

Scottish Accommodation Occupancy Survey 2010

Final Report

June 2011



Introduction



Introduction (1)

- The Scottish Accommodation Occupancy Survey (SAOS) is the most up-to-date and detailed source of information for monitoring the performance of the tourist industry in Scotland.
- Information on the demand for accommodation in Scotland is collected and analysed, with results available within several weeks of the end of each month.
- The occupancy surveys have evolved since being first commissioned in the 1970's. The introduction in 1995 of an EU Directive on Tourism Statistics has also made it essential that the SAOS complies with these requirements, by providing appropriate data for the UK Occupancy Survey.

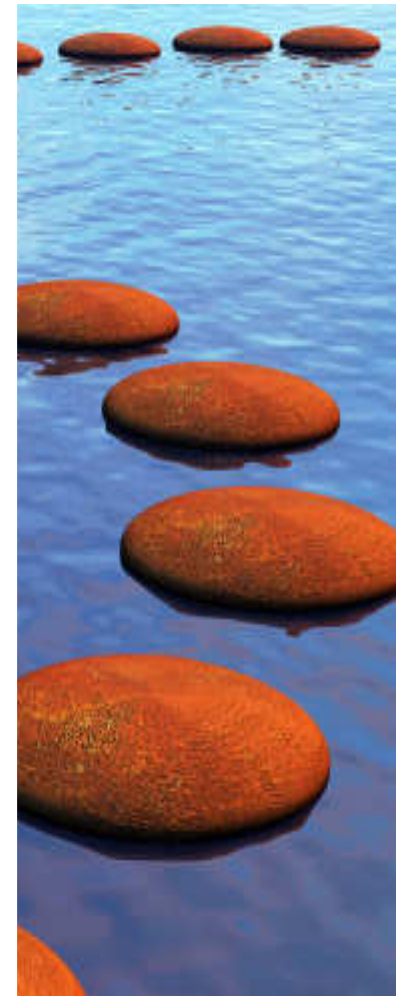
Guest Houses / Bed & Breakfasts



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Guest House and Bed and Breakfasts – methodology

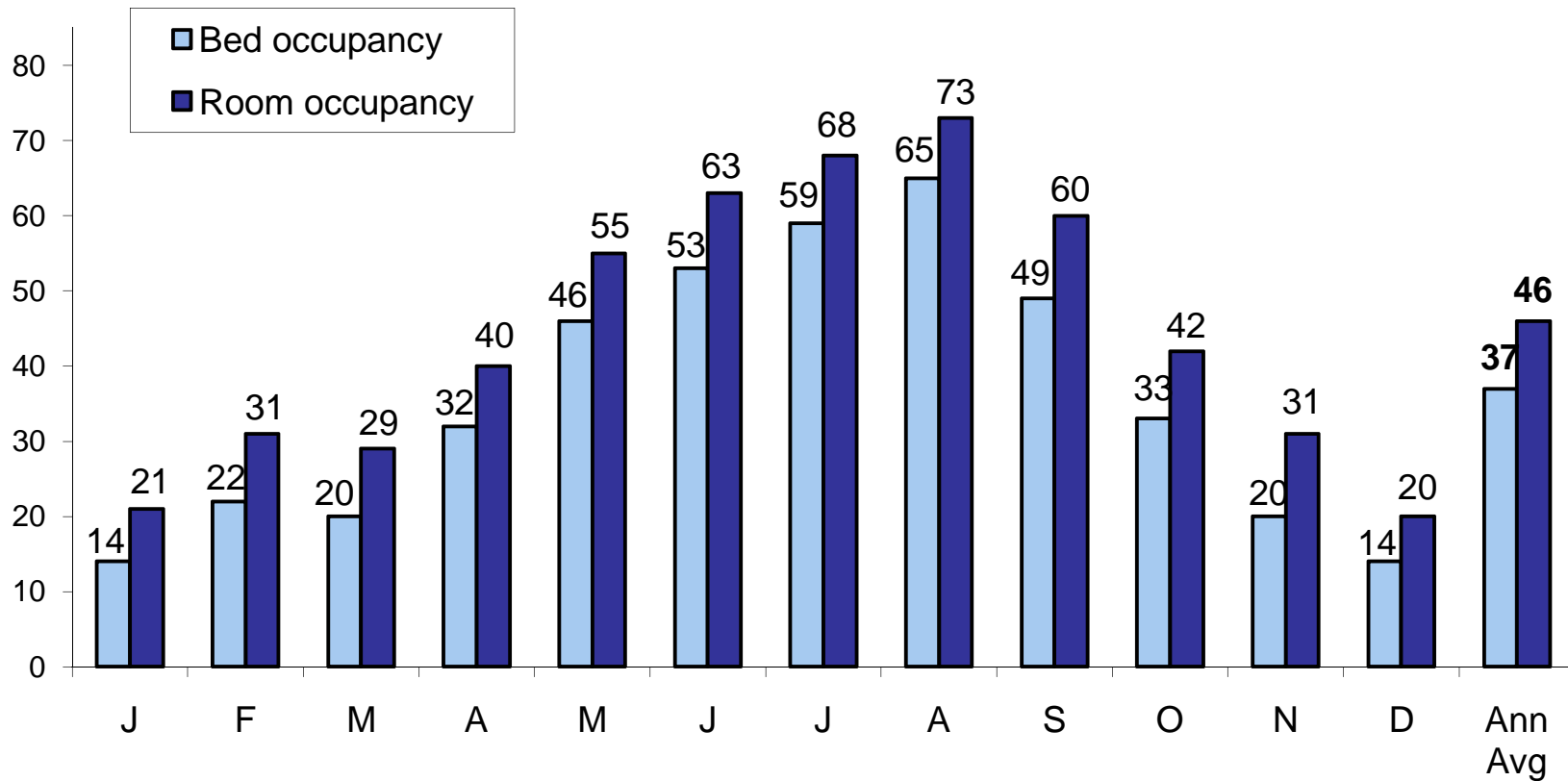
- Survey methodology replicated that used in previous years; therefore, results are comparable.
- At the start of each month, operators received a form on which they were asked to provide details, ideally on a daily basis, of:
 - number of new arrivals in their hotel;
 - total number of guests;
 - number of rooms occupied;
 - number of additional bed and rooms used (if any).
- Completed forms were returned to TNS-RI Travel & Tourism for analysis at the end of the month.
- Data for the whole of 2010 was re-run following the end of the year to include any forms returned after the monthly analysis was complete*.



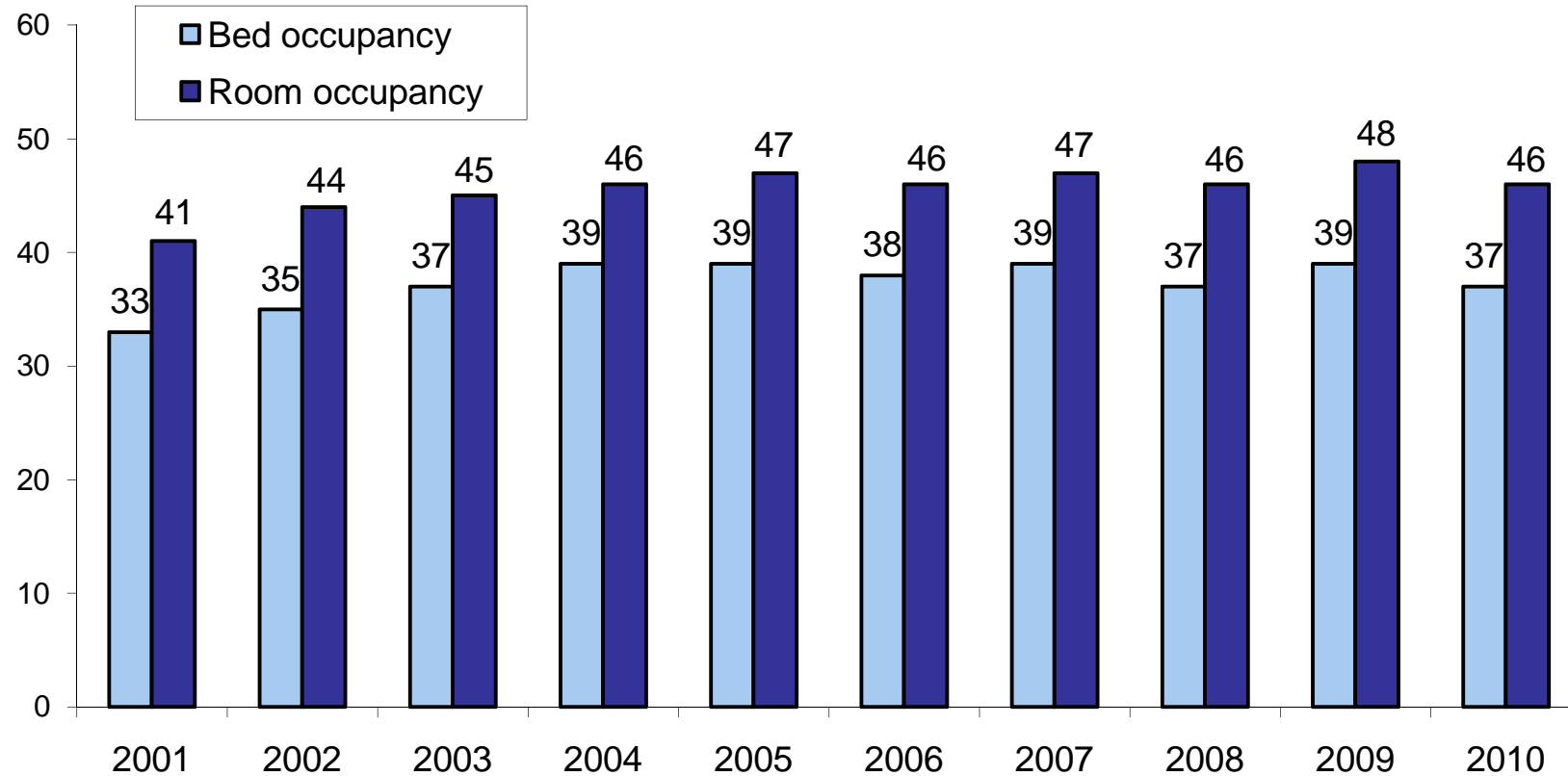
GH/B&B – sample size

| | No. of Establishments | | |
|----------------|-----------------------|--------|-----------------|
| | Making returns | Closed | Analysis sample |
| January | 164 | 62 | 102 |
| February | 162 | 56 | 106 |
| March | 167 | 31 | 136 |
| April | 164 | 15 | 149 |
| May | 162 | 4 | 158 |
| June | 161 | 2 | 159 |
| July | 161 | 0 | 161 |
| August | 162 | 0 | 162 |
| September | 160 | 1 | 159 |
| October | 150 | 11 | 139 |
| November | 154 | 39 | 115 |
| December | 151 | 52 | 99 |
| Average | 160 | 23 | 137 |

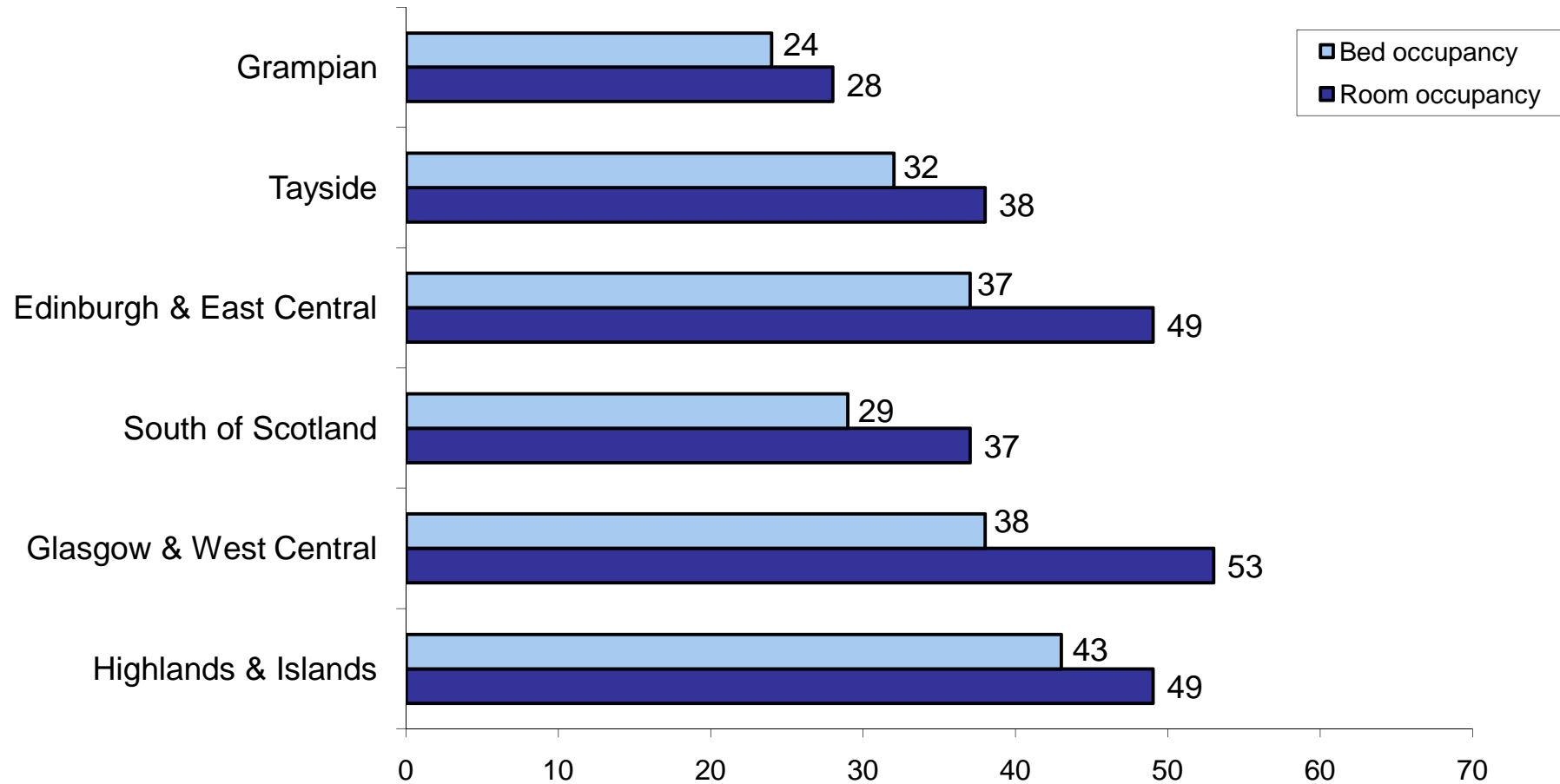
GH/B&B – monthly bed & room occupancy (%)



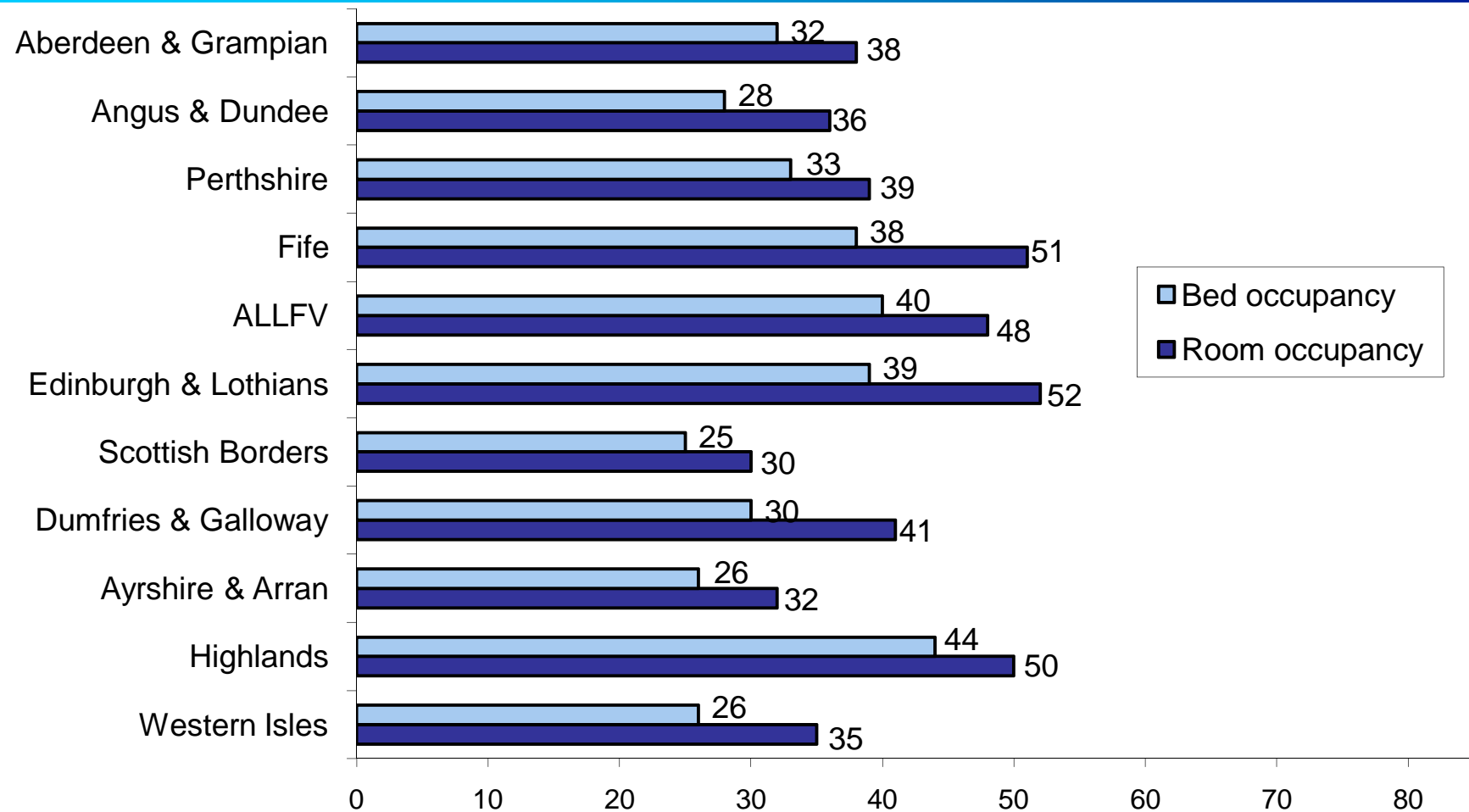
GH/B&B – trends in occupancy (annual averages %)



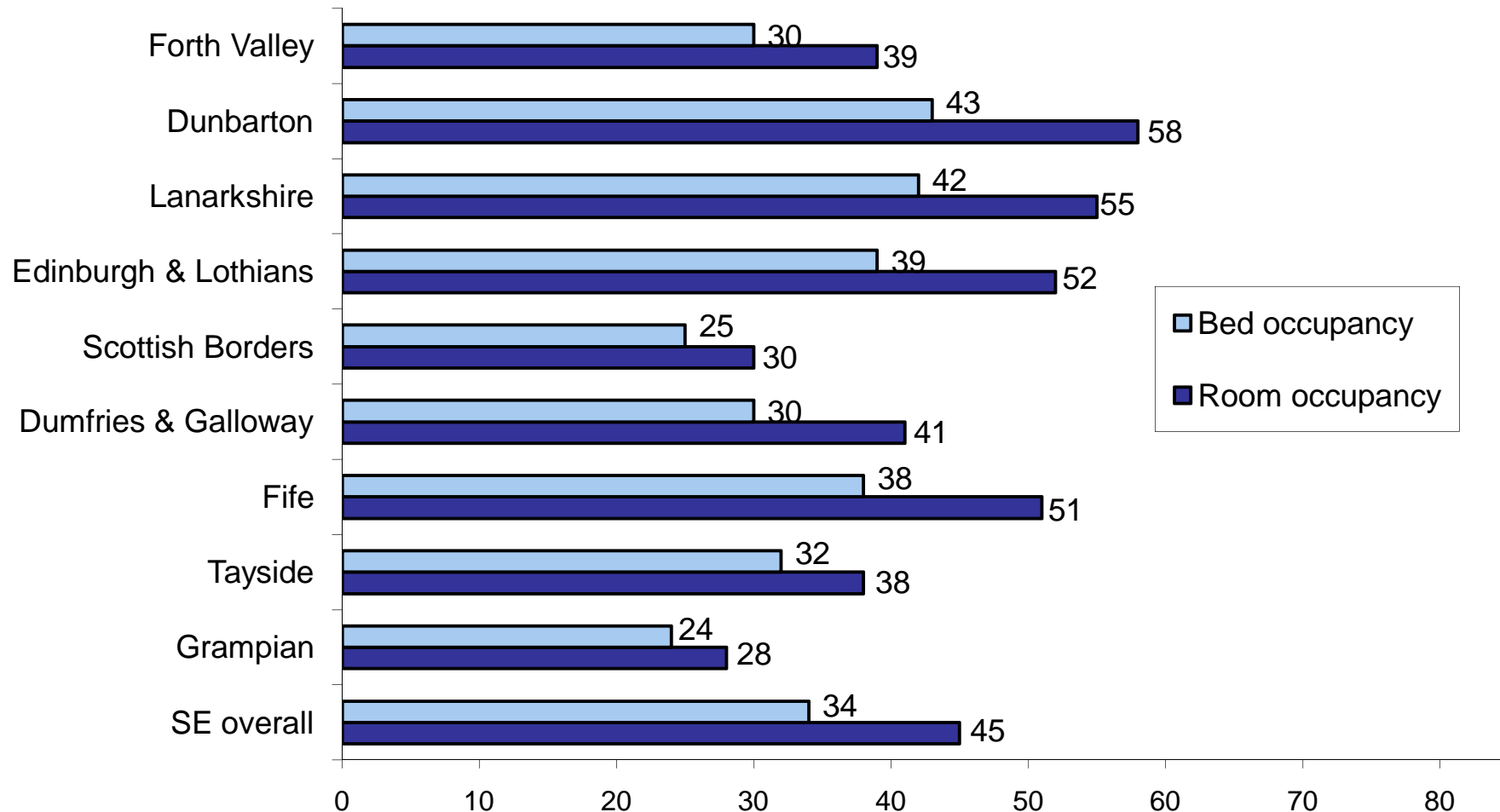
GH/B&Bs – occupancy by area of Scotland (%)



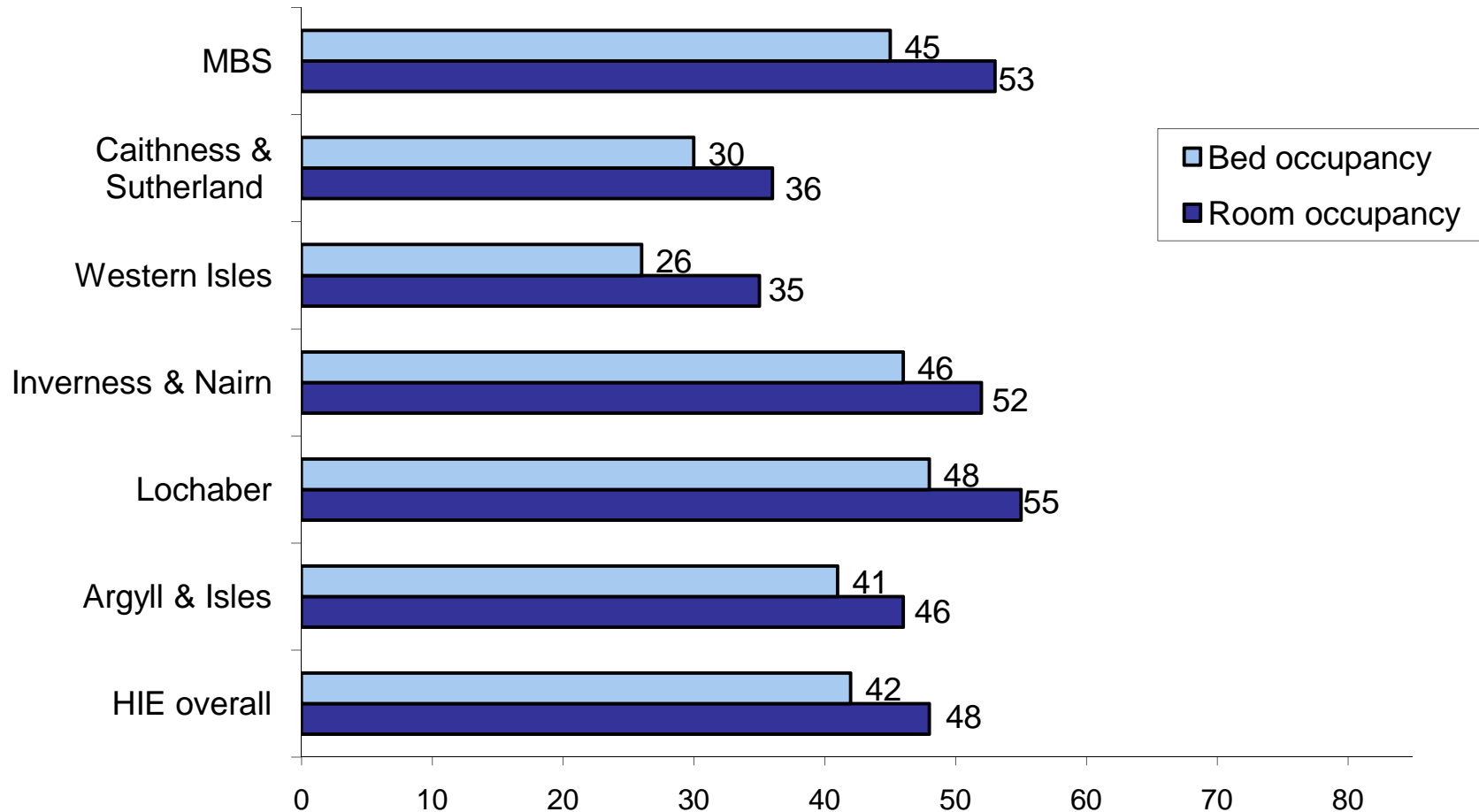
GH/B&B – occupancy by former ATB in Scotland (%)



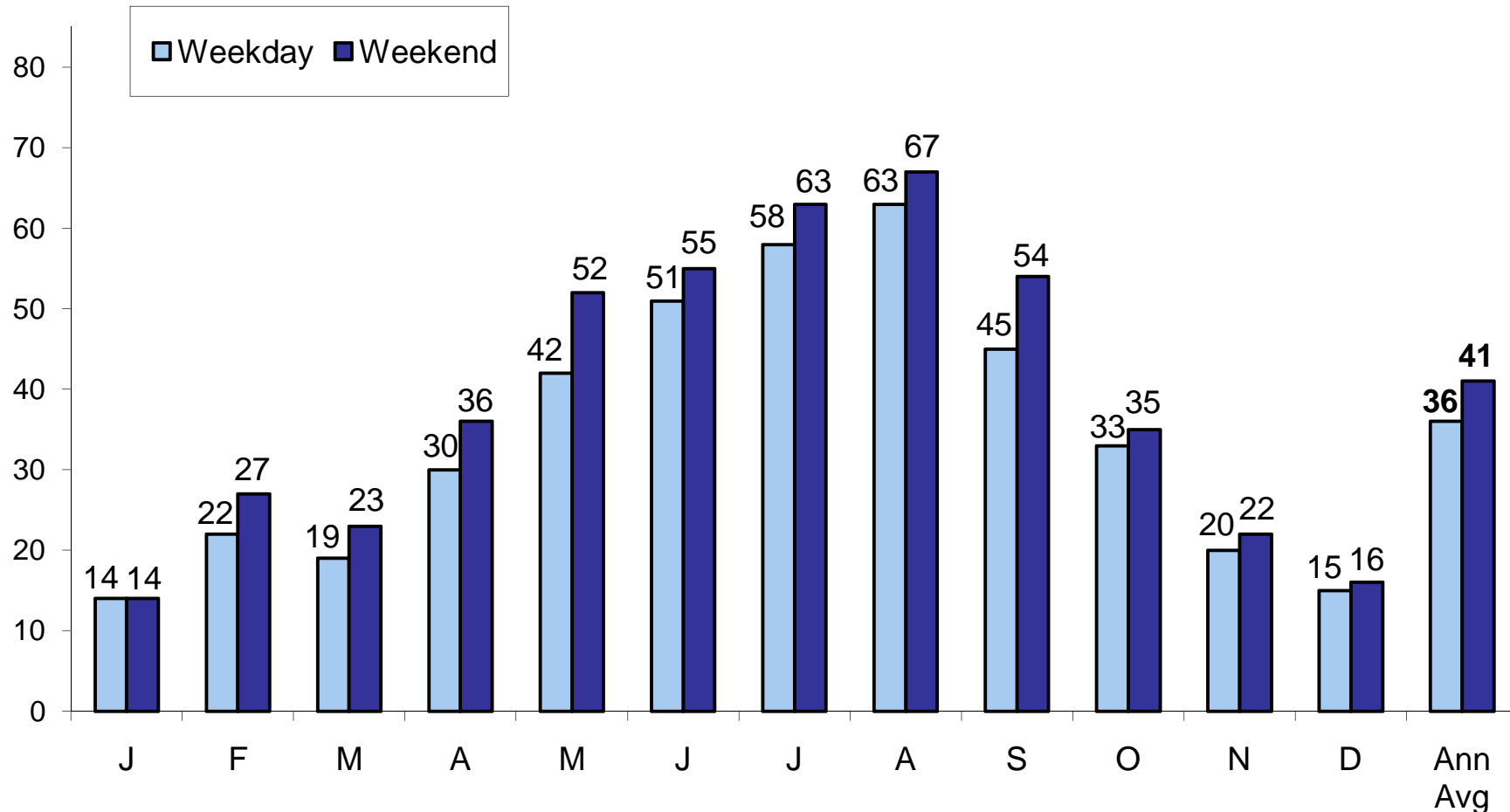
GH/B&B – occupancy within the Scottish Enterprise area (annual averages %)



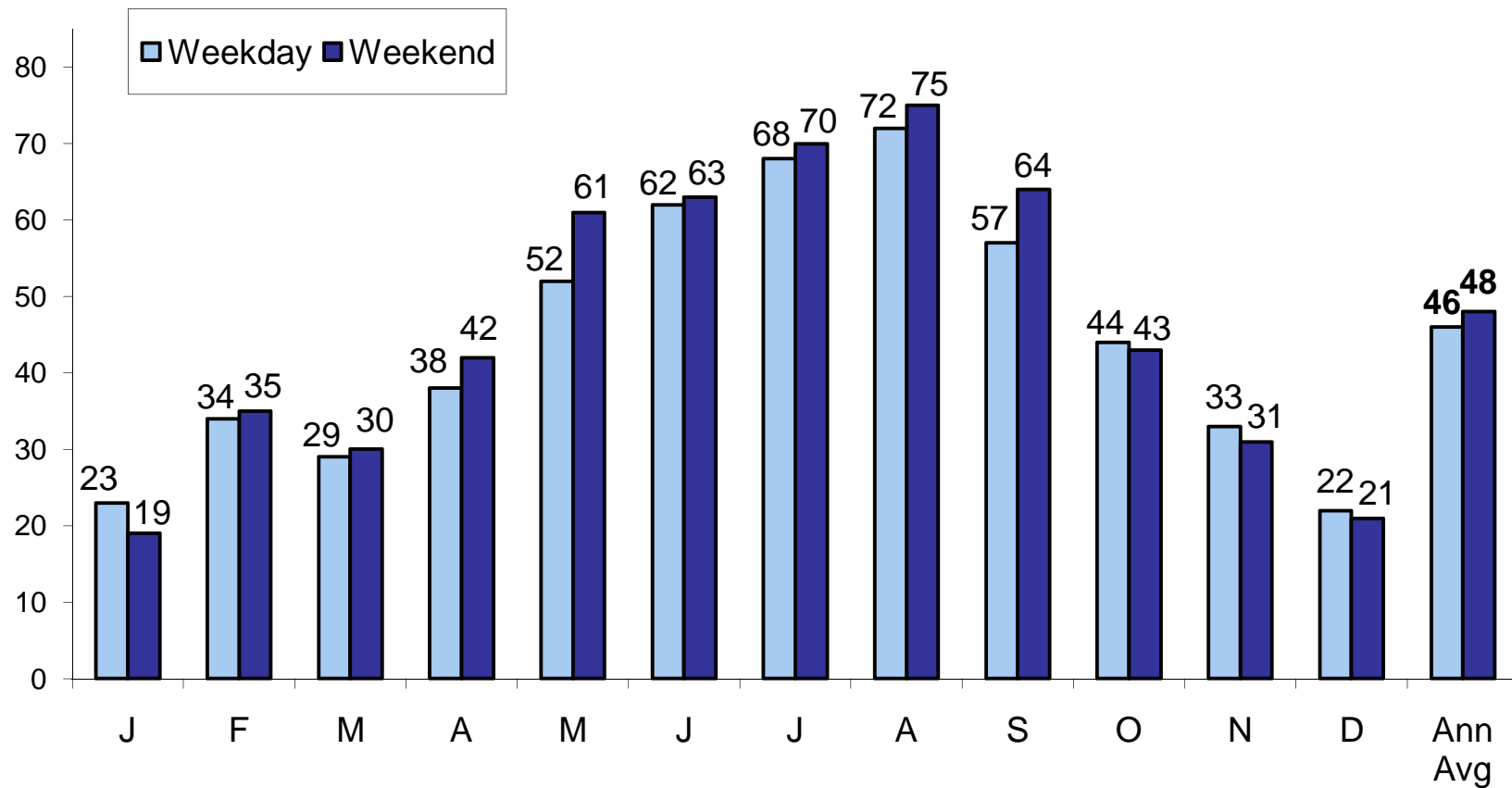
GH/B&B – occupancy within the Highland and Island Enterprise area (annual averages %)



GH/B&B – monthly weekday/weekend bed occupancy (%)



GH/B&B – monthly weekday/weekend room occupancy (%)



GH/B&B – regional weekday/weekend occupancy (annual averages %)

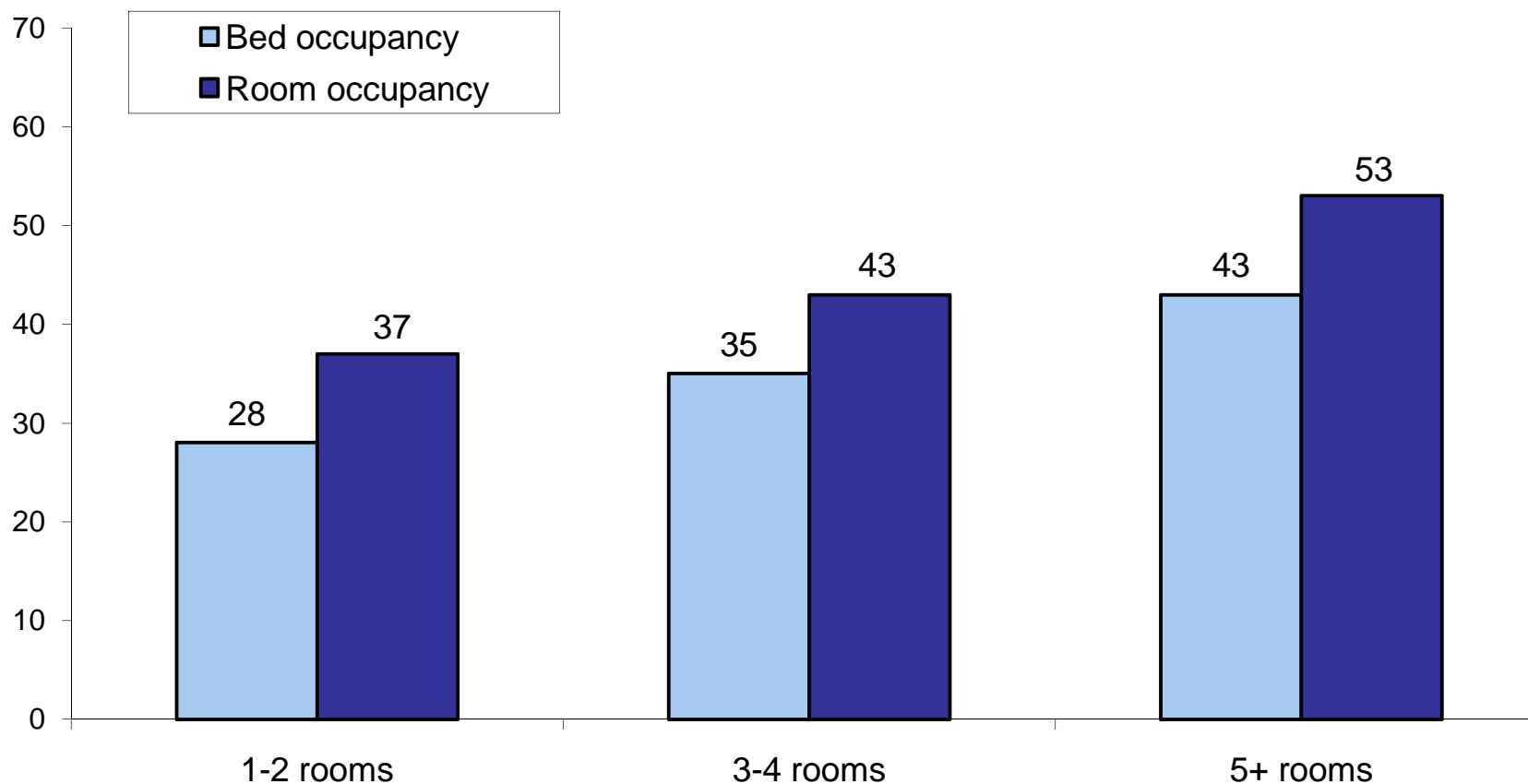
Bed Occupancy

| | Weekday | Weekend |
|---------------------|---------|---------|
| Aberdeen & Grampian | 34 | 34 |
| Angus & Dundee | 32 | 25 |
| Perthshire | 31 | 38 |
| Fife | 39 | 39 |
| ALLFV | 38 | 45 |
| Edinburgh & Lothian | 34 | 47 |
| Ayrshire & Arran | 23 | 33 |
| Scottish Borders | 24 | 28 |
| Dumfries & Galloway | 27 | 34 |
| Highlands | 44 | 47 |
| Western Isles | 31 | 26 |

GH/B&B – weekday/weekend occupancy trends (annual averages %)

| | Bed Occupancy | | Room Occupancy | |
|------|---------------|---------|----------------|---------|
| | Weekday | Weekend | Weekday | Weekend |
| 2001 | 32 | 34 | 41 | 41 |
| 2002 | 34 | 38 | 43 | 44 |
| 2003 | 35 | 40 | 44 | 45 |
| 2004 | 37 | 42 | 45 | 48 |
| 2005 | 37 | 43 | 46 | 49 |
| 2006 | 37 | 41 | 46 | 47 |
| 2007 | 38 | 42 | 47 | 48 |
| 2008 | 36 | 40 | 46 | 46 |
| 2009 | 38 | 42 | 48 | 50 |
| 2010 | 36 | 41 | 46 | 48 |

GH/B&B – bed & room occupancy by size (annual averages %)

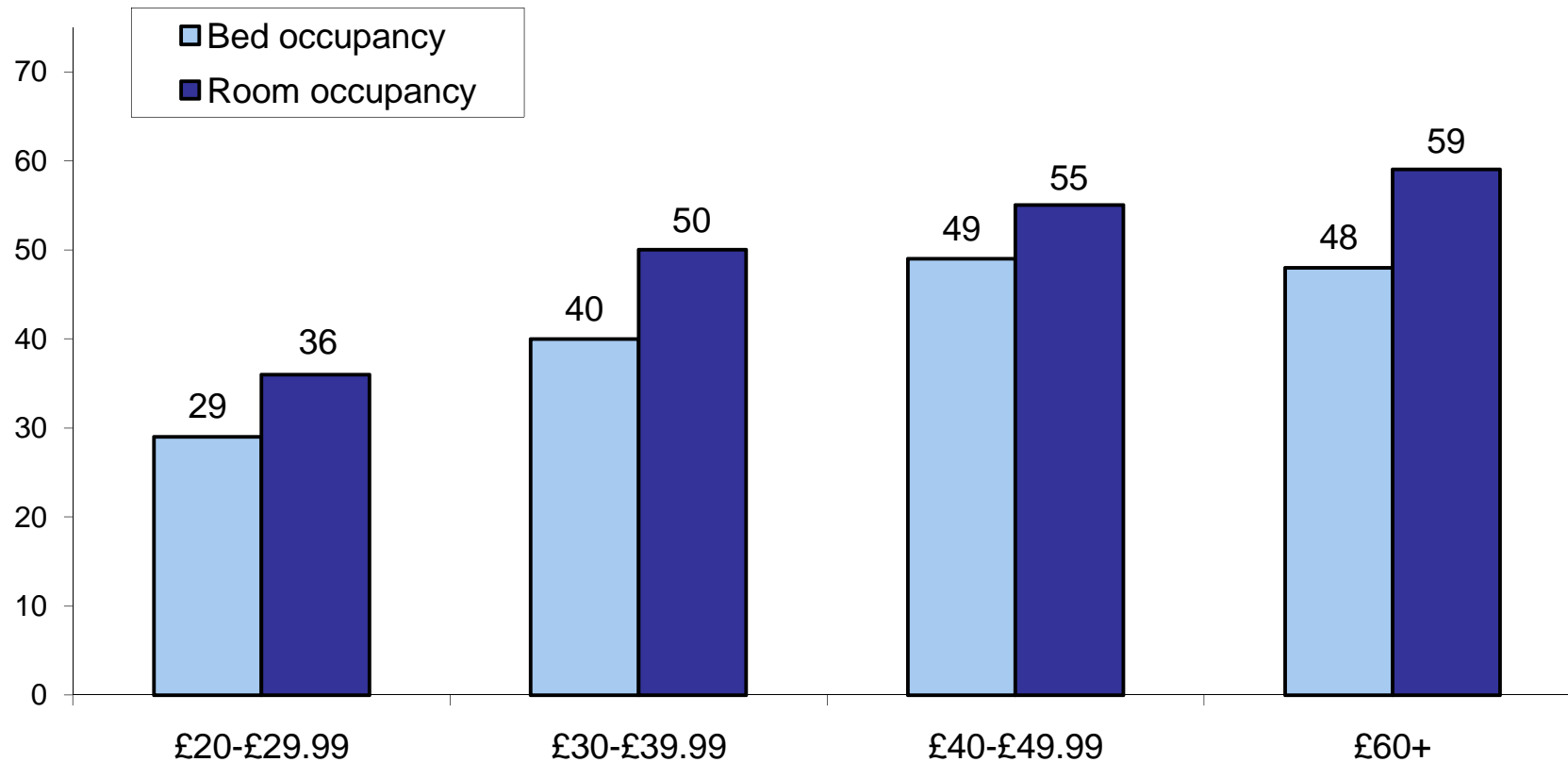


GH/B&B – bed occupancy trends by size (annual averages %)

Annual Average Bed Occupancy

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| 1-2 rooms | 22 | 25 | 28 | 29 | 34 | 28 | 30 | 28 | 30 | 28 |
| 3-4 rooms | 32 | 35 | 38 | 39 | 38 | 39 | 39 | 35 | 38 | 35 |
| 5+ rooms | 40 | 41 | 41 | 43 | 43 | 43 | 44 | 43 | 44 | 43 |

GH/B&B – bed & room occupancy by tariff (annual averages %)

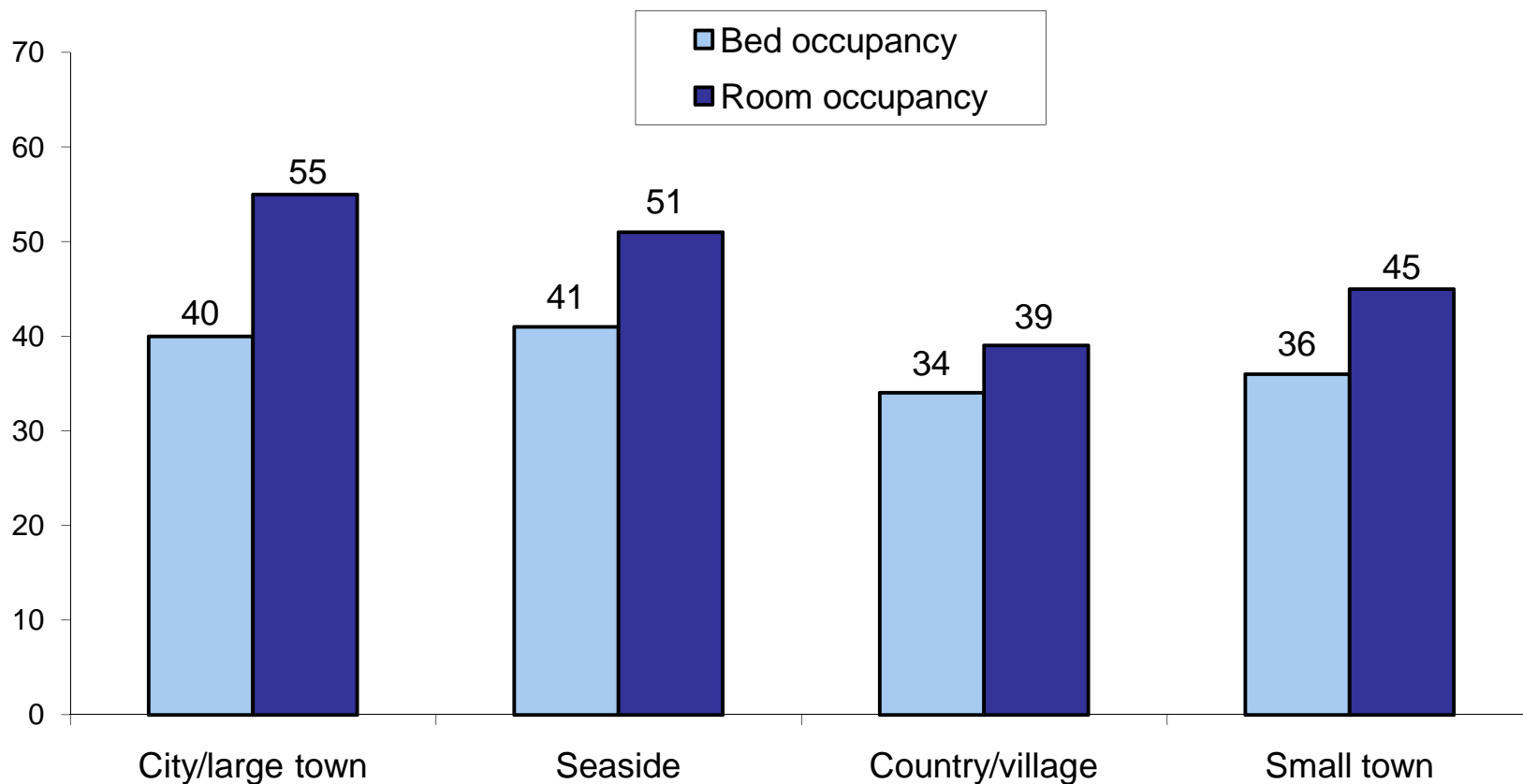


GH/B&B – occupancy trends by tariff (annual averages %)

Annual Average Bed Occupancy

| | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| £20-£29.99 | 40 | 38 | 31 | 36 | 32 | 28 | 29 |
| £30-£39.99 | 51 | 50 | 39 | 47 | 43 | 31 | 40 |
| £40-£49.99 | 43 | 48 | 47 | 47 | 40 | 45 | 49 |
| £60+ | * | * | * | 40 | * | * | 48 |

GH/B&B – bed & room occupancy by location (annual averages %)

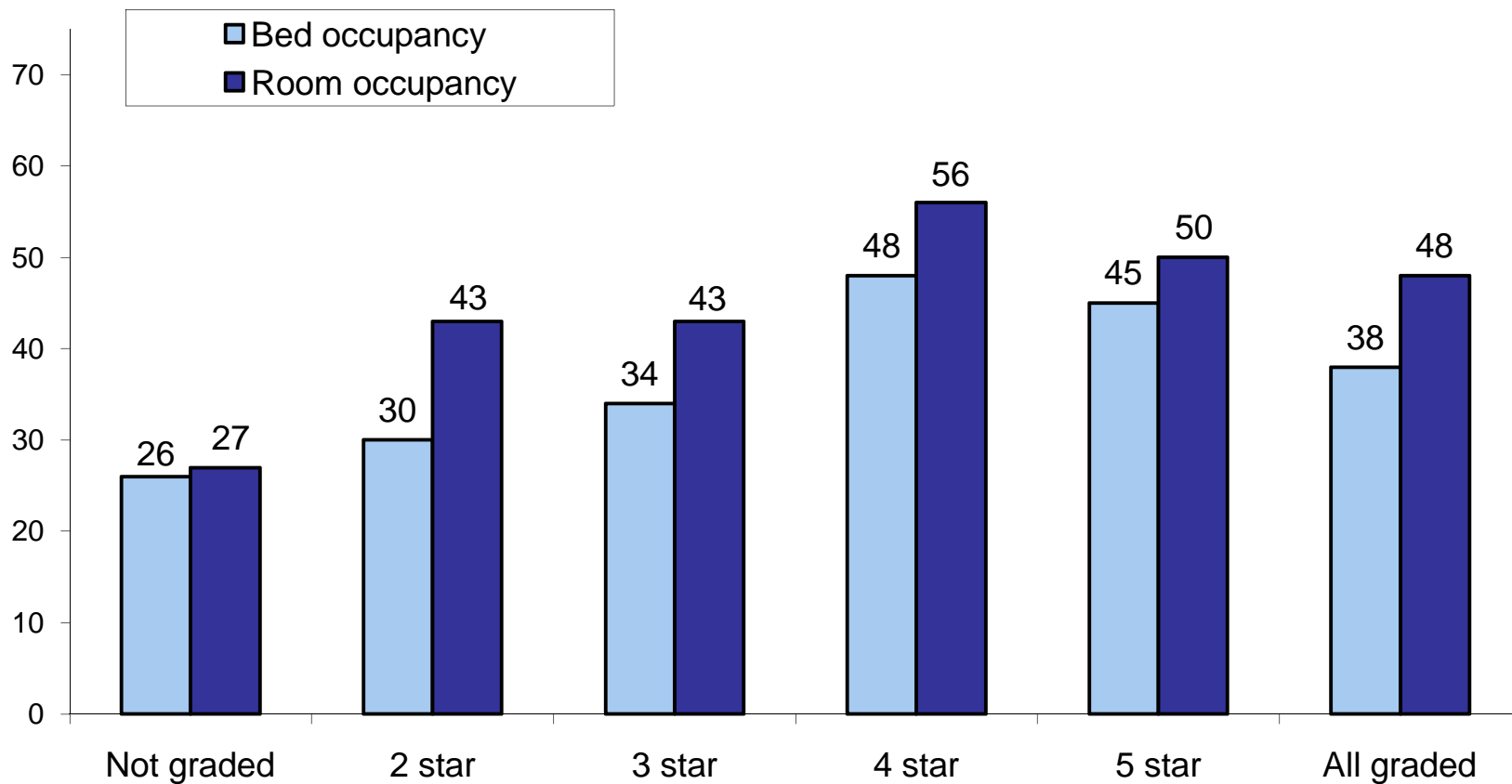


GH/B&B – bed occupancy trends by location (annual averages %)

Annual Average Bed Occupancy

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|-----------------|------|------|------|------|------|------|------|------|------|------|
| City/large town | 45 | 47 | 46 | 48 | 47 | 47 | 49 | 45 | 42 | 40 |
| Small town | 31 | 35 | 37 | 40 | 40 | 37 | 36 | 35 | 39 | 36 |
| Seaside | 33 | 32 | 37 | 38 | 37 | 40 | 41 | 40 | 41 | 41 |
| Country/village | 27 | 31 | 33 | 34 | 36 | 34 | 36 | 33 | 36 | 34 |

GH/B&B – bed & room occupancy by grading (annual averages %)



GH/B&B – bed occupancy trends by grading (annual averages %)

| | Annual Average Bed Occupancy | | | | | | | | |
|------------|------------------------------|------|------|------|------|------|------|------|------|
| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
| Not graded | 27 | 26 | 24 | 26 | 28 | 25 | 23 | 26 | 26 |
| 2 star | 31 | 35 | 35 | 32 | 32 | 33 | 27 | 31 | 30 |
| 3 star | 36 | 37 | 39 | 40 | 37 | 38 | 31 | 36 | 34 |
| 4 star | 42 | 44 | 46 | 46 | 45 | 47 | 36 | 50 | 48 |
| 5 star | * | * | * | * | * | * | * | * | 45 |
| All graded | 36 | 39 | 40 | 41 | 39 | 41 | 39 | 41 | 38 |

GH/B&B – room occupancy trends by grading (annual averages %)

Annual Average Room Occupancy

| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
|------------|------|------|------|------|------|------|------|------|------|
| Not graded | 33 | 31 | 26 | 30 | 32 | 28 | 27 | 27 | 27 |
| 2 star | 40 | 44 | 42 | 42 | 41 | 43 | 46 | 45 | 43 |
| 3 star | 45 | 45 | 48 | 49 | 46 | 47 | 45 | 47 | 43 |
| 4 star | 48 | 51 | 52 | 53 | 52 | 54 | 54 | 58 | 56 |
| 5 star | * | * | * | * | * | * | * | * | 50 |
| All graded | 44 | 46 | 48 | 49 | 48 | 49 | 48 | 51 | 48 |

GH/B&B – average length of stay (nights)

| | Average length of stay | | | | | | | | |
|---------------------|------------------------|------------|------------|------------|------------|------------|------------|------------|------------|
| | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 |
| Aberdeen & Grampian | 1.9 | 1.9 | 1.8 | 1.8 | 1.8 | 1.9 | 1.9 | 1.8 | 1.8 |
| Angus & Dundee | 2.2 | 2.1 | 2.1 | 2.0 | 2.0 | 2.3 | 2.1 | 2.2 | 2.2 |
| Perthshire | 1.6 | 1.6 | 1.7 | 1.6 | 1.6 | 1.7 | 1.7 | 1.7 | 1.6 |
| Fife | 1.9 | 1.8 | 1.8 | 2.0 | 1.9 | 2.0 | 1.9 | 2.0 | 2.2 |
| ALLFV | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 1.9 | 1.8 | 1.8 | 1.8 |
| Edinburgh & Lothian | 2.1 | 2.1 | 2.2 | 2.1 | 2.1 | 2.3 | 2.1 | 2.0 | 2.1 |
| Scottish Borders | 1.9 | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 1.9 | 1.8 | 1.7 |
| Dumfries & Galloway | 1.9 | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 1.8 | 1.7 | 1.7 |
| Highlands | 1.7 | 1.7 | 1.6 | 1.7 | 1.6 | 1.6 | 1.7 | 1.6 | 1.6 |
| Western Isles | 2.0 | 1.9 | 1.8 | 1.7 | 1.7 | 1.8 | 2.0 | 1.9 | 2.0 |
| Total | 1.9 | 1.8 | 1.9 | 1.9 | 1.9 | 1.9 | 1.9 | 1.8 | 1.8 |

So what did this mean for guest houses and bed and breakfasts during 2010?

- In 2009, increases in occupancy levels were recorded for the Guest House and B&B sector as guests appeared to select this type of accommodation over more expensive options such as hotels.
- However, in 2010, occupancy levels in this sector decreased, indicating that some travellers who switched to this type of accommodation in 2009 may have had the confidence to return to alternatives in 2010.
- Some notable highlights are:
 - Room occupancy rates in particular were lower than in the previous year, particularly in the first half of 2010.
 - The relationship between establishment size and occupancy levels was again evident.
 - While graded establishments recorded higher occupancy levels than non-graded, the graded establishments recorded a decrease between 2009 and 2010 while the rates for non-graded establishments remained equal to those recorded in the previous year.
- Occupancy rates were higher in the Highlands and Islands (HIE) than in the Scottish Enterprise area. There was also a smaller difference between the annual average bed and room occupancy rates for HIE indicating a greater proportion of leisure visitors to this area.