Aberdeenshire Accommodation Audit

Presentation
by
Tourism Resources Company

Objectives

▸ Audit of accommodation stock

▸ Categorise by geography and sector
  ◦ Capacity data – rooms/pitches and bed spaces
  ◦ Hotel sector's accessibility
  ◦ Those with VS Quality Assurance, Green Tourism and/or Taste Our Best
  ◦ Those listed on VisitAberdeenshire website

▸ Provide data in editable format

▸ Mapping of accommodation stock

▸ Outline approach/benefits of a potential Aberdeen City Audit
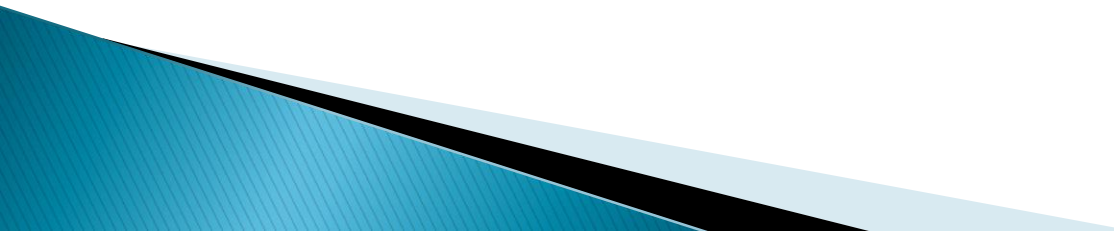
▸ Presentation of Findings

Method

- **Inception Meeting**
  - Data to be collected
  - Geographic sub-areas
  - Study process

- **Desk-based Review**
  - VisitAberdeenshire
  - VisitScotland

- **Internet Searches**
  - Booking platforms
  - Tourist/accommodation guides
  - Individual business websites

- **Fieldwork**
  - Online Survey
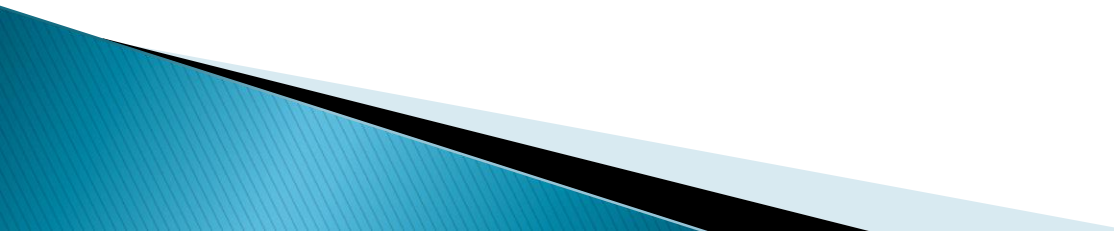 - Telephone Survey

- **Analysis & Reporting**

Geographic Sub-areas

Accommodation Categories

- Serviced
  - Hotel
  - Small Hotel
  - Guest House
  - B&B
  - Inn
  - Restaurant with Rooms (RwR)

- Non-serviced
  - Self-catering
  - Serviced Apartments
  - Exclusive Use
  - Hostel

- Holiday / Touring Park
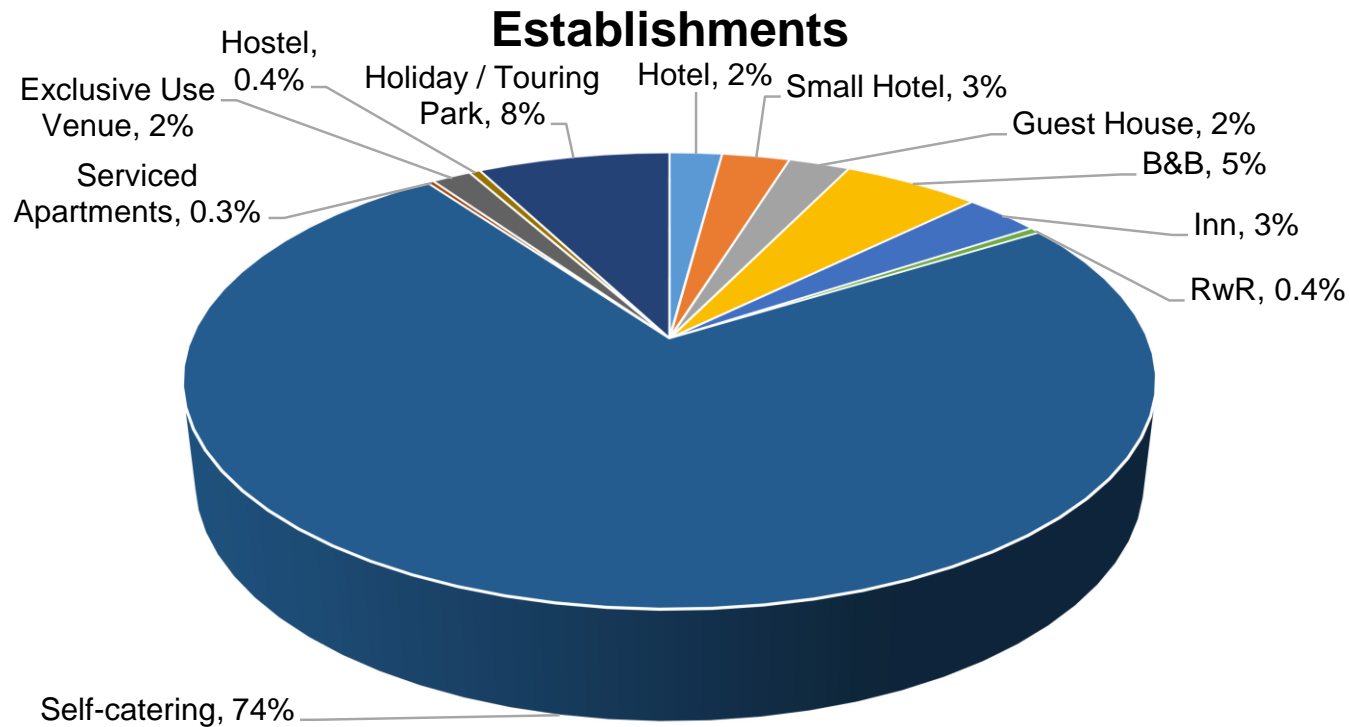
Data to be Collected

- Rooms / pitches

- Bed spaces

- Accessibility (Hotel & Small Hotel)
  - Number of accessible rooms and bed spaces
  - Disabled Parking and/or Drop Off Point

- Listed on VisitAberdeenshire website

- VisitScotland Quality Assurance Rating
  - Number
  - Star Rating

- Green Tourism
  - Number
  - Level of award

- Taste Our Best

Accommodation Stock Region

ACCOMMODATION STOCK REGION			
	Establishments	Rooms / Pitches	Bed Spaces
Serviced	16%	27%	23%
Non-serviced	76%	41%	35%
Holiday / Touring Park	8%	33%	41%
Total	1,152	8,146	18,855

Accommodation Stock Region

Establishments

- Hostel, 0.4%
- Exclusive Use Venue, 2%
- Serviced Apartments, 0.3%
- Holiday / Touring Park, 8%
- Hotel, 2%
- Small Hotel, 3%
- Guest House, 2%
- B&B, 5%
- Inn, 3%
- RwR, 0.4%
- Self-catering, 74%

Listed VisitAberdeenshire Website

| LISTED ON VISITABERDEENSHIRE WEBSITE			
Accommodation Category	Number of Establishments	Number Listed on VA Website	% of Total
Fully Serviced			
Hotel	24	16	67%
Small Hotel	31	13	42%
Guest House	28	7	25%
B&B	63	15	24%
Inn	35	7	20%
Restaurant with Rooms	5	1	20%
Sub Total	186	59	32%
Non–Serviced			
Self–Catering	852	112	13%
Serviced Apartments	3	2	67%
Exclusive Use Venue	18	13	72%
Hostel	5	2	40%
Sub Total	878	129	15%
Sub Total of Serviced and Non–Serviced Sectors	1,064	188	18%
Holiday / Touring Park	88	22	25%
TOTALS	1,152	210	18%

Accommodation by Category

Serviced Bed Spaces
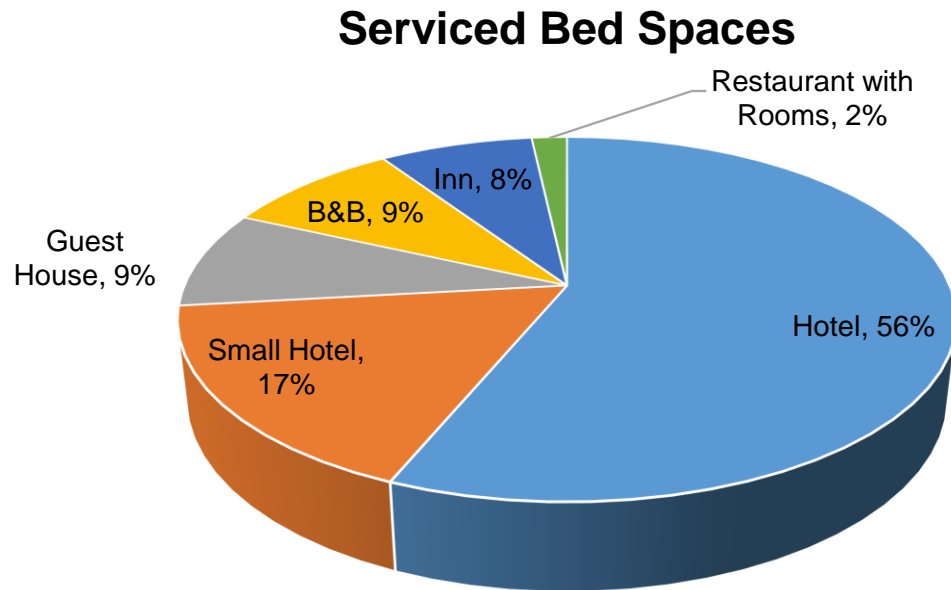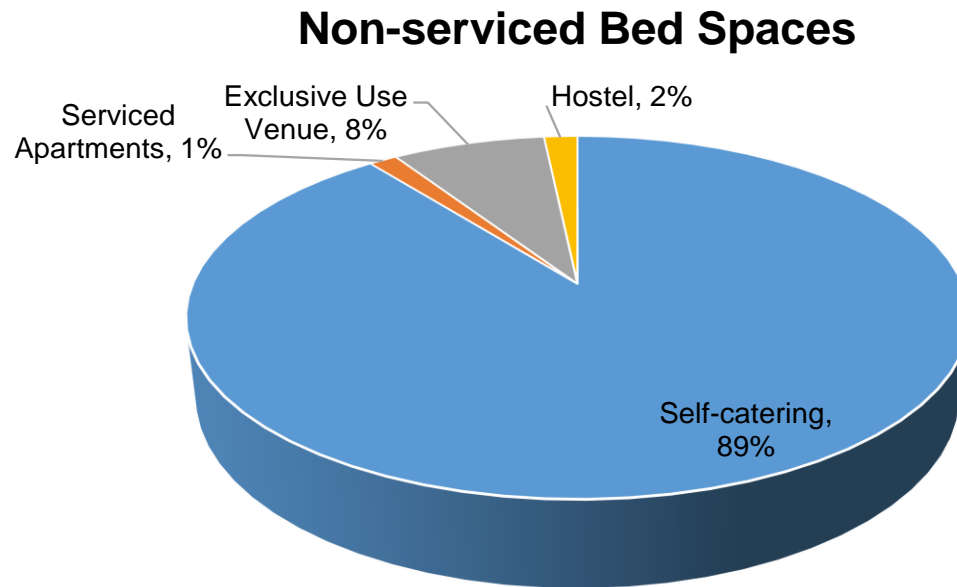

- Hotel – 13% of establishments but 56% of bed spaces
- B&Bs – Conversely 34% of establishments but only 9% of bed spaces
- Small Hotel – same proportion establishments and bed spaces 17%

Accommodation by Category (Cont.d)
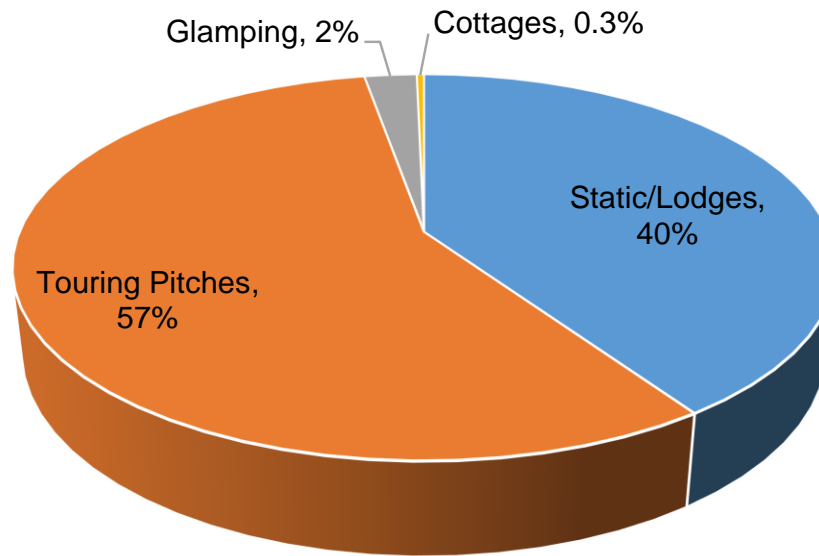
Average Number of Rooms

Accommodation by Category (Cont.d)
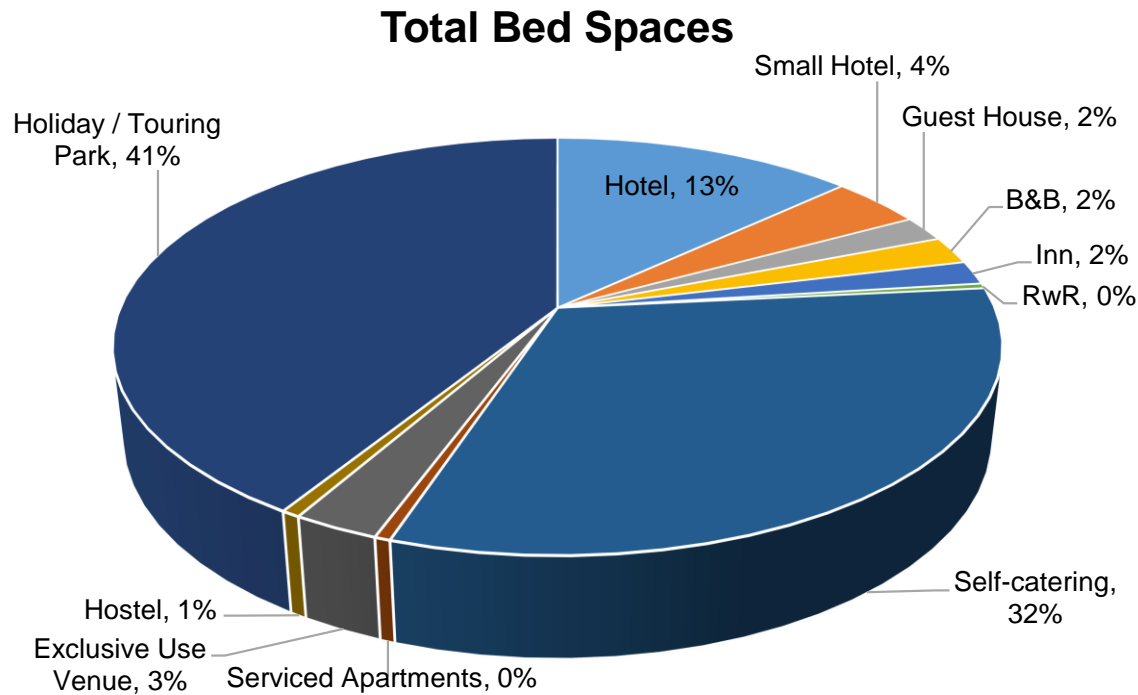
Non-serviced Bed Spaces
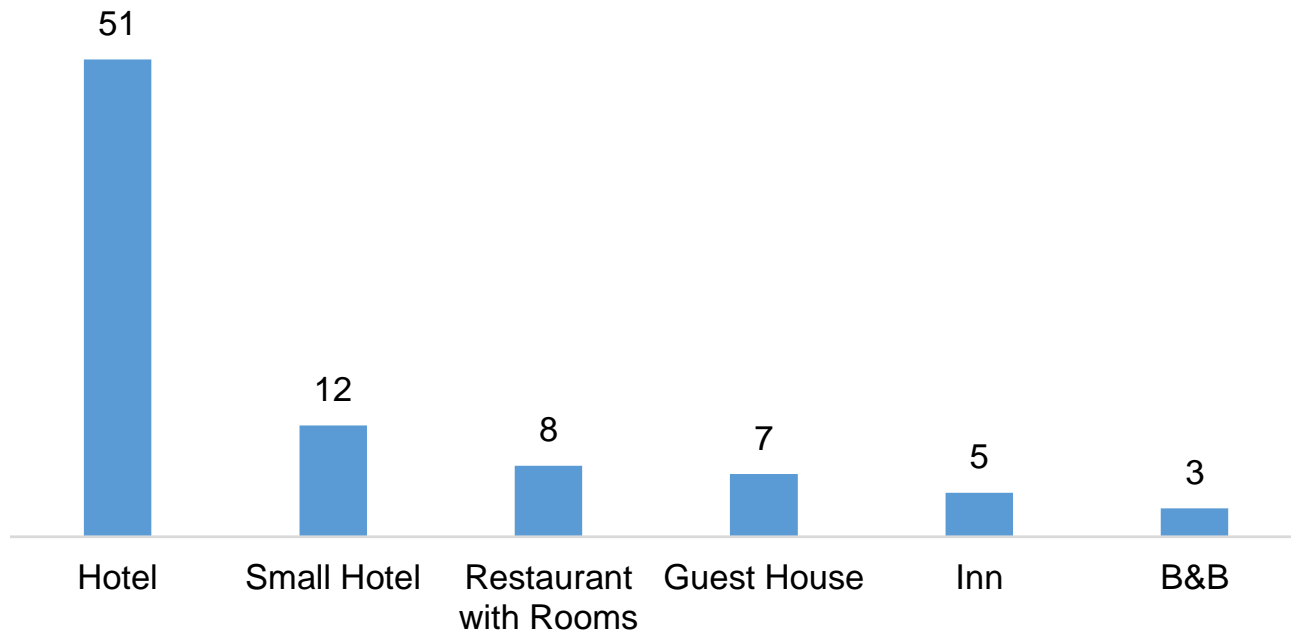
- Self-catering
  - 97% establishments, 89% bed spaces
  - Dominated by single units 89%
  - However, >5 units only 2% of establishments but one-fifth of bed spaces
- Exclusive use – 2% establishments, 8% bed spaces

Accommodation by Category (Cont.d)

Holiday / Touring Park Pitches/Units

Glamping, 2%

Cottages, 0.3%

Static/Lodges, 40%

Touring Pitches, 57%

Accommodation by Category (cont.d)

Total Bed Spaces

- Holiday / Touring Park, 41%
- Small Hotel, 4%
- Guest House, 2%
- Hotel, 13%
- B&B, 2%
- Inn, 2%
- RwR, 0%
- Self-catering, 32%
- Serviced Apartments, 0%
- Hostel, 1%
- Exclusive Use Venue, 3%

- Overall Total
  - Hotel – 2% establishments, 13% bed spaces
  - Self–catering – 74% establishments, 32% bed spaces
  - Holiday / Touring Park – 8% establishments, 41% bed spaces

Accommodation by Area

PERCENTAGE OF BED SPACE CAPACITY							
Accommodation Category	Banff & Buchan	Buchan	Formartine	Garioch	Marr	Kincardine & Mearns	Total
Fully Serviced							
Hotel	3%	26%	7%	29%	13%	22%	100%
Small Hotel	24%	11%	15%	7%	29%	14%	100%
Guest House	22%	22%	0%	15%	32%	9%	100%
B&B	11%	14%	9%	8%	33%	24%	100%
Inn	10%	9%	29%	12%	14%	26%	100%
RwR	0%	0%	0%	43%	45%	12%	100%
Sub Total	**9%**	**20%**	**9%**	**21%**	**20%**	**20%**	**100%**
Non–serviced							
Self–Catering	19%	5%	7%	6%	48%	14%	100%
Serviced Apartments	0%	39%	0%	37%	0%	25%	100%
Exclusive Use	9%	0%	7%	21%	28%	35%	100%
Hostel	23%	0%	0%	0%	70%	7%	100%
Sub Total	**18%**	**5%**	**7%**	**8%**	**47%**	**16%**	**100%**
Sub Total Serviced & Non–Serviced	**14%**	**11%**	**8%**	**13%**	**36%**	**18%**	**100%**
Holiday / Touring Park	29%	7%	5%	2%	36%	21%	100%
TOTALS	**21%**	**9%**	**6%**	**8%**	**36%**	**19%**	**100%**

Accommodation by Area (Cont.d)

- Marr
  - Largest area (47%)
 - Incorporates Royal Deeside

- Banff & Buchan
  - Not largest in any
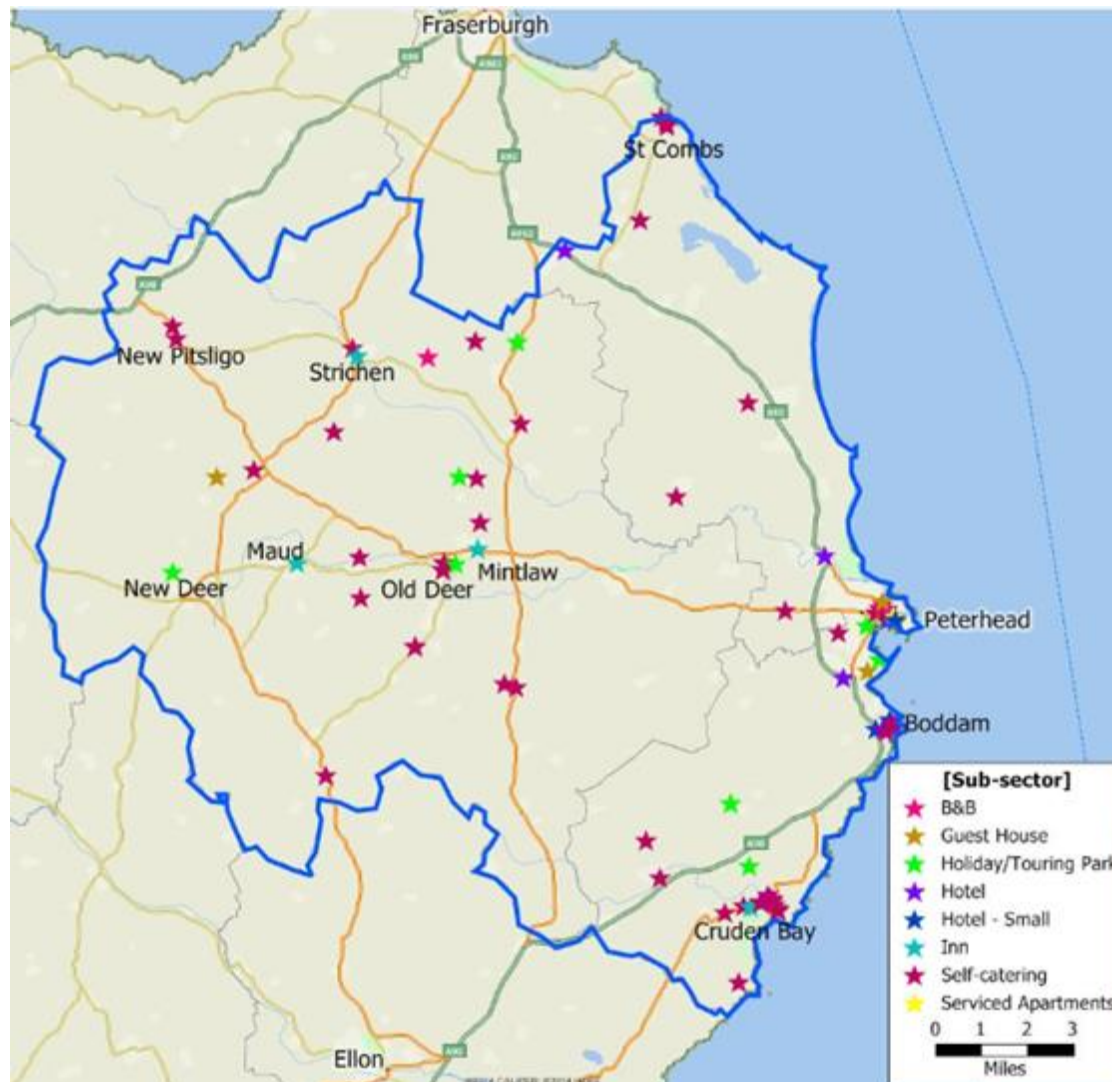 - Second largest in – Holiday / Touring Park (29%), Small Hotel (24%), Hostel (23%), Self-catering (19%)

Accommodation by Area (Cont.d)

Proportion in Relation to Aberdeenshire Average						
	Banff & Buchan	Buchan	Formatine	Garioch	Marr	Kincardine & Mearns
Serviced	↓	↑	↑	↑	↓	Similar
Non-serviced	↓	↓	Similar	↓	↑	↓
Holiday / Touring	↑	↓	↓	↓	Similar	↑

Banff & Buchan
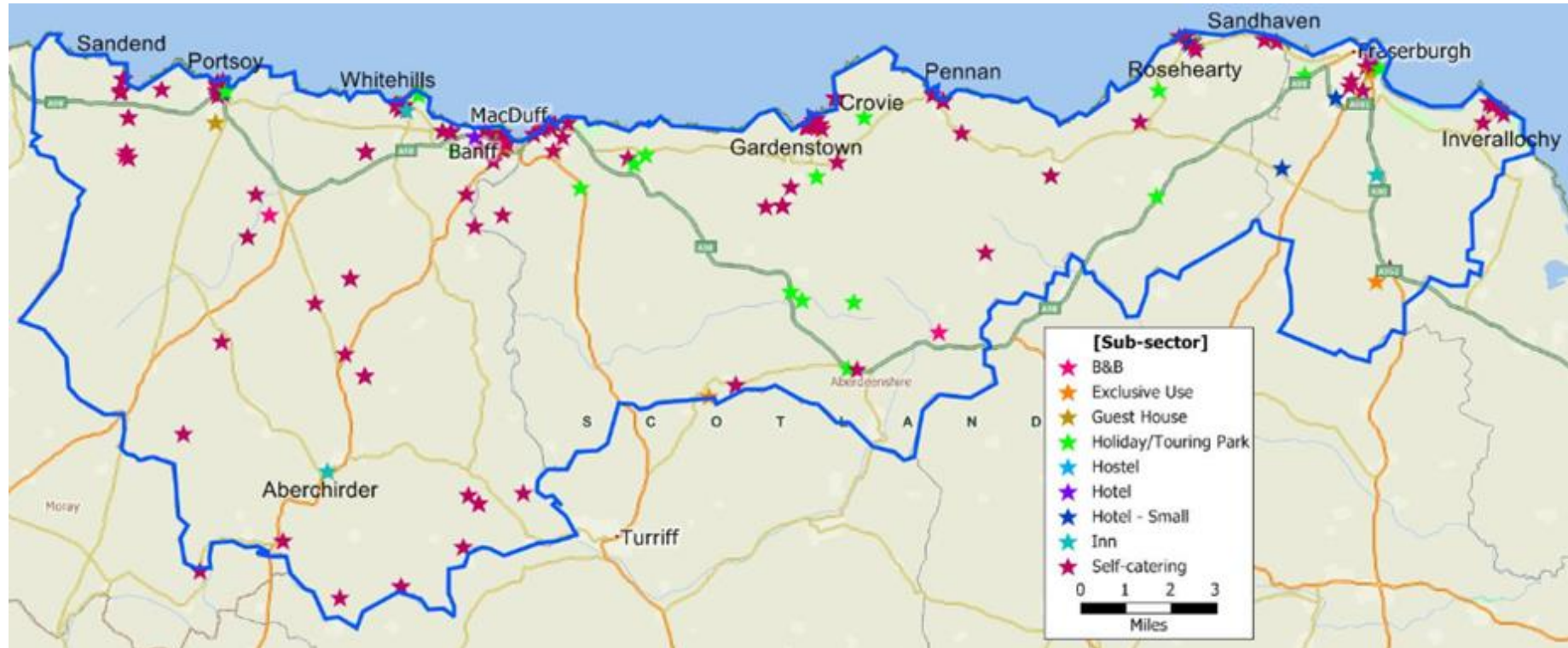
Buchan

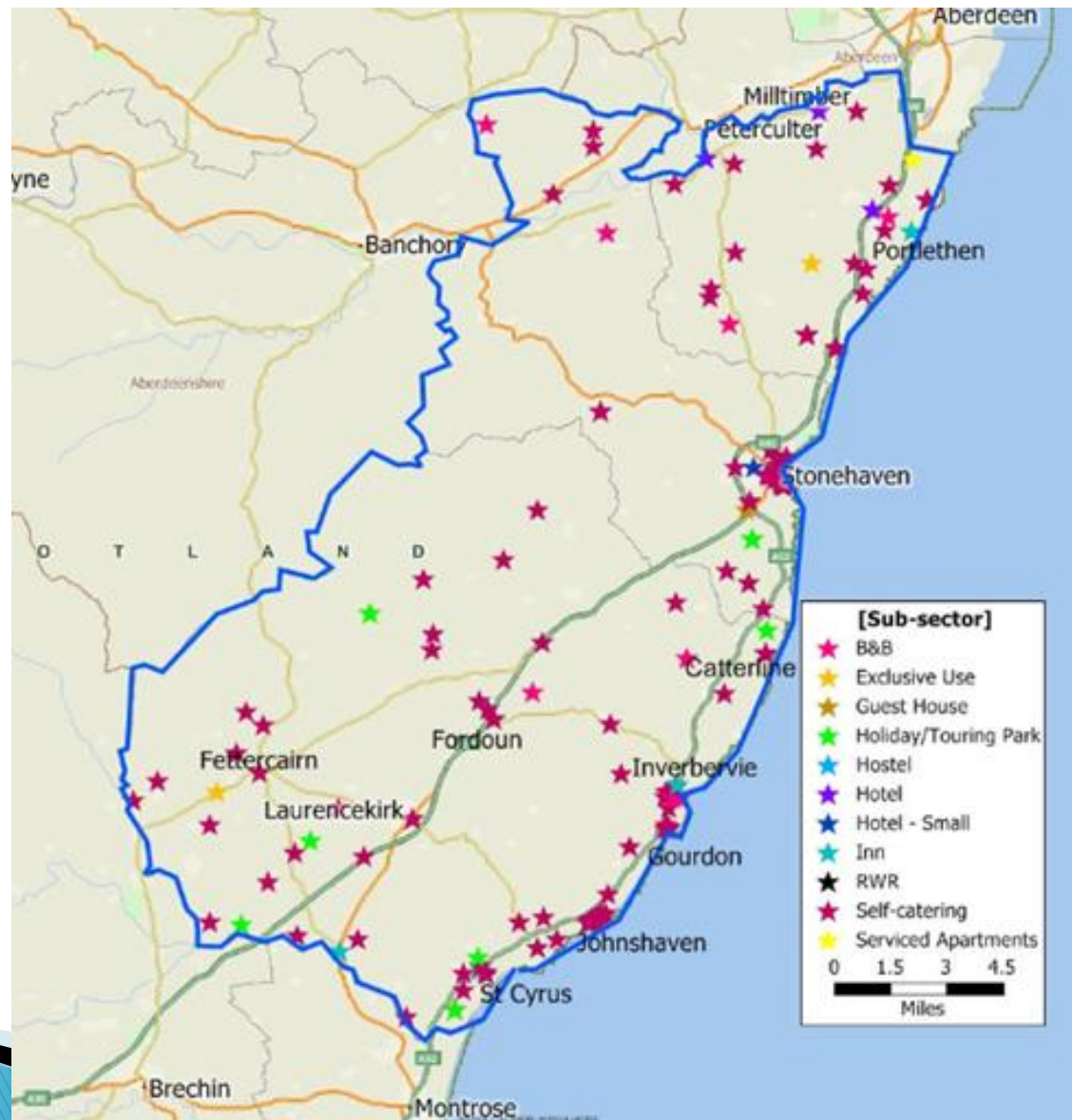# Formartine
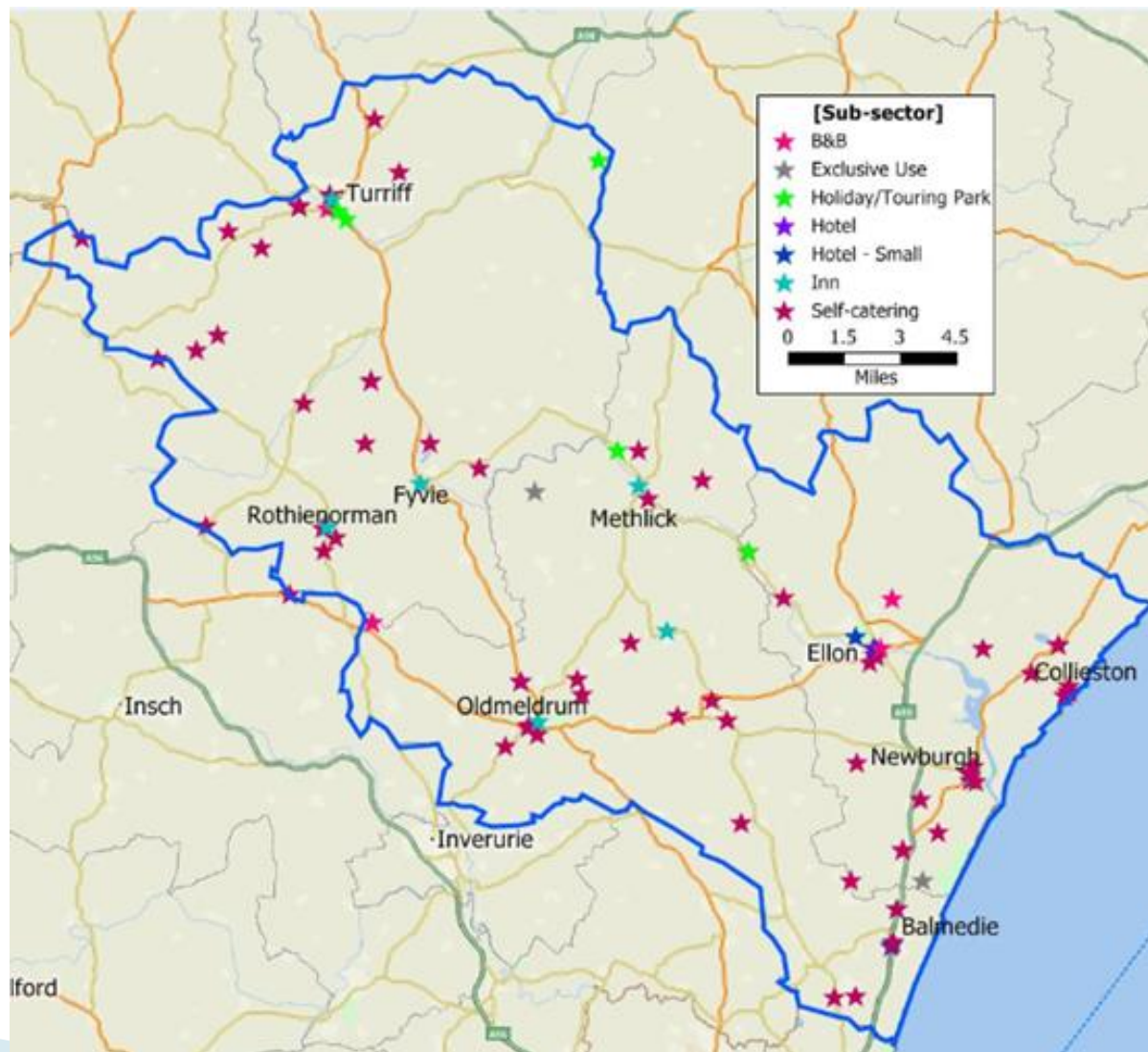
Garioch
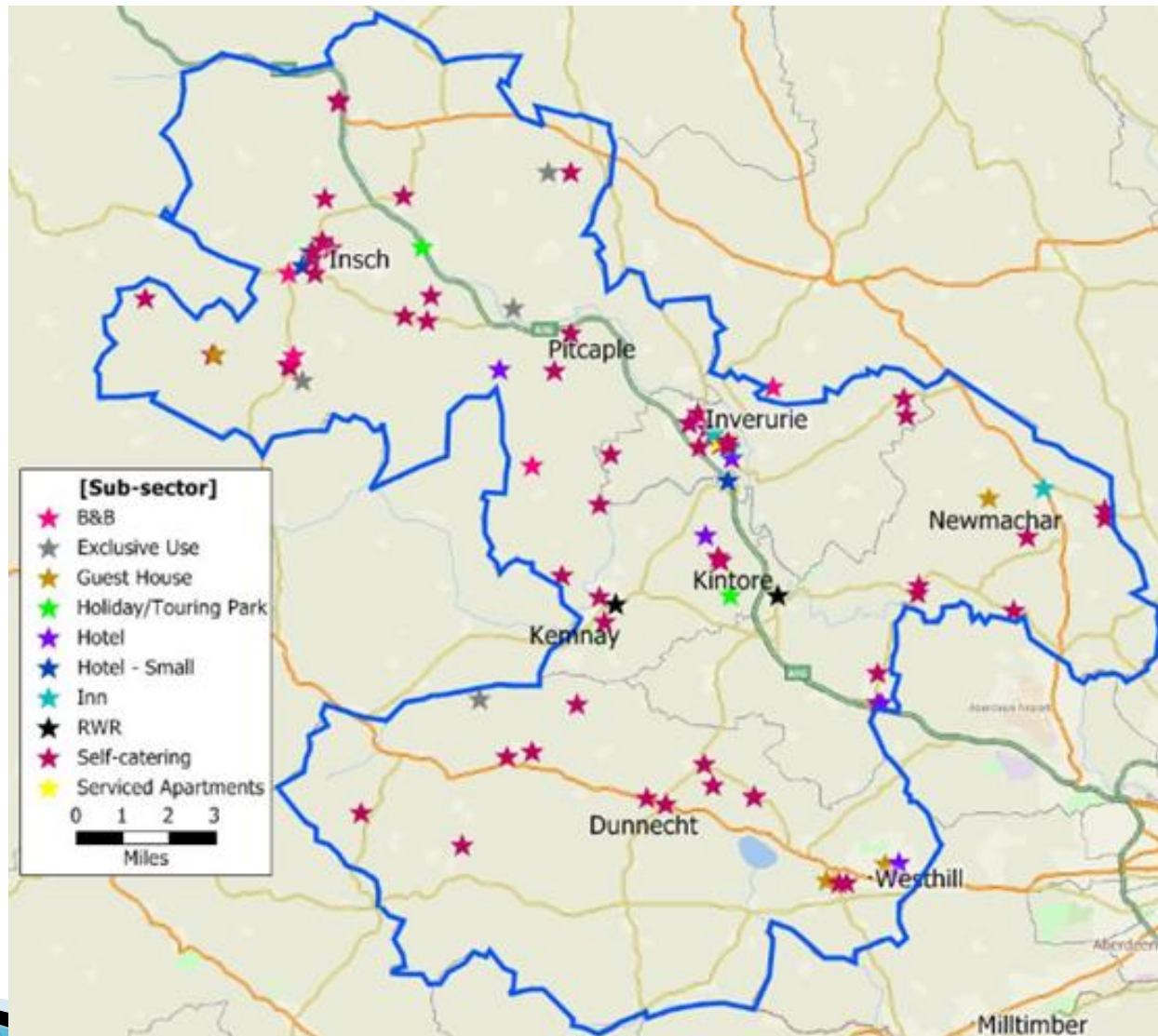
Marr
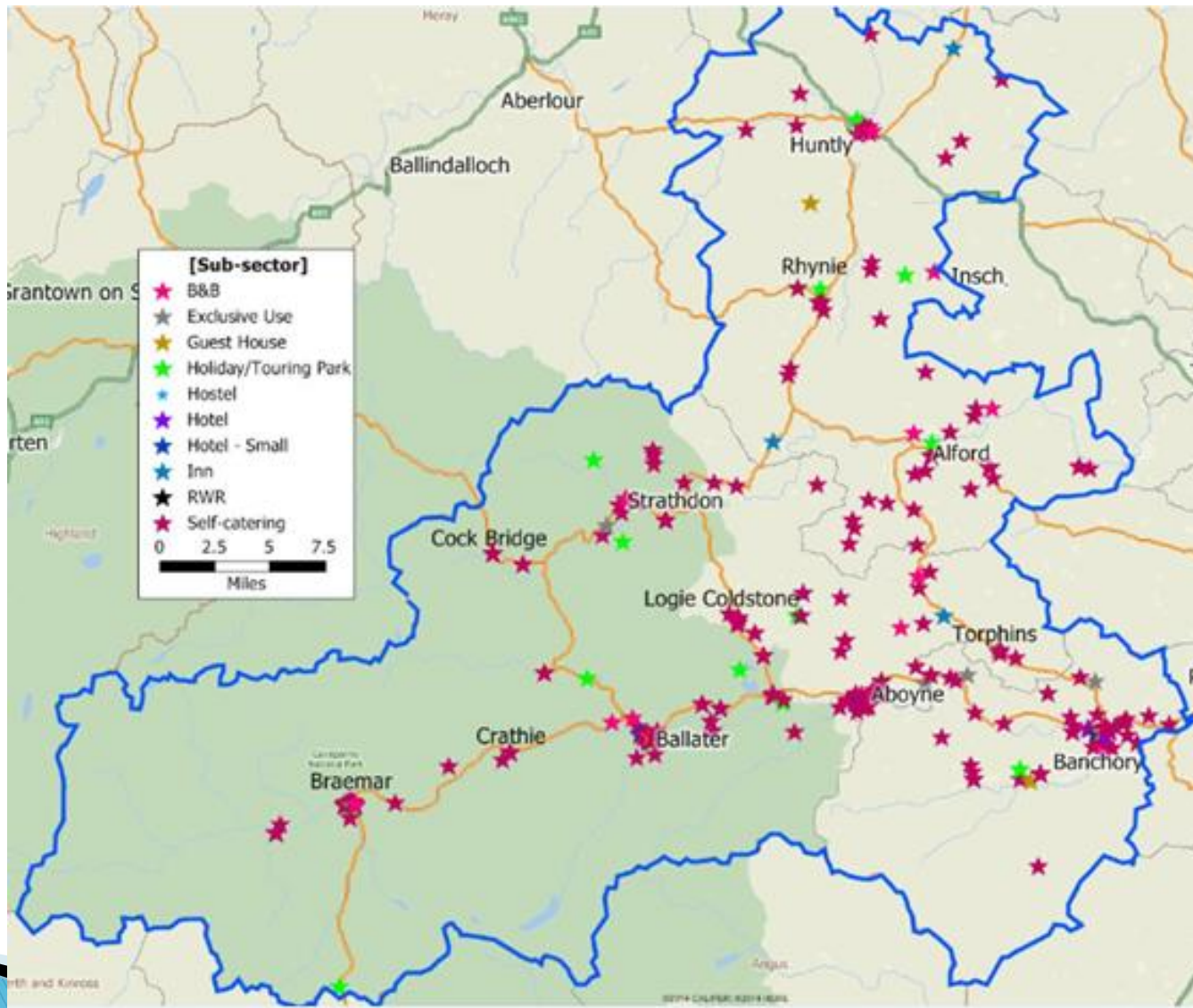
Kincardine & Mearns

Accommodation by Area (Cont.d)

- **Banff & Buchan**
  - 9% area, 14% population, 22% of establishments
  - Large proportion of operations along the coast
  - Not just larger coastal towns – Fraserburgh, Banff & Macduff
  - Also smaller settlements – Portsoy, Whitehills, Gardenstown, Rosehearty and Inverallochy
  - Number of Holiday / Touring parks, Self-catering and couple of Exclusive Use inland

- **Buchan**
  - 9% area, 16% population, 8% of establishments
  - Concentrations in Peterhead and Cruden Bay – mix of Hotel, B&B, Guest House, Inn, Self-catering, Holiday / Touring Park
  - Hotels and Self-catering at Boddam
  - Inland a number of Inns, Self-catering and Holiday / Touring Parks

- **Formartine**
  - 14% area, 17% population, 9% of establishments
  - Reasonable spread across area
  - Less concentration on coast
  - Small clusters inland – Ellon, Turriff, Oldmeldrum
  - Number of Inns and Holiday / Touring Parks inland
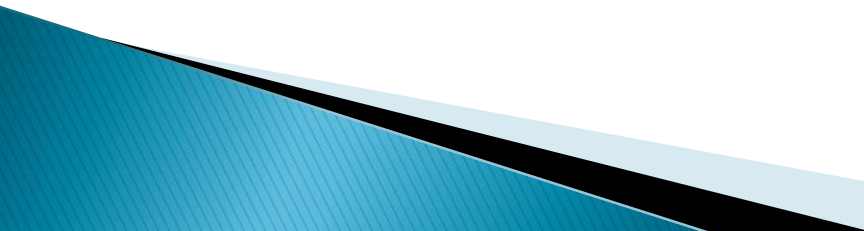
Accommodation by Area (Cont.d)

- Garioch
  - 9% area, 22% population, 9% of establishments
  - Inverurie good mix all categories (except Hostel)
  - To a lesser extent a mix of offer in and around Insch
 - Couple of the larger Hotels at Westhill

- Marr
  - 47% area, 15% population, 34% of establishments
  - Spread of accommodation throughout
  - Concentrations – Aboyne, Ballater, Banchory, Braemar
  - To lesser extent – Alford, Huntly, Strathdon

- Kincardine & Mearns
  - 12% area, 17% population,18% of establishments
  - Largest concentration Stonehaven – Small Hotel, Guest House, B&B, Inn, RwR, Self-catering, Holiday / Touring Park
  - Smaller clusters in number of coastal settlements Porthlethen, Inverbervie, Johnshaven and St Cyrus
  - Inland tends to be more Self-catering and Holiday / Touring Parks
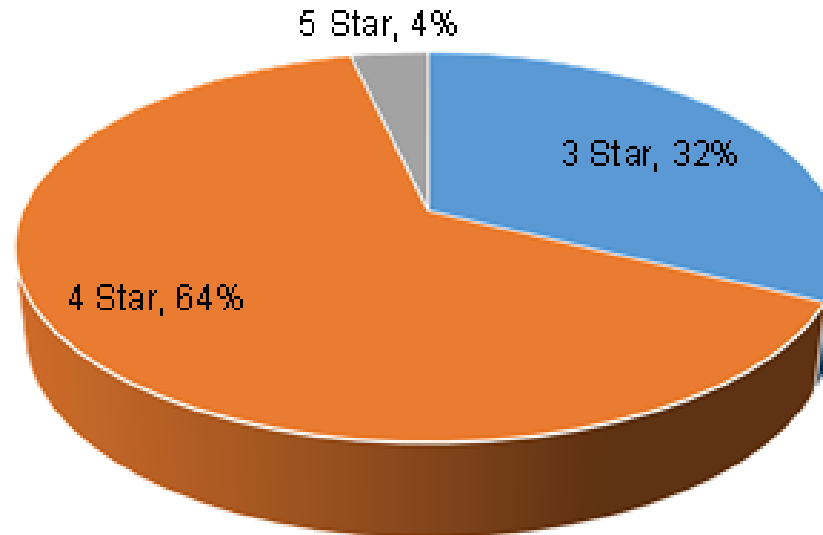 - Also has a couple of the larger hotels

VS Quality Assurance

VS Quality Assurance
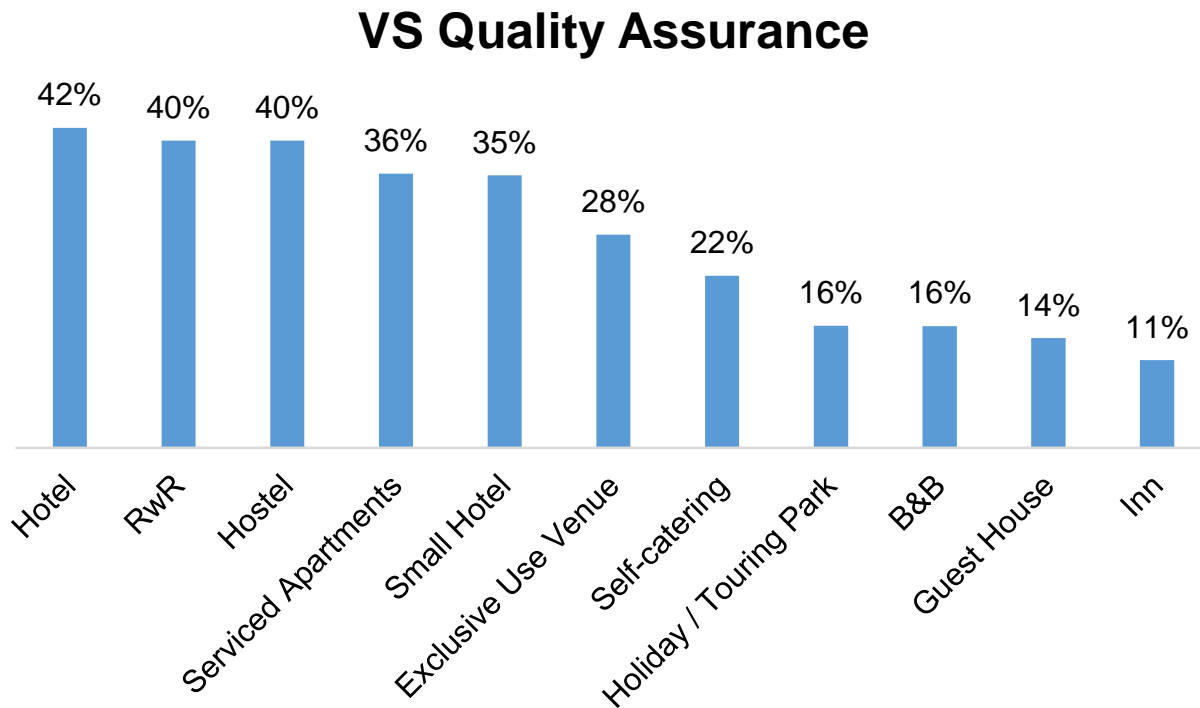
- ◦ 22–23% of Serviced and Non-serviced, 16% of Holiday / Touring Parks
- ◦ Highest proportions – Hotel (42%), RwR (40%), Hostel (40%)
- ◦ Lowest Holiday / Touring Park, B&B (both 16%), Guest House (14%) and Inn (11%)
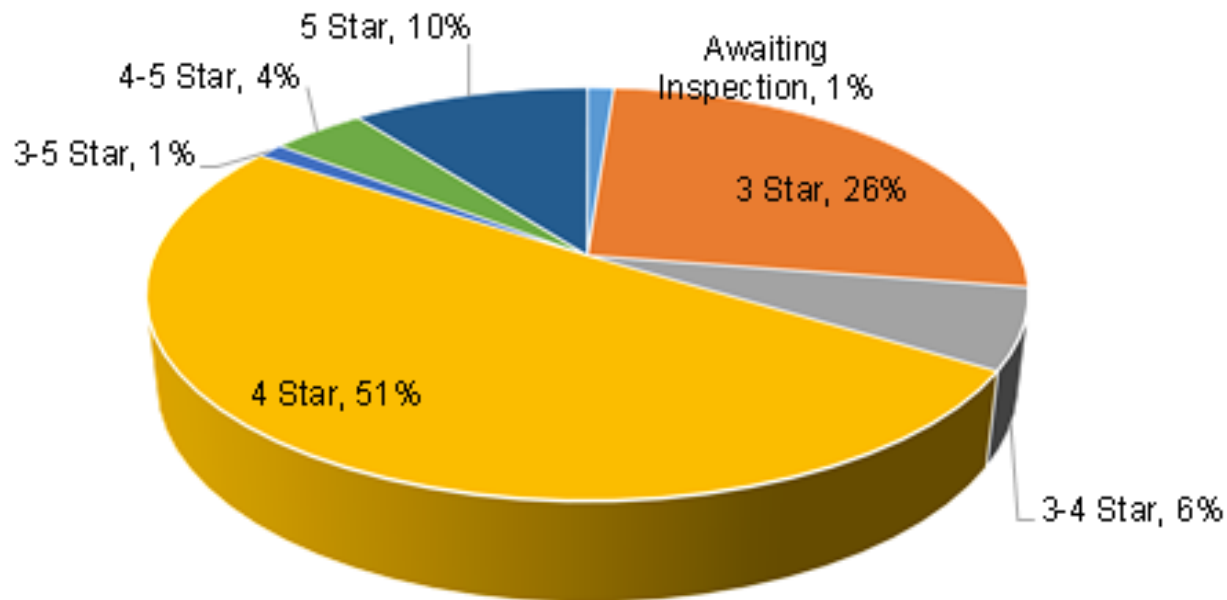
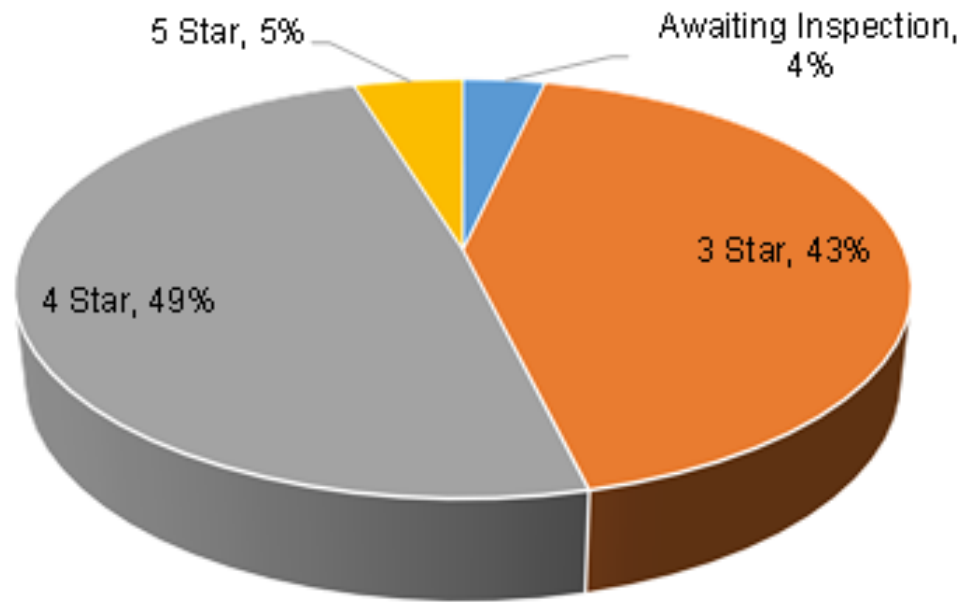# VS Quality Assurance (Cont.d)

Serviced Graded Rooms Star Rating

5 Star, 4%
3 Star, 32%
4 Star, 64%

VS Quality Assurance (Cont.d)

Non-Serviced Graded Rooms Star Rating

- 5 Star, 10%
- 4-5 Star, 4%
- 3-5 Star, 1%
- 4 Star, 51%
- Awaiting Inspection, 1%
- 3 Star, 26%
- 3-4 Star, 6%

VS Quality Assurance (Cont.d)

Holiday / Touring Park Graded Pitches

5 Star, 5%

Awaiting Inspection, 4%

3 Star, 43%
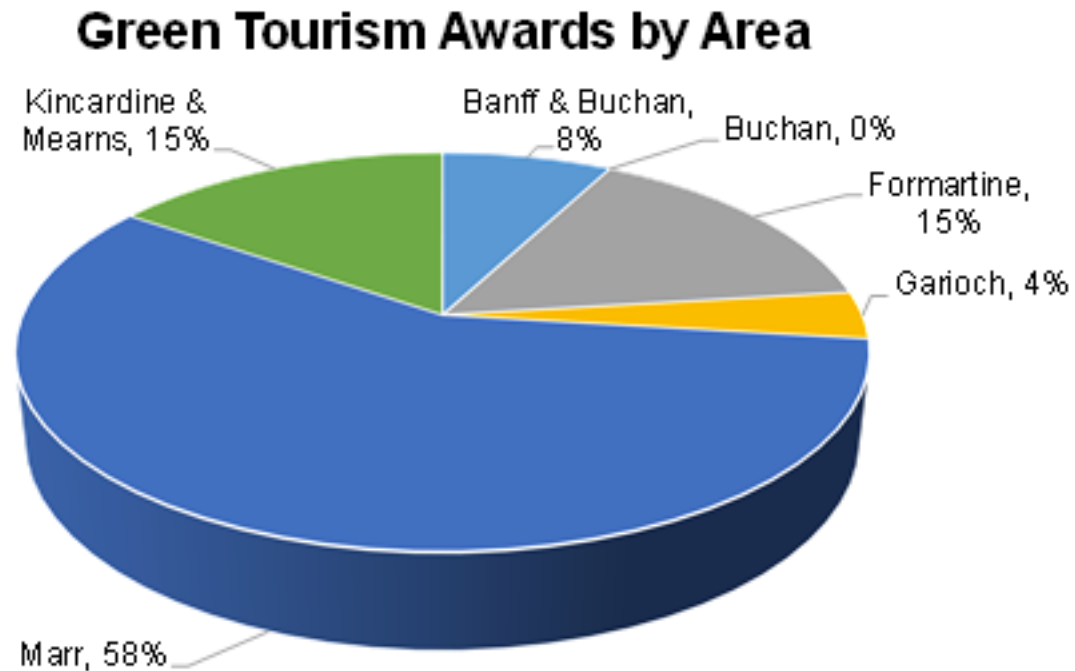
4 Star, 49%

Green Tourism and Taste Our Best

- Green Tourism
  - 24 establishments
  - 62% in Self-catering, Hotel & Holiday / Touring Park (both 12%)
  - Gold (32%), Silver (50%), Bronze (18%)
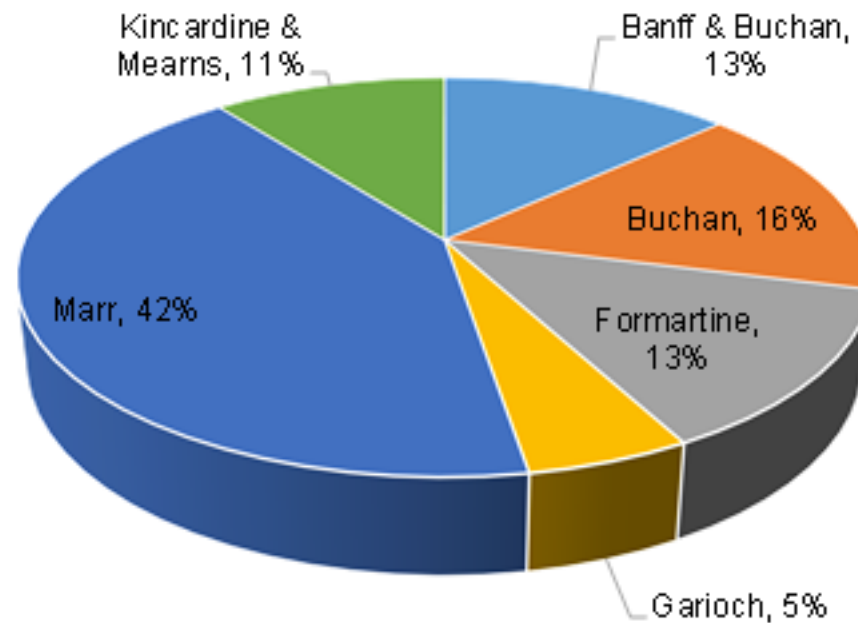
- Taste Our Best
  - 38 establishments
  - Hotels (29%), Small Hotel (18%), B&B (16%)

Green Tourism (Cont.d)

Green Tourism Awards by Area

- Kincardine & Mearns, 15%
- Banff & Buchan, 8%
- Buchan, 0%
- Formartine, 15%
- Garioch, 4%
- Marr, 58%
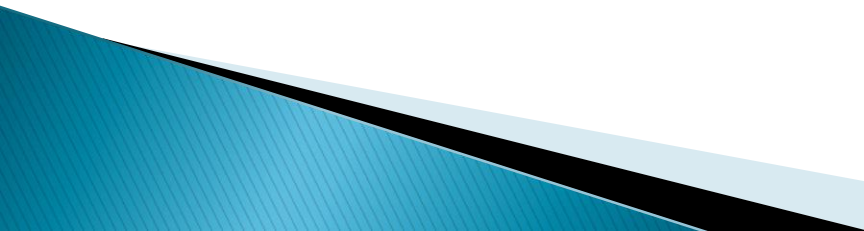
Taste Our Best (Cont.d)

Accessibility

- Hotels and Small Hotels – Accessible Rooms
  - Hotels (79%)
  - Small Hotels (29%)
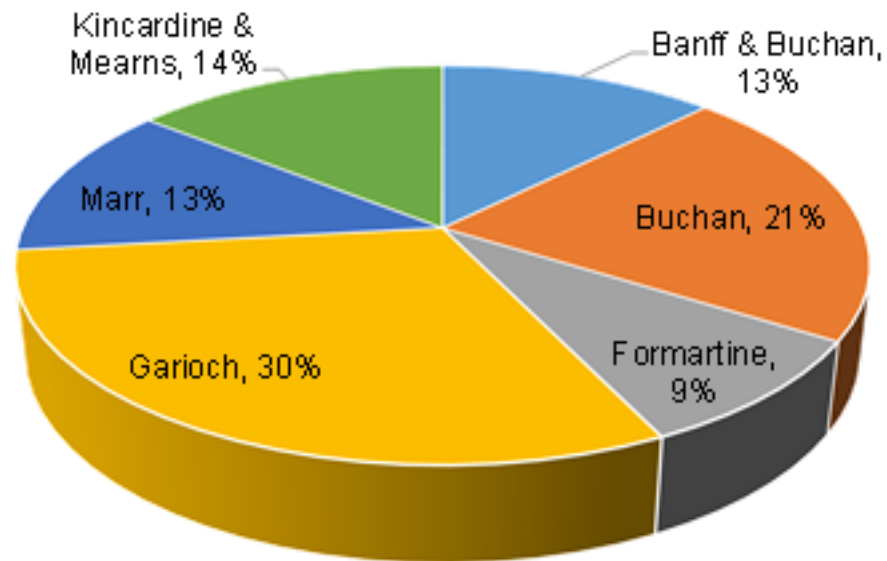 - Combined (51%)

- Accessible Rooms
  - 56 rooms
  - 120 bed spaces
  - 4% of rooms and bed spaces

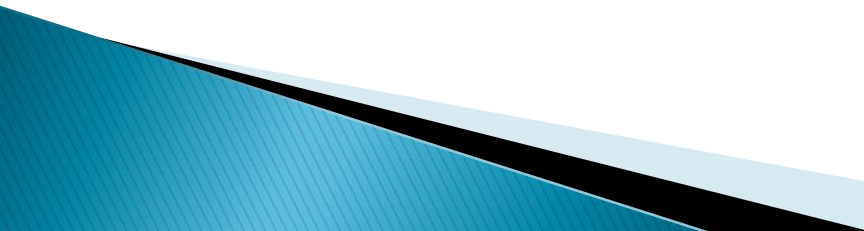- Disabled Parking and/or Drop Off Point
  - Hotels (88%)
  - Small Hotels (39%)
  - Combined (60%)

Accessibility (Cont.d)

Accessible Rooms by Area

- Banff & Buchan, 13%
- Buchan, 21%
- Formartine, 9%
- Garioch, 30%
- Marr, 13%
- Kincardine & Mearns, 14%

Potential Aberdeen City Audit

▸ No issues arose that suggested the need for a different approach

▸ Would provide scale and type of accommodation

▸ Market does not necessarily make distinction in and around boundary – likely most don't know where boundary is

▸ Aberdeen City will have very different profile compared to Aberdeenshire – more Hotels, less Self-catering, Holiday / Touring Parks

Potential Aberdeen City Audit (Cont.d)

- Complement each other in areas in easy reach of City and vice versa

- Larger events accommodation use will spread beyond City. Understanding of capacity within City and immediate surrounding area to meet needs of events

- Larger Hotel stock in City so more accessible rooms. So would clearer indication of accessible offer in the local area

- Accessible rooms in Aberdeenshire form part of City offer for larger events