



Scottish Accommodation Occupancy Survey Annual Report 2015



Contents

1. What is the Scottish Accommodation Occupancy Survey?	03
2. Hotels	09
3. Guest Houses and B&Bs	16
4. Self-catering	22
5. Caravan & camping parks	29
6. Hostels	34
7. Appendices	00

1. What is the Scottish Accommodation Occupancy Survey?



Survey introduction

The most up-to-date and detailed source of information for monitoring the performance of the tourist industry in Scotland
Information is collected and analysed, with results available within several weeks of the end of each month

This report presents the key themes coming from the 2015 data for the five main accommodation sectors* (shown below)
Detailed data tables are available as an appendix to this report



Hotels



Guest Houses and B&Bs



Caravan & camping parks



Self-catering



Hostels

*Where available, comparative figures from previous years are also presented throughout the report. Separate sector specific reports are also available. Throughout the reports the following abbreviations have been used: SE = Scottish Enterprise area, HIE = Highlands and Islands Enterprise area, MBSE = Moray, Badenoch and Strathspey Enterprise area, ALLFV = Argyll, Loch Lomond and Forth Valley area

Methodology

At the start of each month in 2015, operators received a form. On the form, the information requested varied by sector, as follows:



Serviced

Arrivals;
Guests (including business);
Rooms occupied;
Additional beds and rooms used (if any)



Self-catering

Lets;
Number of nights let;
Tariff;
Party size



Caravan/ Camping Parks

Number of pitches;
Pitches let;
Tariff per pitch



Hostels

Arrivals (UK/ Overseas);
Guests (UK/ Overseas);
Additional beds used (if any)

Completed forms were returned to TNS Travel and Tourism for analysis at the end of the month. Data for the whole of 2015 was re-run following the end of the year to include any forms returned after the monthly analysis was complete

The figures reported are based on the annual re-run and therefore may vary from those initially produced in the monthly summaries

The benefits of participation

Accommodation demand

Comprehensive and up-to-date information on the demand for accommodation in Scotland

Key performance indicator

Participants receive monthly reports with a record of their own occupancy rates, those of similar businesses in their area and in Scotland as a whole

Comprehensive Up-to-date

The monthly reports are an invaluable business tool, for example, in business planning, loan/grant applications etc. Participation comes at no cost – all materials and results are provided free of charge

Information provided is treated in the strictest confidence, with data only publicly available in aggregate form. The identity of participants is strictly confidential

Taking part

Getting started

On joining the survey and annually thereafter, participants supply basic information about their establishment

Monthly data

Monthly occupancy data can be supplied using a number of methods including online, email, post or fax

Results sent

All participants receive an individual results sheet, comparing their data with their area and Scotland overall

Monthly summary sheets are also provided giving details of occupancy rates in Scotland by variables such as size, location, classification etc

Online participants can also undertake their own additional analysis using a dedicated online portal

To learn more/ take part:

Contact the TNS Occupancy Team:
e: occsurvey@tnsglobal.com
T: 01312433900
Or email research@visitscotland.com

Occupancy levels by sector

Across all sectors, **Hotels** have the highest occupancy rates – in 2015, room occupancy rates were 71% and bed occupancy was 52%

Guest House and B&Bs had a 47% room occupancy rate and a 40% bed occupancy rate in 2015

For **Self-catering** properties, unit occupancy was 48% over 2015

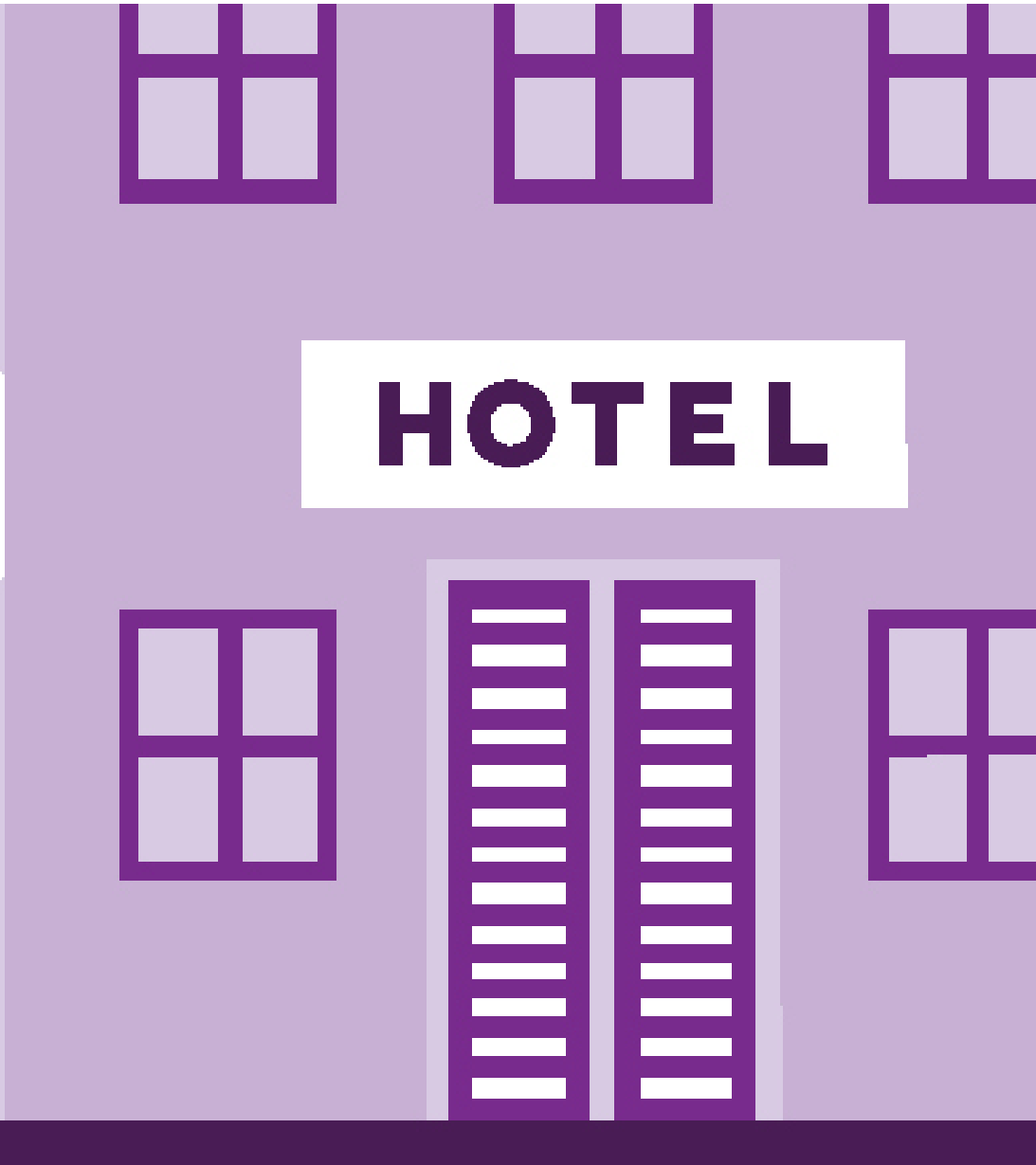
Pitch occupancy for **Parks** stood at 41% in 2015

For 2015, **Hostels** had a bed occupancy rate of 22% across the year

2. Hotels



HOTEL



Hotels in brief



Hotel occupancy levels have remained consistent over the last three years

Both room and bed occupancy rates were higher in the summer months, with room occupancy at around 80% capacity between June and September

Occupancy rates were higher for more expensive rooms. Hotels with tariffs of £60+ had an room occupancy rate of 74% in 2015, compared to 53% for rooms in the £30-£39.99 tariff during the same period



Room occupancy for hotels in city/large town locations was 77% for 2015

Seaside hotels saw growth between 2014 and 2015, with room occupancy rising from 60% to 66%

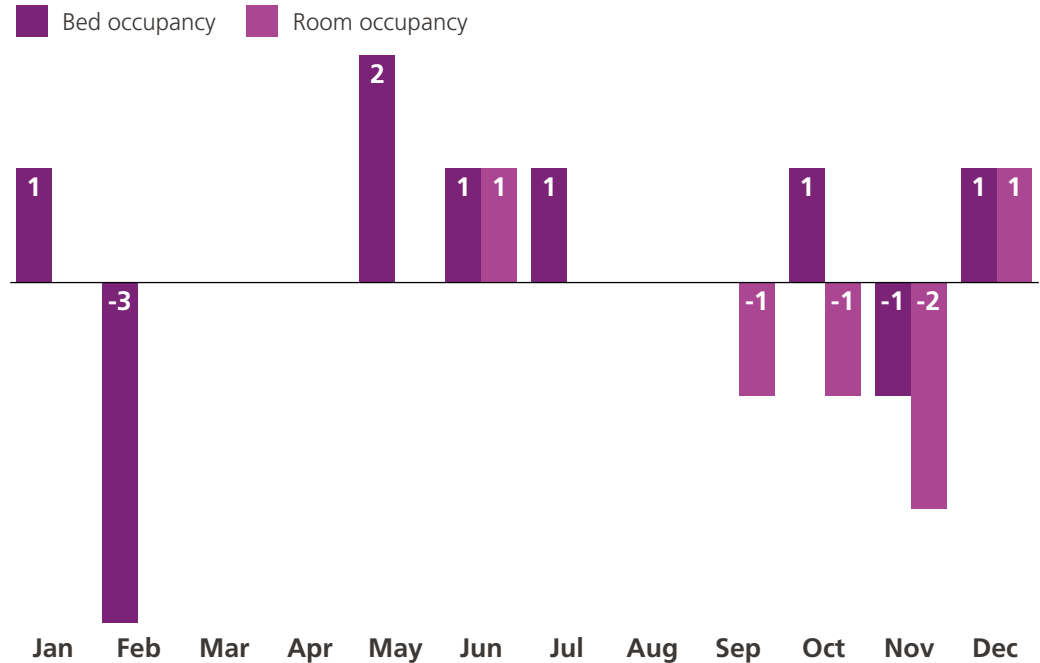
Occupancy remains consistent over time



At the overall level, both bed and room occupancy rates have remained broadly consistent between 2013 and 2015, with small increases in room occupancy

	2013	2014	2015
 Bed occupancy (annual averages)	51%	52%	52%
Percentage point change	+1	NO CHANGE	
	2013	2014	2015
 Room occupancy (annual averages)	68%	70%	71%
Percentage point change	+3	+1	

2014-2015 (percentage point change)



Monthly room and bed occupancy rates were consistent in 2014 and 2015. In the summer months of 2015, room occupancy levels were highest at around 80%

Occupancy levels increase in line with tariff band

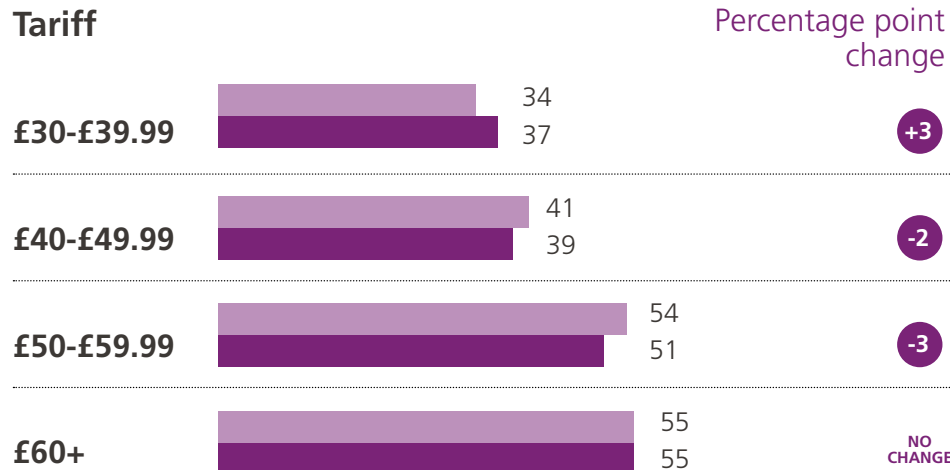


Room and bed occupancy is higher for the more expensive rooms than lower tariff rooms



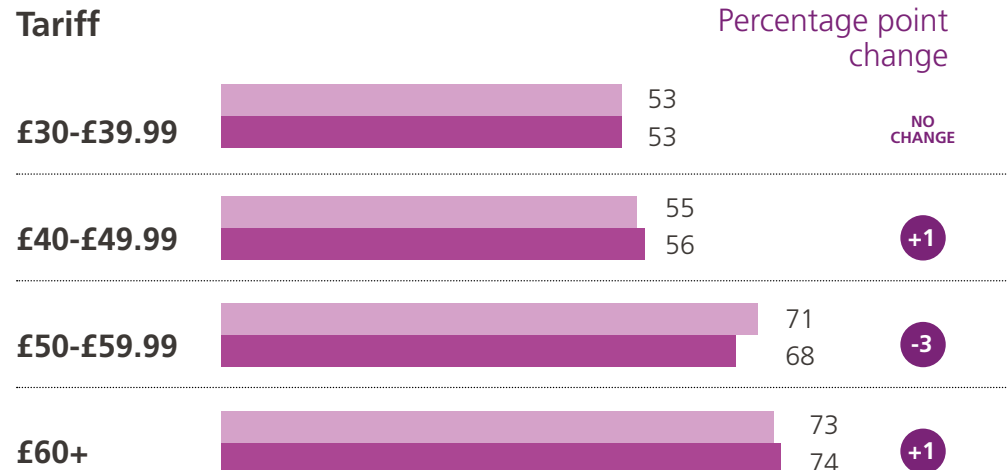
Bed occupancy

2014 2015



Room occupancy

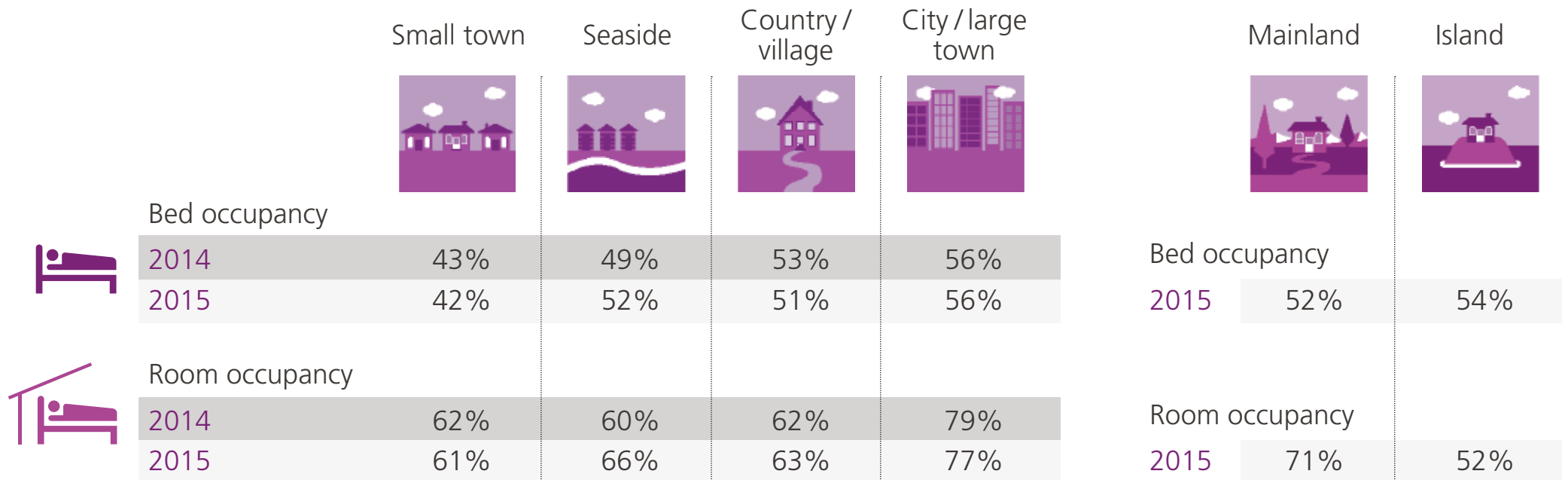
2014 2015



Increased seaside occupancy



Occupancy rates for hotels are generally consistent with 2014. Occupancy rates for hotels in seaside areas have significantly increased in 2015, notably for room occupancy



Room occupancy rates are higher for mainland hotels than for island hotels

Area profiles

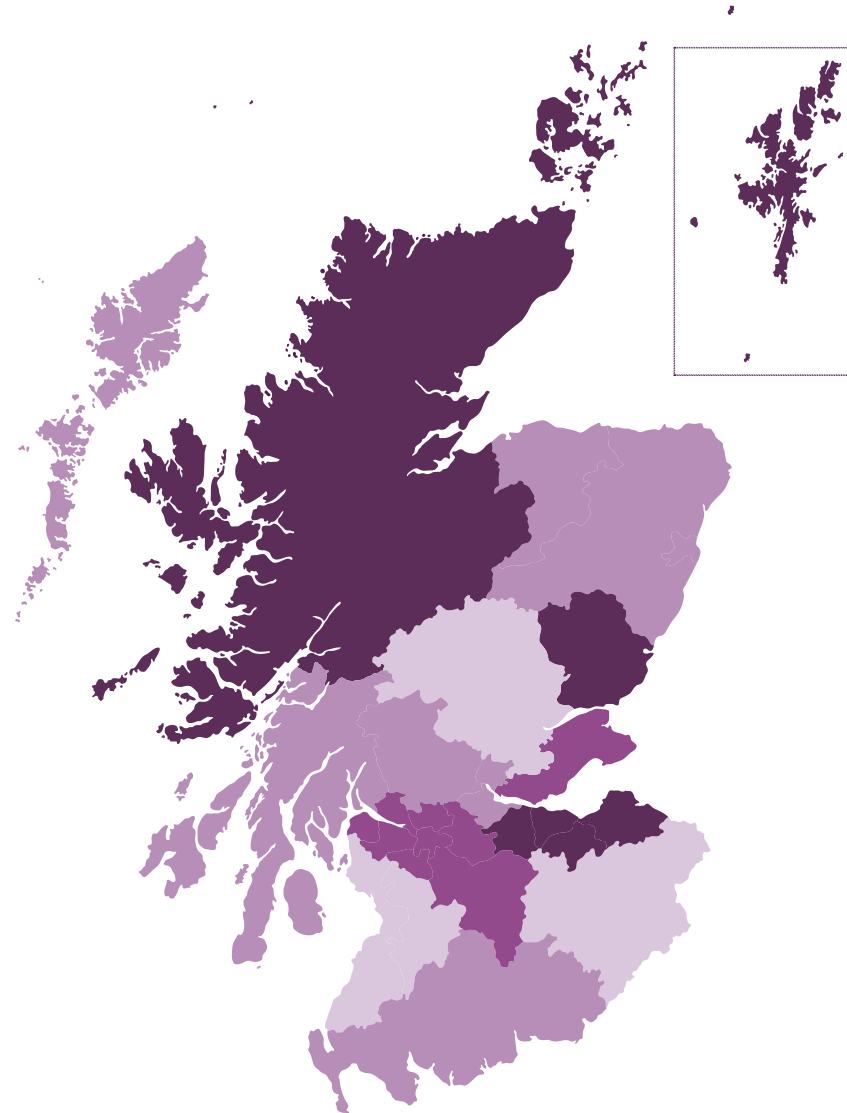


Largest percentage point (2014-2015) increases for:

Argyll, Loch Lomond & Forth Valley

Bed occupancy +6

Room occupancy +7



Bed occ % Room occ%

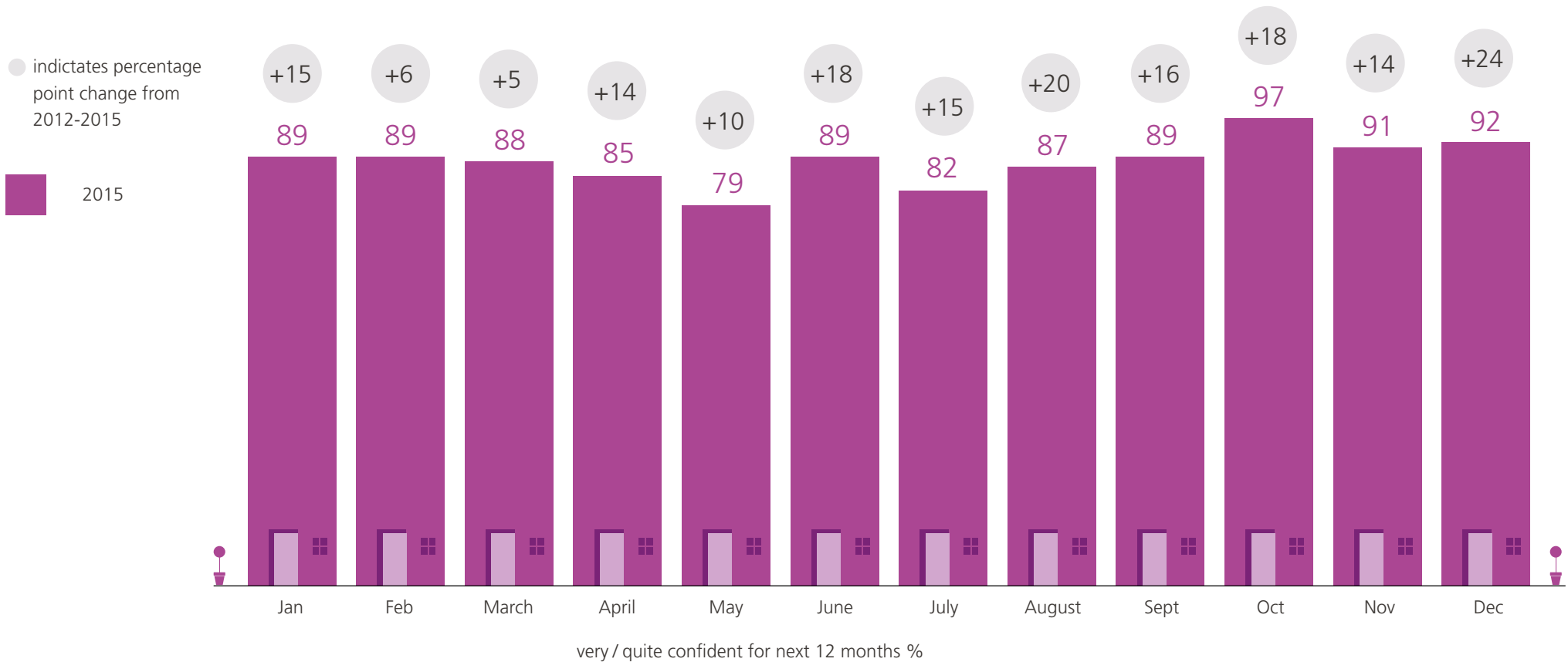
	Bed occ %	Room occ%
Aberdeen & Grampian	40	67
Angus & City of Dundee	47	66
Perthshire	49	66
Fife	56	66
ALLFV*	58	65
Edinburgh & Lothian	62	82
Glasgow & Clyde Area	53	79
Ayrshire & Arran	50	65
Scottish Borders	44	58
Dumfries & Galloway	38	48
Highlands	49	64
Western Isles	43	60

*Argyll, Loch Lomond & Forth Valley

Growing levels of confidence



Business confidence has risen considerably for most months over the last four years



Please note that not all establishments provide this information

3. Guest Houses and B&Bs



Guest-houses and B&Bs summary



Bed occupancy rates have remained consistent between 2013 and 2015

The summer months of 2015 were the busiest months of the year for GH and B&Bs, with bed occupancy rates peaking between May to September and being quieter in at the start and towards the end of the year

Properties charging £50-£59.99 per night have seen significant growth in bed occupancy rates between 2013 and 2015

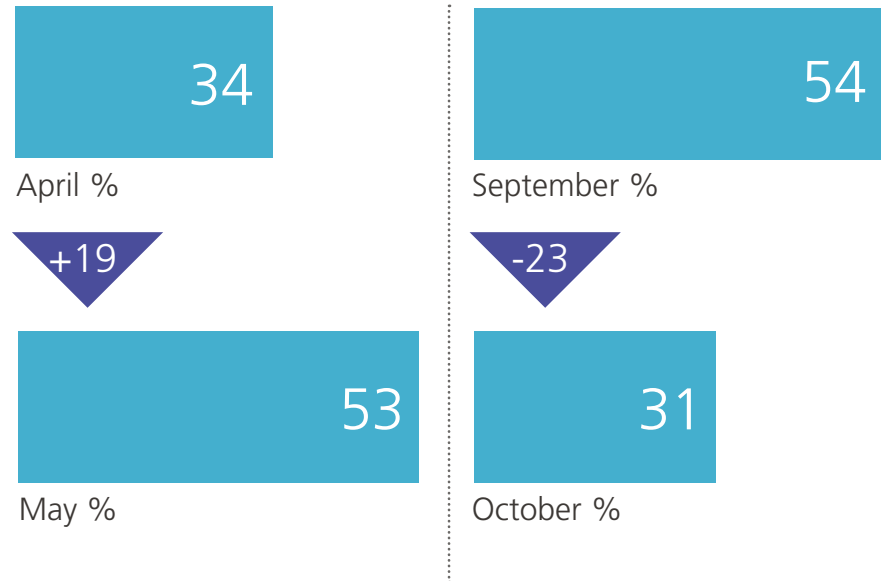
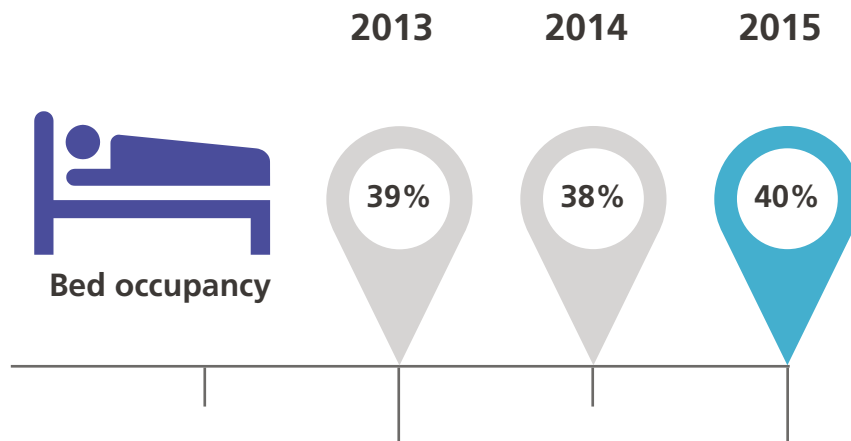
Bed occupancy rates tended to be higher in seaside and countryside/village locations in 2015 than in city/large towns and small towns

Consistent annual occupancy levels and seasonal variations



The 2015 annual average bed occupancy rate recorded was very similar to that recorded in previous years

Bed occupancy rates are highest for the summer months, with months outside the traditional summer season having lower rates



Size and tariff

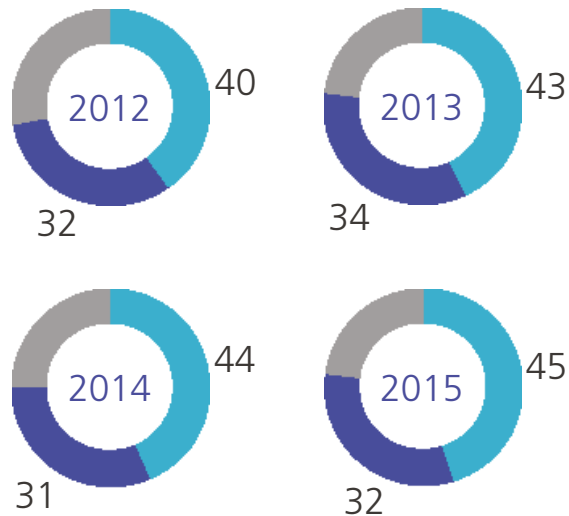


Size of establishment

Bed occupancy figures for smaller and larger establishments have seen small, steady increases year on year

Bed occupancy (%)

- 4-10 rooms
- 1-3 rooms
- Other



Tariff

Continuing the trend from previous years, the bed occupancy levels for the £50-£59.99 tariff have increased significantly from 2013 to 2015

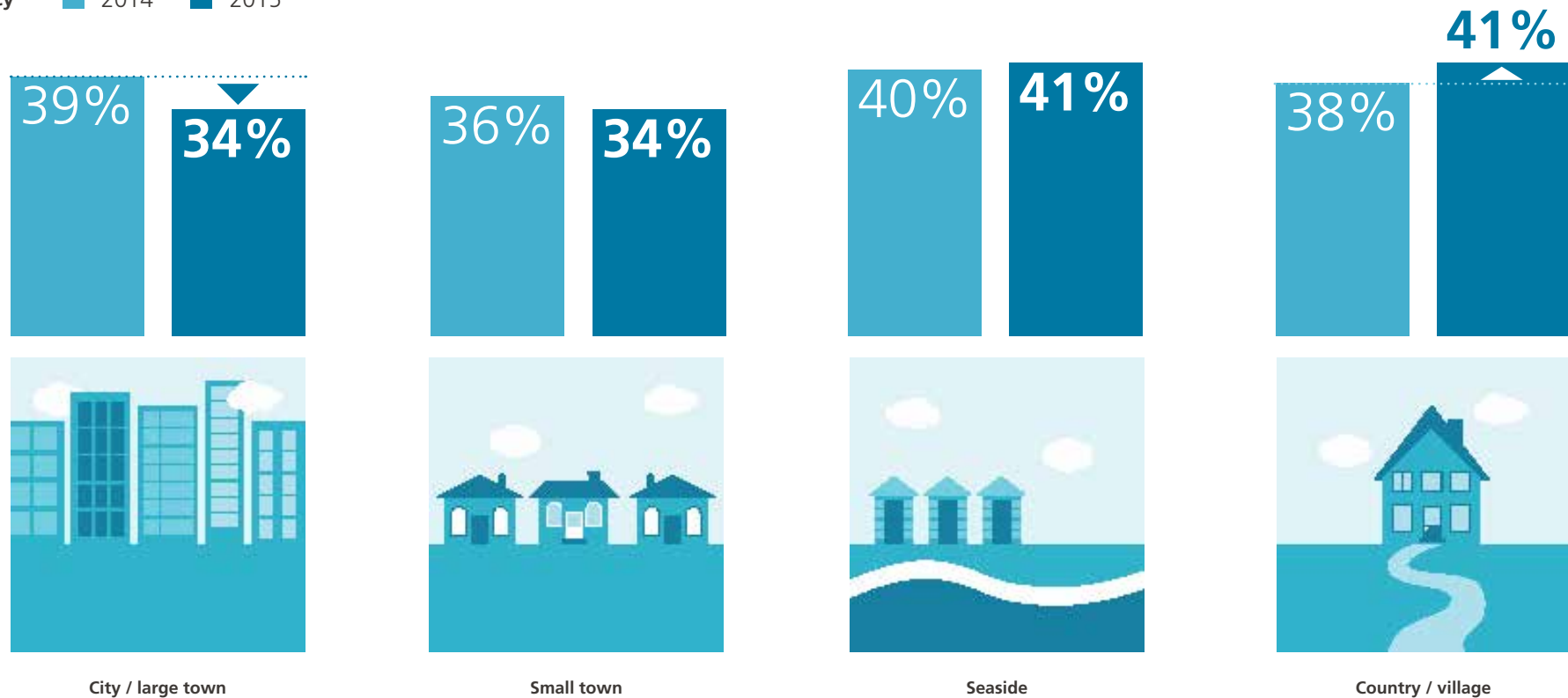
Bed occupancy (%)	Bed occupancy (%)			Percentage point change
	2013	2014	2015	2013-2015
£20-£29.99	30	27	30	NO CHANGE
£30-£39.99	35	35	34	-1
£40-£49.99	43	44	45	+2
£50-£59.99	48	53	64	+16
£60+	49	46	41	-8

Countryside occupancy rises



Bed occupancy rates are relatively even between locations, however occupancy rates for establishments in city/ large town locations have dropped and country/ village locations have increased

Bed occupancy ■ 2014 ■ 2015

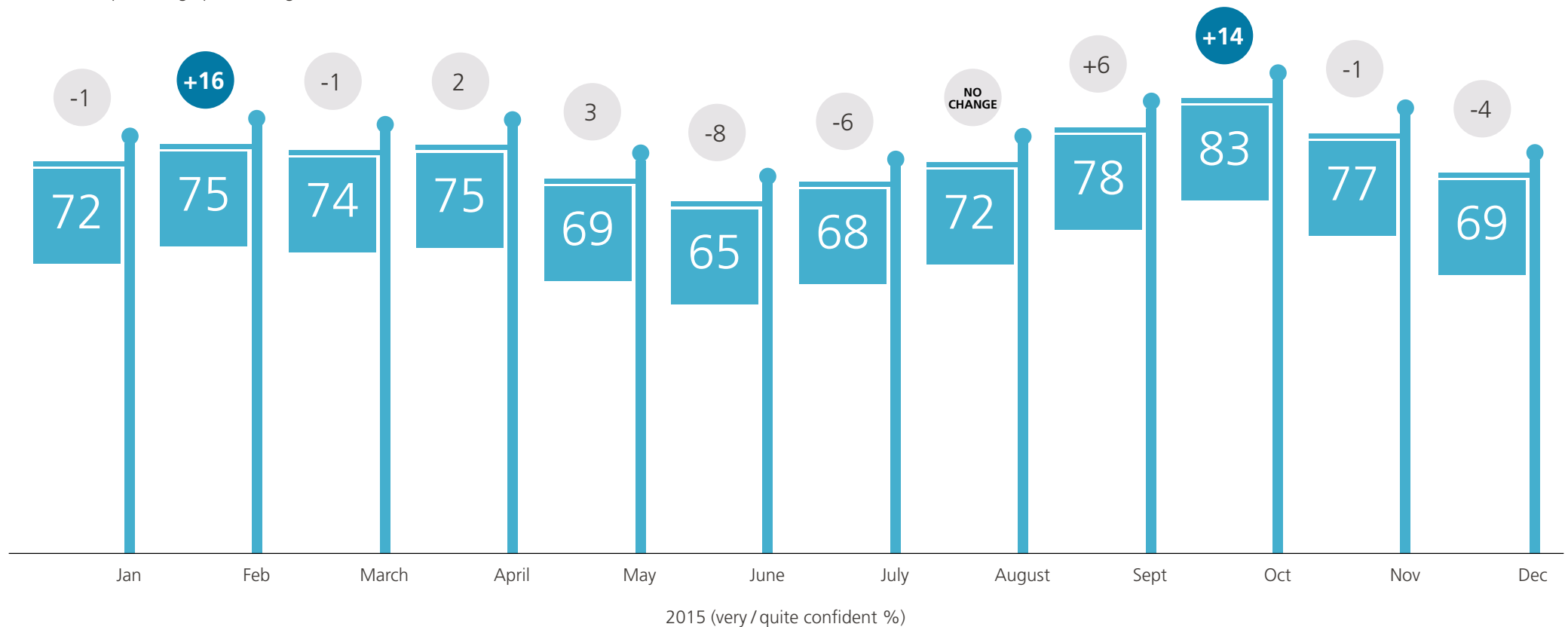


Mixed levels of confidence in 2015



Levels of business confidence vary throughout the year, with confidence higher at the start of the year, dipping in the summer and then rising again towards the end of 2015

● indicates percentage point change from 2014



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4. Self-catering



Self-catering summary



Unit occupancy in the self-catering sector has continued to grow year on year, and rose to 48% in 2015

Occupancy rates were highest in the summer months, peaking at 80% in August. January, November and December were the quietest months for the sector

Properties in cities or large towns had the highest occupancy rates over the year. Other locations, such as seaside properties having an average occupancy rate of 44%, highlight the link to seasonal growth and decline

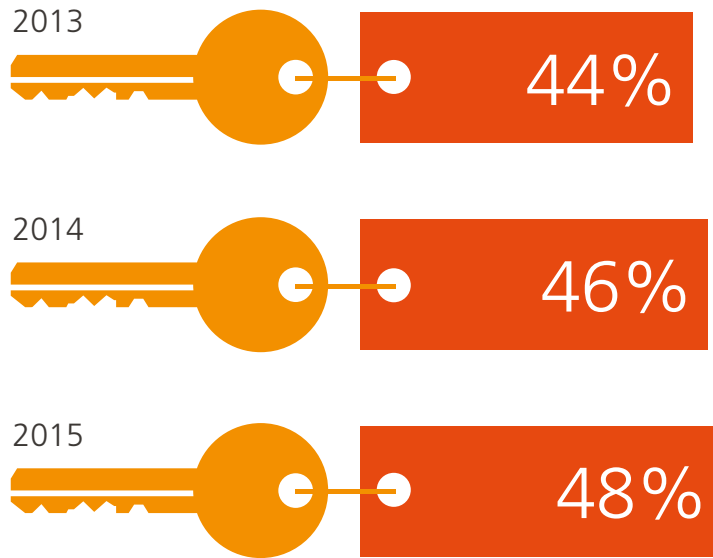
Both graded and non-graded properties saw growth in unit occupancy, however the difference year on year is bigger among those with a grading

Continued growth



Annual unit occupancy has continued to grow year on year since 2013

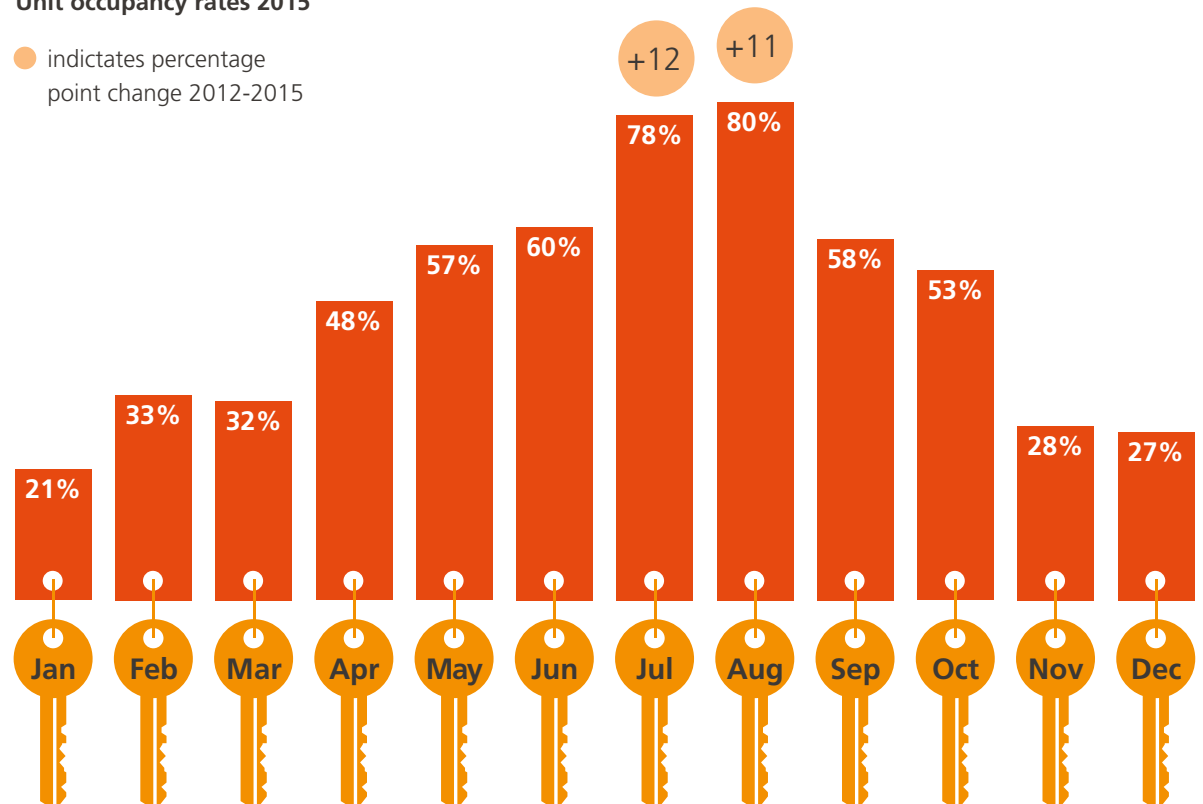
Unit occupancy rate



Unit occupancy rates for the summer months of July and August were higher than at any point of the year. Rates in these months are also considerably higher than in 2012

Unit occupancy rates 2015

● indicates percentage point change 2012-2015



Continued increases across all locations

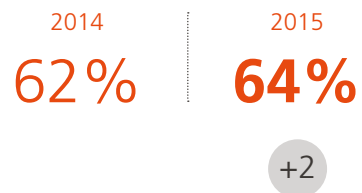


Increases in unit occupancy were recorded across all locations in 2015

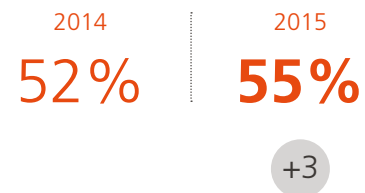
Unit occupancy



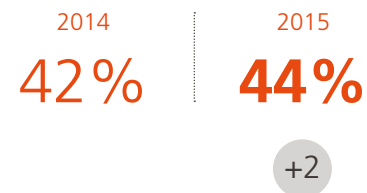
City / large town



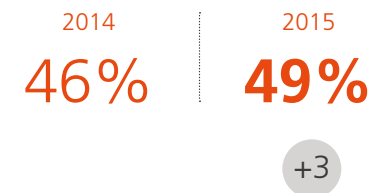
Small town



Seaside



Country / village



● indicates percentage point change from 2014

Agent-let occupancy increases

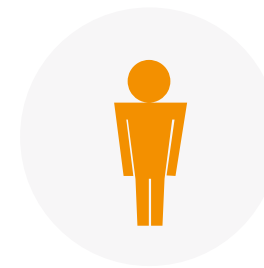


Annual average unit occupancy rates for agent-let properties increased in 2015 against 2014, with independently let unit occupancy rates decreasing

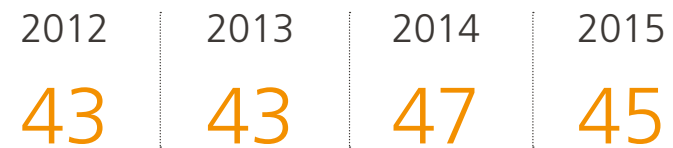
Unit occupancy (%)



Agent-let



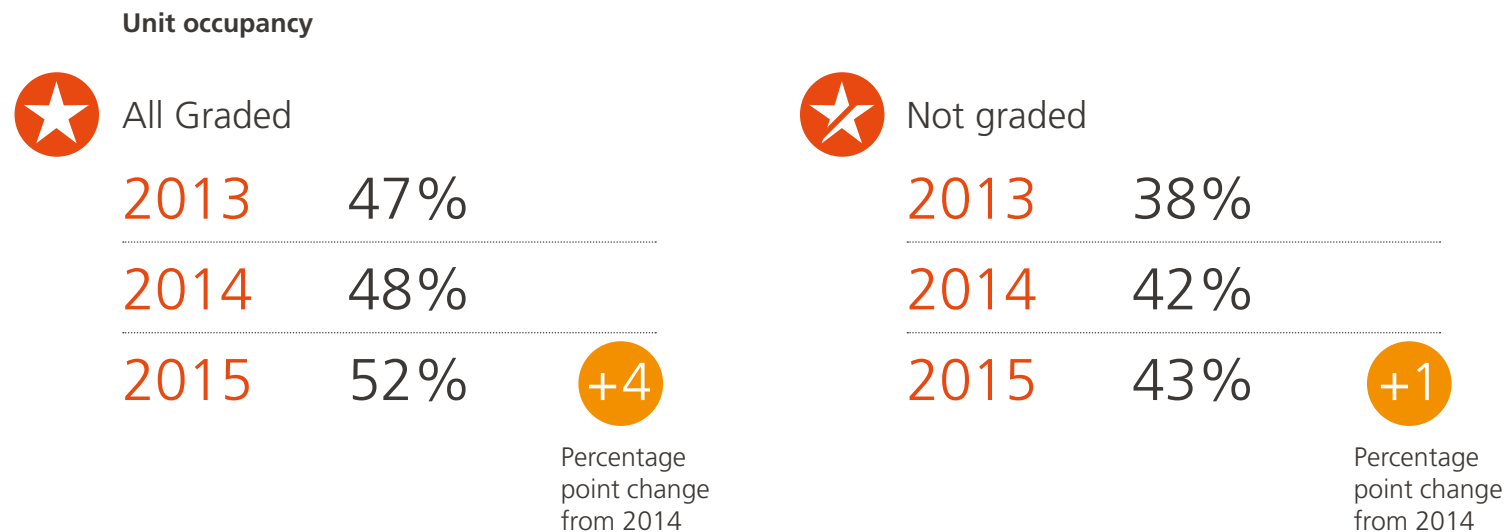
Independently



Both graded and non-graded properties see increases in unit occupancy



Both graded and non-graded properties continued to see increases in unit occupancy rates in 2015, with graded properties seeing the biggest rise

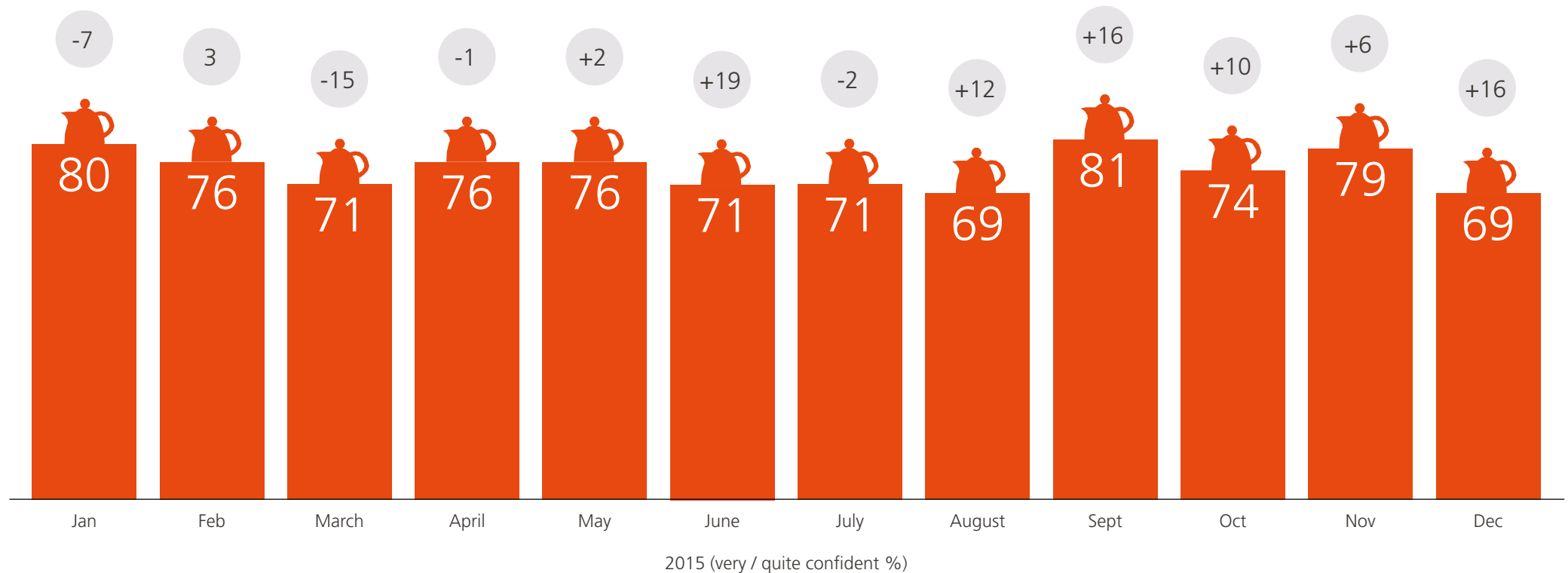


Mixed levels of confidence across the year



Business confidence during 2015 was mixed, with lower than 2014 results observed through the first few months of the year, growing towards the end of the year

● indicates percentage point change in 2014



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5. Caravan & camping parks



Parks summary



The seasonal average for parks, based on data from April to October, shows pitch occupancy remains consistent between 2014 and 2015 (at 41%)

As would be expected, occupancy levels were highest in the peak summer months of June, July and August

Larger sites, with 100-199 pitches, had a higher pitch occupancy rate than smaller sized sites

Sites in the south of Scotland saw some growth in occupancy between 2014 and 2015

Pitch occupancy remains steady



By month:

Pitch occupancy when analysed by month was generally lower compared to 2014



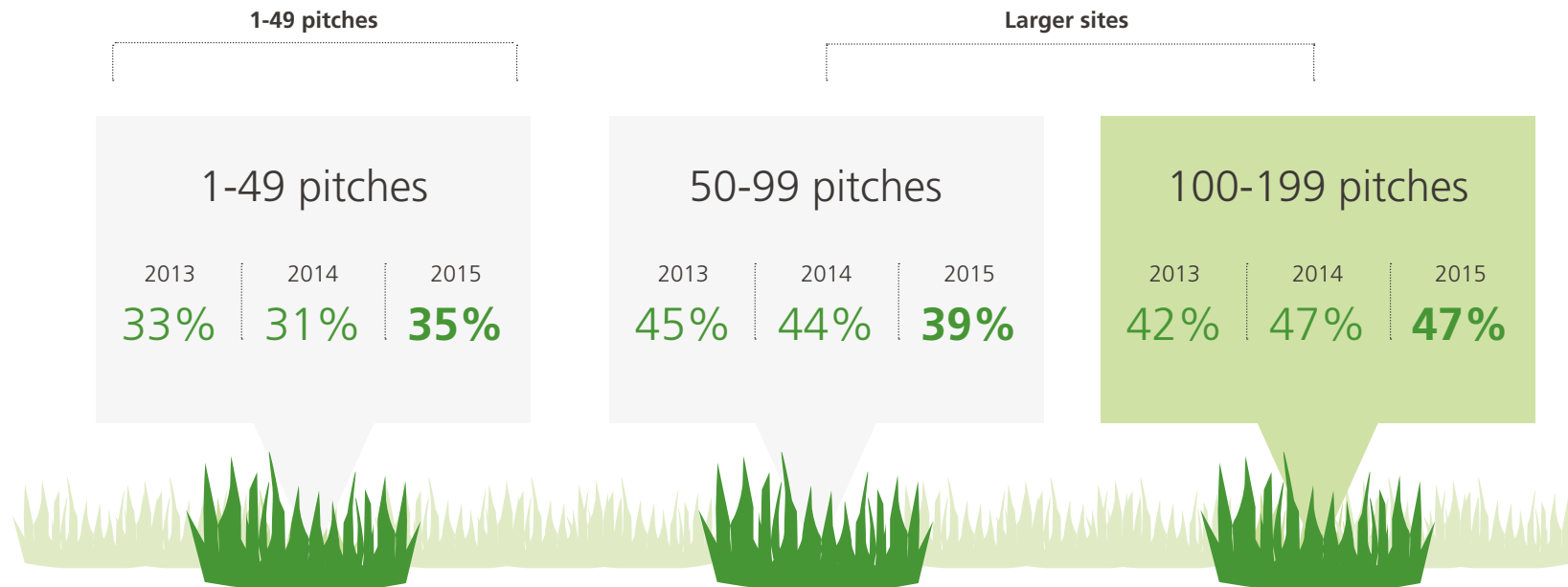
Pitch occupancy	2014	2015	Percentage point change
April	29%	28%	-1
May	43%	39%	-4
June	48%	46%	-2
July	57%	49%	-8
August	57%	55%	-2
September	40%	42%	+2
October	29%	25%	+5
Seasonal-average	42%	41%	-1

Pitch occupancy consistent for larger sites



Pitch occupancy was highest for sites with 100-199 pitches in comparison to smaller sites

Pitch occupancy

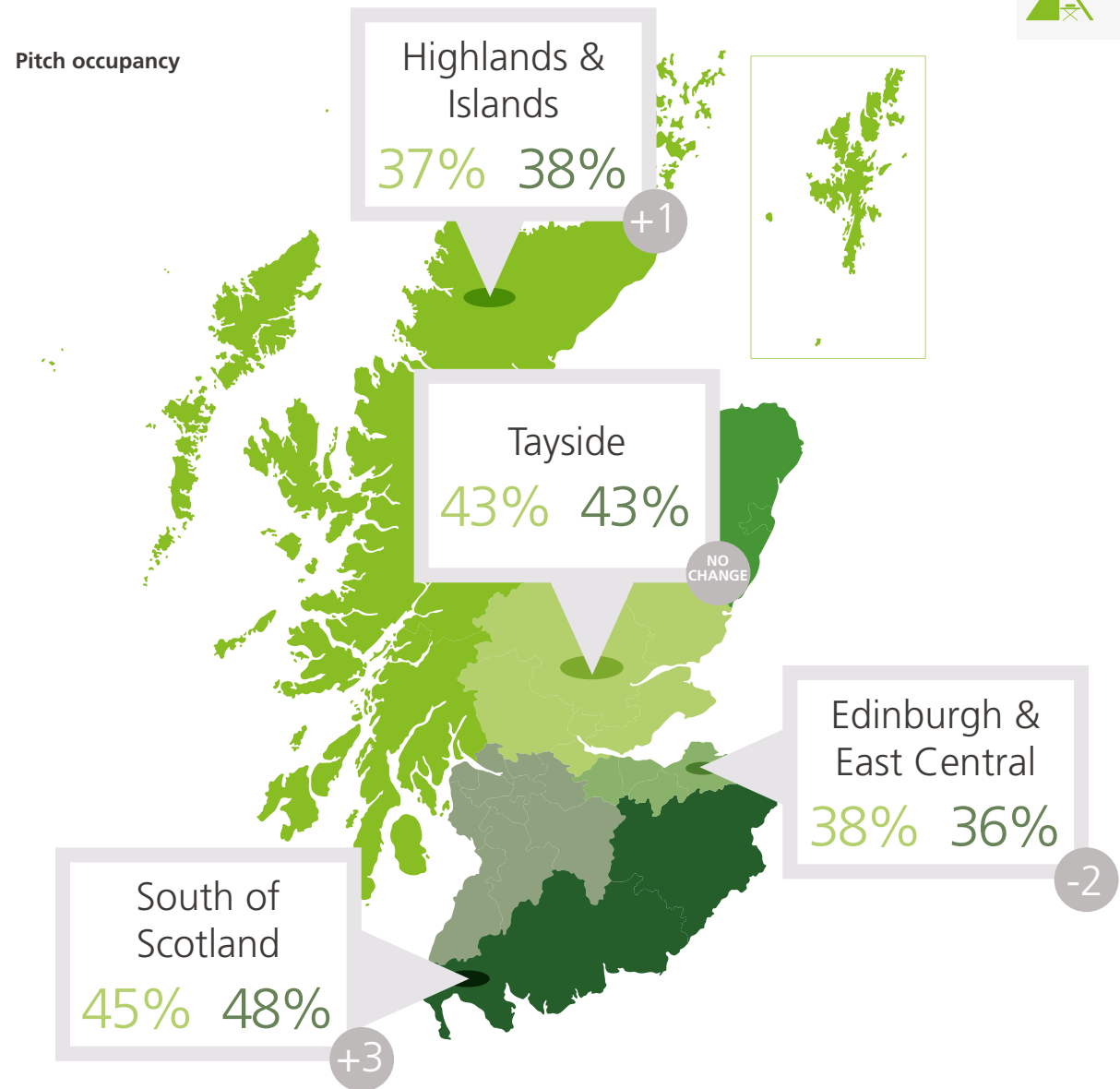


Regional growth

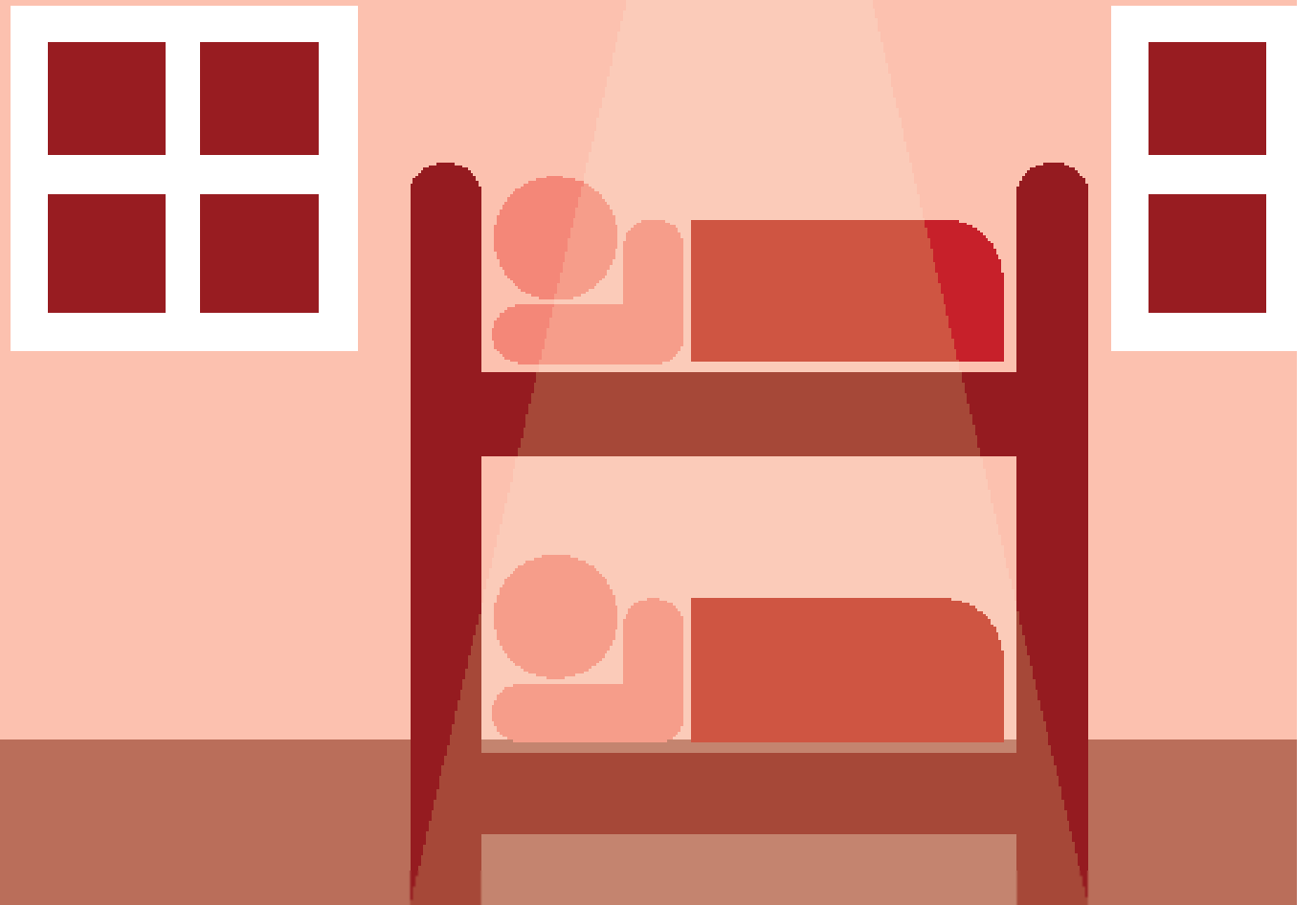


Pitch occupancy has risen in South of Scotland and Highlands & Islands in 2015
Other regions have varied

- indicates percentage point change from 2014-2015
- 2014 percentage
- 2015 percentage



6. Hostels



Hostels summary



Hostels have experienced growth in occupancy for a number of years, rising year on year from 39% in 2011 and 52% in 2015

Overseas visitors data is collected for hostels and shows that in 2015, 23% of available beds were occupied by visitors from outside the UK

Growing hostel occupancy

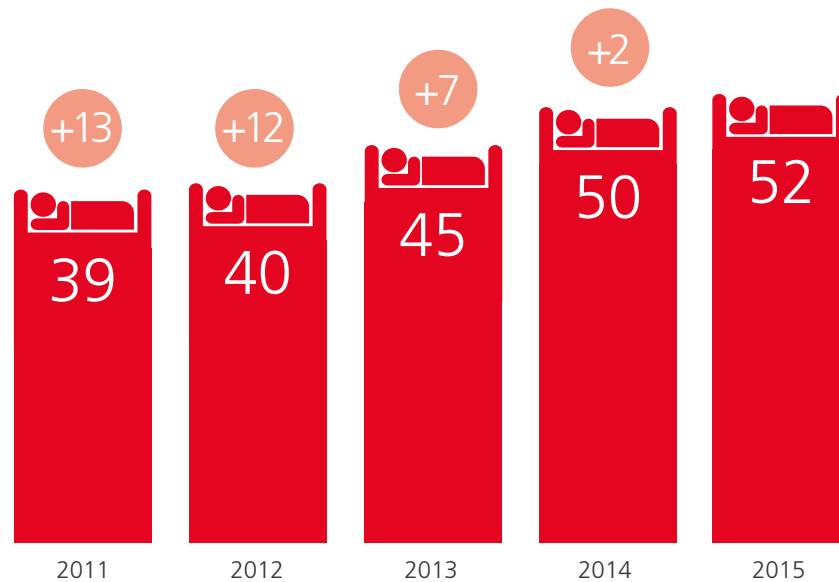


Annual average bed occupancy rates have steadily increased year on year to the highest levels recorded since 2001

Overseas bed occupancy continues to steadily grow in 2015

Annual average bed occupancy rates (%)

● Indicates percentage point change from 2015 occupancy level



Overseas growth

2013 17%

2014 20%

2015 23%

increase of 5 percentage points from 2013



*Please note that due to the relatively small sample size, results should be treated with a degree of caution

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