-44	5%
45-54	21%
55-64	40%
65+	28%
Prefer not to say	1%

#### Size of camping vehicle

Size	% Vehicles (renters)	% Vehicles (owners)
5.99 metres or smaller	38%	50%
6 metres to 7.99 metres	56%	47%
8 metres or larger	2%	2%
I do not know	5%	0%

#### Length of time using a camping vehicle

Length of time	% of trips
A year or less	6%
1 to 2 years	10%
3 to 4 years	19%
5 to 10 years	29%
Over 10 years	35%



## 2. What do these trips look like?

### Trip seasonality

Month	% trips taken in an owned/rented vehicle	% trips taken in a tent or other structure
January	28%	9%
February	31%	12%
March	48%	22%
April	63%	42%
May	72%	63%
June	66%	62%
July	60%	60%
August	59%	56%
September	71%	55%
October	60%	32%
November	34%	12%
December	27%	10%

### Number of places

	Motorhome users	Campervan users	Caravan users	Campers
1 place	20%	29%	55%	38%
2 places	15%	17%	21%	20%
3 places	12%	13%	9%	12%
4 places	9%	8%	4%	8%
5 places	9%	7%	3%	5%
More than 5 places	35%	26%	8%	16%
I do not remember	1%	0%	1%	1%



### Preferred location type (vehicle users)

Location	Motorhome users	Campervan users	Caravan users
In a village or town	53%	32%	28%
On the outskirts of a village or town	93%	75%	83%
A remote rural car park (over 5 miles to the nearest village or town)	56%	63%	27%
Off-road away from any settlements	67%	74%	31%

### Types of sites for overnight stays (vehicle users)

Place type	% of trips
Campsite with toilet and washing facilities	73%
Overnight parking in a car park (no monetary charge)	38%
Overnight parking in a car park (monetary charge)	34%
Aires motorhome stopover	28%
Off-road	28%
Overnight roadside	27%
Campsite without toilet and washing facilities	26%
Other	14%

### Campers' usage of managed campsites

Reasons	% of trips
There was no managed campsite in the place that I wanted to visit	54%
Other	42%
There was a cost involved	22%
The managed campsite that I tried to book had no availability	12%
The facilities were unsuitable for my needs	10%
Access times were unsuitable	9%
There was a limit on group size	1%

### 3. What do people know?

#### Topics of interest

	Motorhome users	Campervan users	Caravan users	Campers
Where to dispose of black waste from the toilet	91%	69%	73%	51%
The location of less formal campsites (e.g. aires / Stay the Night car parks)	89%	89%	61%	78%
Where to dispose of grey waste from washing up	77%	59%	66%	45%
Overnight parking regulations	75%	75%	49%	67%
Where you can informally camp in a vehicle	74%	76%	38%	64%
Where you can wild camp	60%	57%	29%	50%
Day time parking regulations	57%	54%	39%	49%

### 4. What do people do on trips?

#### Accessing food and drink

	Motorhome users	Campervan users	Caravan users	Campers
Bought food from a local supermarket in the destination / while on my trip	54%	53%	62%	46%
Ate at a cafe/restaurant/pub in the local town or village	24%	20%	12%	16%
Ate food brought from home	17%	21%	20%	32%
Got takeaway from the local town or village	3%	3%	3%	3%
Bought food from the campsite shop (if applicable)	0%	1%	0%	0%
Other	2%	2%	2%	3%
Day time parking regulations	57%	54%	39%	49%

### Activities undertaken

Activities	% of trips
Went to a visitor attraction	52%
Went for a night out to a bar, pub or club	39%
Took part in an outdoor leisure activity	38%
I did not pay for any activities during my trip	25%
Went to a museum or art gallery	22%
Attended an organised local event	14%
Went on a guided sightseeing tour	9%
Took part in an indoor leisure activity	5%
Went to a theatre or cinema	3%

### Willingness to pay for facilities

Facilities	Motorhome users	Campervan users	Caravan users	Campers
Electrical hook up	72%	72%	84%	60%
Showers	58%	79%	63%	75%
Waste disposal: black waste from the toilet	82%	65%	72%	47%
Fresh water tap	69%	52%	59%	44%
Waste disposal: grey waste from washing up	66%	50%	58%	37%
Toilets	48%	57%	60%	54%
Clothes washing facilities	54%	53%	48%	51%
Washing up facilities	20%	31%	30%	33%

### Willingness to pay for types of site

Sites	Motorhome users	Campervan users	Caravan users	Campers
Fully provisioned site (a wide variety of facilities available and the site is fully managed)	79%	84%	91%	84%
Basic site (some facilities available)	95%	96%	87%	93%
Bare site (a defined area to park or camp but with no facilities)	67%	60%	42%	52%

## 5. What is their general perception of taking trips in Scotland?

### Experiences with local communities

Experiences	True	Sometimes true and sometimes false	False
The service that I received in shops was of good quality	89%	10%	1%
The service that I received in cafes/bars/restaurants was of good quality	88%	11%	1%
I found the local people to be friendly	87%	12%	1%
I generally felt welcome within the local area	87%	12%	1%
The attitude towards campers was positive	62%	34%	5%
The attitude towards motorhome/campervan/caravan users was positive	57%	38%	5%
There was a variety of hospitality options on offer for those on a camping trip	54%	37%	8%

### **Making sustainable choices**

Very difficult	2%
Difficult	18%
Neutral	42%
Easy	29%
Very easy	10%

### **Making sustainable choices: disposal of black and/or grey waste**

	<b>Facilities that were accessed</b>	<b>Facilities unable to be accessed but would have liked to</b>
Waste disposal: black waste from the toilet	84%	54%
Waste disposal: grey waste from washing up	77%	43%



Disclaimer:

This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents.

VisitScotland may add, change, improve or update this publication at any time without notice. Images © VisitScotland

CONTACT US

Insight Department  
[visitscotland.com](https://visitscotland.com)  
[visitscotland.org](https://visitscotland.org)  
[research@visitscotland.com](mailto:research@visitscotland.com)

