



Forestry and
Land Scotland
Coilltearachd agus
Fearann Alba

Motorhome and Campervan Trial

Review Report

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Executive Summary

- i The number of overnighting motorhomes and campervans at Forestry and Land Scotland (FLS) sites has grown significantly in recent years. Current FLS policy is not to permit overnight parking, but there are very limited resources to enforce it, undermining the credibility of the policy with users and staff.
- ii At the beginning of 2020, FLS was planning a small permit-based campervan trial across Scotland, which was cancelled due to COVID-19.
- iii To help support the rural tourism sector and to manage the predicted surge in campervan activity after lockdown restrictions were lifted, FLS agreed to trial one night stays by self-contained campervans and motorhomes. A trial with **30** sites was launched across Scotland in mid-July. Most sites had no facilities, some had toilets and one (Clatteringshaws) had a Rural Tourism Infrastructure Funded (RTIF) chemical toilet disposal provision.
- iv Information and data for this review of the trial was gathered from a number of sources: an on-line user survey; emails from users and stakeholders to a dedicated trial email address and feedback sessions with regional Land Management staff impacted by the trial.
- v User satisfaction was one trial objective and **66%** of users rated the trial experience as **good, very good** or **excellent** with almost **90%** stating they would visit another trial site and **95%** feeling their expectations had been **met** or **exceeded**. User expectations varied, some felt a basic offer with no facilities was what the experience was about, while others felt additional services such as access to fresh water and chemical and waste water disposal points would improve the experience.
- vi The original trial intended to charge **£5** for a one night stop-over, however due to time constraints a charging mechanism was not put in place for the reworked trial and it was implemented with no charge. Whilst all regions would have preferred to charge for the trial, it was not always the deciding factor when choosing which or how many sites were in the trial.
- vii Users were asked to indicate their 'willingness to pay', with **52%** stating they would pay more than the proposed **£5**, including **20%** who were willing to pay **£10**.
- viii Most regions reported more campervan activity this summer than in previous years, although it is unclear what proportion was related to COVID-19. Visitor numbers in general were much higher than in previous years, with some sites reporting double the usual footfall in August.
- ix Most regions reported campervan demand outweighed capacity, generally at weekends in July and August. There were only a few reports of changed patterns of use, mainly less locals visiting some sites when campervan numbers were high.



- x Overnight campervan activity, in most regions, was generally higher at 'non-trial' sites than at trial sites. The main reason given was 'location' - campervanners knew where they wanted to go and knew there was limited or no FLS enforcement at sites. There was also visitor confusion reported as some third party apps and forums stated all FLS car parks were included in the trial.
- xi Regional Visitor Services and Delivery staff provided feedback on the operational aspects of the trial. Almost **50%** of responses stated the trial helped manage overnight stays in their area, with **40%** saying it did not help.
- xii Trial **pros** focused on having a positive story when engaging with visitors, being able to inform them about the legitimate stop-over sites and asking them to move on. Being able to offer visitors a legitimate alternative site led to a more positive response from visitors and potentially reduced the safety risk of staff engaging with the public.
- xiii Trial **cons** focused mainly on lack of resources to manage and monitor the trial effectively, a limited number of sites, not being able to include some preferred sites in the trial and no income from the trial to offset operational costs.
- xiv Most regional staff said that less than **50%** of anti-social behaviour at trial sites was linked to campervan or motorhome users. Most anti-social behaviour at trial sites was attributed to tent/vehicle campers and used more regional resource to manage than self-contained motorhome or campervan activity.
- xv The timeframe between agreeing and starting the trial was very short. Implementation of the trial would have benefitted from more planning time prior to launch.
- xvi Fifty sites were removed from the initial trial list supplied by regions due to a combination of environmental impact concerns and potential confusion caused by two schemes operating in LLTNP, resulting in Central region having no trial sites. West Region hosted more than a third of all the trial sites.
- xvii Potential planning issues and licencing requirements for sites allowing overnight stays remain unclear.



Purpose

1. The purpose of this report is to present the findings of the internal review into the 'stay the night' motorhome and campervan trial.
2. It uses research findings to draw evidence based conclusions as to what worked well and what the main issues, failings and limitations of the trial were.

Background

3. Current FLS policy is not to permit overnight parking. Feedback from regions is that car based camping in FLS car parks regularly causes issues for managers and other visitors. Campervans and motorhomes however, usually involve single night stays and lower impacts.
4. FLS does not have the resources to enforce a no overnight policy in most areas, undermining the credibility of the policy with both users and staff.
5. Campervanning is growing significantly and is an increasingly important sector for Scottish tourism. FLS sites are widely promoted on campervan and motorhome on-line forums and apps and overnight campervan use at sites has become widespread and is growing.
6. In early 2020, FLS was planning a small, permit-based trial (with charging) at 10 car parks across Scotland. The trial was cancelled due to COVID-19.
7. The Scottish Government Rural Tourism Infrastructure fund (RTIF) financed a trial, simple off-line chemical toilet disposal facility at Clatteringshaws. The site was visited by the Cabinet Secretary in 2019, prior to construction.
8. Prior to the lifting of COVID-19 lockdown travel restrictions in July, the tourism sector predicted a significant surge in campervan activity as people holidayed at home and sought self-contained, rural locations.
9. FLS regions were concerned about our ability to influence the activity and behaviours of these visitors and unmanaged activity was also anticipated to be a concern for some local communities.
10. To help support the rural tourism sector and to manage demand at our sites, FLS agreed to trial one night stays by self-contained campervans and motorhomes at a number of sites across Scotland from mid-July.



11. The trial launched in mid-July with **30** sites (Appendix A). It was expected that the trial would operate free of charge for a short period of time and a charging system would be implemented at a later date.
12. The list of trial sites was reviewed in mid-August and four sites were removed and one new site was added, meaning the trial continued operating with **27** sites (Appendix A).

Scope

13. This internal review will focus on the following aspects of the stay the night trial.
In scope
 - performance of the trial against the original trial objectives
 - profile of trial visitors
 - quality of the trial experience
 - operational impact of campervan and motorhome activity on regions (at trial sites and non-trial sites)
 - issues, concerns and complaints about the trial (internal and external)
 - suggested changes and improvements
14. **Out of scope**

Although 'out of scope' for this review, some points will be referenced in the findings and conclusions if they had an impact on or were impacted by the trial.

 - non-campervan and motorhome visitor impacts at sites
 - investigation of potential planning and licencing requirements for our car parks for any future campervan and motorhome overnight stay activity
 - investigating potential charging systems
 - consultation with other FLS functions e.g. Corporate Services, Estate Development or Business Services
 - consultation with external stakeholders
 - making recommendations about any future approach

Methodology

15. The review methodology was developed to assess the trial against the original trial objectives set out in early 2020.
16. The trial implemented after COVID-19 restrictions were lifted in July differed in three main ways from the original planned trial:
 - the revised trial offered more trial sites (**30** instead of **10**)
 - charging was not implemented
 - Central Region had no trial sites. This was due to environmental sensitivities and potential conflict with Loch Lomond & the Trossachs National Park camping management zone that could not be resolved in time for the trial.



The original trial objectives were developed to measure:

- a. Demand – number of overnight stays per sites
- b. Estimated payment honesty rate
- c. Any changed patterns of use
- d. Impacts on FLS ability to manage overnight stay activity in the area
- e. User satisfaction – including feedback on facilities
- f. Impact on the site (e.g. litter/human waste)
- g. Impact on staff management/admin time
- h. Impact on overall site management cost (net position)

An additional objective of helping Scottish tourism recover post COVID-19 was added to the revised trial.

17. The review covers the period from the launch of the trial in mid-July until the end of September (**12 weeks**) and uses the following data sources.

- Qualitative and quantitative feedback received from trial users via an on-line survey (**967** responses received)
- **450+** emails received to the dedicated campervan trial email address from users, motorhome and campervan owners and stakeholders
- Feedback on the operation of the trial from regional teams via an online survey and from individual and group feedback sessions (**24** responses)
- Feedback from regional teams with campervan activity but no trial sites (**6** responses)
- Vehicle counter data where available
- Incidents related to campervan or motorhome activity recorded on the FLS accident and incident reporting system (AIRS)
- Google analytics to review the FLS ‘stay the night’ web page

18. Limitations of the review methodology

- The user survey was a self-selecting, on-line questionnaire and as such may not be truly representative of all trial users
- It is likely that visitors who were not following the trial rules did not complete a user survey, so responses may be overly positive
- The qualitative feedback from regions and stakeholders is the observations and thoughts of the respondents and cannot be verified
- The vehicle counters at trial sites count all vehicles, campervans and motorhomes cannot be specifically identified from the data
- No charging was implemented making it impossible to measure objective ‘b’ - estimated payment honesty rate



Findings

19. This section will present and explain the research findings.

What do we know about the trial visitors?

20. This information was collected from **967** completed user surveys. Graphs containing full details can be found at Appendix B.

- **79%** of those completing the survey were over the age of **45**
- **84%** had no children in their party and **10%** were travelling on their own
- **50%** of respondents lived in Scotland and **43%** lived in England
- **96%** were using their own vehicle - motorhomes (**52%**) and campervans (**48%**)
- **6%** were first time motorhome/campervan users
- **51%** were using their vehicle more than once a month
- **41%** had visited a trial site more than twice during the review period

Conclusions of 'visitor profiling' findings

21. These include that:

- Trial respondents were generally travelling in pairs, without children
- The profile of respondents suggests they may be less tied to school holiday dates and have greater flexibility around when they can travel and visit
- Half of users were from Scotland and almost half were from England
- Users came from all regions of Scotland and England
- Almost all respondents owned their own vehicle and over half used it more than once a month. There is the potential to build loyalty with these visitors and for them to become frequent users of FLS recreation facilities.

The quality of the visitor experience

22. One of the key objectives of the trial was to record and report on user satisfaction. The information below is taken from the on-line user survey and feedback received via emails. More detail can be found at Appendix C.

- **66%** of visitors rated trial sites as either '**good**', '**very good**' or '**excellent**'
- **58%** felt their trial expectations were **met** and **36%** felt it was **exceeded**
- **89%** said they would '**definitely**' use a stay the night site again
- **82%** felt the trial operating times of 6pm – 10am were appropriate

23. Many trial users and potential users indicated they would be happy to pay for an overnight stay. Feedback included setting a charging structure based on the on-site facilities i.e. charge more at sites with facilities such as fresh water, chemical waste disposal and toilets.

24. Although no charges were implemented during the trial, users were asked to suggest an appropriate charge for their 'stay the night' experience. **52%** felt the experience was worth more than the original proposed charge of **£5**, with **20%** stating **£10** would be appropriate. (Appendix C)



25. Trial users were asked about waste water disposal behaviour (**700 responded**). Approximately one third of respondents (**225 visitors**) stated they took both black (chemical toilet waste) and grey water (waste water) home. **15%** used the next campsite and the same just stated 'took it with them'.
26. When asked how they found out about the trial, the responses were as follows:
 - **28%** from a website (mainly the FLS dedicated 'stay the night' pages)
 - **21%** word of mouth
 - **20%** a Facebook group
 - **10%** an app
 - **9%** just passing a site
 - **8%** the Campervan and Motorhome Professional Association (CaMPA)
27. Reference to the European motorhome stopover scheme - Aires was regularly mentioned in feedback, particularly by members of CAMpRA – Campaign for Real Aires UK, whose aim is to provide safe, overnight parking spaces for motorhomes and campervans.
28. From the trial launch in mid-July until the end of September, the dedicated stay the night campervan trial email in-box received **250** emails focusing on thanking FLS for implementing the stay the night trial, for listening and to keep the trial going.
29. Following a review of the trial in early August and the subsequent announcement that the trial would end early at the end of August, the stay the night email in-box received **189** emails in the space of 3 weeks expressing a mixture of disappointment, anger and lobbying for the trial to be re-instated.
30. After the announcement that the trial would be extended beyond the end of August a further **90** emails were received thanking FLS for extending the trial. A summary of themes emerging from the email responses to the trial can be found at Appendix D.

Conclusions of 'quality of the visitor experience' findings

31. These include that:
 - Campervan and motorhome owners/users are very passionate about their activity with over **450** emails received during the trial reporting period
 - The motorhome and campervan community are very active on social media and digital channels
 - Levels of social engagement suggests this user group are very receptive to targeted communications
 - Campervan and motorhome users felt this trial was a positive move in supporting their activity
 - Users were happy with the trial offer with almost **90%** stating they would use a trial site again
 - Expectations by trial users about what was and should be offered for overnighing campervans varied. Some were happy with a basic offer, but some felt additional



- services were needed. Just over **100** suggested the provision of waste disposal and **84** suggested the availability of fresh water.
- The ability to stop-over at FLS sites was welcomed as not all vehicle owners want to stay in formal campsites

Demand at trial sites

32. The 'stay the night' trial was not actively promoted by FLS, but the trial webpage www.forestryandland.gov.scot/staythenight received **135,000** page views (**86,000** unique) from launch in July to the end of September. This is 3 times more than any other FLS webpage during this period.
33. Over **80%** of FLS regional staff stated that campervan and motorhome numbers were higher this summer than during previous summers.
34. There was a very limited number of trial sites with vehicle counters. Looking at two sites with counters - Kirroughtree and Clatteringshaws (South Region), vehicle numbers were up on average **24%** and **54%** respectively in August and September this year compared to 2018/2019. Looking further into the data, both sites recorded a **6-8%** increase this year in vehicles arriving after 6pm, the start of the trial operating time.
35. Feedback from regions indicated that demand from campervans and motorhomes to stay overnight outweighed capacity in a number of places. Only 3 respondents said demand never outweighed capacity. These sites were Back O' Bennachie and Winding Walks (East region) and Strathrory (North region).
36. Estimates of the numbers of campervans and motorhomes staying at trial sites was largely anecdotal. Numbers ranged from 16+ vehicles every weekend at locations such as Clatteringshaws, Balnain and Innerleithen, to 1-2 daily at quieter locations such as Kilvrecht car park and Winding Walks.
37. West Region reported campervan and motorhome owners were travelling in groups and parking close to each other overnight. It is difficult to determine if this was normal behaviour or due to COVID-19. This was not mentioned by any other region.
38. West region reported the same level of overnighting campervan activity for all 3 months, while others reported numbers dropping in September. See Appendix E for a full breakdown of estimated overnighting vehicles, including non-trial sites in Central region.
39. Regions were asked to comment on the reasons some trial sites were more popular than others. The main reasons given were:
 - Location/destination
 - Accessibility of site i.e. close to a main road
 - Local campsites closed



Conclusions of 'demand' findings

40. These include that:

- Over **135k** views (**86k** unique) of the stay the night webpage suggests a significant interest in the offer
- Most regions reported more campervan and motorhome activity this summer than in previous years
- It is unclear what impact COVID-19 had on increased campervan and motorhome activity
- Numbers were highest in July and August, but were still significant in September
- Monitoring usage and demand by payment at trial sites was not possible
- In the absence of vehicle counters and with limited staff resources to monitor trial sites, estimates of demand are largely anecdotal
- The busiest sites were the already well-known and popular visitor destinations
- More remote sites were less popular

Impact at trial sites

41. **Trial implementation**

Prior to the lifting of COVID-19 lockdown travel restrictions, FLS reviewed options in June to respond to the predicted summer surge in campervan activity. The options were to:

- do nothing
- implement the previously proposed trial, providing 10 sites across all 5 FLS regions
- provide 20-30 sites nationally (medium response)
- provide 80 sites nationally (maximum response)

42. The maximum response option was recommended and planning began to launch the trial in time for the lifting of the COVID-19 travel restrictions in mid-July.

43. Approximately **80** sites, spread across all **5** regions, were chosen for the trial by regions and the development of site signage, guidance and webpages began.

44. Prior to launch, a number of issues relating to potential trial sites were raised by FLS teams and stakeholders. It was highlighted that habitat risk assessments (HRA) would be required for the Glenmore sites and as a consequence, these sites were removed.

45. The Central region trial sites were removed following concerns raised by Loch Lomond & the Trossachs National Park (LLTNP) which needed additional time to resolve.

46. LLTNP had concerns that running two different permit schemes within the park would be confusing for visitors. The LLTNP scheme required booking in advance for an allocated space, the FLS scheme was fundamentally different with no advance booking and a different charge.

47. The National Park also had concerns about the FLS scheme operating within their March to September seasonal Camping Management Byelaw area which requires visitors to have a



permit to camp. They were positive about including FLS sites but there was insufficient time to reach a suitable solution before the trial launched and all proposed FLS trial sites within the park area were removed.

48. As a result of these issues, the list of trial sites was reduced from **80** down to **30**.
49. West Region launched with the most trial sites, 11 (**36%**), South had 8 (**26%**), East had 7 (**23%**) and North had the least with 5 (**15%**) (see Appendix A).
50. West Region had reported a significant increase in overnighting campervan and motorhomes over recent years and felt the trial could help them manage activity. The Regional Manager was very supportive of the trial and as the campervans were already coming, the Regional Visitor Services Manager wanted to fully embrace the trial with as many sites as possible.
51. South Region initially felt they did not want to encourage more campervans to an already busy Tweed Valley, or compete with local campsites. These concerns limited the initial list of trial sites in this region.
52. North region were severely impacted by environmental constraints and concerns about the trial from wider regional teams. These issues meant they were unable to offer trial sites at busy destinations such as Glenmore, which already had a significant issue with overnighting campervans.
53. East Region were not able to operate the trial on the scale they would have wanted or at their preferred sites, mainly due to concerns about unfair competition from local campsites and not being able to charge to cover management costs at busy sites. The busiest sites in this region for campervan activity were non-trial sites – Roseisle, Faskally, Culbin and Tentsmuir.
54. Following a review of the concerns raised by campsite operators and potential planning and licencing issues associated with trial sites, FLS took the decision to end the trial early, at the end of August.
55. The announcement resulted in **189** emails from disappointed stakeholders and the writer and broadcaster Cameron McNeish also led a social media campaign to reinstate the trial.
56. At this point, FLS looked into the potential planning and licencing issues further and contacted all Local Authorities, receiving responses from Perth & Kinross and Argyll & Bute only. These two councils indicated they were content for the trial to continue this year, but further discussion would be required in the future.
57. With these responses and sites where there was potential conflict with a nearby campsite removed from the trial, the decision to finish the trial at the end of August was reversed and



the trial was re-instated with an end date to be confirmed for later in the year. It was subsequently agreed that the trial would run until the end of 2020.

58. A review of trial sites in August resulted in 4 sites being removed – Ratagan, Queen’s View and Glen Sherup in response to local business or community concerns and Glen Nant for operational reasons. Innerleithen was added at the request of South Region to alleviate campervan pressures in the nearby village of Innerleithen. There were no further changes to the list of trial sites.
59. When the trial was launched, it was only intended to be free for a short period of time, to allow an effective charging system to be developed. As the trial progressed, it became apparent that a charging system could not be implemented in sufficient time. From late August, a small number of sites with pay parking machines asked overnighting campervan visitors to purchase and display a day parking ticket as a way of paying for the trial.
60. Establishing payment honesty levels was an initial trial objective, but as charges were not universally implemented, this objective could not be measured. Many trial users indicated through their survey responses that they would be prepared to pay for the facility to stay overnight and **52%** stated they would be prepared to pay more than the proposed **£5** per night.
61. When asked about charging, all regions stated they would have preferred the trial to have been implemented with charges. The main reason was to generate additional income to help with the cost of managing trial sites and to avoid a perception of unfair competition with adjacent formal site providers.
62. Some regions felt the inability to charge was a key trial constraint. It led to some regions removing already busy visitor sites from their proposed list of trial sites.

Conclusions of ‘implementation’ findings

63. It was concluded that:
 - The decision made in June to launch the trial in mid-July meant there was very little time for planning
 - Consideration had not been given to habitat risk assessments (HRAs) which resulted in the late removal of some trial sites from North and Central regions
 - Potential planning issues and licencing requirements for sites allowing overnight stays remains unclear
 - The quick launch schedule resulted in many meetings with regions and a number of changes to the list of trial sites and supporting material e.g. site signage
 - The changes to the site list caused additional work for a number of FLS teams delivering the trial
 - There was limited time for regional Visitor Services teams to discuss trial implications with other regional colleagues which resulted in some negative feeling about the trial internally



- Regions were responsive to local concerns and trial sites were removed quickly when issues were raised
- More time for planning may have enabled Central region to reach agreement with LLTNP to allow trial sites within the park
- Regions experienced different challenges and constraints when developing and implementing the trial
- Some popular non-trial sites were busier with campervan activity than many trial sites
- The inability to charge meant that some regions did not include their preferred sites in the trial and the overall number of trial sites was less than anticipated
- Some regions felt the small number and location of some trial sites meant the trial had a minimal impact on managing campervan activity in their area as visitors continued to park at their preferred non-trial sites

Impacts at trial sites

64. Just over **50%** of regional staff who provided feedback felt they had not observed any changes in patterns of use at trial sites. Comments by regions who had observed changes included:

- 'less local visitors due to the volume of campervans' (**Clatteringshaws**)
- 'more car camping' (**Glen Sherup**)
- 'the site was empty by mid-morning which was unusual. Overnighters were leaving earlier.' (**Glen Garry car park**)

65. Regional teams were asked to comment on whether or not three key 'stay the night' site rules were being observed by users. Their observations are recorded in the table below.

	Always	Generally	Sometimes	Rarely	Don't know
Parking 4 metres apart	6%	20%		40%	33%
Staying one night only	6%	50%	6%	13%	25%
Leaving the site by 10am		19%	31%	13%	38%

66. While **27%** of regional staff said they observed no-antisocial behaviour at trail sites, **69%** said they had observed some anti-social behaviour, with **40%** saying it was observed at '**a few**' sites and **20%** saying it was observed '**at all**' trial sites.

67. The most common issue was '**littering**', reported by **80%** of regions followed by '**evidence of human waste**' reported by **60%**. A small amount of inappropriate chemical toilet waste disposal was reported by 4 regions. For a breakdown of anti-social behaviour at trial sites, see Appendix F.

68. To understand more about who was causing the anti-social behaviour at trial sites, regional teams were asked to rank three profile of visitors with '**1**' causing the most anti-social behaviour and '**3**' causing the least. Ranking is based on local knowledge but includes whether



litter was bagged or simply left around the site (bagged rubbish was more likely to be from a self-contained unit).

- 69. **91%** ranked ‘other overnight visitors’ (not self-contained, potentially using tents) as causing most of the anti-social behaviour
82% ranked ‘self contained campervan/motorhome/caravan second
82% ranked ‘general day visitors’ as causing the least anti-social behaviour
- 70. During the period of this review, **5** incidents were reported on the FLS AIRS system linked to campervan activity (not necessarily a trial sites). Two reports related to anti-social behaviour at Balnain car park in North region (although one complaint mentions campervans and tents), one each of anti-social behaviour at Glenmore and Glentress (both non-trial sites) and a campervan blocking a site entrance in Central Region.
- 71. Regions were asked to estimate how much management (attending meetings), operational (clearing sites) and admin/other (finance, email enquiries etc) time was spent on the trial during the 12 week review period. Responses ranged from ‘a few hours’ of management time to 21 days of operational time depending on the region and the number of trial sites they had. Admin time varied across the regions from a 1-2 hours to a 1-2 days.

	Lowest	Average	Highest
Management time	3 hours	1 day	4 days
Operational time	30 mins	9 days	21 days *
Admin/other time (liaising with community)	1-2 hours	2 days	5 days

* West region only

- 72. Estimates varied widely and most regions found it difficult to give accurate responses to this question. Therefore putting an accurate monetary cost against the operation of the trial is not possible.
- 73. There was also concern from a few communities that FLS would be encouraging visitors at a time when rural communities were feeling a general pressure with extra visitors following the relaxing of COVID-19 restrictions.
- 74. There was positive feedback from the Innerleithen community when FLS was able to alleviate some campervan pressure from the village by including Innerleithen car park in the trial following the mid-August trial review.
- 75. When asked if the trial helped to manage campervan and motorhome activity and demand in their area, **47%** of regional respondents felt it did help, **40%** felt it didn’t help and **13%** didn’t know. Of those who said it did help, the main value was in visitor management. It enabled staff to open a conversation with visitors who were staying at non-trial sites and inform them about the trial and direct them to trial sites where they could legitimately stay.



Regions reported that being able to offer visitors a legitimate alternative site generally led to a more positive response from visitors and potentially reduced the safety risk of staff engaging with the public.

76. Regions were also asked if they felt the trial had been successful in their area. **38%** said they felt it had not been successful, **25%** felt it had been successful and **37%** didn't know/didn't comment.
77. When asked how they were measuring success, regions mentioned having a legitimate place to direct visitors to was useful but the sheer volume of general visitors following the easing of COVID-19 lockdown restrictions made it difficult to measure. In some areas the scale of the trial was so small they felt the impact was minimal as visitors continued to use the more popular non-trial sites.
78. Feedback from trial users suggested that local communities could benefit from additional spend by campervan and motorhome users visiting local shops, pubs and restaurants. This was mentioned **62** in email responses (Appendix D).

Conclusions of 'impact' findings

79. Findings include:
 - Anecdotal feedback suggests parking 4 metres apart was rarely observed, staying one night was generally observed and leaving site by 10am was sometimes observed
 - less than **50%** of anti-social behaviour at trial sites was attributed to campervan or motorhome users
 - On average, more than **50%** of anti-social behaviour at trial sites was attributed to tent/vehicle campers meaning potentially more regional resource was used to manage this visitor group than self-contained motorhomes or campervans
 - Inappropriate disposal of chemical waste did not appear to be a widespread issue
 - Some regions reported less local visitors at sites, but there was not a significant change in patterns of use reported at trial sites
 - With COVID-19 this was an unprecedented year, making it difficult for regions to determine whether the trial substantially helped manage campervan activity
 - Monitoring of the trial by regions was largely anecdotal and all regions reported insufficient staff to deliver, enforce or monitor the trial
 - An increase in operational time spent at sites was the biggest impact of the trial on regional teams
 - Regions measured the success of the trial differently

Non trial site demand and impacts

80. Central Region, had no trial sites, yet the demand and impact of campervan and motorhome activity on this region was significant if not acute. The regional team reported activity at many sites with demand outweighing capacity on an almost daily basis at many sites. At the peak of the summer, sites such as Ardentenny and Jubilee Point were recording 16+ vans per night at weekends with 6-10 mid-week.



81. The main reasons given for the level of demand included 'location', 'destination' and 'COVID-19'. There was also some confusion reported by visitors who thought all FLS sites were involved in the trial as this was reported by some third party apps and forums.
82. Central Region (with no trial sites) estimated that **1000+** bags of rubbish were cleared from their sites in the Cowal area alone during the 12 week trial review period. From their monitoring activity, they estimate that over **50%** of rubbish was associated with overnight tent/car campers and **40%** was associated with campervan/motorhome activity. Day visitors accounted for the remaining **10%**.
83. Having kept detailed records, Central Region estimate **240** hours of staff time, equivalent to approximately **£5,280**, was allocated to campervan and motorhome management in the Cowal area.
84. All other regions involved in the trial reported issues with campervans and motorhome overnighting at non-trial sites. Some sites where this was happening could be described as 'destinations' e.g. Roseisle, Glenmore and others where it was their location, for example on the North Coast 500 or just off the A9.
85. There were reports of campervans displacing day visitors and locals at Ardentinny, Jubilee Point, Rowardennan and Ben Venue in Central Region and Kilmore, Skelbo and Falls of Shin in North Region – all non-trial sites. Evidence of irresponsible chemical waste disposal was reported by Central and North Regions at a few non-trial sites.

Conclusions of demand and impact findings at non-trial sites

86. Conclusions include that:
 - Central Region had no trial sites, yet campervan and motorhome activity was significant and displaced other visitors
 - The impact on staff resources and budgets of managing campervan activity at non-trial sites was considerable, however resources to manage overnight tenting was higher
 - Evidence from Central Region, with no trial sites, suggests campervans and motorhomes will come whether or not there is a trial
 - Destinations with unique selling points such as beaches and stunning views were popular stop-over locations, whether or not they were part of the trial
 - Third party apps and websites advertising all FLS sites available for stop-overs caused some confusion for visitors

Comments and suggested changes and improvements

87. This section captures the qualitative feedback received from trial users, campervan and motorhome owners, stakeholders and regional teams. It highlights observations, feelings and suggestions from group and individual feedback sessions with regional teams, from stakeholder emails and the comments received to the open questions asked in the on-line user feedback survey. A summary of all this feedback is available at Appendices D, G and H.



Suggestions from users

88. Trial users were very forthcoming with their comments and suggestions about the trial. There were **6** suggestions with more than **50** comments each.

1. Keep the trial going beyond the proposed finish date (**164 comments**)
2. Have chemical waste disposal points (**111 comments**)
3. Include more sites in the trial (**105 comments**)
4. Have grey water disposal points (waste water from sink/showers etc.)(**105 comments**)
5. have a fresh water supply, could just be a tap (**84 comments**)
6. Provide on-site litter, dog poo and recycling bins (**55 comments**)

A summary of all other user suggestions can be found at Appendix G.

Conclusions about user suggestions

89. These include:

- The level and quality of comments from trial users suggests there is demand for this kind of provision and that more trial sites would be welcome
- There is potentially demand for this offer out with the main summer holiday period
- Many users feel the experience could be improved by the addition of disposal points and access to fresh water. Some suggest charging more for these extra facilities.

Comments from regions

90. Regions provided useful feedback on the issues they faced and also suggestions about how the trial could be improved. Two main themes emerged:

a. Management of trial sites and charging

b. Trial communications (internal and external)

A detailed summary of regional feedback can be found at appendix H.

91. Conclusions about regional comments and suggestions

- Campervans and motorhomes were and are using our sites for overnight stays
- FLS should embrace the situation, turn it into a positive offer and generate income
- Campervans and motorhome users were generally overnighiting where they wanted, rather than using trial sites
- Some regions felt the trial was not operated on a big enough scale to make a significant impact on the management of the campervan and motorhome issue
- There was visitor confusion and mis-information on third party forums and apps that all FLS sites were in the trial
- Clarification is required on FLS no overnight parking policy to help avoid confusion
- Better promotion of the Scottish Outdoor Access Code and communication of messages to help inform visitors of their responsibilities and rights
- Better communication that car parks are stop overs not destinations for this activity



Appendix A - Stay the Night trial sites



- There were **30** trial sites when the trial launched in mid-July
- There were **27** trial sites following the August review

North Region	West Region	East Region	Central Region	South Region
Balnain	Achnabreac	Back O' Bennachie		Ae - Naze
Farigaig	Aoineadh Mor	Glen Sherup *		Cheviot (lower)
Littlemill	Ard-Airigh, Loch Sunart	Kilvrecht car park		Cheviot (upper)
Ratagan *	Ardcastle	Quarry Wood		Clatteringshaws
Strathrory	Dunardry	Queen's View *		Dalbeattie - 7stanes car park
	Fearnoch	Torrieston	No trial sites	Innerleithen *
	Garbh Eilean, Loch Sunart	Winding Walks		Kirroughtree
	Glen Lochy			Wauchope
	Glen Nant **			
	Glengarry car park			
	Strone Hill			

* These three sites were removed part way through the trial following concerns raised by local campsite owners about unfair competition

** This site was removed for operational reasons – a damaged bridge

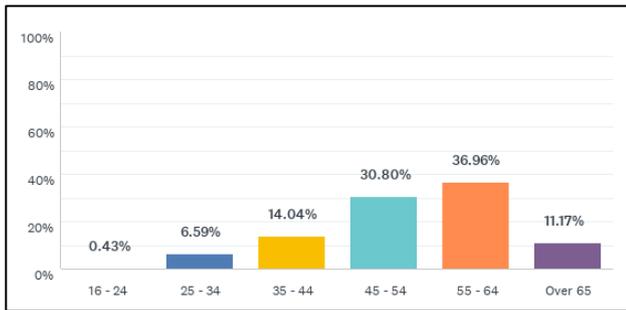
* This site was added to help alleviate campervan pressures in the local town



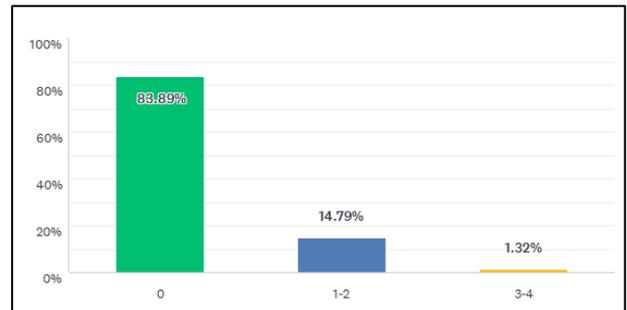
Appendix B - What do we know about the trial users?

(Each question received more than 700 responses)

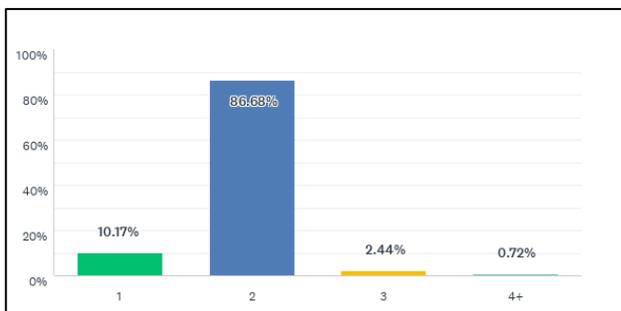
Age range of respondents



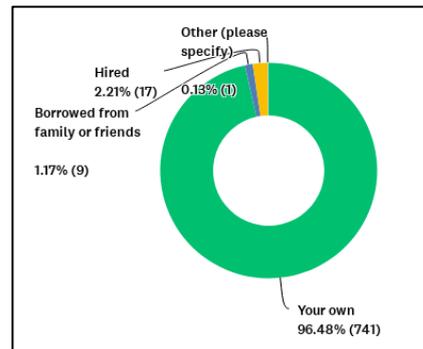
Number of children in the group



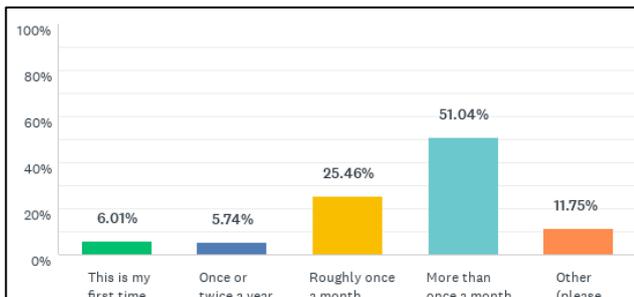
Number of adults in the group



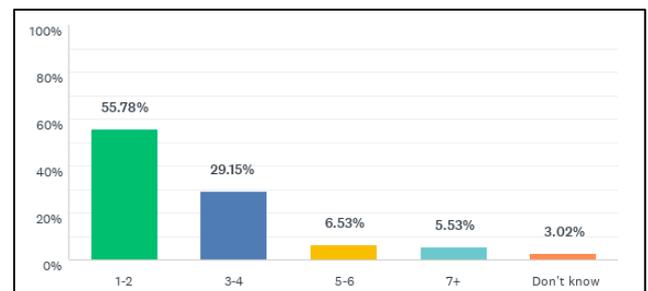
The vehicle was.....



How often do you use your vehicle?



How many times have you stayed at a trial site?





Appendix B (continued)

Where do you live?

ANSWER CHOICES	RESPONSES	
▼ Aberdeen & Aberdeenshire	4.56%	32
▼ Argyll & the Isles	2.71%	19
▼ Ayrshire & Arran	3.99%	28
▼ Dumfries & Galloway	3.42%	24
▼ Dundee & Angus	3.42%	24
▼ Edinburgh & the Lothians	6.99%	49
▼ Fife	3.99%	28
▼ Glasgow & the Clyde Valley	8.27%	58
▼ Highlands	4.99%	35
▼ Loch Lomond, The Trossachs, Stirling & the Forth Valley	3.28%	23
▼ Orkney	0.14%	1
▼ Perthshire	3.85%	27
▼ Scottish Borders	0.57%	4
▼ England North East	11.13%	78
▼ England North West	11.70%	82
▼ England Midlands	10.56%	74
▼ England South	8.70%	61
▼ Wales	3.42%	24
▼ Northern Ireland	0.71%	5
▼ Republic of Ireland	0.14%	1
▼ Europe	0.29%	2
▼ Other (please specify) Responses	3.14%	22
TOTAL		701

The top 10 ten sites produced almost 60% of responses

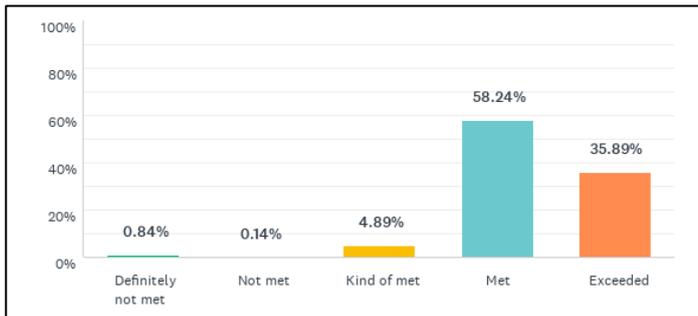
Trial site	Responses	Response percent
Clatteringshaws	96	9.93%
Glengarry car park	72	7.45%
Dalbeattie - 7stanes car park	70	7.24%
Kirroughtree	61	6.31%
Ae - Naze	54	5.58%
Queen's View	52	5.38%
Glen Lochy	50	5.17%
Achnabreac	47	4.86%
Glen Sherup	33	3.41%
Back O' Bennachie	31	3.21%
TOTAL	566	58.54%



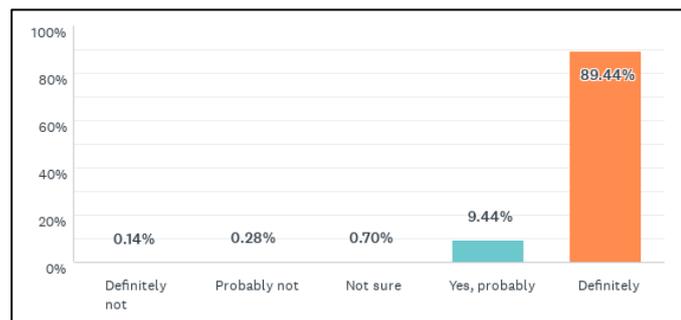
Appendix C - The quality of the user experience

(Questions received more than 700 responses)

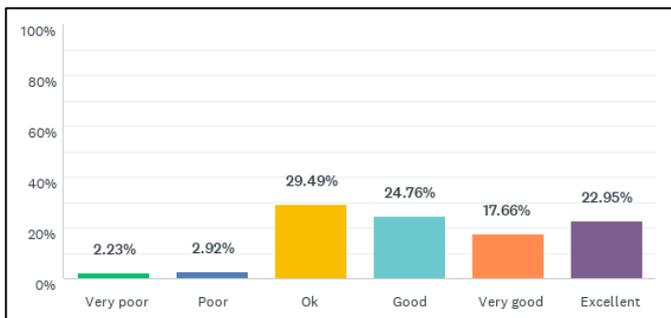
My expectations about the trial were



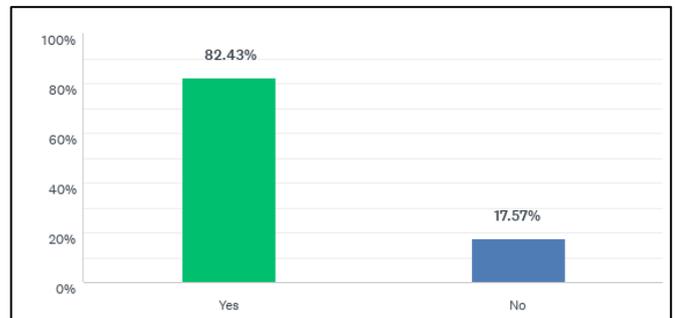
Would you stay again?



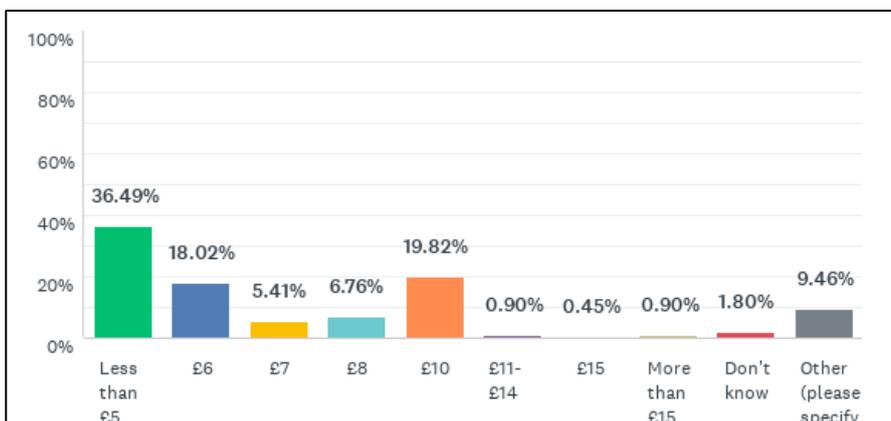
How would you rate the facilities?



Was the operating time appropriate?
(6pm-10am)



What would you be willing to pay for a one night stay? (222 responses)





Appendix D - Summary of email themes from users and stakeholder feedback

Themes emerging from email feedback	Number of responses
Thanks for doing it, for listening, please keep it going, well done and great idea	251
Complaints about ending trial early at end August	189
Thanks for announcement of extending trial end date till later in the year	90
Belief pressure from campsite owners responsible for ending trail early	86
Sites perfect for what most want, mix of informal & occasional use of formal sites for site facilities	83
No lost revenue for campsites as users rarely use them, were full, not open or closed in off-season	77
Happy to pay small amount around £5 - £10	76
Users positive contribution to hospitality/shops/etc to support local community	62
Run scheme all year round or at least longer season (especially when campsites closed anyway)	45
Scotland Aires type system should be introduced with waste/water facilities, electric hook ups, etc	43
Like sites that are quiet, natural, remote, beautiful and off-grid	42
Want simple not formal sites as self contained	32
Campervans and motorhome users help to keep sites tidy, leave no trace	26
Need scheme like this to help manage whole campervan/motorhome demand and issues caused	23
Happy with one night stop over and move on rule	23
Anti-social, litter and toileting issues tent/car campers and others generally not campervan/motorhomes	21
More sites for more choice, variety, trip planning and dispersal of users away from busy sites	16
Are caravans included (and other roof mounted tents just 3 of total)	14
Keep any charge low for simple sites and higher for sites with extra facilities	13
Specific site questions	12
Chemical (black) waste disposal points	11
Introduce an annual permit	11
More sites to avoid overcrowding and better information about other close by sites available	10
More clarity and better information about which sites taking part and which not	10
Better online/app information for location finding, site information, what it's like and rules, etc	9
Better access to scheme information when poor signal, so downloadable list/map, information	9
More promotion/publicity for scheme to let users know	9
Waste (grey) waste disposal	8
Provide on-site litter, dog poo, recycling bins	8
Fresh water supply, could just be a tap	7
Site terms and conditions just right and most users will abide by them	7
Allow pre-booking of spaces and pre-payment	7
Monitoring and checking to help control waste/litter, anti-social, payment and other issues	6
When will trial end	6
Better site signage for useage, rules, guidance, capacity, parking management and charges	5
Ability to see available spaces at sites to help plan and avoid overcrowding	4
Better control of parking spaces, delineation of spaces and distance between vehicles	4
Information on where nearest chemical, grey waste and litter/rubbish disposal point are	3
Worry that users being seen as impacting negatively in local communities	3
Overnight parking for cars for proper wild camping (e.g. backpack wild camping)	3
Extend to car and tent camping	3
Vehicle hire businesses should help promote responsible behaviour	3
More sites with toilets	2
Easy and flexible payment options like phone, online, card or an app	2
Allow 2 nights stays	2
Users should take away all their own waste and rubbish	2
Permit system and/or payment helps deter anti-social, litter, waste issues	2
Take location, layout, levels, size, capacity and maneuvering limitation into account selecting sites	1
Allow BBQs	1
Will we publish findings of trial	1



Appendix E - Overnighting campervans per region

North region

JULY & AUGUST	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓	✓	✓		✓✓
Weekends at quiet sites	✓	✓✓			
Week days at busy sites	✓✓	✓	✓		✓✓
Weekdays at quieter sites	✓✓	✓			
SEPTEMBER	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓✓		✓		✓✓
Weekends at quiet sites	✓	✓✓			
Week days at busy sites	✓✓		✓		✓✓
Weekdays at quieter sites	✓✓	✓			

West region

JULY, AUGUST & SEPTEMBER	1-2	3-5	6-10	11-15	16+
Weekends at busy sites			✓	✓	
Weekends at quiet sites	✓		✓		
Week days at busy sites			✓	✓	
Weekdays at quieter sites	✓		✓		

East region

JULY	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓	✓	✓	✓	
Weekends at quiet sites		✓✓			
Week days at busy sites	✓✓		✓		
Weekdays at quieter sites	✓	✓			
AUGUST	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓			✓✓	
Weekends at quiet sites		✓	✓		
Week days at busy sites	✓	✓	✓		
Weekdays at quieter sites		✓✓			
SEPTEMBER	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓	✓✓	✓		
Weekends at quiet sites	✓	✓			
Week days at busy sites	✓✓	✓			
Weekdays at quieter sites	✓✓				

South region

JULY & AUGUST	1-2	3-5	6-10	11-15	16+
Weekends at busy sites				✓	✓
Weekends at quiet sites		✓		✓	
Week days at busy sites		✓		✓	
Weekdays at quieter sites		✓	✓		
SEPTEMBER	1-2	3-5	6-10	11-15	16+
Weekends at busy sites			✓		✓
Weekends at quiet sites		✓		✓	
Week days at busy sites		✓		✓	
Weekdays at quieter sites	✓		✓		

Central region had no trial sites, but did have significant overnight campervan activity

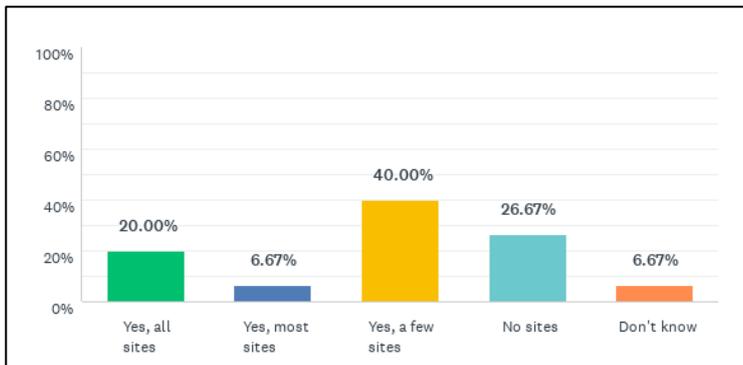
JULY	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓	✓	✓✓		
Weekends at quiet sites		✓✓✓			
Week days at busy sites	✓✓	✓✓			
Weekdays at quieter sites	✓	✓✓			
AUGUST	1-2	3-5	6-10	11-15	16+
Weekends at busy sites		✓✓		✓	✓
Weekends at quiet sites		✓	✓✓		
Week days at busy sites	✓	✓✓	✓		
Weekdays at quieter sites		✓✓✓			
SEPTEMBER	1-2	3-5	6-10	11-15	16+
Weekends at busy sites	✓✓		✓	✓	
Weekends at quiet sites		✓✓✓			
Week days at busy sites	✓✓	✓	✓		
Weekdays at quieter sites	✓	✓✓			

- ✓ Each tick represents a response from an individual or group feedback session and could relate to the same or a different area of a region

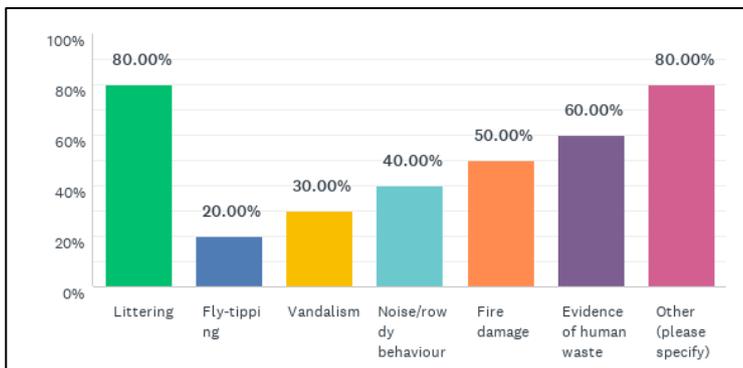


Appendix F - Summary of anti-social behaviour

Was anti-social behaviour observed at trial sites?



What anti-social behaviour was observed at trial sites?



The following was recorded under 'other':-

- damage to interpretation panels
- grey waste water emptied
- visitors playing football
- tree cutting
- portable potty left



Appendix G - User comments and suggestions from SurveyMonkey feedback

Comment theme	Number of comments
Like trial as is, thank you for doing it and please keep it going	164
Chemical (black) waste disposal points	111
More sites for more choice, variety, trip planning and dispersal of users away from busy sites	105
Waste (grey) waste disposal	99
Fresh water supply, could just be a tap	84
On-site litter, dog poo, recycling bins	55
Happy to pay and think £10 - £15 reasonable and more or less for reduced/increased facilities	49
Charge for extras like water top up, chemical waste/grey water disposal	38
More sites with toilets	29
Easy and flexible payment options like phone, online or an app	24
Better site signage for usage, rules, guidance, capacity, parking management and charges	23
Like sites that are quiet, natural, remote and beautiful	21
Scheme should be all year round or at least longer season	20
Scotland wide Aires type sites introduced with facilities, electric charge points, etc	20
Happy to pay small amount (£3 - £5)	19
Take location, layout, levels, size, capacity and manoeuvring limitation into account selecting sites	17
Better online/app information for location finding, site information, what it's like and rules, etc	15
Monitoring and checking to help control waste/litter, anti-social, payment and other overnighters issues	14
Users should take away all their own waste and rubbish	12
Better control of parking spaces, delineation of spaces and distance between vehicles	12
Information on where nearest chemical, grey waste and litter/rubbish disposal point are	10
Introduce and annual permit	10
Electric hook ups	10
More promotion/publicity for scheme to let users know	9
Some volunteering to and doing litter picks on sites	8
Allow pre-booking of spaces and pre-payment	8
More clarity and better information about which sites taking part and which not	8
Ability to see available spaces at sites to help plan and avoid overcrowding	6
Majority of campervanners and motorhomers are responsible	6
Allow 2 nights stays	5
Better access to scheme information when poor signal, so downloadable list/map, etc	5
Longer opening hours for any on-site facilities like cafes, toilets to overlap with Stay the Night	5



Appendix H - Regional comments and suggestions

Management and charging

- Car parks being used anyway so need to embrace and turn it into a positive offer and realise potential for commercial return
- Could scheme or sites be offered as commercial opportunities?
- Charging could cause displacement to other sites not in any future scheme
- Needs to be financially sustainable and able to contribute to resource required to manage it
- Flexible payment options required if we introduce payment in any future trial
- Any charge should reflect sites facilities, location and any features that make it special, this may would mean a variable charge rate
- Should we look at booking in advance, but balanced with users who want a more free flexible offer
- General feedback from interaction with users that they would be happy to pay and indeed may help in management also
- We need to operate at a bigger scale with more sites to make any difference
- Do we pick what are already our busiest sites and try to use any scheme to displace users?
- How do we control capacity at some sites and/or limit the number of vans
- Feeling that motorhome & campervan activity didn't take up much time
- Covid made this a very unusual year with a huge amount of added pressures and issues across all our sites making it difficult to assess the trial. Need a 'normal' year to measure effectiveness
- Sites which were visible from the road suffered less anti-social behaviour
- Local communities could be better option to run either our sites or other local initiatives

Communication

- Provide leaflet/information on etiquette for rental businesses to help promote responsible behaviour
- Management of sites in third party apps and websites required to clarify which sites overnight stays are permitted and which are not. Misinformation saying people could stay overnight in any of our car parks.
- Better management of sites and communication of any scheme extent to help control users who think they can use any car park
- Visitor confusion about trial and why some sites in and some not and why not all
- Clarification of our policy on overnight parking to help avoid confusion
- Clearer signage to reinforce the no overnight parking message in sites generally and especially if to make clear which sites in and which out if trial goes ahead again
- Better promotion of SOAC and communication of its messages to help inform visitors of their responsibilities and rights
- More 'professional' and organised rollout for any future scheme including consistent messaging and signage nationally, including higher standard of signage not temporary quick solution this year
- Communicate clearly that car parks are stop overs not destinations in themselves
- Uncertainty of some FLS staff about formally permitting campervan overnight stays

Infrastructure

- Provide simple electric hook up and waste disposal in areas where not available
- Need to consider infrastructure to support trial if made permanent



Appendix H (continued)

Regional comments and suggestions

Resources

- Need to manage campervans and motorhomes but not enough staff or general resource to manage effectively
- Robust monitoring of use and impact on sites

Litter

- Generally huge increase in litter and litter picking but this was as result of big increase in all visitors and non-campervan overnight stays
- Campervans and motorhomes tended to bag up their rubbish and either take it away or leave it for collection

Miscellaneous

- Sites where campervans and motorhomes were present acted as a deterrent for anti-social behaviour and targeting of car park charging machines. (Central region)
- Particular issues with planning/licensing sites mixed in with camping bylaws in national park area makes an introduction of a trial complex and dependant on close working with national park
- Liaise with national park to learn from their experience with camping permit scheme
- More information about location of disposal and water points and more integration on this so people know where they are
- Recognition of potential issues with us being seen as competing with local businesses if we are offering free or very low cost
- Consider using more specialist areas in forests rather than using our 'normal' car parks
- General view by some communities campervans were to blame for anti-social behaviour this not the case, most caused by tent campers
- Some trial sites not busy but other sites in more popular areas were extremely busy (including sites not included in trial which were very busy anyway)
- Local community consultation needed for choice of sites. Some very vocal and their views need to be taken on board