# Scottish Agritourism Growth Tracker

2021 Inaugural Report

Scottish Agritourism

Preprepared by VisitScotland on behalf of Scottish Agritourism
Final Report - March 2022

VisitScotland | Alba

# Contents

Executive Summary 4

Introduction 6

Section 1: Profile 7

Section 2: Nature of Activities 19

Section 3: Business Performance 23

Section 4: Impact & Value 25

Section 5: 2020 Business Performance 29

Section 6: Future Plans 35

Section 7: Suggested Government Policies for Sector Development 36

Section 8: Sustainability Practices 39

Section 9: Marketing; Memberships; Certifications; Key Meetings 42

**Cover image**, Duncan Family Farms © Go Rural/Craig Stephen Photography

*Disclaimer: VisitScotland has published this report in good faith to update stakeholders on its activity. VisitScotland has taken all reasonable steps to confirm the information contained in the publication is correct. However, VisitScotland does not warrant or assume any legal liability for the accuracy of any information disclosed and accepts no responsibility for any error or omissions. Images © Go Rural / Craig Stephen Photography / VisitScotland*

# Summary of tables / graphs


EX.1: Key Performance Indicators 5
1.1: Location of Current & Potential Agritourism Businesses 7
1.3: Nature of Agritourism Activities by Enterprise Agency Area 10
1.4: Nature of Agritourism Activities by Former Scottish Tourist Board Area 11
1.5: Nature of Agritourism Activities by Local Authority Area 12
1.7: Farm Size 13
1.8: Grouped Main Agricultural Activities 14
1.9: Main Agricultural Activities 14
1.10: Sales of Produce Direct to Consumer (all farms) 15
1.11: Method of Sales of Produce Direct to Consumer (all farms) 15
1.12: Future Plans - Selling Produce Directly to Consumers (all farms) 16
1.13: Currently Process Produce on the farm (all farms) 16
1.14: Agritourism Businesses - Eating Produce Onsite 17
1.15: Why Can't you Eat Produce Onsite 17
1.16: Agritourism Business Birth Year 18
1.18: Agritourism Business Relationship with Farm Business 18
1.17: Agritourism Operational Months 18
2.1: Involved in Agritourism Activity 19
2.2: Nature of Activities 20
2.3: Operators of Agritourism Business 21
2.4: Future Operators of Agritourism Business 21
2.5: Timeframe of Planned Activities 21
2.6: Barriers to Agritourism - Reasons Not Currently in Agritourism 22
3.1: Turnover & Estimated Current & Future Value 23
3.2: Profit (turnover/ net profit) 24
3.3: Current & Potential Agritourism Assets 24
4.1: Visitor Numbers 25
4.2: Visitor Origin Pre & During Covid-19 25
4.4: Are Family Members Paid for their Work? 27
4.5: Capital Investment 27
4.6: Businesses with more than one Director or Partner 27
4.7: Applied for Capital Grants (past 20 years) 28
4.8: Capital Grants Received to Develop Agritourism 28
5.1: Closed During Covid-19 29
5.2: Status of Closure: Fully Closed/ Partially Closed/ Unsure 30
5.3: Covid-19 Impact on Turnover & Profit Compared to Previous FY 31
5.4: Types of Covid-19 Financial Support Received 32
5.5: Value of Support Received 33
5.6: Turnover Expectations for this Financial Year 34
6.1: Nature of Activities - Planning to be involved 35
8.1: Sustainability Practices 39
9.1: Business Promotion 42
9.2: Online – Sales & Bookings 42
9.3: Quality Assurance (Agritourism only) 43
9.4: Organic Certification 43
9.5: Part of the Green Tourism Scheme 43
9.6: Attendance at Scottish Enterprise Agritourism Monitor Farm Meetings 43

# Executive Summary

## Agritourism Strategic Direction to 2030

Scotland's Agritourism Strategy[1] aims to ensure the sector has 'a long-term sustainable future that delivers a high quality, authentic visitor experience with agriculture and food and drink at its core, sustaining the future of family farms in Scotland contributing to the rural economy and positioning Scotland as a key player in global agritourism'.

It is known that there are around 500 businesses currently operating in the sector. The 'ambition for the sector is to have 1,000 Scottish farming and crofting enterprises offering an agritourism experience with at least 50% providing a food and drink element by 2030.'

## Agritourism Growth Tracker Purpose

The Agritourism Growth Tracker provides the tool to monitor progress towards these high-level targets along with numerous other factors that will provide vital information to help steer and maximise the sustainable development of the sector in the coming years.

## Baseline Position

This inaugural Growth Tracker sets a baseline position for Scottish Agritourism. Future iterations will show progress against the data contained in this report and provide qualitative information to explain barriers to development and identify emerging opportunities with further growth potential.

The Growth Tracker demonstrates Scotland's agritourism sector provides significant opportunity for Scotland's farms, rural communities and visitor economy.

Agritourism is an important contributor to national and regional inclusion, diversity and economic development objectives by providing:

- an important stimulus to Scottish food and drink sales and national food tourism
- equal and inclusive employment opportunities for men and women which are available to all age profiles and skill levels
- a sustainable core domestic based visitor market
- strong growth expectations and profitability levels
- new revenue streams to cross fund agricultural activities
- vital family and external employment opportunities in rural areas
- commercial and entrepreneurial opportunities to strengthen rural communities
- high levels of historic and planned investment to support other rural businesses and supply chain rural jobs
- A successful agritourism sector also helps re-build demand and consumer loyalty for food grown and reared on Scottish farms.

1 Scotland's Agritourism Growth Strategy | VisitScotland.org

## Key Performance Indicators

Key Performance Indicators (KPIs) have been identified to help articulate the value and importance of agritourism, monitor performance and project the scale of future impacts. The initial list of indicators provided in Table EX.1 will be developed in future iterations.

### EX.1: Key Performance Indicators

| | Baseline Value[2] | |
|---|---|---|
| **KPI Area** | **% / No. / £** | **No. Responses** |
| **Visitor Numbers** | | |
| Average visitor numbers per agritourism business p.a. | 5,496 | 105 |
| **Turnover** | | |
| Average turnover per agritourism business p.a. | £120,592 | 56 |
| **Employment** | | |
| Average FTE jobs per agritourism business | 3.4 | 90 |
| **Food & Drink** | | |
| % of farms that sell produce direct to customers | 35% | 63 |
| % of farms that process produce on their farm | 15% | 26 |
| % of agritourism business that cater for produce being eaten onsite | 40% | 47 |

*Note: Sector value estimates and 2030 forecast value is provided in Table 3.1 Executive Summary*

2 Respondents were asked to provide performance information for a 'normal year'. If they started their agritourism activities or farm retail post March 2020 they were asked to provide any relevant performance information.

# Introduction

This report reflects the findings of the inaugural Scottish Agritourism Growth Tracker Survey. The survey was open to all farm businesses and received responses from farm businesses that currently operate, are considering operating or have previously operated an agritourism or farm retail business.

The Growth Tracker has informed the development of the Agritourism Growth Strategy and sets a baseline to measure progress in the sector in the coming years.

## Response Rate

The findings are based on the responses of 179 farms, two third of which are actively involved in agritourism, with one third considering agritourism.

There is thought to be between 500 to 700 active agritourism operators in Scotland[3]. Scottish Agritourism and VisitScotland are actively encouraging agritourism businesses to take up a free business listing on VistScotland.com[4] to help establish a robust baseline figure for active operations.

An initial review of the profiles of respondents suggests a number of large established agritourism operators have not taken part in the survey. Indeed, almost half of responses are from small to medium size agritourism businesses that have only become operational since 2014. The findings are however considered to be broadly representative of the sector and represent the profile and views of operators most likely to engage in the future development of the sector.

## Report Structure

This detailed profiling report complements the Agritourism Emerging Themes report completed in September 2021.

The analysis broadly follows the structure of the survey questionnaire:

- Section 1: Profile
- Section 2: Nature of Activities
- Section 3: Business Performance
- Section 4: Impact & Value
- Section 5: 2020 Business Performance
- Section 6: Future Plans
- Section 7: Government Policies to Support Sector Development
- Section 8: Sustainability Practices
- Section 9: Other (Marketing; Memberships; Certifications; Key Meeting attendance)

3 Equivalent response rate: 36% for 500 and 26% for 700. Margin of error at 95% confidence level: 5.87 for 500 and 6.32 for 700. Source: www.smartsurvey.co.uk/margin-of-error-calculator
4 https://www.visitscotland.org/supporting-your-business/marketing/opportunities/national-tourism-website

# Section 1: Profile

The location of business respondents has been split into those actively involved in agritourism and those considering agritourism[5] and then grouped into Scottish Enterprise Agency geographies and Scottish Tourist Board Area (to align with official visitor statistics).

The results are slightly skewed by the size of each enterprise area (south of Scotland for example only has two local authority areas). However, there is relatively broad coverage across all three enterprise areas and each Scottish Tourist Board area. Interestingly the share of businesses considering agritourism broadly matches those already operating (Table 1.1).

Table 1.2 provides the same breakdown by Scottish local authority area. Unsurprisingly agritourism businesses and intent is more prominent in rural geographies that are traditionally characterised by agricultural activity.

5 Please note all 61 respondees not actively involved are considering agritourism in the future. There were no responses from businesses not considering agritourism to skew the analysis

## 1.1: Location of Current & Potential Agritourism Businesses

| Location of Current & Potential Agritourism Businesses | Involved in agritourism | | Not involved but considering agritourism | | Total responses | |
|---|---|---|---|---|---|---|
| Area | No. | % | No. | % | No. | % |
| Scotland Enterprise Agency Level | | | | | | |
| South of Scotland Enterprise* | 16 | 14% | 8 | 13% | 24 | 13% |
| Highlands & Islands Enterprise ** | 35 | 30% | 16 | 26% | 51 | 28% |
| Scottish Enterprise*** | 67 | 57% | 37 | 61% | 104 | 58% |
| **Total** | **118** | **100%** | **61** | **100%** | **179** | **100%** |
| Scottish Tourist Board Area (in line with official visitor statistics) | | | | | | |
| Highlands and Islands | 21 | 18% | 13 | 21% | 34 | 19% |
| Aberdeen and Grampian | 17 | 14% | 8 | 13% | 25 | 14% |
| Angus and Dundee | 5 | 4% | 4 | 7% | 9 | 5% |
| Perth & Kinross | 10 | 8% | 9 | 15% | 19 | 11% |
| Fife | 9 | 8% | 1 | 2% | 10 | 6% |
| Edinburgh and Lothians | 7 | 6% | 3 | 5% | 10 | 6% |
| Argyll, The Isles, Loch Lomond, Stirling and Trossachs | 19 | 16% | 7 | 11% | 26 | 15% |
| Greater Glasgow and Clyde Valley | 10 | 8% | 5 | 8% | 15 | 8% |
| Ayrshire and Arran | 4 | 3% | 3 | 5% | 7 | 4% |
| South of Scotland | 16 | 14% | 8 | 13% | 24 | 13% |
| **Total** | **118** | **100%** | **61** | **100%** | **179** | **100%** |

* *South of Scotland Enterprise is Scottish Borders and Dumfries and Galloway*

** *Highlands and Islands Enterprise covers whole of Highlands, Islands and Argyll & Bute and Moray local authority areas*

*** *Scottish Enterprise covers central Scotland and Aberdeen City and Shire local authority areas*

## 1.2: Location of Current & Potential Agritourism Businesses

| | Involved in agritourism | | Not involved but considering agritourism | | Total responses | |
|---|---|---|---|---|---|---|
| Local Authority Area | No. | % | No. | % | No. | % |
| Aberdeenshire | 14 | 12% | 8 | 13% | 22 | 12% |
| Angus | 5 | 4% | 4 | 7% | 9 | 5% |
| Argyll & Bute | 11 | 9% | 3 | 5% | 14 | 8% |
| City of Edinburgh | 1 | 1% | 0 | 0% | 1 | 1% |
| Clackmannanshire | 1 | 1% | 0 | 0% | 1 | 1% |
| Dumfries & Galloway | 8 | 7% | 6 | 10% | 14 | 8% |
| East Ayrshire | 0 | 0% | 1 | 2% | 1 | 1% |
| East Dunbartonshire | 1 | 1% | 0 | 0% | 1 | 1% |
| East Lothian | 4 | 3% | 1 | 2% | 5 | 3% |
| Fife | 9 | 8% | 1 | 2% | 10 | 6% |
| Highland | 17 | 14% | 10 | 16% | 27 | 15% |
| Inverclyde | 1 | 1% | 0 | 0% | 1 | 1% |
| Midlothian | 1 | 1% | 1 | 2% | 2 | 1% |
| Moray | 3 | 3% | 0 | 0% | 3 | 2% |
| Na h-Eileanan Siar | 0 | 0% | 2 | 3% | 2 | 1% |
| North Ayrshire | 0 | 0% | 1 | 2% | 1 | 1% |
| North Lanarkshire | 2 | 2% | 0 | 0% | 2 | 1% |
| Orkney Islands | 3 | 3% | 0 | 0% | 3 | 2% |
| Perth & Kinross | 10 | 8% | 9 | 15% | 19 | 11% |
| Renfrewshire | 0 | 0% | 1 | 2% | 1 | 1% |
| Scottish Borders | 8 | 7% | 2 | 3% | 10 | 6% |
| Shetland Islands | 1 | 1% | 1 | 2% | 2 | 1% |
| South Ayrshire | 4 | 3% | 1 | 2% | 5 | 3% |
| South Lanarkshire | 5 | 4% | 3 | 5% | 8 | 4% |
| Stirling | 7 | 6% | 4 | 7% | 11 | 6% |
| West Dunbartonshire | 1 | 1% | 1 | 2% | 2 | 1% |
| West Lothian | 1 | 1% | 1 | 2% | 2 | 1% |
| **Total** | **118** | **100%** | **61** | **100%** | **179** | **100%** |

*Note: No survey responses received from: Dundee City, City of Glasgow, Aberdeen City, East Renfrewshire, Falkirk*

## Nature of Agritourism Activities

Tables 1.3, 1.4 and 1.5 show the availability of agritourism activities and product offer by enterprise area, former Scottish Tourist Board Area and Scottish local authority area.

Conditional formatting has been applied to help identify where there are high and low concentrations of agritourism activities across the various geographies. Dark green identifies high concentration and light green identifies low concentrations.

### Enterprise Agency

The Scottish Enterprise Agency area has the highest concentration of agritourism activities. This is perhaps unsurprising given the number of local authority areas contained within this north east and central Scotland geography.

### Former Scottish Tourist Board Area

Analysis by Former Scottish Tourist Board Area begins to show a more interesting pattern of agritourism businesses across Scotland. There is a relatively high concentration of agritourism businesses in Aberdeen and Grampian; the Highlands and Islands; the South of Scotland and Argyll, The Isles, Loch Lomond, Stirling and Trossachs.

### Local Authority Area

Local authority analysis shows Aberdeenshire has the highest concentration of agritourism businesses across most activity categories.

This fairly disaggregated local authority analysis also identifies pockets of activity e.g. festivals and events in Fife and Perth and Kinross. It also shows agritourism activities such as glamping are more evenly distributed throughout Scotland.

Clearly the area analysis in Tables 1.3, 1.4 and 1.5 will become more relevant and provide opportunities for more detailed granular analysis as a greater proportion of agritourism businesses submit completed Growth Tracker questionnaires.

## 1.3: Nature of Agritourism Activities by Enterprise Agency Area (dark green: high concentration / light green: low concentration)

| | On farm cafes and restaurants, pop up food | Farm tours/ experiences, including wildlife tours | Children's farm parks or children themed events | On farm events space for weddings, conferences, etc. | Action and adventure sports hosted by farmer/ farm employees | Festivals and events | Glamping, huts, yurts, wigwams, teepees, etc. | Farmhouse B&B | Self-catering in farm cottages or farmhouse | Self-catering in lodges or other larger new build | Caravan site/ camping - | Hotel / restaurant with rooms | Other accommodation (please specify) | Other (please specify) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 26 venues | 46 venues | 6 venues | 17 venues | 4 venues | 13 venues | 31 venues | 9 venues | 56 venues | 25 venues | 7 venues | 1 venue | 6 venues | 16 venues |
| HIE | 15% | 22% | 0% | 0% | 50% | 8% | 19% | 11% | 43% | 24% | 29% | 0% | 17% | 31% |
| South of Scotland Enterprise | 12% | 13% | 0% | 12% | 0% | 0% | 16% | 22% | 11% | 12% | 29% | 0% | 0% | 19% |
| Scottish Enterprise | 73% | 65% | 100% | 88% | 50% | 92% | 65% | 67% | 46% | 64% | 43% | 100% | 83% | 50% |
| **Total** | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

## 1.4: Nature of Agritourism Activities by Former Scottish Tourist Board Area (in line with official visitor statistics)

| | On farm cafes and restaurants, pop up food 26 venues | Farm tours/ experiences, including wildlife tours 46 venues | Children's farm parks or children themed events 6 venues | On farm events space for weddings, conferences, etc. 17 venues | Action and adventure sports hosted by farmer/ farm employees 4 venues | Festivals and events 13 venues | Glamping, huts, yurts, wigwams, teepees, etc. 31 venues | Farmhouse B&B 9 venues | Self-catering in farm cottages or farmhouse 56 venues | Self-catering in lodges or other larger new build 25 venues | Caravan site/ camping - 7 venues | Hotel / restaurant with rooms 1 venue | Other accommodation (please specify) 6 venues | Other (please specify) 16 venues |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Highlands and Islands | 4% | 13% | 0% | 0% | 50% | 0% | 13% | 11% | 23% | 16% | 14% | 0% | 17% | 25% |
| Aberdeen and Grampian | 35% | 15% | 33% | 18% | 0% | 38% | 10% | 0% | 7% | 16% | 0% | 100% | 33% | 13% |
| Angus and Dundee | 4% | 4% | 0% | 0% | 0% | 0% | 6% | 11% | 4% | 12% | 0% | 0% | 0% | 6% |
| Perth & Kinross | 12% | 15% | 0% | 35% | 25% | 23% | 10% | 11% | 14% | 8% | 14% | 0% | 17% | 19% |
| Fife | 12% | 4% | 0% | 6% | 25% | 23% | 3% | 22% | 4% | 16% | 14% | 0% | 0% | 0% |
| Edinburgh and Lothians | 12% | 7% | 33% | 18% | 0% | 8% | 3% | 0% | 4% | 0% | 0% | 0% | 17% | 0% |
| Argyll, The Isles, Loch Lomond, Stirling and Trossachs | 4% | 17% | 0% | 6% | 0% | 8% | 23% | 11% | 27% | 8% | 29% | 0% | 17% | 13% |
| Greater Glasgow and Clyde Valley | 4% | 9% | 33% | 6% | 0% | 0% | 10% | 11% | 5% | 4% | 0% | 0% | 0% | 6% |
| Ayrshire and Arran | 4% | 2% | 0% | 0% | 0% | 0% | 6% | 0% | 2% | 8% | 0% | 0% | 0% | 0% |
| South of Scotland | 12% | 13% | 0% | 12% | 0% | 0% | 16% | 22% | 11% | 12% | 29% | 0% | 0% | 19% |
| **Total** | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

## 1.5: Nature of Agritourism Activities by Local Authority Area (dark green: high concentration / light green: low concentration)

| | On farm cafes and restaurants, pop up food | Farm tours/ experiences, including wildlife tours | Children's farm parks or children themed events | On farm events space for weddings, conferences, etc. | Action and adventure sports hosted by farmer/farm employees | Festivals and events | Glamping, huts, yurts, wigwams, teepees, etc. | Farmhouse B&B | Self-catering in farm cottages or farmhouse | Self-catering in lodges or other larger new build | Caravan site/ camping | Hotel / restaurant with rooms | Other accommodation (please specify | Other (please specify) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 26 venues | 46 venues | 6 venues | 17 venues | 4 venues | 13 venues | 31 venues | 9 venues | 56 venues | 25 venues | 7 venues | 1 venue | 6 venues | 16 venues |
| Aberdeenshire | 27% | 13% | 33% | 18% | 0% | 31% | 10% | 0% | 5% | 16% | 0% | 100% | 33% | 6% |
| Angus | 4% | 4% | 0% | 0% | 0% | 0% | 6% | 11% | 4% | 12% | 0% | 0% | 0% | 6% |
| Argyll & Bute | 4% | 7% | 0% | 0% | 0% | 0% | 6% | 0% | 18% | 8% | 14% | 0% | 0% | 0% |
| City of Edinburgh | 4% | 2% | 17% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Clackmannanshire | 0% | 0% | 0% | 0% | 0% | 0% | 3% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Dumfries & Galloway | 8% | 7% | 0% | 0% | 0% | 0% | 6% | 11% | 5% | 8% | 14% | 0% | 0% | 6% |
| East Ayrshire | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| East Dunbartonshire | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 4% | 0% | 0% | 0% | 0% |
| East Lothian | 8% | 4% | 17% | 12% | 0% | 8% | 3% | 0% | 2% | 0% | 0% | 0% | 17% | 0% |
| Fife | 12% | 4% | 0% | 6% | 25% | 23% | 3% | 22% | 4% | 16% | 14% | 0% | 0% | 0% |
| Highland | 4% | 9% | 0% | 0% | 50% | 0% | 10% | 11% | 18% | 16% | 14% | 0% | 17% | 25% |
| Inverclyde | 0% | 2% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Midlothian | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 0% |
| Moray | 8% | 2% | 0% | 0% | 0% | 8% | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 6% |
| Na h-Eileanan Siar (the Outer Hebrides) | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| North Ayrshire | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| North Lanarkshire | 4% | 2% | 17% | 0% | 0% | 0% | 3% | 0% | 2% | 0% | 0% | 0% | 0% | 0% |
| Orkney Islands | 0% | 2% | 0% | 0% | 0% | 0% | 3% | 0% | 5% | 0% | 0% | 0% | 0% | 0% |
| Perth & Kinross | 12% | 15% | 0% | 35% | 25% | 23% | 10% | 11% | 14% | 8% | 14% | 0% | 17% | 19% |
| Renfrewshire | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Scottish Borders | 4% | 7% | 0% | 12% | 0% | 0% | 10% | 11% | 5% | 4% | 14% | 0% | 0% | 13% |
| Shetland Islands | 0% | 2% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| South Ayrshire | 4% | 2% | 0% | 0% | 0% | 0% | 6% | 0% | 2% | 8% | 0% | 0% | 0% | 0% |
| South Lanarkshire | 0% | 4% | 17% | 6% | 0% | 0% | 6% | 11% | 2% | 0% | 0% | 0% | 0% | 6% |
| Stirling | 0% | 11% | 0% | 6% | 0% | 8% | 13% | 11% | 9% | 0% | 14% | 0% | 17% | 13% |
| West Dunbartonshire | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 2% | 0% | 0% | 0% | 0% | 0% |
| West Lothian | 0% | 0% | 0% | 6% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| **Total** | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |

## Type of Business

The majority (72%) of businesses involved in agritourism are farm businesses. Around one in five are either crofts (11%) or estates (10%).

### 1.6: Type of Business

| Type of Business | Involved in agritourism | | Not involved but considering agritourism | | Total responses | |
|---|---|---|---|---|---|---|
| | No. | % | No. | % | No. | % |
| Farm | 85 | 72% | 47 | 77% | 132 | 74% |
| Croft | 13 | 11% | 10 | 16% | 23 | 13% |
| Estate | 12 | 10% | 3 | 5% | 15 | 8% |
| Other[6] | 8 | 7% | 1 | 2% | 9 | 5% |
| **Total** | **118** | **100%** | **61** | **100%** | **179** | **100%** |

6 Those answering 'Other' responding with the following: Christmas Tree growing and retail - farm diversification; community land, previous farm; Contracting; Cottage/Kitchen Garden Industry (up to 5 acres) - Lavender and other botanical growing; Country bed and Breakfast; Fruit Farm, Farm Shop, Cafe and Wedding/Events Venue; Orchard and Tea Garden and two Small holdings.

## Farm Size

There is a relatively broad distribution of farm sizes among businesses already involved in agritourism and those not involved but considering it. Small farms with less than 50 hectares were more likely to be involved or more likely to be considering agritourism activities.

### 1.7: Farm Size

| Size | Involved in agritourism | | Not involved but considering agritourism | | Total responses | |
|---|---|---|---|---|---|---|
| | No. | % | No. | % | No. | % |
| 0-50 hectares | 37 | 31% | 16 | 26% | 53 | 30% |
| 51-100 hectares | 12 | 10% | 10 | 16% | 22 | 12% |
| 101-200 hectares | 23 | 19% | 19 | 31% | 42 | 23% |
| 201-500 hectares | 27 | 23% | 6 | 10% | 25 | 14% |
| 501 hectares plus | 19 | 16% | 6 | 10% | 25 | 14% |
| **Total** | **118** | **100%** | **61** | **100%** | **179** | **100%** |

## Main Agricultural Activities

Meat related farms are the most prevalent type of farm involved in agritourism or considering being involved in agritourism.

### 1.8: Grouped Main Agricultural Activities

| Type of Business | Involved in agritourism | | Not involved but considering agritourism | | Total responses | |
|---|---|---|---|---|---|---|
| | No. | % | No. | % | No. | % |
| Meat* | 78 | 66 | 48 | 79 | 126 | 70 |
| Dairy** | 8 | 7 | 1 | 2 | 9 | 5 |
| Eggs | 17 | 14 | 7 | 11 | 24 | 13 |
| Fruit | 12 | 10 | 0 | 0 | 12 | 7 |
| Vegetagles | 13 | 11 | 3 | 5 | 16 | 9 |
| Cereals | 31 | 26 | 17 | 28 | 48 | 27 |
| Oher (please specify) | 27 | 23 | 7 | 11 | 34 | 19 |
| None | 2 | 2 | 4 | 7 | 6 | 3 |
| **Total*** ** | **118** | - | **61** | - | **179** | |

* *Scotch Beef/ Scotch Lamb/ Scotch Pork /Chicken/Goat /Turkey*
** *Cows/Sheep/Goats*
*** *Total percentage not relevant as respondent could provide multiple answers*

Table 1.9 disaggregates the various types of meat production and shows the main activities to be Scotch beef and Scotch lamb production. Cereal activity is the second most common activity.

### 1.9: Main Agricultural Activities

| Type of Business | Involved in agritourism | | Not involved but considering agritourism | | Total responses | |
|---|---|---|---|---|---|---|
| | No. | % | No. | % | No. | % |
| Meat - Scotch Beef | 56 | 47% | 37 | 61% | 93 | 52% |
| Meat - Scotch Lamb | 65 | 55% | 38 | 62% | 103 | 58% |
| Meat - Scotch Pork | 5 | 4% | 1 | 2% | 6 | 3% |
| Meat - Chicken | 1 | 1% | 0 | 0% | 1 | 1% |
| Meat - Goat | 4 | 3% | 0 | 0% | 4 | 2% |
| Meat - Turkey | 1 | 1% | 0 | 0% | 1 | 1% |
| Dairy - Cows | 7 | 6% | 1 | 2% | 8 | 4% |
| Dairy - Sheep | 1 | 1% | 0 | 0% | 1 | 1% |
| Dairy - Goats | 1 | 1% | 0 | 0% | 1 | 1% |
| Eggs | 17 | 14% | 7 | 11% | 24 | 13% |
| Fruit | 12 | 10% | 0 | 0% | 12 | 7% |
| Vegetables | 13 | 11% | 3 | 5% | 16 | 9% |
| Cereals | 31 | 26% | 17 | 28% | 48 | 27% |
| Other (please specify) | 27 | 23% | 7 | 11% | 34 | 19% |
| None | 2 | 2% | 4 | 7% | 6 | 3% |
| Total* | 118 | - | 61 | - | 179 | - |

**Total percentage not relevant as respondent could provide multiple answers*

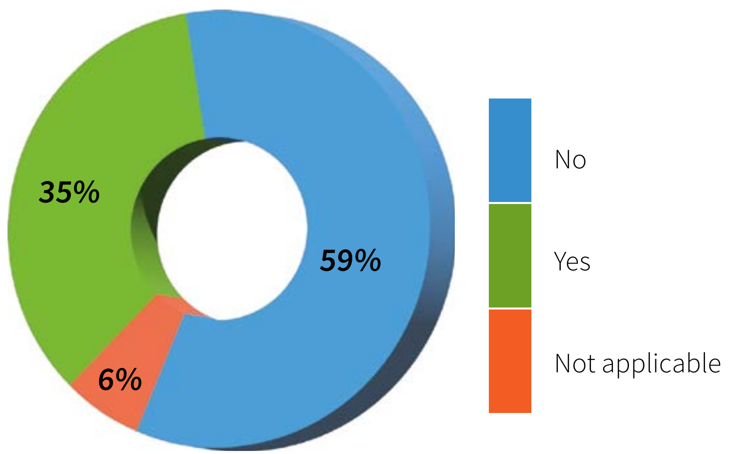
## Sales of produce onsite

Growing the sales of produce onsite and providing a more comprehensive food experience is a major part of Scotland's Agritourism Strategy.

### Sales of Produce Direct to Consumer (all farms)

Just over a third (35%) of businesses currently sell their produce direct to consumers.

1.10: Sales of Produce Direct to Consumer (all farms)




## Method of Sales of Produce Direct to Consumer (all farms)

The most commonly reported method for selling produce direct to customers was via 'an on-farm shop' (44%) and direct to guests 'staying or visiting for agritourism' (40%).

A similar proportion of respondents (40%) identified other methods including: online (farm website and social media); direct from freezers on the farm; via farm boxes (home delivery and collection); repeat customers and adverts; via neighbours and friends and seasonal events such as an annual pumpkin patch and pick your own strawberries service.

1.11: Method of Sales of Produce Direct to Consumer (all farms)

| | % | No. |
|---|---|---|
| Via on-farm shop | 44% | 28 |
| Other (please specify) | 41% | 26 |
| To guests who are staying or visiting for agritourism | 40% | 25 |
| Via on-farm honesty box | 19% | 12 |
| Via farmers market | 17% | 11 |
| Via local food hub | 17% | 11 |
| **Total*** | - | 63 |

**Total percentage not relevant as respondent could provide multiple answers*

## Future Plans - Selling Produce Directly to Consumers (all farms)

Around four in ten businesses (42%) not currently selling produce direct plan to start selling direct (12% within the next year and 30% one year from now). Just over half (52%) have no intention of selling direct in the near future. Those answering 'other' stated they were either considering opening a shop space for local producers or a sales outlet/distribution hub for other local small-scale producers.

### 1.12: Future Plans - Selling Produce Directly to Consumers (all farms)

| Future Plans | % | No. |
|---|---|---|
| Yes, considering selling directly to consumers more than a year from now | 30% | 32 |
| Yes, planning to start selling directly to consumers in next 12 months | 12% | 13 |
| No, not currently considering selling directly to consumers | 52% | 55 |
| Unsure | 3% | 3 |
| Other (please specify) | 2% | 2 |
| **Total** | **100%** | **105** |

## Currently Process Produce on the farm (all farms)

Only a small proportion (15%) currently process produce on their farm. The majority (55%) have no immediate plans to process produce, however around one in five (21%) stated the are currently considering it.

### 1.13: Currently Process Produce on the farm (all farms)

| Process Produce on farm | % | No. |
|---|---|---|
| No, and are not currently considering this | 55% | 99 |
| No, but we are considering this | 21% | 38 |
| Not applicable | 9% | 16 |
| Yes | 15% | 26 |
| **Total** | **100%** | **105** |

Examples of food and drink currently being processed or being considered include:

- Apple juice; cider and jam and soft fruit production
- Processed seasonal fruit (for instant freezing)
- Botanical spirits and malting for beer
- Sausages, burgers, koftas, biltong, pastrami, smoked meat (lamb and pork)
- Organic beef and lamb
- Cheese, ice cream, milkshakes and pasteurised milk
- Homemade cakes, traybakes, scones, puddings, meringues
- Steak pies, mince and steak rounds, sausage rolls, scotch eggs, quiche
- Ready meals and food hampers
- Soups, stocks, beef dripping, croutons, breadcrumbs
- Pickles/preserved vegetables and salads
- Seasonal produce e.g. pumpkin chutney and pumpkin soup
- Honey
- Non-food added value products including wool products

### Agritourism Businesses - Eating Produce on Site

Four in ten agritourism businesses have the facilities to offer food consumption onsite. Over a quarter (27%) are also considering developing facilities to do this in the future. Encouragingly, only 15% of operational agritourism have no plans to allow food consumption of farm produce onsite.

## 1.14: Agritourism Businesses - Eating Produce Onsite

| | % | No. |
|---|---|---|
| Yes | 40% | 47 |
| No, but we supply food and drink from the local area to guests | 20% | 24 |
| No, but we would like to be able to do this in the future | 27% | 32 |
| No, and do not intend to in the future | 15% | 18 |
| **Total** | 100% | 118 |


### Agritourism Businesses – Reasons Produce Cannot Be Eaten Onsite

The reasons provided for why farm produce cannot be eaten onsite included ‘it’s not possible as we do not produce food or drink that can be directly consumed on the farm’ (38%) and ‘It’s not possible as there are no local processing facilities to allow us to provide food to guests’ (25%).

## 1.15: Why Can’t you Eat Produce Onsite

| | % | No. |
|---|---|---|
| It’s not possible as we do not produce food or drink that can be directly consumed on the farm | 38% | 27 |
| It’s not possible as there are no local processing facilities to allow us to provide food to guests | 25% | 18 |
| Not possible for another reason | 25% | 18 |
| Unsure | 18% | 13 |
| **Total*** | - | 71 |

**Total percentage not relevant as respondent could provide multiple answers*

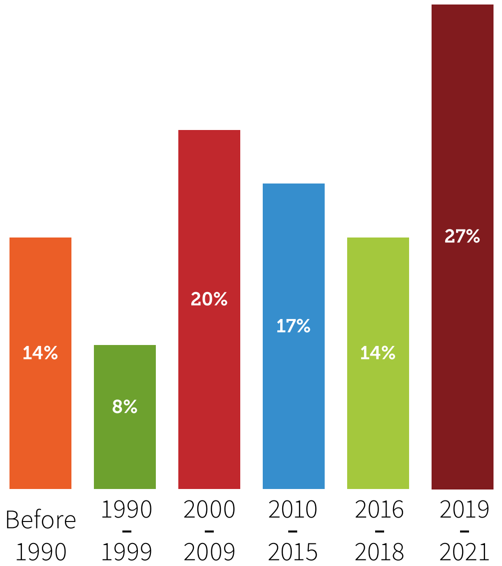
Other reasons included

- Lack of resource (time and money)
- Lack of appetite for additional regulation (health and safety)
- Lack of experience
- Hesitancy that revenue would cover additional set up and staff costs
- Lack of enquiries from visitors
- Lack of onsite processing facilities
- Lack of abattoirs locally
- Concern over possible food waste
- Lack of support staff

## Agritourism Business Birth Year

Over 40% of respondents started their agritourism business over the past five years which demonstrates a somewhat recent entrepreneurial spirit within the sector. However, over a fifth of respondents also started before 1999.

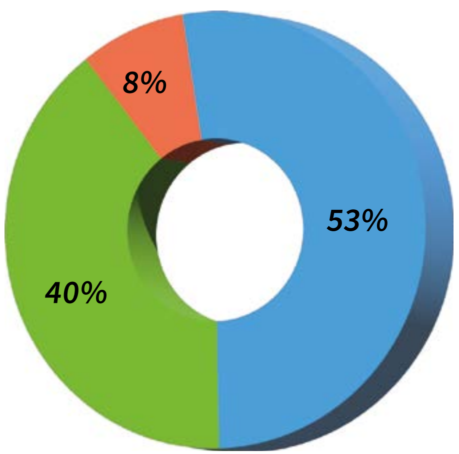
### 1.16: Agritourism Business Birth Year




## Agritourism Business Relationship with Farm Business

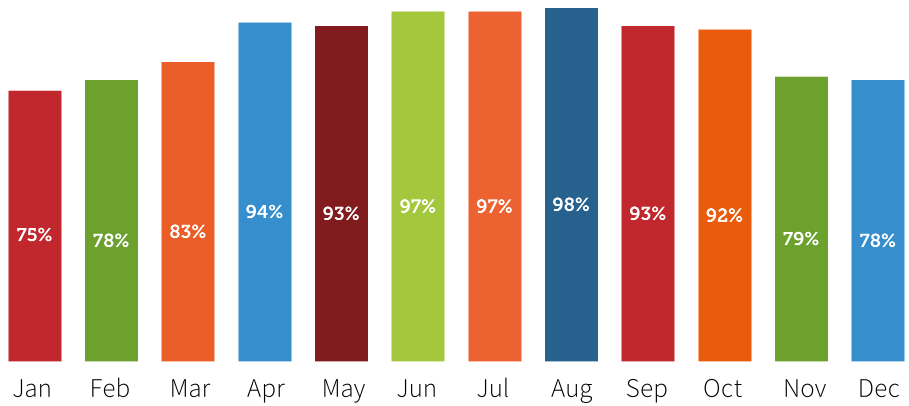
The majority (53%) of agritourism businesses were legally part of the farm business. However, a large proportion (40%) were a separate business entity to the farm business.

### 1.18: Agritourism Business Relationship with Farm Business




7 'Other' responses included: differs by venture; different companies with different legal status; complex legal arrangement of partnership and limited company; countryside business sits in a farm; farm owns the asset which the accommodation business uses; accommodation is part of farm business, retail is a separate business but same partners.

### 1.17: Agritourism Operational Months




## Availability Throughout the Year

Agritourism facilities were widely reported to be open throughout the year. At least three quarters of facilities were available during the traditional off-season months.

# Section 2: Nature of Activities

### Involved in Agritourism Activity

Two thirds of respondents (66%) were actively involved in agritourism activities. The remining third (34%) were either not involved or used to be involved. All respondents not involved were all considering agritourism in the future.

## 2.1: Involved in Agritourism Activity

| | % | No. |
|---|---|---|
| Yes, on our farm | 55% | 99 |
| Yes, on our farm and elsewhere | 8% | 14 |
| Yes, elsewhere only, not on our farm | 3% | 5 |
| *Yes (sub-total)* | *66%* | *118* |
| No, we have never offered agritourism activities | 27% | 49 |
| No, we used to offer agritourism activities but no longer do | 7% | 12 |
| *No (sub-total)* | *34%* | *61* |
| Total | 100% | 179 |

## Nature of Activities

Farm tours and accommodation are the most common activities by those involved in agritourism and those planning to be involved. The profile of activities offered by those previously involved (although based on a relatively small number) is markedly different. This shows how the sector has changed and demonstrates the range of new opportunities.

This is further demonstrated by the range of answers for those answering 'other' accommodation including: glamping in a helicopter; glamping in an airplane; accommodation in luxury buses; a bothy and a hostel (primarily to accommodate staff).

'Other' activities included: crafts; orchard and garden tours; deer stalking, shooting, fishing, birdwatching; an art gallery and exhibitions; distillery tours and tastings events; pop up events; craft gin distillery shop and retail outlets in farm buildings.

## 2.2: Nature of Activities

| | Nature of Activities | | | | | |
|---|---|---|---|---|---|---|
| | Currently involved | | Planning to be involved | | Was previously involved | |
| Activity | % | No. | % | No. | % | No. |
| On farm cafes and restaurants, pop up food | 22% | 26 | 29% | 13 | 8% | 1 |
| Farm tours/experiences, including wildlife tours | 39% | 46 | 40% | 18 | 17% | 2 |
| Children's farm parks or children themed events | 5% | 6 | 18% | 8 | 17% | 2 |
| On farm events space for weddings, conferences, etc. | 14% | 17 | 24% | 11 | 0% | 0 |
| Action and adventure sports hosted by farmer/ farm employees | 3% | 4 | 11% | 5 | 8% | 1 |
| Festivals and events | 11% | 13 | 7% | 3 | 25% | 3 |
| Glamping, huts, yurts, wigwams, teepees, etc. | 26% | 31 | 64% | 29 | 0% | 0 |
| Farmhouse B&B | 8% | 9 | 13% | 6 | 33% | 4 |
| Self-catering accommodation in farm cottages or farmhouse | 47% | 56 | 29% | 13 | 33% | 4 |
| Self-catering in lodges or other larger new build | 21% | 25 | 38% | 17 | 0% | 0 |
| Caravan site/camping | 6% | 7 | 29% | 13 | 0% | 0 |
| Hotel / restaurant with rooms | 1% | 1 | 4% | 2 | 8% | 1 |
| Other accommodation | 5% | 6 | 0% | 0 | 8% | 1 |
| Other | 14% | 16 | 4% | 2 | 17% | 2 |
| **Total** | **100%** | **118** | **100%** | **45** | **100%** | **12** |

## Operators of Agritourism Business

The vast majority of agritourism businesses operate their tourism/leisure activities by themselves (91%). A small proportion rent/sub-contract to others (2%) while some do both (8%).

### 2.3: Operators of Agritourism Business

| | % | No. |
|---|---|---|
| We operate all tourism/leisure activities ourselves | 91% | 107 |
| We operate some tourism/leisure activities ourselves and rent/sub-contract some to others | 8% | 9 |
| We rent/sub-contract all tourism/leisure activities to others | 2% | 2 |
| Total | 100% | 118 |

## Future Operators of Agritourism Business

The majority of future agritourism business operators intend to operate the business by themselves (67%). A small proportion do not intend to operate by themselves (13%) or are unsure (15%).

### 2.4: Future Operators of Agritourism Business

| | % | No. |
|---|---|---|
| Yes – operating ourselves | 67% | 41 |
| Yes – renting land/facilities or sub-contracting others to run agritourism activities | 8% | 5 |
| Yes – other | 8% | 5 |
| No | 13% | 8 |
| Unsure | 13% | 8 |
| Total | 100% | 61 |

## Timeframe of Planned Activities

Accommodation projects, particularly glamping style accommodation were the most frequently mentioned future projects that are likely to be advanced in the short to medium term. Farm tours, farm cafes and restaurants and the development of farm event space were also identified as short to medium term projects.

### 2.5: Timeframe of Planned Activities

| | Within the next 12 months | | 1 to 3 years from now | | 4 to 6 years from now | | Unsure | | Total | |
|---|---|---|---|---|---|---|---|---|---|---|
| | % | No. | % | No. | % | No. | % | No. | % | No. |
| On farm cafes and restaurants, pop up food | 27% | 6 | 30% | 6 | 0% | 0 | 50% | 1 | 29% | 13 |
| Farm tours/experiences, including wildlife tours | 36% | 8 | 45% | 9 | 0% | 0 | 50% | 1 | 40% | 18 |
| Children's farm parks or children themed events | 18% | 4 | 20% | 4 | 0% | 0 | 0% | 0 | 18% | 8 |
| On farm events space for weddings, conferences, etc. | 14% | 3 | 35% | 7 | 0% | 0 | 50% | 1 | 24% | 11 |
| Action and adventure sports hosted by farmer/farm employees | 14% | 3 | 10% | 2 | 0% | 0 | 0% | 0 | 11% | 5 |
| Festivals and events | 5% | 1 | 10% | 2 | 0% | 0 | 0% | 0 | 7% | 3 |
| Glamping, huts, yurts, wigwams, teepees, etc. | 59% | 13 | 70% | 14 | 100% | 1 | 50% | 1 | 64% | 29 |
| Farmhouse B&B | 18% | 4 | 5% | 1 | 100% | 1 | 0% | 0 | 13% | 6 |
| Self-catering accommodation in farm cottages or farmhouse | 32% | 7 | 25% | 5 | 0% | 0 | 50% | 1 | 29% | 13 |
| Self-catering in lodges or other larger new build | 32% | 7 | 40% | 8 | 100% | 1 | 50% | 1 | 38% | 17 |
| Caravan site/camping | 32% | 7 | 30% | 6 | 0% | 0 | 0% | 0 | 29% | 13 |
| Hotel / restaurant with rooms | 0% | 0 | 10% | 2 | 0% | 0 | 0% | 0 | 4% | 2 |
| Other (please specify) | 0% | 0 | 5% | 1 | 0% | 0 | 50% | 1 | 4% | 2 |
| Total | 100% | 22 | 100% | 20 | 100% | 1 | 100% | 2 | 100% | 45 |

## Barriers - Reasons Not in Currently in Agritourism

Over half of business respondents considering agritourism stated 'costs and funding' barriers and 'time and resources required' as the main factors that were limiting business development.

Around a quarter also stated a 'lack of knowledge' as a restrictive barrier. 'Other' responses included parents retiring; uncertainty over crofting policy support for agritourism developments; uncertainty related to landlord's influence and objections; and delays with planning, regulation and building works.

### 2.6: Barriers to Agritourism - Reasons Not Currently in Agritourism

| Barriers to Agritourism - Reasons Not Currently in Agritourism | % | No. |
|---|---|---|
| Cost and funding | 62% | 38 |
| Time and resource required | 57% | 35 |
| Lack of knowledge | 23% | 14 |
| Want to concentrate on core farming | 15% | 9 |
| Don't want to have the public on the farm | 11% | 7 |
| I don't think my farm lends itself to agritourism | 11% | 7 |
| Other | 11% | 7 |
| I don't want to be consumer facing / dealing directly with the public | 3% | 2 |
| Total | - | 61 |

**Total percentage not relevant as respondent could provide multiple answers*

# Section 3: Business Performance

## Turnover

Table 3.1 provides a high-level indicative estimate of the current and future value of agritourism and farm retail businesses. The estimates have been based on the Growth Tracker survey responses, average turnover levels and the Agritourism Strategy target to develop at least 1,000 active agritourism businesses by 2030.

Agritourism is worth at least £60million to the Scottish economy. The estimated value is likely to be several tens of million pounds in excess of this conservative estimate as a number of businesses with high turnover levels did not engage with the inaugural Growth Tracker survey.

Assuming Strategy targets are achieved, the combined value of agritourism and farm retail in 2030 based on known information and average values would be around a quarter of a billion pounds and would support almost 10,000 FTE jobs.

These figures should also be viewed in the context of rural economy impacts where revenue and employment opportunities can have a disproportionately higher impact than in urban economies.

### 3.1: Turnover & Estimated Current & Future Value

| | Agritourism | Farm Retail |
|---|---|---|
| **Estimated Current Value** | | |
| Turnover from responses (£m) | £6.8 | £5.8 |
| No. of responses | 56 | 25 |
| Turnover per business | £120,592 | £232,930 |
| Estimated no. of current businesses | 500 | 267* |
| Sector Value (£m) | £60.3 | £62.2 |
| Employment (full time equivalent)** | 1,684 | 3,039 |
| **2030 Strategy Target (Provided for Indicative Purposes Only)** | | |
| Businesses (based 2030 target) | 1,000 | 534* |
| Turnover (£m) | £120.6 | £124.4 |
| Employment (full time equivalent)** | 3,369 | 6,078 |

* *Based on known ratio of farm retail to agritourism businesses (63/118 = 53%)*

** *Based on known average Full-Time Equivalent (FTE) workers per business per activity (see Table 4.3). Note one FTE is equivalent to one worker working full-time or two workers working part-time*

## Profitability

The profitability associated with agritourism and each specific agritourism activity far exceeded that reported for farm activities. Farm retail profit also exceeded farm profit without farm subsidies. Table 3.2 shows the profit levels when turnover and net profits are totalled for each type of business operation.

### 3.2: Profit (turnover/ net profit[8])

| Profit (turnover/ net profit) | Profit |
|---|---|
| Farm (excluding subsidy) | 7% |
| Farm Retail | 13% |
| Agritourism | 23% |
| • Glamping, huts, yurts, wigwams, teepees, etc. | 42% |
| • Caravan site/camping | 42% |
| • Farmhouse B&B | 33% |
| • Self-catering accommodation on farm (general) | 37% |
| • Farm tours/experiences | 26% |
| • On farm events space for weddings, conferences, etc. | 20% |
| • On farm cafes and restaurants, pop up food | 14% |

8 Respondents were asked to provide their Turnover and Net Profit (after all costs).

## Agritourism Assets

A wide range of assets are being utilised for agritourism activities ranging from land (78%) and panoramic views (75%) to crops and historic connection to famous points in history (both 19%). Land (38%) along with livestock (36%) where the most frequently mentioned assets that could be used in the future.

### 3.3: Current & Potential Agritourism Assets

| | Currently being used for agritourism | | Not being used but could be used in future | |
|---|---|---|---|---|
| | % | No. | % | No. |
| Land | 78% | 92 | 38% | 68 |
| Farm/estate buildings (non-residential) | 40% | 47 | 30% | 54 |
| Farm/estate buildings (residential) | 49% | 58 | 16% | 29 |
| Historic buildings | 19% | 23 | 15% | 27 |
| Family member/s / staff with specific skills | 60% | 71 | 21% | 37 |
| Livestock | 47% | 55 | 36% | 64 |
| Crops | 19% | 22 | 17% | 30 |
| Countryside walks (on farm/estate) | 53% | 63 | 32% | 58 |
| Panoramic views | 75% | 88 | 31% | 55 |
| Environmental features – green tourism | 53% | 63 | 26% | 46 |
| Wildlife | 69% | 81 | 30% | 53 |
| Historic connection to famous point in history | 19% | 23 | 20% | 35 |
| Other (please specify) | 3% | 4 | 13% | 23 |
| **Total** | **100%** | **118** | **100%** | **179** |

# Section 4: Impact & Value

## Visitor Numbers

Agritourism businesses recorded 577,000 visitors pre-pandemic while farm retail businesses recorded just over one million visitors[9]. Table 4.1. converts this into average annual and weekly visitor numbers to show a relatively high level of visitation/ customer base.

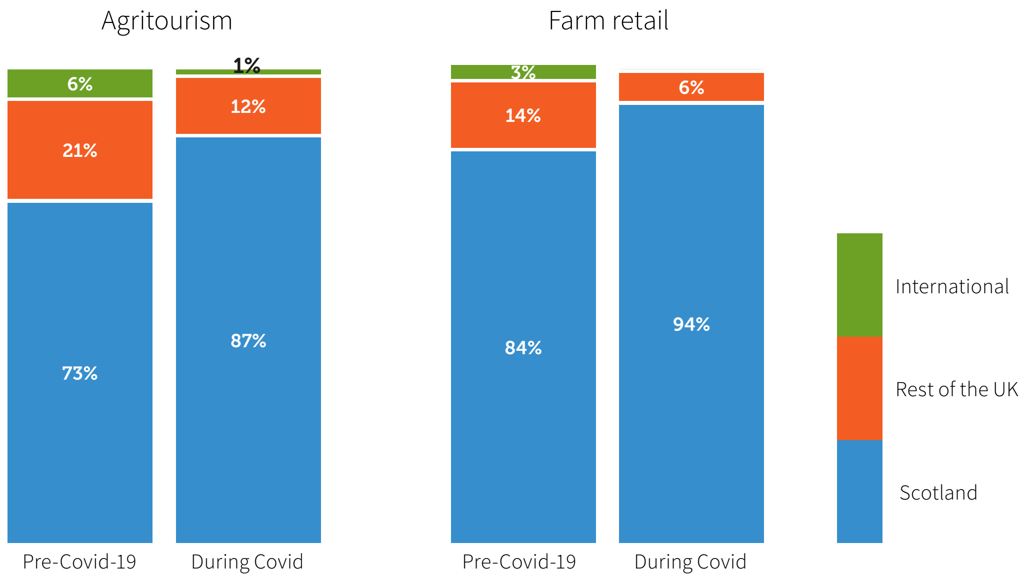
### 4.1: Visitor Numbers

| Visitor Numbers | Total | Responses | Average Visitors per business per annum | Average Visitors per business per week |
|---|---|---|---|---|
| Agritourism | 577,040 | 105 | 5,496 | 106 |
| Farm Retail | 1,021,908 | 51 | 20,037 | 385 |

## Visitor Origin

Pre Covid-19 pandemic the vast majority of agritourism and farm retail visitors and customers were from Scotland. Understandably market origins changed during the pandemic with a contraction in rest of UK and International visitors and an increased reliance on the domestic market.

### 4.2: Visitor Origin Pre & During Covid-19




9 Respondents were asked to provide 'a high-level estimate for overall visitor numbers in a normal year' related to agritourism and farm retail operations. If they started their agritourism activities or farm retail post March 2020

## Employment

Table 4.3 shows the level of employment associated with agritourism and farm retail almost matches the level of employment associated with traditional farm operations[10].

Importantly this shows how agritourism and farm retail can increase employment densities associated with large farmland areas in Scotland. The average level of employment associated with an agritourism business are comparable to a farm business but are much higher for farm retail businesses.

Significantly agritourism and retail businesses provide important 'external' employment opportunities in rural areas. Agritourism and farm retail businesses also provide additional seasonal employment opportunities and provide an outlet to upskill existing staff, expand capabilities and enhance productivity.

### 4.3: Employment Level by Nature of Employment

| Employment Level by Nature of Employment | Employment | | | Employment per business | | |
|---|---|---|---|---|---|---|
| | Farm | Agritourism | Farm Retail | Farm | Agritourism | Farm Retail |
| **Family members** | | | | | | |
| Management level - FT | 188 | 64 | 24 | 1.1 | 0.5 | 0.9 |
| Management level - PT | 115 | 102 | 34 | 0.6 | 0.9 | 1.3 |
| Non-management level - FT | 28 | 3 | 3 | 0.2 | 0.0 | 0.1 |
| Non-management level - PT | 104 | 53 | 16 | 0.6 | 0.4 | 0.6 |
| **External employees** | | | | | | |
| Management level - FT | 56 | 25 | 18 | 0.3 | 0.2 | 0.7 |
| Management level - PT | 10 | 15 | 4 | 0.1 | 0.1 | 0.2 |
| Non-management level - FT | 172 | 94 | 98 | 1.0 | 0.8 | 3.8 |
| Non-management level - PT | 145 | 208 | 94 | 0.8 | 1.8 | 3.6 |
| **Other** | | | | | | |
| Not covered above - FT | 14 | 7 | 1 | 0.1 | 0.1 | 0.0 |
| Not covered above - PT | 33 | 31 | 4 | 0.2 | 0.3 | 0.2 |
| Total employment | 865 | 602 | 296 | 4.8 | 5.1 | 11.4 |
| Total employment in FTEs | 662 | 398 | 220 | 3.7 | 3.4 | 8.5 |

10 Indicative point. Based on survey responses only

## Family Members Pay

The majority of family members are paid for their work in the business either at industry rates (20%) or at a 'lower than equivalent employee rate for the role' (34%). Almost one in four (39%) were not paid for their contribution to the business.

### 4.4: Are Family Members Paid for their Work?

| | % | No. |
|---|---|---|
| No, not paid | 39% | 69 |
| Not applicable – no family members work in the business | 4% | 7 |
| Other | 4% | 7 |
| Yes, at industry rates | 20% | 35 |
| Yes, but at lower than equivalent employee rates | 34% | 61 |
| Total | 100% | 179 |


## Capital Investment

Agritourism and farm retail activities have provided high levels of historic and planned investment. Agritourism businesses have on average invested £452,000 per business since their launch and plan a further £97,000 per business over the next two years. Farm retail businesses have invested £140,000 per business since their launch and plan to invest £63,000 per business over the next two years.

### 4.5: Capital Investment

| | Agritourism | | | Farm Retail | | |
|---|---|---|---|---|---|---|
| Capital Investment | £ m | No. | Average per business | £ m | No. | Average per business |
| Total capital investment since you started in business | £44.3 | 98 | £451,948 | £6.3 | 45 | £140,195 |
| Total capital investment in the past 2 years | £9.5 | 98 | £97,021 | £2.8 | 45 | £63,161 |
| Capital investment planned in the next 12 months | £8.8 | 122 | £71,991 | £1.2 | 56 | £21,218 |

## Directors & Partners

Farm businesses have a higher proportion of male directors and partners under 40 years of age and over 40 years of age compared to agritourism businesses and farm retail businesses. This pattern is notably reversed for agritourism businesses and farm retail businesses. Agritourism and farm retail businesses have more female directors and partners. Agritourism can therefore play an important role in addressing the gender imbalance in farm business ownership and management and business decision-making processes.

### 4.6: Businesses with more than one Director or Partner

| | Farm | Agritourism | Farm Retail |
|---|---|---|---|
| Over 40 years of age | | | |
| Male | 92% | 77% | 38% |
| Female | 83% | 83% | 46% |
| Under 40 years of age | | | |
| Male | 42% | 37% | 10% |
| Female | 35% | 42% | 14% |

## Links Between Agritourism Business & Farm Ownership

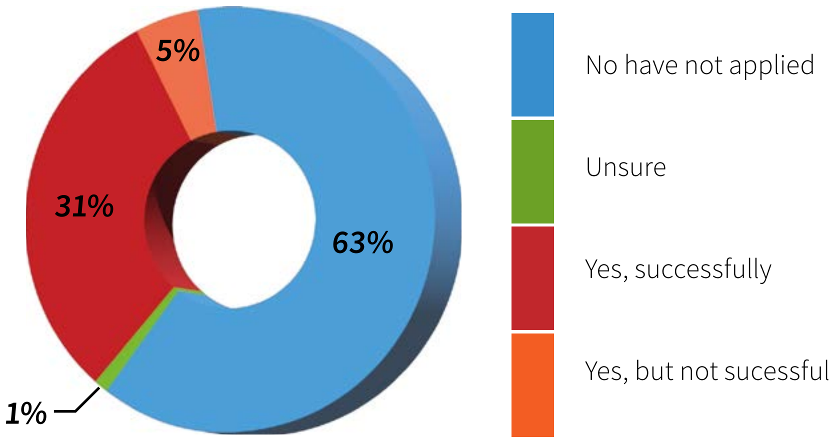
Respondents were asked ''If you are the main manager or driver of the agritourism business, but do not have any ownership role in the business, can you provide some explanation/ comment on why this is the case please.''

The majority of the respondents stated they were the owners of their agritourism business, with only 20 out of 118 respondents stating they are the agritourism business managers but don't have any ownership role in their agritourism business. This is largely due to the fact that those business are operated in a format of family partnership or joint ownership - while some family members are responsible for the day-to-day running of the business, the capital assets (land, buildings, fixtures fittings etc.) are registered under the names of their parents or spouses, or adult children who work full time elsewhere. This is also because some businesses operate agritourism by having part-time employees.

## Capital Grants for Agritourism

Around a third of respondents have applied for a capital grant over the past 20 years. Only a small proportion (5%) have applied but have been unsuccessful.

### 4.7: Applied for Capital Grants (past 20 years)




## Capital Grants Received to Develop Agritourism

Scottish Rural Development Programme and Leader grants were the most common capital grants received to develop agritourism. Farm Business Development Scheme; Digital Boost and Local Authority Grants were also particularly prominent among the remainder.

The grants were used for a variety of purposes including developing new buildings; converting and refitting redundant buildings; construction of visitor facilities and the purchase of leisure equipment (e.g. hot tubs) and the purchase of livestock. The most commonly refused grants were from the Scottish Rural Development Programme and Local Authority Grants.

### 4.8: Capital Grants Received to Develop Agritourism

| | Accepted | | Refused | |
|---|---|---|---|---|
| | % | No. | % | No. |
| Scottish Rural Development Programme | 15% | 27 | 2% | 3 |
| Leader Grant | 14% | 25 | 1% | 2 |
| Farm Business Development Scheme | 7% | 12 | 1% | 1 |
| Grants from your local authority | 7% | 12 | 2% | 3 |
| Digital Boost | 7% | 12 | 0% | 0 |
| Food processing and marketing grant | 2% | 3 | 0% | 0 |
| Other (Please specify): | 4% | 8 | 1% | 1 |
| • BRASS | 0.5% | 1 | 0% | 0 |
| • Business gateway grant | 0.5% | 1 | 0% | 0 |
| • HIE grand funding | 0.5% | 1 | 0% | 0 |
| • Innovate UK Covid grant | 0.5% | 1 | 0% | 0 |
| • leader funding via local food and drink network | 0.5% | 1 | 0% | 0 |
| • PERF Covid Fund | 0.5% | 1 | 0% | 0 |
| • Pivotal Enterprise Grant | 0.5% | 1 | 0% | 0 |
| • Zero Waste Scotland - Energy Efficiency Scheme | 0.5% | 1 | 0% | 0 |
| • Scotland Food & Drink | 0% | 0 | 1% | 1 |

*Note: Percentages rounded to one decimal place*

# Section 5: 2020 Business Performance

## Enforced Closures During Covid-19

The majority of agritourism businesses were understandably closed during the most restrictive phases of the Covid-19 pandemic, however farm businesses and farm retail where in the main able to operate and trade throughout.


### 5.1: Closed During Covid-19

| | Farm | | Agritourism | | Farm Retail | |
|---|---|---|---|---|---|---|
| Month/ Year | % | No. | % | No. | % | No. |
| March 2020 | 7% | 12 | 75% | 88 | 14% | 9 |
| April 2020 | 8% | 14 | 85% | 100 | 19% | 12 |
| May 2020 | 7% | 13 | 82% | 97 | 17% | 11 |
| June 2020 | 6% | 10 | 77% | 91 | 17% | 11 |
| July 2020 | 4% | 8 | 46% | 54 | 16% | 10 |
| August 2020 | 3% | 6 | 29% | 34 | 6% | 4 |
| September 2020 | 2% | 4 | 30% | 35 | 5% | 3 |
| October 2020 | 3% | 5 | 36% | 43 | 8% | 5 |
| November 2020 | 4% | 7 | 53% | 63 | 8% | 5 |
| December 2020 | 5% | 9 | 71% | 84 | 13% | 8 |
| January 2021 | 6% | 10 | 82% | 97 | 17% | 11 |
| February 2021 | 6% | 10 | 81% | 95 | 16% | 10 |
| March 2021 | 6% | 10 | 81% | 95 | 14% | 9 |
| April 2021 | 6% | 10 | 66% | 78 | 13% | 8 |
| May 2021 | 2% | 3 | 24% | 28 | 8% | 5 |
| June 2021 | 2% | 4 | 17% | 20 | 3% | 2 |
| Not closed at all | 92% | 164 | 10% | 12 | 78% | 49 |
| Total | - | 179 | - | 118 | - | 63 |

### Status of Closure

Table 5.2 shows the status of the closures (e.g. full/ partial closure) for each business that stated they were closed in Table 5.1 The majority of agritourism and farm retail businesses that stated they were closed were 'fully closed' throughout the pandemic.

## 5.2: Status of Closure: Fully Closed/ Partially Closed/ Unsure

| | Farm | | | Agritourism | | | Farm Retail | | |
|---|---|---|---|---|---|---|---|---|---|
| Month/ Year | Fully | Partially | Unsure | Fully | Partially | Unsure | Fully | Partially | Unsure |
| March 2020 | 58% | 17% | 25% | 74% | 24% | 2% | 78% | 22% | 0% |
| April 2020 | 57% | 21% | 21% | 91% | 7% | 2% | 83% | 8% | 8% |
| May 2020 | 54% | 23% | 23% | 89% | 9% | 2% | 73% | 18% | 9% |
| June 2020 | 60% | 20% | 20% | 86% | 12% | 2% | 73% | 18% | 9% |
| July 2020 | 63% | 25% | 13% | 63% | 30% | 7% | 50% | 50% | 0% |
| August 2020 | 67% | 17% | 17% | 68% | 24% | 9% | 75% | 25% | 0% |
| September 2020 | 75% | 0% | 25% | 66% | 26% | 9% | 67% | 33% | 0% |
| October 2020 | 40% | 40% | 20% | 60% | 33% | 7% | 60% | 20% | 20% |
| November 2020 | 57% | 14% | 29% | 75% | 22% | 3% | 100% | 0% | 0% |
| December 2020 | 67% | 11% | 22% | 76% | 21% | 2% | 63% | 25% | 13% |
| January 2021 | 60% | 20% | 20% | 89% | 9% | 2% | 82% | 9% | 9% |
| February 2021 | 60% | 20% | 20% | 89% | 8% | 2% | 70% | 20% | 10% |
| March 2021 | 50% | 30% | 20% | 88% | 9% | 2% | 78% | 11% | 11% |
| April 2021 | 40% | 40% | 20% | 72% | 26% | 3% | 75% | 25% | 0% |
| May 2021 | 67% | 0% | 33% | 57% | 36% | 7% | 40% | 60% | 0% |
| June 2021 | 50% | 0% | 50% | 55% | 30% | 15% | 50% | 50% | 0% |

## Covid-19 Impact on Turnover & Profit

Covid-19 had a significantly negative impact on agritourism turnover and profits. Farm retail turnover and profit levels were mixed with a higher proportion of businesses stating their performance had improved compared to those stating it had declined.

### 5.3: Covid-19 Impact on Turnover & Profit Compared to Previous FY

| | | Turnover | | | Net Profit | | |
|---|---|---|---|---|---|---|---|
| | | Farm | Agritourism | Farm Retail | Farm | Agritourism | Farm Retail |
| Decrease | Up to 10% decrease | 8% | 3% | 0% | 8% | 4% | 2% |
| | 11% to 25% decrease | 6% | 11% | 8% | 6% | 13% | 3% |
| | 26% to 50% decrease | 2% | 28% | 8% | 4% | 24% | 8% |
| | Over 51% decrease | 2% | 26% | 10% | 4% | 25% | 13% |
| | Sub-total decrease | 19% | 69% | 25% | 22% | 65% | 25% |
| Increase | Up to 10% increase | 8% | 2% | 11% | 7% | 5% | 13% |
| | 11% to 25% increase | 3% | 3% | 6% | 2% | 3% | 13% |
| | 26% to 50% increase | 1% | 2% | 6% | 1% | 2% | 5% |
| | Over 51% increase | 2% | 6% | 14% | 2% | 3% | 10% |
| | Sub-total increase | 14% | 12% | 38% | 12% | 13% | 40% |
| | No change to previous year | 67% | 19% | 37% | 66% | 22% | 35% |
| | Total responses | 179 | 118 | 63 | 179 | 118 | 63 |


## Covid-19 Financial Support

Table 5.4 shows the wide range of financial support sought and received during Covid-19. A quarter of businesses did not request/ receive financial support during the pandemic.

## 5.4: Types of Covid-19 Financial Support Received

| | % | No. |
|---|---|---|
| Bounce-back Loan | 40% | 71 |
| None | 25% | 45 |
| Self-Employed Income Support Scheme (SEISS) | 25% | 44 |
| Strategic Framework Business Fund | 25% | 44 |
| Restart Grant | 24% | 43 |
| Staff Furlough Scheme (CJRS) | 20% | 35 |
| Small Business Grant (based on NDR) | 17% | 31 |
| Larger 7+ Self-Catering Grant / Exclusive Use Venue | 9% | 16 |
| Business Interruption Loan (CBILS) | 6% | 10 |
| Creative, Tourism & Hospitality Hardship Fund | 5% | 9 |
| Small Accommodation Providers on Council Tax Grant | 5% | 9 |
| Hospitality Top Up | 4% | 8 |
| Other (please specify) | 4% | 8 |
| Pivotal Enterprise Resilience Fund | 4% | 7 |
| A sector specific fund (please specify) | 2% | 4 |
| Visitor Attraction Support Fund | 1% | 2 |
| Newly Self-Employed Hardship Fund | 0 | 0 |
| **Total*** | - | **179** |

**Total percentage not relevant as respondent could provide multiple answers*

### Value of Support Received

Table 5.5 itemises the value of support awarded by each fund and provides an average award for each recipient business.

## 5.5: Value of Support Received

| | Total Award | Number of Businesses | Average per Business |
|---|---|---|---|
| Bounce-back Loan | £2,770,322 | 64 | £43,286 |
| Self-Employed Income Support Scheme (SEISS) | £460,638 | 39 | £11,811 |
| Strategic Framework Business Fund | £800,700 | 39 | £20,531 |
| Restart Grant | £648,500 | 38 | £17,066 |
| Staff Furlough Scheme (CJRS) | £794,240 | 26 | £30,548 |
| Small Business Grant (based on NDR) | £383,000 | 23 | £16,652 |
| Larger 7+ Self-Catering Grant/Exclusive Use Venue | £55,000 | 12 | £4,583 |
| Business Interruption Loan (CBILS) | £900,000 | 9 | £100,000 |
| Creative, Tourism & Hospitality Hardship Fund | £141,881 | 8 | £17,735 |
| Small Accommodation Providers on Council Tax Grant (SAP-CTX) | £97,250 | 6 | £16,208 |
| Hospitality Top Up | £81,800 | 6 | £13,633 |
| Other (please specify) | £170,400 | 7 | £24,343 |
| Pivotal Enterprise Resilience Fund | £371,500 | 5 | £74,300 |
| A sector specific fund (please specify) | £100,000 | 4 | £25,000 |
| Visitor Attraction Support Fund | £38,000 | 2 | £19,000 |
| Newly Self-Employed Hardship Fund | £0 | 0 | £0 |

### Turnover Expectations (April 2021 to end of March 2022)

Agritourism and farm retail businesses reported strong growth potential for 2021/22. 66% of agritourism businesses and 46% of farm retail businesses anticipate an increase in turnover this year compared to only 27% of farm businesses.

## 5.6: Turnover Expectations for this Financial Year

| | | Turnover Expectations | | |
|---|---|---|---|---|
| | | Farm | Agritourism | Farm Retail |
| Decrease | Up to 10% decrease | 7% | 1% | 10% |
| | 11% to 25% decrease | 4% | 99% | 6% |
| | 26% to 50% decrease | 3% | 10% | 5% |
| | Over 51% decrease | 1% | 3% | 2% |
| | Sub-total decrease | 15% | 24% | 22% |
| Increase | Up to 10% increase | 19% | 22% | 22% |
| | 11% to 25% increase | 5% | 16% | 10% |
| | 26% to 50% increase | 2% | 15% | 6% |
| | Over 51% increase | 1% | 13% | 8% |
| | Sub-total increase | 27% | 66% | 46% |
| | No change to previous year | 58% | 10% | 32% |
| | Total responses | 179 | 118 | 63 |

# Section 6: Future Plans

## Future Plans

Accommodation, specifically glamping style and accommodation (64%) and self-catering lodges (38%); farm cottages (29%) or caravan/camping areas (29%) were the most frequently identified future developments along with farm tours (40%) and event space (24%).

### 6.1: Nature of Activities - Planning to be involved

| Nature of Activities - Planning to be involved | Planning to be involved | | Within next 12 months | 1 to 3 years from now | 4 to 6 years from now | Unsure |
|---|---|---|---|---|---|---|
| Activity | % | No. | % | % | % | % |
| Glamping, huts, yurts, wigwams, teepees, etc. | 64% | 29 | 45% | 48% | 3% | 3% |
| Farm tours/experiences, including wildlife tours | 40% | 18 | 44% | 50% | 0% | 6% |
| Self-catering in lodges or other larger new build | 38% | 17 | 41% | 47% | 6% | 6% |
| Self-catering accommodation in farm cottages or farmhouse | 29% | 13 | 54% | 38% | 0% | 8% |
| Caravan site/camping | 29% | 13 | 54% | 46% | 0% | 0% |
| On farm cafes and restaurants, pop up food | 29% | 13 | 46% | 46% | 0% | 8% |
| On farm events space for weddings, conferences, etc. | 24% | 11 | 27% | 64% | 0% | 9% |
| Children's farm parks or children themed events | 18% | 8 | 50% | 50% | 0% | 0% |
| Farmhouse B&B | 13% | 6 | 67% | 17% | 17% | 0% |
| Action and adventure sports hosted by farmer/farm employees | 11% | 5 | 60% | 40% | 0% | 0% |
| Festivals and events | 7% | 3 | 33% | 67% | 0% | 0% |
| Hotel / restaurant with rooms | 4% | 2 | 0% | 100% | 0% | 0% |
| Other (please specify) | 4% | 2 | 0% | 50% | 0% | 50% |
| Other accommodation (please specify) | 0% | 0 | 0% | 50% | 0% | 50% |
| Total | 100% | 45 | 45% | 48% | 3% | 3% |

**Barriers to Development** A range of barriers were identified in the verbatim comments including:

- Cost/available capital
- Time constraints
- The planning system
- Lack of staff/available labour and tradesmen
- Local/regional competition
- Economic uncertainty
- Health and Covid-19 restrictions
- Infrastructure (internet and road access)
- Overall general and specific advice (available funding; loans; planning; market potential)

# Section 7: Suggested Government Policies for Sector Development

Respondents were asked to identify government policies that could improve the performance of agritourism businesses and stimulate sector development[11].

Almost three quarters of respondents provided verbatim responses to this question. The planning system, value-added tax (VAT); finance and grant support were the most frequently identified policies and support measures.

This section provides a summary of responses that can help inform future government policies for sector development.

## Planning System

The planning system was mentioned by 28% of respondents (50 businesses). Several aspects of the planning system appear to be impeding investment, growth and enthusiasm for new agritourism projects or the redevelopment of existing properties for agritourism use.

Feedback related to existing regulations and restrictions, related expenses, efficiency and complexity of the planning system and the speed of the decision-making process.

Specific feedback on regulations related to change of use and also conditions related to the height of new buildings. One respondent referred to this condition creating a 'mass of kit houses' which is 'preventing multi-generational farmhouses and business use.'

It was also felt that planning could be 'simpler and less expensive for genuine low impact developments' and that planning for development and agritourism could be more relevant to the region and scale of development.

There was a general sense that the planning system could be more supportive of agritourism projects and wider development and investment in rural areas. Greater levels of engagement with planning departments was called for to help improve understanding, reduce costs and improve the overall experience of the planning process.

Some respondents referred to a 'sense of anti-development with local objectors given too much clout' and that the planning system should be more 'welcoming to rural diversification.'

Other more specific comments/ recommendations related to:

- Better planning support for small/ start up agritourism businesses
- A designated point of contact for initial discussions prior to committing large sums on consultants, especially for start-up or small agritourism businesses
- A relaxing of planning rules for glamping/ motorhomes and temporary campsites and structures
- Improved planning rules for campervan parking (a particular problem on one island)
- Agritourism not being classed as agriculture which provides associated tax/ change of use consequences
- Scottish Environment Protection Agency (SEPA) regulations including wastewater management and the cost of disposal
- A more supportive planning system with a better 'balance for the need for rural community vibrancy alongside the recreational users of the countryside.'

11 What government policies (e.g. planning rules, VAT/tax, etc.) could best help you develop an agritourism business?'

## VAT

The importance of lowering VAT levels was referred to by 25% (44 respondents) and was considered to be an essential requirement to ensure short term business survival and to encourage new entrants.

Scotland's VAT levels for leisure and tourism related activities was also mentioned in the context of equivalent VAT levels in Europe (e.g. 'reduced VAT for agritourism like other European countries')

Other specific VAT comments included:

- New start-up VAT / tax relief to assist new business survival rates
- Reduced VAT on new build/ new business innovation and development that provide economic growth to rural areas
- Increased VAT threshold to help rebuild cash reserves
- Clearer VAT rules that are accessible to all operators (without accounting advice)
- VAT rules that favour preservation rather than new builds
- Consideration and sensitivity to the effects of returning to pre-pandemic VAT levels

## Funding

A range of ways to finance new agritourism projects were identified ranging from capital grants to loans with low interest rates or favourable repayment terms. Grants linked to environmental agritourism and educational agritourism were also mentioned.

Problems accessing funding were also identified. This was linked to agritourism projects 'not ticking the right boxes' for lenders.

The relationship between hospitality based agricultural projects and the traditional agricultural sector lead to confusion among some lenders and business development organisations. This was exacerbated when new projects and potential financial support were considered alongside farming subsides.

## Infrastructure

The availability and reliability of broadband internet is a crucial component of any modern business. Availability and reliability in rural areas was identified as a significant constraint on operations. One rather pertinent respondent on this constraining factor commented 'Broadband - actually deliver it to remote rural areas!!! Every business in the country is being told to 'Go Digital', cattle records digital, VAT digital, marketing for everything digital!.'

## Other Suggested Government Policies & Actions

A range of other policy interventions and suggestions to encourage and promote agritourism were identified including:

- Policy to specifically support development of commercial agritourism projects
- Replace Rural Leader with rural development funding. Incorporate learnings from the Leader scheme to develop a new scheme which is more efficient for applicants and administrators
- Further support of the Scottish Enterprise Agritourism Monitor Farm Programme[12] to extend its reach throughout Scotland. The work by this Group was considered to inspire development and change
- Policy to support education and understanding of the countryside and Scottish Outdoor Access Code (SOAC) [13]
- Advice to new entrants relating to Department for Environment, Food and Rural Affairs (DEFRA) and rural payments
- Continued, accessible training and support for marketing and management skills This was considered essential for maximising profitability and growth potential
- 'The Scottish Government prioritising Land Reform and the Absolute Right to Buy'
- Greater control of Land Management and less government imposed additional financial obligations 'without compensation'
- Re-joining the EU to access a flexible and appropriately skilled workforce
- Reducing regulation of short term letting and holiday accommodation
- Reduced rates for non-domestic buildings
- Support for the installation of smaller scale renewables / energy saving initiatives
- Policies and support to help keep countryside free of wild camping/mess
- Assistance obtaining Brown Tourist Signs
  Note: advice on application process available here:
  Brown tourist signs | VisitScotland.org

12 https://agritourism-monitorfarm.com/
13 https://www.outdooraccess-scotland.scot/

# Section 8: Sustainability Practices

Four in five businesses actively aim to minimise waste (80%). A large proportion also actively improve the energy efficiency of their premise (76%) and systems (54%). Over half have invested in renewable energy (53%). Constantly reviewing routes to market (27%) and the uses of transport for travel and transport for supplies and distribution (19%) were also identified as common sustainability practices. 'Other' more specific responses included rewilding to create sustainable wildlife habitats and creating biodiversity nature trails.

### 8.1: Sustainability Practices

| | % | No. |
|---|---|---|
| Looking to minimise our waste | 80% | 144 |
| Improving the energy efficiency of our premises | 76% | 136 |
| Improving the energy efficiency of our systems and processes | 54% | 97 |
| Reviewing our use of transport for travel | 25% | 44 |
| Investigating or investing in ways to offset our carbon emissions | 46% | 82 |
| Reviewing our routes to marketWW | 27% | 48 |
| Reviewing our use of transport for supplies and distribution | 19% | 34 |
| Investing in renewable energy on farm | 53% | 94 |
| Other (please specify) | 2% | 3 |
| None | 6% | 10 |
| Unsure | 1% | 2 |
| Total* | - | 179 |

**Total percentage not relevant as respondent could provide multiple answers*


A wide range of additional detail on sustainable working practices were identified in the verbatim comments. They have broadly categorised below.

## Memberships, Guidance & Best Practice

- Membership of the Agri-Environment Climate Scheme (AECS)
  The AECS promotes land management practices to protect and enhance Scotland's natural heritage, improve water quality, manage flood risk and mitigate and adapt to climate change[14].
- Green Tourism[15] practices and awards for the agritourism activities side of the business
- Organic Farm Certification[16]
- Zero Waste Scotland – loan and extensive report on business and steps to achieve carbon neutral status
- B Corp accreditations (B Corps meet the highest standards of social and environmental performance) [17]
- Active waste reduction programs
- Full sustainability policies for agritourism activities (including procurement, energy usage etc.)
- Sustainability policy written into event/ wedding contracts

## Carbon Audits/ Reduction/ Offsetting

- Carbon footprint and carbon audits
- Following advice to incrementally reducing emissions
- Carbon offset with tree planting
- Planting trees (with and without grants), greening and hedgerow planting
- Hedges and wetland restoration
- Reduced livestock numbers
- Buildings upgrades and new insulation
- Actively informing guest of green farm credentials and sustainability projects
- Efficient use of materials, using less plastic, recycling
- Reduced livestock numbers/ reducing cow size
- Reusable or recyclable, "make do and mend" wherever possible, considered to be an 'overlooked sustainability practice'
- Electric bike charging points
- One respondent was carbon negative (electricity from renewable sources, mainly generated from onsite solar panels stored in onsite batteries)

14 https://www.ruralpayments.org/topics/all-schemes/agri-environment-climate-scheme/
15 https://www.green-tourism.com/pages/home
16 https://www.soilassociation.org/certification/farming/what-is-organic-certification/
17 https://bcorporation.uk/?gclid=EAIaIQobChMI_7S3mcvR9AIVC-3tCh3WjwVcEAAYASAAEgIPd_D_BwE

## Food Miles

- Shortest route to market possible, promotion of local produce
- Supply chain inputs with low carbon footprint
- Honesty box for vegetables to help reduce food miles
- Retaining more farm produce for agritourism offering
- Educating guests on food to encourage sustainable choices

## Waste

- Waste recycling
- Actively investigating ways to use waste products (e.g. coffee)
- Sustainable grazing practices and increased attention to soil, insect life, ponds, wildlife meadows
- Water management and water bore holes
- Biodegradable where possible (e.g. compostable takeaway boxes etc.)
- Bio digesting sewage treatment

## Biodiversity & Habitats

- Agroforestry[18] (the practice of combining agricultural crops or livestock with trees and shrubs to provided healthier soil, higher yields and vital homes for wildlife)
- Increasing biodiversity rewilding regime to encourage a resurgence of nature and biodiversity (e.g. beaver translocation and beetle banks)
- Wetland, woodland and grassland habitat management and sustainable woodland management plan for whole farm
- Peatland restoration; river conservation; taking livestock off land
- Conservation management and monitoring with RSPB

## Renewable Projects

- Renewable projects including wind turbines; solar panels; biomass systems and district heating biomass boilers
- Investment in Ground Source Heat Pumps and Air Source Heat Pumps
- Interest was expressed in pursing renewable energy projects utilising surplus energy from other industries however the ‘costs of the equipment are prohibitively expensive at present.’
- Hydro schemes were considered prohibitively expensive and there was also reference made to wind turbine failures and operators going out of business.


18 https://www.soilassociation.org/causes-campaigns/agroforestry?gclid=EAIaIQobChMI28C338zR9AIVi-vtCh2eIgIfEAAYASAAEgIi5_D_BwE

# Section 9: Marketing; Memberships; Certifications; Key Meetings

These tables provide information on marketing and promotion, memberships, certifications and attendance at Scottish Enterprise Agritourism Monitor Farm meetings.

## Business Promotion

Half of farm businesses do not promote their business. This is in contrast with 95% of agritourism businesses that promote their business in some way. A similarly high proportion (79%) of farm retail businesses also promote their business.

The most prevalent promotion methods for agritourism and farm retail businesses include a personalised dedicated website, Facebook and Instagram. Overall agritourism businesses engage in active marketing more than farm retail for each method of promotion.

### 9.1: Business Promotion

| | Farm | | Agritourism | | Farm Retail | |
|---|---|---|---|---|---|---|
| Our website | 31% | 56 | 86% | 101 | 62% | 39 |
| Facebook | 39% | 70 | 82% | 97 | 78% | 49 |
| Instagram | 27% | 49 | 71% | 84 | 62% | 39 |
| Twitter | 16% | 29 | 34% | 40 | 27% | 17 |
| TikTok | 1% | 2 | 9% | 11 | 5% | 3 |
| Other (please specify) | 2% | 4 | 20% | 24 | 11% | 7 |
| None | 50% | 89 | 5% | 6 | 21% | 13 |
| Total* | - | 179 | - | 118 | - | 63 |

*Total percentage not relevant as respondent could provide multiple answers*

## Online – Sales & Bookings

Almost all (84%) of agritourism businesses provide online sales and bookings. This figure is less than half for farm retail (44%) and understandably relatively low for farm businesses (12%).

### 9.2: Online – Sales & Bookings

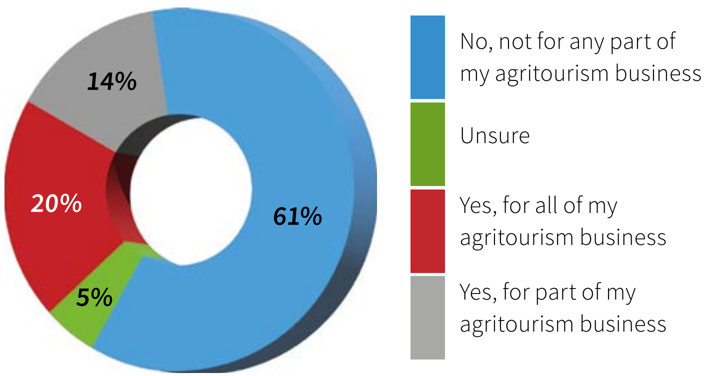
| | Farm | Agritourism | Farm Retail |
|---|---|---|---|
| No | 87% | 16% | 54% |
| Yes | 12% | 84% | 44% |
| Unsure | 2% | 0% | 2% |
| Total | 100% | 100% | 100% |
| Responses | 179 | 118 | 63 |

## Quality Assurance

Research for the Agritourism Strategy shows successful global leaders in agritourism provide a strong focus on quality assurance for accommodation along with experiences and food and drink.

The majority (61%) of operational agritourism businesses are not quality assured by VisitScotland. A third (34%) are either quality assured for every component of their agritourism business or part of their agritourism business (representing 20% and 14% respectively).

### 9.3: Quality Assurance (Agritourism only)

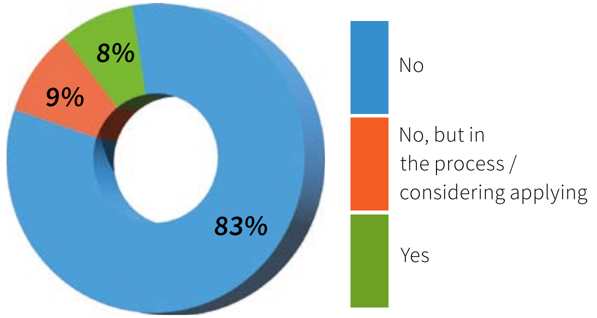



More information on VisitScotland's Quality Assurance Scheme and the range of benefits is provided in the following link: https://www.visitscotland.org/supporting-your-business/visitor-experience/quality-assurance-ratings.

## Organic Certification

Only a small proportion of farms hold an organic farm certification (8%). The vast majority do not have organic farm status (83%) and only a minority are considering applying in the future (9%).

### 9.4: Organic Certification

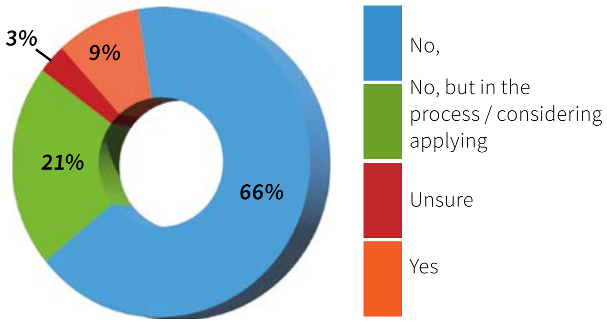



## Green Tourism Scheme[19]

Green Tourism promotes greener ways for businesses and organisations to operate. [20]

Less than one in ten farms stated they were part of the Green Tourism Scheme. Two thirds (66%) are not part. A further one in five were not part but were either in the process of applying or considering applying. A small minority were unsure.

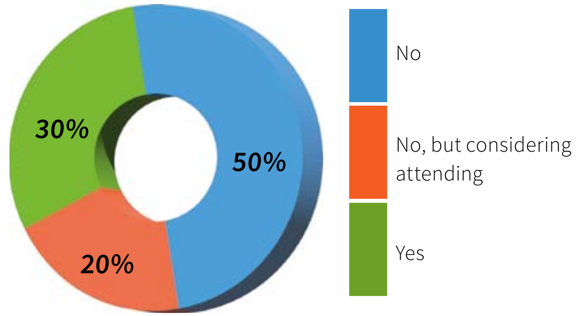
### 9.5: Part of the Green Tourism Scheme




## Attendance at Scottish Enterprise Agritourism Monitor Farm Meetings

Less than a third (30%) of farms attend Scottish Enterprise Agritourism Monitor Farm meetings, half (50%) do not while a one in five (20%) are considering attending a monitor farm meeting.

### 9.6: Attendance at Scottish Enterprise Agritourism Monitor Farm Meetings




19 https://www.green-tourism.com/about-us

20 Advice is provided on: Reducing energy use; Saving water; Efficient & eco-friendly waste disposal; Ethical buying; Staying local & seasonal; Minimising food miles; Promoting biodiversity; and Adopting a smart, sustainable outlook from top to bottom.