



**Scottish Borders Center Parcs Proposition
Initial Survey of SSDA Members
5-12th November 2024**

RESULTS:

Executive Summary:

On the 5th November 2024, as it was announced that Center Parcs was looking to build a holiday village in the Scottish Borders (its first in Scotland), the SSDA launched a one-week survey asking its members what they felt about the proposition.

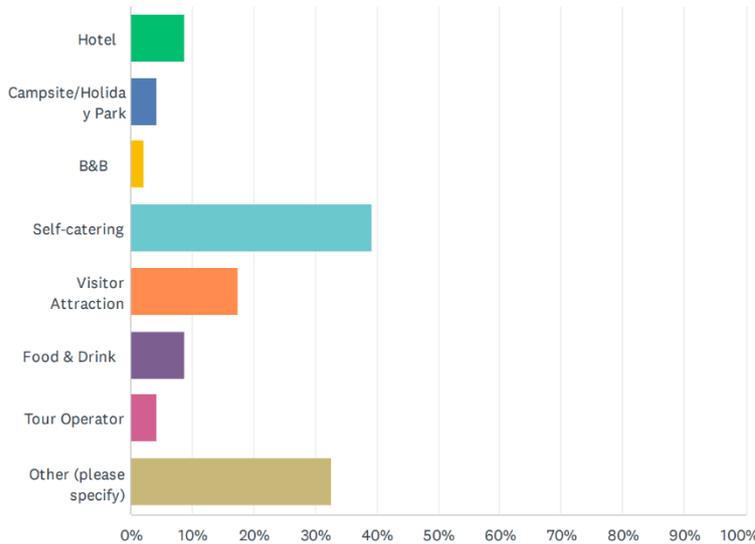
47 respondents completed the survey and all results, in full, are publicly shared in this document. One business completed the survey twice, their full qualitative data is included but they have only been counted once in the graphs.

Over 73% of respondents strongly support the proposition, with under 10% objecting to it. Over 65% of respondents felt the proposal would positively impact their own business. The overwhelming majority of respondents felt the SSDA should actively engage, support and influence Center Parcs to maximise local economic and community benefit.

Respondents:

Q4 Type of Organisation/Sector

Answered: 46 Skipped: 1



'Others':

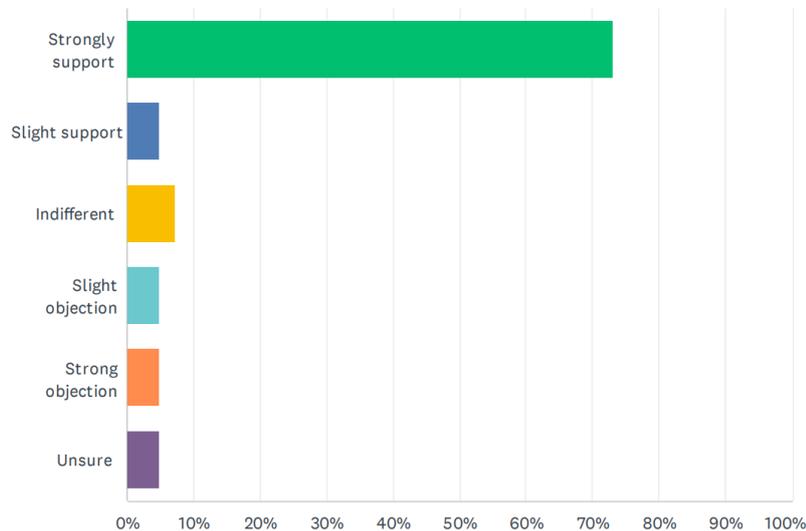
- Bookshop
- Community Group (x2)
- Construction
- Convenience store
- Dance school- Hawick
- Farm and B&B business
- Hawick Third Sector/Place Plan
- Local resident
- Outdoor activities/nature tourism
- Printers
- Retail
- Tour guide
- Tourism consultant

| ANSWER CHOICES | RESPONSES |
|------------------------------|-------------------------------------|
| ▼ Hotel | 8.70% 4 |
| ▼ Campsite/Holiday Park | 4.35% 2 |
| ▼ B&B | 2.17% 1 |
| ▼ Self-catering | 39.13% 18 |
| ▼ Visitor Attraction | 17.39% 8 |
| ▼ Food & Drink | 8.70% 4 |
| ▼ Tour Operator | 4.35% 2 |
| ▼ Other (please specify) | Responses 32.61% 15 |
| Total Respondents: 46 | |

Support for the proposition:

Q7 With as much as you know now, are you supportive of the proposal to build a Center Parcs in the Scottish Borders?:

Answered: 41 Skipped: 6



Respondents were also asked to comment on why they felt this way.

Those who said '**Strong support**' commented:

- Additional tourism into the region
- An amazing opportunity for the Scottish Borders
- Brings a focus to the South of Scotland
- Even though I strongly support this, I am also apprehensive about this development
- Extra business for the local area
- Game-changer for Hawick economy.
- Great to see investment happening.
- Hopefully, it will help to attract more visitors to the South of Scotland in general.
- Huge investment, bringing a different type of visitor to the area. What's not to like?
- Huge opportunity for business development, skills and training for young people and wider economic impact assessment.
- Huge opportunity for the South great for the Borders in particular. To be the first in Scotland. Great for local tourism businesses including local shops and restaurants,
- Impact of jobs, use of local suppliers, and creation of a new woodland from grasslands.
- It will be so beneficial to the local area and economy.
- It will be so good for Hawick and the surrounding area.
- It will put South of Scotland on the map, and I believe if you link up with them it would be particularly helpful in keeping Center Parc guests in the Borders a little longer.
- It's a breath of fresh air for the area. Giving hope to small businesses under pressure.
- It's a good business and I'm pleased it's coming to the Borders.
- Major benefit to the Scottish Borders economy.
- Our region desperately needs need job opportunities
- Positive plan for the area, will bring in more visitors and create more habitats for wildlife
- Significant investment for tourism and huge boost for local employment.
- The area needs a boost. Encouraging tourism on this scale can only be beneficial

- The area needs this type of investment.
- The Scottish Borders needs to be a destination not just a drive through 'to Scotland'. I believe a business like Centre Parcs will do this. It will also bring much needed employment to the area which in turn benefits everyone
- We need visitors
- Would boost local economy

Those who said '**Slight support**' commented:

- As long as employment for short term construction and long term careers are made available to local people. Career opportunities for our young adults leaving school currently limited and so this presents a superb entry into the work place; other local businesses mostly have their staff requirements covered or offer work to local people.
- Good for raising awareness of the area, but not certain that other businesses in south Scotland will benefit from visitors spending money with them rather than just spending it at Centre Parks

Those who said '**Indifferent**' commented:

- Different client base to ours
- I would like to have evidence regarding 95% of visitors to centre Parcs will be "New" visitors to the area. Another 750 units in the area will quite probably mean supply outstrips demand yet of course Centre Parcs with all their funding will be able to pick and choose

Those who said '**Slight objection**' commented:

- More large accommodation in local area
- No disrespect but I've watched Center Parks develop, first down South and then I watched closely as they opened at Penrith. I had friends/relatives who supported and some opposed. A part of my "slight" objections is based on your response "I can not overstate" and "game changing" etc. My worry is that you at SSDA will be induced into helping them (who don't need your help) at the expense of small local businesses (who do need). It's an easy fix for SSDA "This is 20% of our 10-year job-creation target". I agree they mainly bring "new visitors..who would not otherwise come to the area" but as you say "mostly stay on site for the duration of their visit"- I'd go further as they have to leave their vehicle and walk around the sites, they never leave. So they do NOT help the LOCAL economy. Thats the experience of Penrith.

Those who said '**Strong objection**' commented:

- Centre parcs guests stay in the parks- it's designed for that to happen- so it will not do anything for the visitor economy and seems in exact opposition to slow tourism and responsible tourism
- It is direct competition to our businesses and quite irresponsible of our own association to be supporting it
- Self-catering accommodation is way over subscribed

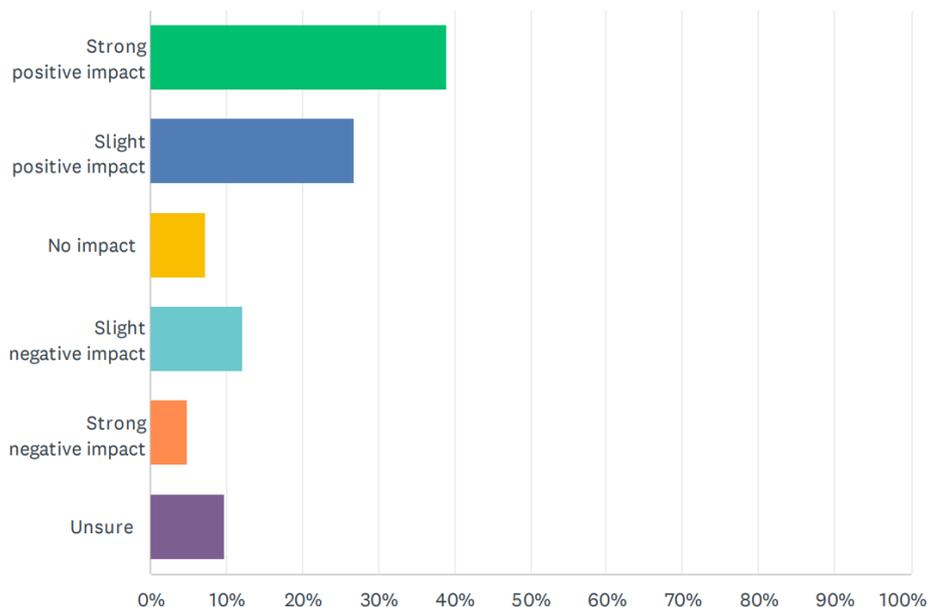
Those who said '**Unsure**' commented:

- It's a big ambitious project with lots of great headline numbers that could benefit the area. All the pros get listed but unsure of the potential cons that come with such a big development in an otherwise quiet and unspoilt rural area. Not against it but just don't know enough about the potential negative impacts.
- The centre parcs no car policy means that all visitors stay on site and will not benefit the local community. Trade and cleaners are hard to get at the moment. There is simply not the labour force in the Borders to absorb the extra 1200 jobs!!

Impact of the proposition:

Q8 What impact do you think the Center Parcs would have on your business:

Answered: 41 Skipped: 6



Respondents were also asked to comment on why they felt this way.

Those who said '**Strong positive impact**' commented:

- Capitalise on many more visitor numbers
- If developed in a way it will create more footfall throughout the borders, great
- Increased footfall, more local jobs giving people more spending power
- Investment will create jobs and infrastructure to an area and local towns and villages.
- It maybe holiday makers will google Scottish Borders and book extra nights
- It will bring people into the entire Anglo-Scottish Borders, a fundamental need for a long long time
- Massive boost to the surrounding towns with tourism
- More visitors
- Potential to be included in construction subcontracts
- An increase in visitors to the local area, improved marketing opportunities, and chance of local charities financially.
- Purely from a tourism side of things it is likely to bring more visitors to the area.
- See above
- The CP project will help put Hawick 'on the map' in a new and positive way.
- While people stay on site, they will undoubtedly want to explore further afield. We are positioned to benefit.

Those who said '**Slight positive impact**' commented:

- Although probably not impacting directly, it should have a positive impact on a lot of our customer which should indirectly help us.

- Any pub positive publicity for South of Scotland is positive for all tourism businesses.
- Bringing focus to South of Scotland as holiday destination
- Due to the distance I don't see too many additional visitors travelling but any additional visitors would be a positive
- Focus on the South of Scotland
- Having been holidaying with Center Parcs for 35 years (!), I know the model well and tourists rarely come out of the village. However, if there was a possibility that CP would consider working with local food producers like us or those who could provide visitor experiences like us, then this would have a positive effect.
- I think it raises the profile of the area, and that's a good thing. I am not sure if I will directly get business from it given the type of visitor.
- Increased footfall
- Perhaps not just my bookshop, but other regional booksellers will benefit from people ordering books to enjoy during their stay?
- The huge investment has credibly opened up the Borders to a whole new audience and put us on the map- it will make more people think about the South as a place to visit
- We get a few visitors find us on google and visit us for ice cream or pick and mix.

Those who said '**No impact**' commented:

- Too far away from Newton Stewart and appeals to a different demographic
- Too far away. 2hr 20min drive. CP is a self-contained attraction, and whilst some visitors will certainly make day trips outside of venue, I'd guess anything more than an hour is no go for obvious reasons.
- We are adult only so we do not share the same guest

Those who said '**Slight negative impact**' commented:

- All local hospitality and accommodation businesses struggle to find staff. Centre Parcs will likely make recruitment more difficult for us.
- As above unless someone can furnish me with facts?
- Competition in the self-catering sector is already massive in the Scottish Borders
- It'll be harder to get staff locally. Harder to get tradesmen. Centre parcs are the "supermarket" equivalent in tourism and I believe in quality not quantity so I believe the supermarkets have been responsible for dumbing down quality in food etc.
- People taking their business to centre parcs and not staying in the Dumfries and Galloway area

Those who said '**Strong negative impact**' commented:

- Because we offer accommodation and outdoor activities. You just invited in a massive competitor.
- Competition is good but the market in the Scottish Borders is now saturated

Those who said '**unsure**' commented:

- Hopefully, the impact will be positive.
- Unsure but would love to get my little dancers involved in any Scottish nights
- Unsure potential for new businesses opening up or extending their product
- Unsure/worry our accommodation could suffer. Will it add to the Borders??

Role the SSDA should play:

What role do you feel the SSDA should play between now and the Center Parcs opening up?

Summary:

Overall, there was a relatively high degree of consensus that respondents felt the SSDA should actively engage and support the proposition, using its influence to help maximise the benefits to local businesses and communities: keeping members briefed and engaged, representing members' interests, ensuring Center Parcs does not compete with existing businesses and that a proportion of new visitors explore beyond Center Parcs. A small proportion of respondents felt the SSDA should not engage or support the proposition.

All responses (random order):

- Acting as an essential partner for local businesses who could partner with CP, demonstrating what the region has to offer in terms of **partnership opportunities** and supporting this to happen
- Lobbying for improved **infrastructure** in conjunction with ensuring no obstacles are in way of CP opening!
- Support the project where possible and reasonable and **keep members up to date** with progress
- SSDA should be working along Center Parcs to ensure that the whole project goes through smoothly and that **local people are kept in the loop** and up to date on progress and information
- Continuing to push the **tourism landscape as it exists now**, since the project may take a few years to get started.
- Work closely with them to help The Borders. We need growth and people. Local shops and tourist attractions should gain a little bit but I believe when they book Center Parcs they remain there as all activities are there and included in the rate but they **may extend holiday** in the area.
- Ensuring that the organisations who contribute to Hawick and the region's USPs (unique-selling points) are **fully aware of the opportunity** which will come with this influx of new visitors.
- I understand for local towns things to do businesses this is really good news, but not for small accommodation providers. Schloss is already building 43 accommodations locally.
- You've obviously got to support them, but don't get carried away, please because it's not a panacea- far from it.
- **Create positive links** by giving the people of Hawick and Selkirk more connection such as nature/ cycle paths to the town for workers and visitors, plus day passes as they feel that there is not much for young people here in the borders. Also to make sure that surrounding landscape is kept as it is, no pylons destroying the beauty of the area. Everyone that I've spoken to is outraged by a proposed plan for huge pylons. I imagine that visitors may also be put off as much as the locals.
- SSDA should **hold Center Parcs to account** in making certain that as well as having minimum impact on residents of the area, Center Parcs also support rather than compete with established tourism businesses in the area
- Ensuring that all SSDA members are able to see **transparent plans** going forward.
- To maintain **ongoing communication** with members regarding the parc's development and to guide strategies that inspire a travel-and-explore mindset, encouraging potential visitors to

engage with what the local community has to offer before they even arrive at the parc.
Ensure **transport links and infrastructure** is in place.

- **Getting the word out**
- Ensure existing local homegrown businesses do not suffer increased **recruitment difficulties**
- Work with local population to **allay fears**. Be realistic about the pros and cons and not just short term but longer term. How will this development change the area longer term.
- **Make sure the plans are approved** and our local council do not find a way of rejecting the application. Most of the economic issues in the area are due to our short-sighted council
- Support local community and existing local tourism Businesses!!
- To help establish the demographic and habits of CP visitors, so businesses can best prepare and then capitalise on this new audience. To engage with CP to see if they can help **promote local business** as part of their offering. Essentially making it easier for visitors to tap into what's on offer with least amount of friction.
- Continue to **build the strong case for tourism** and hospitality as a vital industry in the south of Scotland. Showcase Centre Parcs as a leading national employer, highlighting long term career possibilities for local people as well as the obvious additional benefits of a national company investing in our area. **Establish early relationships** between colleagues and key people at Centre Parcs.
- **Making sure it doesn't** and supporting people actually here
- Not sure
- To make sure the **interests of the area are upheld**. Centre Parcs must not walk over anything the SSDA do not approve of.
- **Itineraries** for shoulder nights, **help for suppliers to gear up**
- Facilitating and promoting with both the communities and developers. **Communication of progress.**
- **Lobby government** on supporting the proposals
- Work with local tourism businesses and communities to **maximise the opportunities.**
- **Help existing businesses** they have huge resources
- **Liaison**, promotion of members business.
- Absolutely none. The SSDA should be **supporting the smaller local businesses** not the big guys like centre parcs and skyes
- Come into the town and see if any **local businesses can help or supply.**
- Ensuring that the development is done **collaboratively and sensitively** with communities. Being the **voice of local businesses** and helping bridge the gap between the business on the ground and the bigger powers at CP. Working closely with CP on **positioning and marketing** so that they take on board our messaging and are **actively integrated into our responsible visitor economy strategy**
- You should **oppose it**. You should support your own members and work to bring visitors to the Scottish Borders, not to a self-contained holiday village that will act as a direct competitor and make our businesses- in particular the outdoor activities that we have been trying hard to build up- unprofitable and unviable.
- **Be onside for the development**, do what you can NOW to help advertise this development NOW not just locally, worldwide. We are sure if this project is taken on properly, this is what has been needed in the Entire Scottish Borderland for many many a year. GT experience over the last 3 years with International visitors is always 'wow, we never ever dreamt that we could visit an area so beautiful, it equals the North!' With that sort of thinking, the country of Scotland gains.
- Ensuring sustainable development and an insistence of meeting **net zero targets.**
- Liaising between locals and the developer to **allay fears**. The area is culturally very resistant to change so this must be overcome.

What role do you feel the SSDA should play after the Center Parcs has opened?

Summary:

There was a broad consensus that the SSDA should continue to engage Center Parcs after opening: maximising the number of Center Parcs visitors who also stay elsewhere, promoting the South of Scotland and local businesses, helping smaller local businesses to grow and benefit, improving infrastructure, and carefully monitoring potential harm and actively looking to mitigate this. A small proportion of respondents felt the SSDA should not engage.

All responses (random order):

- The same as above, **ensuring it continues**.
- Continuing to **improve infrastructure** and **develop and market** The Borders and tourist attractions throughout.
- Have some sort of **presence on the site** which informs visitors of what else there is to do in the area during their visit to the site
- SSDA should help **develop other businesses** in the industry to use the opening of Center Parcs to develop and increase their businesses.
- Liaising to **ensure other tourism businesses are not adversely affected**, and to maximise the equal promotion.
- **Keep promoting the Borders** with SSDA if they allow and this can only be positive. We need noticed. Borders been kept in the closet too long! Until SSDA came along. A really good job you are here! Thank you.
- Helping **promote those USPs**.
- **Encourage guests to visit local businesses**
- Minimal; they can look after themselves.
- SSDA should continue to **hold Center Parcs to account** in making certain that as well as having minimum impact on residents of the area, Center Parcs also support rather than compete with established tourism businesses in the area
- To continue to **feedback short and long term impacts on the wider community** both positive and negative and to help address those as needed.
- Continued support to **promote the offerings** of the area.
- Support to the parc
- **Monitor impacts on existing homegrown businesses** to ensure Centre Parcs operations don't adversely impact attractions (overcrowding), competitiveness (driving up employment costs by dominating the small labour pool), and marketing (overshadowing existing businesses in the area's profile)
- **Hold Centre Parcs to their promises**. A failed project would be worse for the area than no project at all. Can we make this development a breath of fresh air in a world where promises are rarely met.
- Working together to with all local businesses to **promote the wider South of Scotland** area
- **Support local community** and existing local tourism businesses!!
- Continue to engage with CP to see if they can help **promote local business** as part of their offering.
- **Champion the local area** for those visiting Center Parcs. **Reassure local businesses** that may be concerned about a loss of business (even if this is not the case), ensuring they know about SSDA and how we can help their business. Continue to be seen supporting the many businesses in the area and not be too quick to throw all eggs into Center Parcs basket.
- They should **prevent it opening**
- Not sure

- Holding hands
- **Itineraries** for guests
- SSDA could be in a partnership with Centre Parcs, **marketing and projects**.
- **Showcase the wider region** to prospective visitors
- The same as for anyone else
- Lobbying on behalf of members to **make sure visitors know about Borders business** and experiences.
- As above
- **Advocate for the nearby places** and its attractions.
- **Partnerships, collaboration, marketing**
- None. You should disband in shame. Your job was to support your members by helping us bring visitors to the region, not to bring in a massive commercial rival that runs self-contained holidays. You know no-one goes out of their places? They're not eating at local restaurants or visiting local attractions or paying for outdoor activities because they are getting everything inside the self-contained village. I cannot believe you would support this for even a split second, yet here we are.
- Exactly the same as above, get out and **let the world know about what we have**, what is available to draw people into Center Parks using it as a feeder for the entire Scottish Border area. Think outside the box. Do SOMETHING different so that we ALL can put the area onto the map at long last. Keep VisitScotland out of it, they have the north, you guys can do it.
- **Monitoring of environmental impact**.
- **Promote not only the development but the surrounding area** as a support network to the visiting experience