ABERDEENSHIRE ACCOMMODATION AUDIT 2023

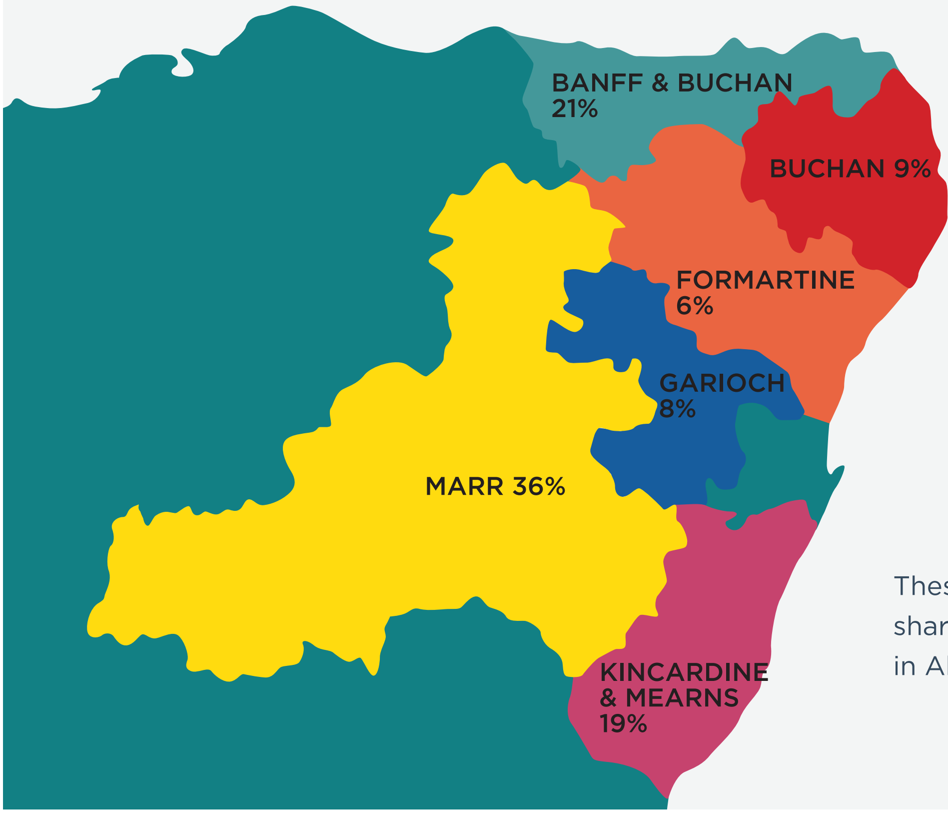
Accommodation plays a key role in the visitor tourism experience. Having a clear understanding of the size of the sector and how that stock breaks down, geographically and by type, is invaluable to any region with a tourism offer – both business and leisure.

VisitAberdeenshire, on behalf of Aberdeenshire Council, commissioned Tourism Resources Company to carry out a baseline audit to give us the best possible measure of stock in the Aberdeenshire Council local authority area, broken down into the six administrative areas of:

Banff & Buchan
Buchan
Formartine
Garioch
Kincardine & Mearns
Marr

Key findings

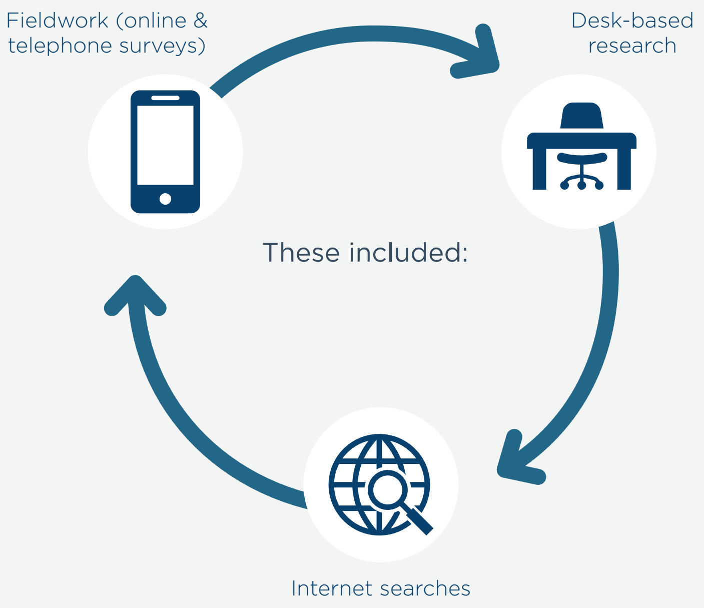
1,152 establishments | **8,146** rooms / pitches | **18,855** bedspaces



These %s illustrate each area's share of the overall bed spaces in Aberdeenshire.

Who did we speak to?

This type of project needed a multi-faceted approach, therefore several stages were put in place to try and reach as many businesses as possible over an extended period of time.



We have broken the accommodation providers into the following categories:

Serviced	Non-serviced	Holiday / Touring Park
Hotel	Self-catering	
Small Hotel	Serviced Apartments	
Guest House	Exclusive Use	
B&B	Hostel	
Inn		
Restaurant with Rooms (RwR)		

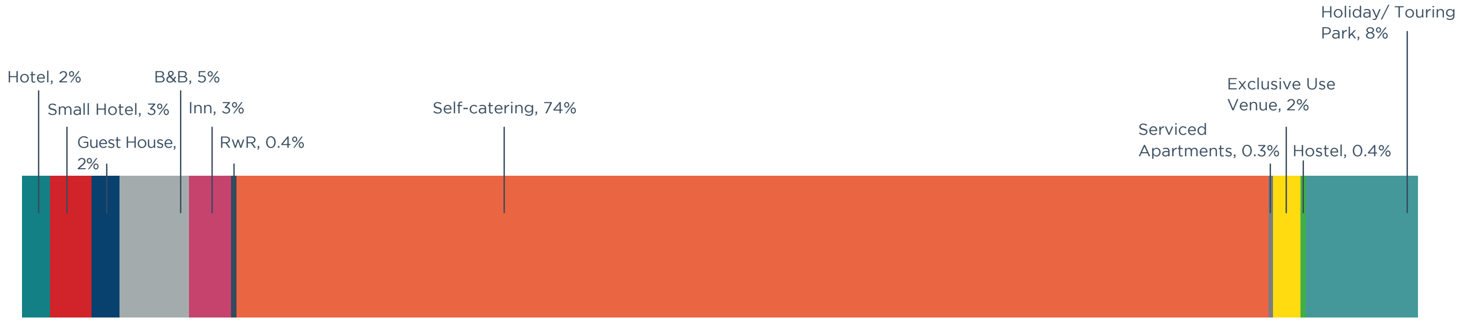
The agreed data to be collected was:

What did we find out?

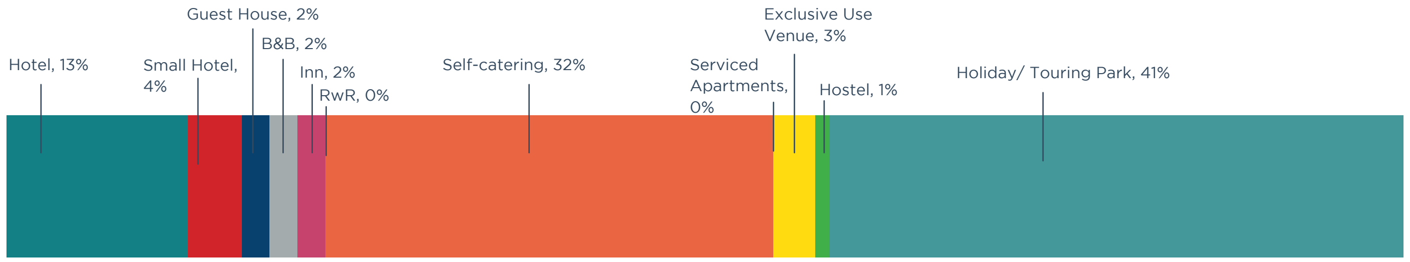
This table breaks down the high level numbers into the categories of serviced, non-serviced and holiday/touring parks.

	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

Moving beyond these main categories, and breaking it down further into more detailed accommodation categories, where do we see the greatest representation?



ESTABLISHMENTS BY SUB ACCOMMODATION CATEGORY



BED SPACES BY SUB ACCOMMODATION CATEGORY

So, exploring the total bed spaces across all accommodation in the region, we see:

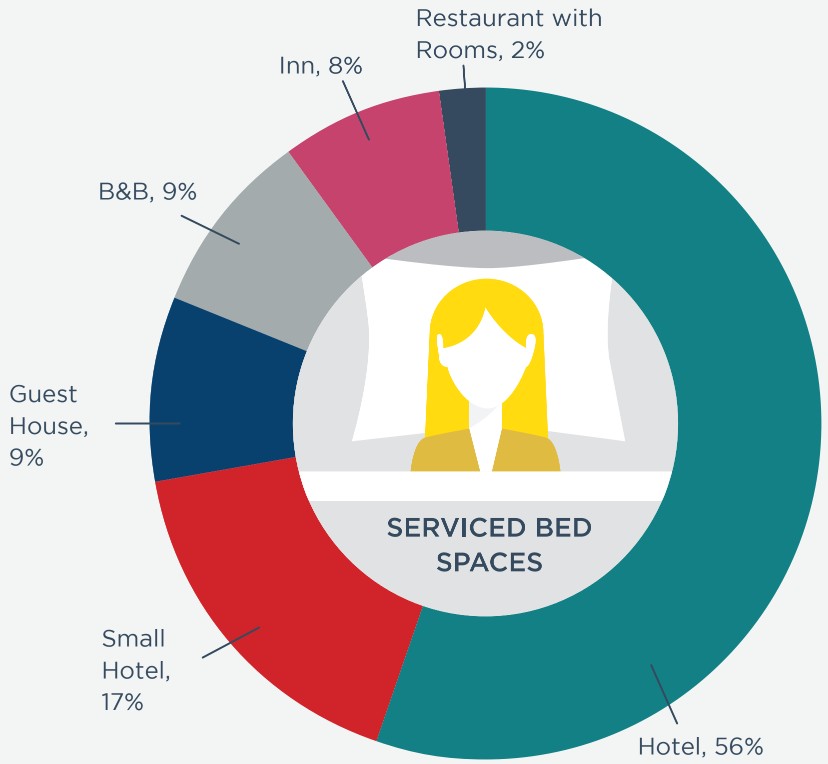
- Hotels have **2%** of establishments, and **13%** of bed spaces
- Self-catering providers have **74%** of establishments, and **32%** of bed spaces
- Holiday/Touring parks have **8%** of establishments and **41%** of bed spaces

RwR = Restaurant with Rooms

Focusing in on the **serviced** and **non-serviced** categories, and exploring bed space levels through that lens, where does the region have strong stock and where are there potential gaps?

Key findings from this section of the audit highlight:

- Hotels represent **13%** of the serviced establishments, but **56%** of the serviced bed spaces
- B&Bs, conversely, represent **34%** of serviced establishments, but only **9%** of the serviced bed spaces
- Small hotels are the same proportion – **17%** of serviced establishments and **17%** of serviced bed spaces



Moving on to the **non-serviced** accommodation businesses, self-catering dominates this space:

NON-SERVICED BED SPACES

Self-catering represents **97%** of non-serviced establishments, and **89%** of non-serviced bed spaces. Within the self-catering sector, it is dominated by single units **(89%).** Exclusive Use represents **2%** of non-serviced establishments and **8%** of non-serviced bed spaces.

Looking again at the results from a geographical perspective, what are each area's strengths, and how does each area compare against the average for the region as a whole?

Marr has the largest proportions in Small Hotel (29.5%), Guest House (31.7%), B&B (33.2%), RwR (44.6%), Self-catering (48.5%), Hostel (70%) and Holiday / Touring Park (36.5%).

Garioch has the largest proportion in Hotel (29.1%), **Formartine** in Inns (28.9%), **Buchan** in Serviced Apartments (38.7%) and **Kincardine & Mearns** in Exclusive Use (34.5%). Whilst **Banff & Buchan** does not have a largest proportion for any of the categories it is second in Small Hotel (23.7%), Self-catering (18.8%), Hostel (22.7%) and Holiday / Touring Park (29.2%).

INDIVIDUAL AREA PROPORTION IN RELATION TO ABERDEENSHIRE AVERAGE

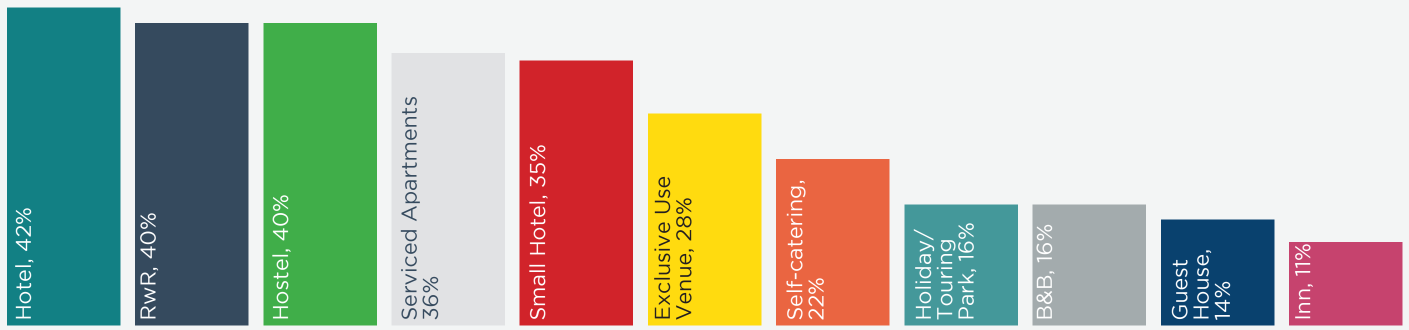
	Banff & Buchan	Buchan	Formatine	Garioch	Marr	Kinkardine & Mearns
Serviced	↓	↑	↑	↑	↓	similar
Non-serviced	↓	↓	similar	↓	↑	↓
Holiday/ Touring	↑	↓	↓	↓	similar	↑

Quality Assurance, Green Tourism and Taste our Best

In addition to understanding stock levels within the region, we were keen to explore current levels of quality assurance membership and gauge how many businesses were actively seeking membership of initiatives such as Green Tourism and Taste our Best.

Looking first at "VisitScotland's Quality Assurance" scheme, **22-23%** businesses from both serviced and non-serviced sectors, and **16%** of holiday/touring parks, were members of this scheme at the time of the audit.

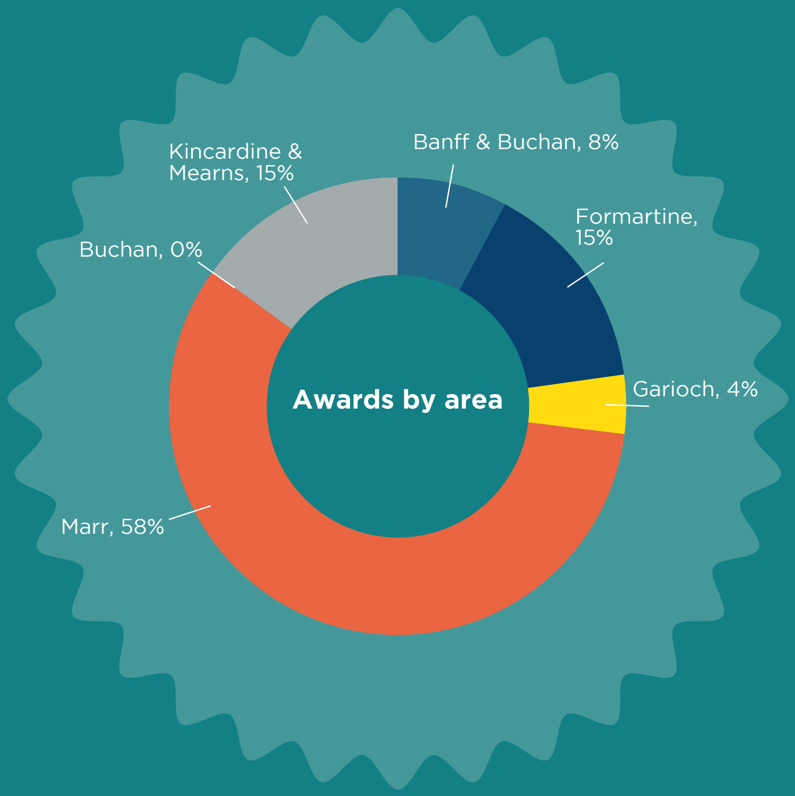
As can be seen from the chart, hotels had the highest sign-up at **42%** and Inns had the lowest at **11%.**

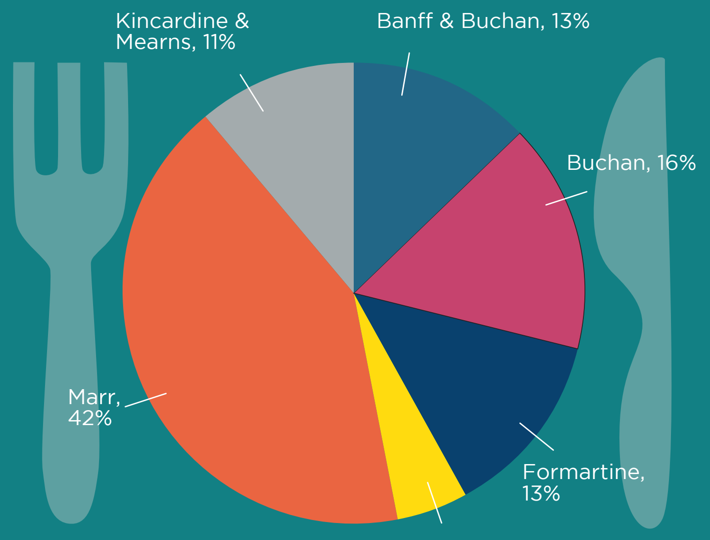


VS QUALITY ASSURANCE

Green Tourism Awards

At the time of this audit, 24 establishments were signed up to the Green Tourism initiative:
Self-catering – 62%
Hotel – 12%
Holiday/touring park– 12%
B&B – 8%
Hostel – 4%
Exclusive use – 4%





Awards by area

Taste our Best Award

At the time of this audit, 38 establishments were signed up to Taste our Best, with the top categories being:

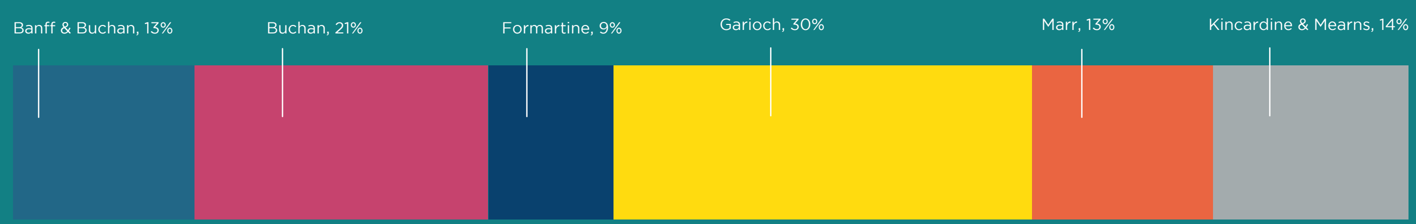
Hotel - 29%
Small Hotel - 18%
Guest House - 8%
B&B - 16%
Inn - 11%
Self-catering - 8%
Exclusive Use - 8%
RwR - 3%

Accessibility

Just under **four-fifths (79%)** of Hotels have accessible rooms and **29%** of Small Hotels. Combined, it is just **over half (51%)** of the properties.

There are a total of **56** accessible rooms and **120** accessible bed spaces (**4%** of the totals, respectively). A total of **88%** of Hotels and **39%** of Small Hotels have disabled parking and/or a drop off point. The combined total is **three-fifths.**

Garioch with **30%** has the largest proportion of accessible rooms, followed by Buchan at **21%.**



ACCESSIBLE ROOMS BY AREA

Why did we carry out this audit?

The exact size of the accommodation sector is not currently known, mainly due to the fact there is no compulsory registration scheme for all types of accommodation establishments in the UK. Whilst some public listings are available, for example through quality assurance schemes and on external commercial databases, not all businesses providing tourism accommodation are listed within these sources. Additionally it is not always possible to source detailed information from these public sources, for example, the number of rooms, bed spaces and accessibility provision.

How can we use these results?

The aim is to provide a source of reliable information which will better inform activities and decisions, and also assist in the development of the region's tourism offering. Having a more accurate understanding of the region's stock, both geographically and by sector, will help inform activity across our organisation, for example:

- within conference/event bid documentation;
- creating marketing content to reflect accommodation strengths/diverse offerings;
- Informing the marketing narrative for the region to ensure it is reflective of the accommodation offer;
- identifying where there may be potential accommodation gaps;
- Informing the future development of VisitAberdeenshire's industry development programme

The outputs from this project will also be of use to other stakeholders across the region, for example informing potential investment opportunities, informing planning policies and decisions to support future industry growth.

Future research

We appreciate the business landscape is constantly changing and acknowledge this initial baseline project will ideally be refreshed on a regular basis in the future.

It is anticipated that this is Phase 1 of a longer-term project which will ultimately capture accommodation information for the whole of the region, including the city of Aberdeen. This phase was funded and supported by Aberdeenshire Council and focused on all areas within that local authority area.

About the project

Please note the audit was commissioned by Aberdeenshire Council and therefore does not cover the city of Aberdeen.

The work was undertaken by Tourism Resources Company.

The audit was undertaken between February and May 2023, and involved desk research, an online survey and follow up telephone calls.

Want to read more on this project specifically?

There is a more detailed slide deck available on our website: **industry.visitabdn.com** and a full report available on request.

Insights & Evaluation at VisitAberdeenshire

VisitAberdeenshire commissions, and project manages, a range of industry and visitor research. To find out more about what we have available in terms of insights specific to your own business needs, or to discuss these results in more detail, contact **insights@visitabdn.com**

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