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A Quantitative Analysis of Serviced Accommodation Providers in Scotland over the period 2003 to 2007

Stephen Harwood
September 2007
School of Management, University of Edinburgh

ABSTRACT

The aim of this report is to provide a profile of the serviced accommodation sub-sector in Scotland for the period 2003 to 2007, paying particular attention to the period 2005. It presents a quantitative insight into the composition and dynamics of this sub-sector, using a spreadsheet database compiled for all identifiable serviced accommodation providers in Scotland. The purpose of the database is to provide material to support research into the online practices of serviced accommodation providers. The data was gathered from four main sources or directories. This was used to calculate the population of serviced accommodation providers. This provides a benchmark to evaluate other findings, including the significance of the different directory channels. An analysis of the database allowed the compilation of 73 tables on a variety of issues, which are presented here. This provides an insight into the heterogeneity of serviced accommodation providers, the geographical distribution of this heterogeneous group and the manner they have engaged with VisitScotland and associated organisations, e.g. visitscotland.com.

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1. INTRODUCTION

The aim of this report is to provide a profile of the serviced accommodation sub-sector in Scotland for the period 2003 to 2007, paying particular attention to the period 2005. It presents a quantitative insight into the composition and dynamics of this sub-sector, using a spreadsheet database compiled for all identifiable serviced accommodation providers in Scotland. The purpose of the database is to provide material to support research into the online practices of serviced accommodation providers. The data was gathered from four main sources or directories. This was used to calculate the population of serviced accommodation providers. This provides a benchmark to evaluate other findings, including the significance of the different directory channels. An analysis of the database allowed the compilation of 73 tables on a variety of issues, which are presented here. This provides an insight into the heterogeneity of serviced accommodation providers, the geographical distribution of this heterogeneous group and the manner they have engaged with VisitScotland and associated organisations, e.g. visitscotland.com.

2. DATA SOURCES

The building of a database of serviced accommodation providers is potentially problematical since there is a grey area where it is difficult to distinguish between providers who are committed to the provision of a service, even if it is perhaps for only a number of months of the year, and those who take advantage of excessive demand and open up to meet this demand as and when it arises. Since a Fire Certificate is required in Scotland for properties that are occupied by more than six people (including both the normal residents and guests), there is no restriction to prevent a household of two to open up two rooms and take four guests. As long as businesses comply with the legislative requirements, e.g. tax and food hygiene, then they can be viewed as legitimate. One of the difficulties in compiling a database of serviced accommodation providers is that the owner of serviced accommodation business may be engaged in other business activities, one of which may actually be the main business activity. Thus, even 'official' sources can be problematical in terms of establishing who to include or exclude. The view taken here is that 'serious' accommodation providers will tend to have visibility through presence in one or more directories, off-line or on-line. Thus, directories are viewed as the source for the compilation of the database.

The database has been compiled from the regional accommodation brochures for the years 2003, 2005 and 2007 (submission deadline is the end of April of preceding year) and is complemented with:

- the visitscotland.com database for October 2004 – this required cleansing of duplicate entries and data entry errors,
- the inventory visible on the visitscotland.com website in February 2006, February and May 2007
- the inventory visible on the SmoothHound website (15th April 2005 and 27th May 2007), the Undiscovered Scotland website (29th May 2007) and the Expedia website (13th July 2007)
- Yellow Pages Directories published closest to October 2004 for entries under the headings of "Bed & Breakfast", Guest Houses" and "Hotels & Inns"

Directory Number	Directory Name	Date of Publication
1	Aberdeen	May 2004
43	Highlands & Islands	May 2005
26	Dundee & Perth	October 2005
32	Fife & Kinross	December 2004
29	Edinburgh	December 2004
83	SW Scotland	July 2005
35	Glasgow South	June 2004
2	Ayr, Kilmarnock & Irvine	June 2004
34	Glasgow North	June 2004
86	Stirling, Falkirk & Grangemouth	June 2004

It is argued that non-VisitScotland subscribers can be identified using both a traditional, commonly used directory and a popular intermediary website. BT telephone directories were considered but analysis of the Directory for the Edinburgh locality suggested that this data-set would not contribute to an understanding of the sub-sector, so was not continued. Of the 360 serviced accommodation providers listed in this directory, 88% were listed with the Yellow Pages, 74% were in the 2005 accommodation brochure and only 13 were unique to the BT, of which 5 were listed in the 2003 accommodation brochure.

Variables were selected on the basis of a) availability in the data sources and b) that they would allow the differentiation of serviced accommodation providers. The data has been collated in the form of a spreadsheet database. Every effort has been taken to ensure the accuracy of the transfer of the data from source to database and a combination of data entry checks and anomaly investigation during analysis gives confidence that errors are minimal.

3. POPULATION OF SERVICED ACCOMMODATION PROVIDERS

The population of-serviced accommodation providers is calculated for the year 2005 and utilises the October 2004 database provided by visitscotland.com, the ATB regional accommodation brochures for 2005, the Yellow Pages and a popular website www.smoothhound.com.

It is acknowledged that there is a timing issue with regard to the marrying of the different data sets. However, it can be argued that brochure and directory entries are present with the expectation to be trading over the next period, which is taken as 2005. The SmoothHound data fits into the 2005 window. The October 2004 database is anticipated to change over time. Thus, this database can be argued to be not representative for 2005. However, the number of entries that are exclusive to this database is 139 (Figure 1). If there was an extraordinary 10% increase or decrease to this specific group, it would affect the calculated population by only ± 14, which is 0.2% of the calculated population. Thus, these data sources can collectively provide an indication of the magnitude of the population with the appreciation that there will be error, though this is viewed as insignificant.

The population of accommodation providers, based on these four sources is calculated to be 6,499 of which 70.5% have a Yellow Pages listing, 62.4% are on the visistscotland.com database, 60.5% have an entry in an ATB accommodation brochure and 34.1% has a presence on the commercial website SmoothHound.com. The degree of overlap is presented in Table 1 and Figure 1.

	database (D)	brochure (B)	yellow pages (Y)	smoothhound (S)
B		73		
S				312
D	139			
Y			1538	
DB	1115	1115		
BY		66	66	
YS			419	419
DY	88		88	
DS	19			19
BS		11		11
DYS	52		52	52
DBS	251	251		251
DBY	1265	1265	1265	
BYS		26	26	26
ALL	1125	1125	1125	1125
	4054	**3932**	**4579**	**2215**

Table 1 **An analysis of the overlap of serviced accommodation providers**

ALL = all four sources B = accommodation brochure D = visitscotland.com database
S = smoothhound.co.uk Y = Yellow Pages
misc = accommodation providers randomly found during the initial database compilation
A combination of letters, e.g. BY, indicates the combination of sources used by providers, i.e. BY represents those providers using both accommodation brochures (B) and Yellow Pages (Y)

A more detailed breakdown by geographical location is provided in Table 48 and Table 49. Only 17% of serviced accommodation providers are represented on all four sources, whilst 24% are represented solely in the Yellow Pages and 20% are represented through the two channels of VisitScotland as well as the Yellow Pages. A significant 35% of serviced accommodation providers had no VisitScotland representation. This does raise the question of how many accommodation providers are invisible. If only 3.6% (13 entries) of accommodation providers listed in the BT telephone directory for the Edinburgh locality are un-represented in the four selected sources, then this suggests that the actual population of accommodation providers is unlikely to be significantly greater.

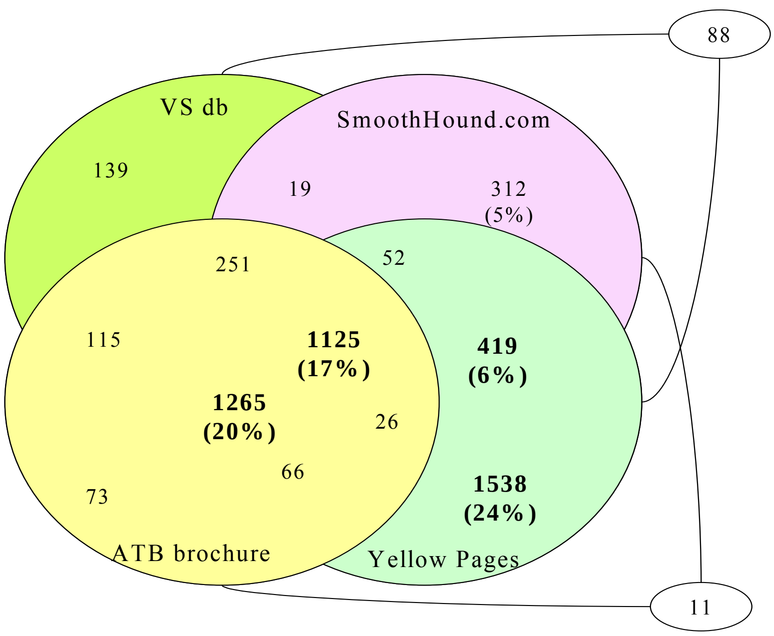

Figure 1 **An analysis of the overlap of serviced accommodation providers (not to scale)**

A small number (23) of serviced accommodation providers were randomly identified during the compilation process, which increases the population to 6522. These included the properties from the larger hotel - lodging groups, e.g. Premier Travel Inn, who did not have their entire inventory listed in one or more of the directories.

Whilst there can be a high degree of confidence regarding the validity of business listed in three of the sources, this is not necessarily the case for Yellow Pages entries which a) may be outdated or b) do not provide accommodation but are instead licensed premises but refer to themselves as hotels or inns. Nevertheless, and despite possible data entry errors, it is postulated that the overall calculated population is relatively accurate, though it would be difficult to be more precise. Whilst working with this large data set, it has been recognised that there are opportunities for data entry errors. Every effort has been taken to prevent these from occurring and to correct them when identified. The controlled nature of the data entry and the analytical process, particularly if numbers do not tally on entry or anomalies are found during analysis, has resulted in confidence that most data errors have been identified.

4. COMPOSITION OF THE POPULATION OF SERVICED ACCOMMODATION PROVIDERS

The composition of serviced accommodation sector can be viewed in terms of accommodation type (e.g. hotel) and in terms of the nature of 'ownership (single or multiple site ownership).

Accommodation type

The composition of the serviced accommodation provider based upon type of accommodation and geographical location is presented in Table 2 (actual numbers) and Table 3 (percentage). The classification is based upon that used by VisitScotland for their grading system. It reveals the Highlands as having the greatest number of serviced accommodation providers (21%). However, if the size (km^2) of each council area is taken into consideration, then, as the last column in Table 2 reveals, the concentration of providers in the Highlands is very low – one property per twenty square kilometres. This contrasts to the cities, especially Edinburgh which has more than two sites per square kilometre. Aside from the large number of businesses in the Highlands area, these results suggest that providers are relatively well distributed throughout Scotland.

	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	TOTAL	number of properties per sq km
Highland	640	-	322	234	22	-	7	7	164	1,396	0.05
Argyll & Bute	261	-	111	87	17	-	2	3	88	569	0.08
Dumfries & Galloway	179	-	70	103	20	-	6	-	59	437	0.07
Fife	153	1	59	72	12	2	5	4	38	346	0.26
Scottish Borders	153	-	32	40	19	-	-	1	39	284	0.06
Perth & Kinross	149	-	80	83	18	1	6	3	59	399	0.08
Edinburgh, City of	124	5	265	89	3	-	11	-	36	533	2.02
Stirling	123	-	59	41	11	-	3	3	27	267	0.12
Aberdeenshire	109	-	65	113	10	-	4	1	40	342	0.05
Eilean Siar	108	-	28	13	3	-	-	-	11	163	0.05
South Ayrshire	74	-	41	36	3	1	2	-	21	178	0.15
Orkney Islands	73	-	14	12	5	-	-	-	10	114	0.12
Angus	66	-	16	30	1	-	1	3	16	133	0.06
Moray	63	-	34	43	6	-	1	-	18	165	0.07
South Lanarkshire	45	-	11	30	2	-	3	-	13	104	0.06
North Ayrshire	44	-	34	31	2	-	-	-	18	129	0.15
East Lothian	38	-	11	20	2	-	2	-	14	87	0.13
Shetland Islands	37	-	14	11	2	-	-	-	6	70	0.05
West Dunbartonshire	35	-	10	14	3	-	1	1	1	65	0.41
West Lothian	23	-	5	21	1	-	2	-	1	53	0.12
Midlothian	20	-	4	11	1	-	-	-	3	39	0.11
Aberdeen City	16	3	103	45	-	-	5	-	9	181	0.97
Falkirk	15	-	6	20	-	-	3	1	3	48	0.16
Glasgow City	15	6	41	70	-	-	7	1	8	148	0.85
East Ayrshire	13	-	2	21	3	-	2	-	6	47	0.04
North Lanarkshire	13	1	11	19	2	-	4	-	5	55	0.12
Renfrewshire	13	-	7	16	4	-	2	-	2	44	0.17
Dundee City	12	-	16	21	-	-	4	1	7	61	1.02
Clackmannanshire	10	-	-	5	-	-	-	-	5	20	0.13
East Dunbartonshire	10	-	1	1	1	-	1	-	2	16	0.09
Inverclyde	5	1	2	6	-	-	1	-	3	18	0.11
East Renfrewshire	4	-	1	5	-	-	-	-	1	11	0.06
TOTALS	2,643	17	1,475	1,363	173	4	85	29	733	6,522	

Table 2 The composition of serviced accommodation providers by geographical locality (locality spatial details are sourced from the General Register Office for Scotland)

	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	TOTAL
Highland	9.81%		4.94%	3.59%	0.34%		0.11%	0.11%	2.51%	21.40%
Argyll & Bute	4.00%		1.70%	1.33%	0.26%		0.03%	0.05%	1.35%	8.72%
Dumfries & Galloway	2.74%		1.07%	1.58%	0.31%		0.09%		0.90%	6.70%
Fife	2.35%	0.02%	0.90%	1.10%	0.18%	0.03%	0.08%	0.06%	0.58%	5.31%
Scottish Borders	2.35%		0.49%	0.61%	0.29%			0.02%	0.60%	4.35%
Perth & Kinross	2.28%		1.23%	1.27%	0.28%	0.02%	0.09%	0.05%	0.90%	6.12%
Edinburgh, City of	1.90%	0.08%	4.06%	1.36%	0.05%		0.17%		0.55%	8.17%
Stirling	1.89%		0.90%	0.63%	0.17%		0.05%	0.05%	0.41%	4.09%
Aberdeenshire	1.67%		1.00%	1.73%	0.15%		0.06%	0.02%	0.61%	5.24%
Eilean Siar	1.66%		0.43%	0.20%	0.05%				0.17%	2.50%
South Ayrshire	1.13%		0.63%	0.55%	0.05%	0.02%	0.03%		0.32%	2.73%
Orkney Islands	1.12%		0.21%	0.18%	0.08%				0.15%	1.75%
Angus	1.01%		0.25%	0.46%	0.02%		0.02%	0.05%	0.25%	2.04%
Moray	0.97%		0.52%	0.66%	0.09%		0.02%		0.28%	2.53%
South Lanarkshire	0.69%		0.17%	0.46%	0.03%		0.05%		0.20%	1.59%
North Ayrshire	0.67%		0.52%	0.48%	0.03%				0.28%	1.98%
East Lothian	0.58%		0.17%	0.31%	0.03%		0.03%		0.21%	1.33%
Shetland Islands	0.57%		0.21%	0.17%	0.03%				0.09%	1.07%
West Dunbartonshire	0.54%		0.15%	0.21%	0.05%		0.02%	0.02%	0.02%	1.00%
West Lothian	0.35%		0.08%	0.32%	0.02%		0.03%		0.02%	0.81%
Midlothian	0.31%		0.06%	0.17%	0.02%				0.05%	0.60%
Aberdeen City	0.25%	0.05%	1.58%	0.69%			0.08%		0.14%	2.78%
Falkirk	0.23%		0.09%	0.31%			0.05%	0.02%	0.05%	0.74%
Glasgow City	0.23%	0.09%	0.63%	1.07%			0.11%	0.02%	0.12%	2.27%
East Ayrshire	0.20%		0.03%	0.32%	0.05%		0.03%		0.09%	0.72%
North Lanarkshire	0.20%	0.02%	0.17%	0.29%	0.03%		0.06%		0.08%	0.84%
Renfrewshire	0.20%		0.11%	0.25%	0.06%		0.03%		0.03%	0.67%
Dundee City	0.18%		0.25%	0.32%			0.06%	0.02%	0.11%	0.94%
Clackmannanshire	0.15%			0.08%					0.08%	0.31%
East Dunbartonshire	0.15%		0.02%	0.02%	0.02%		0.02%		0.03%	0.25%
Inverclyde	0.08%	0.02%	0.03%	0.09%			0.02%		0.05%	0.28%
East Renfrewshire	0.06%		0.02%	0.08%					0.02%	0.17%
TOTALS	40.5%	0.3%	22.6%	20.9%	2.7%	0.1%	1.3%	0.4%	11.2%	100.0%

Table 3 **The composition (percentage) of serviced accommodation providers by geographical locality**

A possible benchmark to evaluate the robustness of the methodology and the calculated population to is contrast the calculated number of hotels for 2005 with the number of hotel liquor licences awarded. A hotel, as defined by the Licensing (Scotland) Act 1976, is required to provide ‘sleeping accommodation’ for travellers. The comparison (Table 4) between the calculated population of hotels and the number of hotel licenses in force on the 31st December 2004 for each Council area reveals a variation of between -7% (Glasgow) and 40% (Renfrewshire). Localities with over 35 hotel licences (both full and restricted) tend to have between 23% and 32% more hotel licences awarded than hotels in the calculated population. This represents 63% (20) of localities, which contrasts with 28% (9) of localities that have less than 23% variation. However, the question that is raised is whether hotel licences are awarded to accommodation types other than hotels, e.g. guest houses and also to businesses that do not offer accommodation, e.g. hotels in name only. The two locations (Aberdeen and Glasgow) with more hotels than properties with hotel licences suggest that there are unlicensed hotels to also acknowledge. If the assumption that hotel licences are awarded to properties other than hotels is valid, then as a very crude measure, the liquor licence data provides an overestimate of the actual number of hotels by around 30%.

Council Area	Hotel in population	Small Hotel in population	Total Hotels in population	Difference between Hotel population and Hotel licences	Total Hotel licences (in force on 31st December 2004)	Restricted Hotel licences (in force on 31st December 2004)	Hotel licences (in force on 31st December 2004)
Aberdeen City	45	9	54	(1)	53	8	45
Aberdeenshire	113	40	153	29	182	5	177
Angus	30	16	46	21	67	6	61
Argyll & Bute	87	88	175	60	235	61	174
Clackmannanshire	5	5	10	-	10	-	10
Dumfries & Galloway	103	59	162	56	218	30	188
Dundee City	21	7	28	3	31	8	23
East Ayrshire	21	6	27	1	28	-	28
East Dunbartonshire	1	2	3	1	4	-	4
East Lothian	20	14	34	11	45	4	41
East Renfrewshire	5	1	6	1	7	-	7
Edinburgh, City of	89	36	125	58	183	42	141
Eilean Siar	13	11	24	12	36	9	27
Falkirk	20	3	23	7	30	1	29
Fife	72	38	110	51	161	20	141
Glasgow City	70	8	78	(5)	73	18	55
Highland	234	164	398	128	526	120	406
Inverclyde	6	3	9	5	14	3	11
Midlothian	11	3	14	4	18	2	16
Moray	43	18	61	19	80	9	71
North Ayrshire	31	18	49	20	69	10	59
North Lanarkshire	19	5	24	7	31	1	30
Orkney Islands	12	10	22	7	29	3	26
Perth & Kinross	83	59	142	62	204	36	168
Renfrewshire	16	2	18	12	30	5	25
Scottish Borders	40	39	79	37	116	17	99
Shetland Islands	11	6	17	5	22	4	18
South Ayrshire	36	21	57	26	83	10	73
South Lanarkshire	30	13	43	3	46	3	43
Stirling	41	27	68	32	100	15	85
West Dunbartonshire	14	1	15	5	20	2	18
West Lothian	21	1	22	9	31	1	30
Total	1,363	733	2,096	686	2,782	453	2,329

Table 4 A comparison of the total number of hotels calculated for 2005 and the number of hotel licences in force on the 31st December 2004

Multi-site organisations

With regard to management, many businesses tend to be single site. However a number of sites can be identified which operate on a collective basis, either having the same owner, e.g. a privately owned group, or operate as a consortia, e.g. membership organisation providing services including marketing. Sixty-three separate organisations have been identified managing / owning 375 sites or 5.7% of the population. Table 5 reveals that ten organisations represent 55% of these 375 sites. Over half (34 or 54%) of these multi-site organisations have three or less sites. Twelve organisations had a token presence in Scotland of one site.

Number of sites	50	40	19	16	15	14	13	12	11	8	6	5	4	3	2	1	Total 375
Number of organisations	1	1	1	2	1	1	1	1	1	3	3	9	4	10	12	12	Total 63

Table 5 The number of sites managed by an organisation

The top 25 organisations, in terms of the numbers of sites handled, are presented in Table 6. Notably, two that take the lead could be described as being in the "budget hotel" or lodge sub-sector: "Premier Travel Inn" and "Travelodge". "Best Western" is a US membership organisation providing a marketing service. The leading Scottish groups are British Trust Hotels and MacDonalds, the former also includes the Crerar Group and more recently the Swallow Group. The continually changing landscape of serviced accommodation provision is reflected in the changing relationship between British Trust Hotels and Swallow Hotels. In July 2005, British Trust Hotels sold 20 out of its 24 hotel portfolio to Swallow Hotels[1]. In September 2006 Swallow Hotels went into receivership[2]. In March 2007 it was reported that the British Trust Hotels would acquire 26 hotels from the failed Swallow Group[3]. Whilst this specific situation is perhaps unique, it dramatically demonstrates the constant state of flux of this sub-sector.

[1] Ian McConnell (2005) "Scottish group changes tack and sells off 20 hotels", 15th July 2005, The Herald [www.scottishhospitalityjobs.com/news/2005-07-15-1.shtml, accessed 1st July 2007]

[2] Hamish Rutherford (2006) "50 jobs lost as administrators close Scottish pubs", 27th September 2006, The Scotsman [[http://thescotsman.scotsman.com/business.cfm?id=1426362006, accessed 1st July 2007]

[3] Paul Rogerson (2007) "Check out the name", 26th March 2007, The Herald [www.theherald.co.uk/business/news/display.var.1287089.0.0.php, accessed 1st July 2007]

Full name	Number of sites	Website	Country	Location
Premier Travel Inn	50	www.premiertravelinn.com	England	Bedfordshire
Best Western	40	www.bestwestern.com	USA	Arizona
Travelodge	19	www.travelodge.co.uk	England	Oxfordshire
British Trust Hotels*	16	www.crerarhotels.com	Scotland	Edinburgh
MacDonald	16	www.MacdonaldHotels.co.uk	Scotland	Bathgate
Swallow Hotels	15	www.swallowhotels.com	Scotland	Edinburgh
IC Holiday Inn – Express	14	www.ichotelsgroup.com	England	Berkshire
Hilton	13	www.hilton.com/	USA	California
Festival Inns	12	www.festival-inns.co.uk/	Scotland	Loanhead
Shearings Holidays	11	www.washearings.com	England	Lancashire
Ramada Jarvis	8	www.ramadajarvis.co.uk	England	Buckinghamshire
Swallow Inns	8	www.swallowhotels.com	Scotland	Edinburgh
Thistle Hotels	8	www.thistlehotels.com	England	Uxbridge
Fox Inns Group	6	www.foxinns.com	Scotland	Edinburgh
IC Holiday Inn	6	www.ichotelsgroup.com	England	Berkshire
Strathmore Hotels	6	www.strathmorehotels.com	Scotland	East Kilbride
Accor	5	www.accor.com	France	Evry Cedex
Costley & Costley Hoteliers Ltd	5	www.costley-hotels.co.uk	Scotland	Ayrshire
Crerar Hotels	5	www.crerarhotels.com	Scotland	Edinburgh
Highland Heritage	5	www.highlandheritage.co.uk	Scotland	Argyll
Innkeepers Lodge	5	www.innkeeperslodge.com	England	Midlands
Lochs and Glens	5	www.lochsandglens.com	Scotland	Dunbartonshire
Maclay Inns	5	www.maclay.com	Scotland	Alloa
Marriott	5	www.marriott.com	USA	Washington
Stonefield Castle Group	5	www.stonefieldhotels.com	Scotland	Renfrewshire

Table 6 The top twenty-five groups in Scotland in terms of the number of sites in Scotland. Note: websites are as of April 2007 [*note: pre-sale to Swallow Hotels]

An analysis of the registered offices for these 63 organisations reveals that twenty-nine are Scottish. Of these twenty-nine Scottish organisations, twenty-one have between two and five properties, whilst the others, at the time of the analysis in 2005, had up to sixteen. There are twenty-four English organisations, six US, two French and one Irish. The details of one company have not been identified (Maksu) though is believed to be Scottish. Aside from the Best Western Group (US), which is a consortia of members, non-UK organisations have limited presence (Table 7).

Ranking	Number of sites	Full name	Website	Country	Location
17	5	Accor	www.accor.com	France	Evry Cedex
52	1	Campanile	www.campanile.fr	France	Torcy
36	3	Jurys Doyle Hotel Group	www.jurysdoyle.com	Ireland	Dublin
2	40	Best Western	www.bestwestern.com	USA	Arizona
8	13	Hilton	www.hilton.com/	USA	California
24	5	Marriott	www.marriott.com	USA	Washington
31	3	Carlson Hotels	www.carlson.com	USA	Minnesota
32	3	Choice Hotels	www.choicehotels.com	USA	Maryland
48	2	Starwood	www.starwoodhotels.com	USA	White Plains

Table 7 Non-UK organisations with a presence in Scotland. Note: websites are as of April 2007

A complete list of the consortia companies with details is presented in Table 60 (Appendix 1). Examination of the grading status of the consortia properties is presented in Table 61 (Appendix 1). Whilst every effort has been made to complete this list, there may be omissions. Nevertheless, this table hints at how these consortia differentiate themselves and their positioning strategies.

5. SIZE (NUMBER OF ROOMS) OF SERVICED ACCOMMODATION PROVIDERS

It appears to be generally accepted that most serviced accommodation providers are very small businesses. An analysis of serviced accommodation providers listed in the 2005 accommodation brochures is presented in Table 8. This reveals that only 6% of serviced accommodation providers have 50 rooms or more. A further 10% have between 15 and 49 rooms. Thus 84% of all serviced accommodation providers have 14 or fewer rooms. Significantly, providers with 2 and 3 rooms represent 42% of all accommodation providers, whilst 1 roomed businesses represent a mere 2%.

number of rooms	number of sites	% of total	cum sum
1	89	2%	2%
2	655	17%	19%
3	987	25%	44%
4	303	8%	52%
5	240	6%	58%
6	262	7%	64%
7	170	4%	69%
8	150	4%	73%
9	111	3%	75%
10	106	3%	78%
11	69	2%	80%
12	67	2%	82%
13	35	1%	83%
14	42	1%	84%
15-19	127	3%	87%
20-49	268	7%	94%
50-99	135	3%	97%
100-199	86	2%	99%
>199	30	1%	100%

Table 8 The distribution of businesses by room size

A breakdown of these figures (Table 9) reveals that providers at this smaller end are primarily bed and breakfast (B&B) businesses with typically 2 to 4 rooms. Guest houses dominate the 4 to 8 room bracket, with Smaller Hotels dominating the 9 to 19 room bracket. This does reflect VisitScotland's description of accommodation: guest houses "*normally larger than a B&B*", smaller hotels normally having "*between 6 and 20 bedrooms*" and hotels having *"at least 20 bedrooms"* (the regional Holiday and Travel Guides, 2007). The full set of figures is presented in Appendix 2.

Number of rooms per site	B&B	Guest House	Small Hotel	as a % of all accommodation for a given number of rooms
1	99%	1%	0%	100%
2	98%	0%	1%	99%
3	91%	7%	0%	98%
4	53%	40%	3%	95%
5	18%	62%	10%	90%
6	4%	65%	19%	89%
7	4%	64%	22%	89%
8	4%	45%	39%	87%
9	4%	33%	50%	87%
10	1%	29%	47%	77%

Table 9 The number of rooms according to accommodation type (% are of the total number of properties with that number of rooms)

Number of rooms	Aberdeen City	Aberdeenshire	Angus	Argyll & Bute	Clackmannanshire	Dumfries & Galloway	Dundee City	East Ayrshire	East Dunbartonshire	East Lothian	East Renfrewshire	Edinburgh, City of	Eilean Siar	Falkirk	Fife	Glasgow City	Highland	Inverclyde	Midlothian	Moray	North Ayrshire	North Lanarkshire	Orkney Islands	Perth & Kinross	Renfrewshire	Scottish Borders	Shetland Islands	South Ayrshire	South Lanarkshire	Stirling	West Dunbartonshire	West Lothian	Total
200 or over	2	-	-	-	-	-	-	-	-	-	-	8	-	-	1	14	-	-	-	-	-	-	-	2	1	-	-	2	-	-	-	-	30
100-199	8	1	-	1	-	1	4	-	-	-	-	22	-	1	1	15	10	1	-	-	1	3	-	1	7	2	-	1	1	3	1	1	86
50-99	10	2	2	15	-	5	2	1	2	1	-	16	1	2	4	12	23	3	-	1	1	4	-	7	3	1	1	1	4	8	1	2	135
20-49	12	10	4	22	-	15	2	2	-	4	1	24	6	3	20	11	42	-	3	7	5	3	4	22	3	9	8	8	7	7	3	1	268
15-19	3	7	1	14	-	13	2	1	-	3	-	11	2	-	6	11	19	-	1	3	2	1	3	10	-	3	1	4	3	1	2	-	127
9-14	7	17	10	59	3	29	5	1	1	4	1	58	8	2	21	9	74	1	2	9	10	-	7	35	-	19	2	11	5	16	3	1	430
6-8	25	26	6	64	1	41	7	1	-	6	-	101	8	-	28	7	108	1	3	4	14	4	14	36	4	20	4	14	3	26	2	4	582
4-5	14	17	8	59	2	35	3	4	2	5	-	54	11	2	30	5	105	1	5	9	14	4	12	38	1	33	12	16	4	26	10	2	543
1-3	7	75	39	193	5	114	9	6	6	31	3	78	95	13	111	7	369	4	9	40	33	6	51	94	4	102	22	42	29	94	27	13	1,731
Total	88	155	70	427	11	253	34	16	11	54	5	372	131	23	222	91	750	11	23	73	80	25	91	245	23	189	50	99	56	181	49	24	3,932

Table 10 The size of serviced accommodation provision by number of rooms in council areas

Number of rooms	Aberdeen City	Aberdeenshire	Angus	Argyll & Bute	Clackmannanshire	Dumfries & Galloway	Dundee City	East Ayrshire	East Dunbartonshire	East Lothian	East Renfrewshire	Edinburgh, City of	Eilean Siar	Falkirk	Fife	Glasgow City	Highland	Inverclyde	Midlothian	Moray	North Ayrshire	North Lanarkshire	Orkney Islands	Perth & Kinross	Renfrewshire	Scottish Borders	Shetland Islands	South Ayrshire	South Lanarkshire	Stirling	West Dunbartonshire	West Lothian	Total
200 or over	2%											2%			0%	15%								1%	4%			2%					1%
100-199	9%	1%		0%		0%	12%					6%		4%	0%	16%	1%	4%			1%	12%		0%	30%	1%		1%	2%	2%	2%	4%	2%
50-99	11%	1%	3%	4%		2%	6%	6%	18%	2%		4%	1%	9%	2%	13%	3%	13%		1%	1%	16%		3%	13%	1%	2%	1%	7%	4%	2%	8%	3%
20-49	14%	6%	6%	5%		6%	6%	13%		7%	20%	6%	5%	13%	9%	12%	6%		13%	10%	6%	12%	4%	9%	13%	5%	16%	8%	13%	4%	6%	4%	7%
15-19	3%	5%	1%	3%		5%	6%	6%		6%		3%	2%		3%	12%	3%		4%	4%	3%	4%	3%	4%		2%	2%	4%	5%	1%	4%		3%
9-14	8%	11%	14%	14%	27%	11%	15%	6%	9%	7%	20%	16%	6%	9%	9%	10%	10%	4%	9%	12%	13%		8%	14%		10%	4%	11%	9%	9%	6%	4%	11%
6-8	28%	17%	9%	15%	9%	16%	21%	6%		11%		27%	6%		13%	8%	14%	4%	13%	5%	18%	16%	15%	15%	17%	11%	8%	14%	5%	14%	4%	17%	15%
4-5	16%	11%	11%	14%	18%	14%	9%	25%	18%	9%		15%	8%	9%	14%	5%	14%	4%	22%	12%	18%	16%	13%	16%	4%	17%	24%	16%	7%	14%	20%	8%	14%
1-3	8%	48%	56%	45%	45%	45%	26%	38%	55%	57%	60%	21%	73%	57%	50%	8%	49%	17%	39%	55%	41%	24%	56%	38%	17%	54%	44%	42%	52%	52%	55%	54%	44%

Table 11 The percentage of serviced accommodation providers of a particular size-band for each Council areas in Scotland

Table 10 and Table 11 reveals the profile of serviced accommodation providers in Scotland by size, in terms of the number of rooms, of serviced accommodation providers for each of the Council areas. Whereas Glasgow has a total of 92 properties, Aberdeen has 88 properties and Dundee has 34 properties, Edinburgh has 372 properties. Examination reveals that many Council areas have upwards of 40% of all properties with only 3 or less rooms, these cities have respectively 8%, 8%, 26% and 21%. Likewise, whilst many other Council areas have less than 5% of properties with 100 or more rooms, these cities have 31%, 11%, 12% and 8% respectively. North Lanarkshire and Renfrewshire follow this city pattern. One question that this raises is whether there is an underlying trend towards the demise in the small accommodation provider as larger providers e.g. Budget Hotels, identify opportunities to position themselves to capture the market traditionally held by these smaller providers.

6. CAPACITY OF ACCOMMODATION PROVISION IN SCOTLAND

The profile of serviced accommodation provision in Scotland together with details about the size of individual businesses can be used to determine the capacity (number of beds / rooms) of Scotland for serviced accommodation provision.

The data provided in the accommodation brochures for both 2005 and 2007, as well as that available on the SmoothHound website for 2005, allows the calculation (Table 12) of an average size (number of beds and rooms) for each accommodation type for both 2005 and 2007. There is a high degree of consistency between the figures for 2005 and 2007 for most accommodation types, e.g. B&Bs, guest houses, hotels. However, there are large variances for the larger accommodation types, the campuses and lodges. This may be due to their small number (e.g. 85 lodges in 2005 but capacity details only available for 29 lodges), the possibility that these sub-sets are not fully represented in the database and that changes due to additions or deletions in the database are likely to have a major impact for these particular groups. These suppositions appear substantiated by an analysis of change in the room composition for the period 2005 to 2007 (Table 31 and Table 32). Only 19% of serviced accommodations represented in the 2007 serviced accommodation brochures, that were also in the 2005 brochures, effected changes to the number of rooms. The average change for this group aggregated was 0.4 of a room. When analysed by type, smaller accommodation types appear to limit the increase or decrease in the number of rooms to one or two. The overall net effect of changes between 2005 and 2007 in the number of rooms available is 198 rooms.

	2005		2007	
	People	**rooms**	**people**	**rooms**
B&B	7	3	6	3
Campus	467	324	365	307
Guest House	14	7	14	7
Hotel	111	54	110	53
Inn	19	9	22	10
International Resort Hotel	474	217	474	207
Lodge	101	46	143	68
Restaurant	13	6	12	6
Small Hotel	24	12	23	11

Table 12 The average capacity (people and rooms) of serviced accommodation providers based upon accommodation brochures (2005 and 2007) and the SmoothHound website (2005)

These averages are used to calculate the total number of rooms and beds available for 2005, for Scotland as a whole, by locality and by type of accommodation. The total capacity for 2005 is calculated, first by using available capacity details for 2005. Missing data is filled using data from the 2003 accommodation brochures. It is assumed that capacity has not changed since 2003. Finally, the remaining missing entries are completed using the averages for 2005. Capacity for properties relating to 2007 is likewise calculated, first by filling missing information using actual capacity information for 2005, then for 2003. The averages for 2007 are used to complete the remaining gaps. Averages have been used to calculated capacity for 23.4% of the population for 2005 and 16.2% of the data available for 2007. An analysis of the properties missing capacity data for 2005 and 2007 by accommodation type is presented in Table 13 and for 2005 by locality in Table 14. Table 15 consolidates this information by revealing where there is missing capacity information for each type of properties for each area. Only 16% of guest houses in Edinburgh in the data set have capacity information missing for 2005 which contrasts with Aberdeen which has 44% of guest houses with missing capacity information.

	2005	2007	2005 estimates as % of total number for type
B&B	275	141	10%
Guest House	453	254	31%
Hotel	687	313	50%
Inn	9	3	5%
Lodge	56	42	66%
Restaurant	1	1	3%
Small Hotel	44	22	6%
Total	1525	776	

Table 13 The breakdown of properties with missing capacity data by accommodation type

Council Area	B&B	Guest House	Hotel	Inn	Lodge	Restaurant	Small Hotel	Total	Total number of properties with missing capacity information as a % of total number of properties identified for locality
Aberdeen City	1	45	12		3		1	62	34%
Aberdeenshire	9	38	83	1	3		2	136	40%
Angus	10	9	20	1	1		1	42	32%
Argyll & Bute	16	22	36				3	77	14%
Clackmannanshire			4					4	20%
Dumfries & Galloway	20	22	63		3		1	109	25%
Dundee City	2	5	9		4		1	21	34%
East Ayrshire	1	1	18		1		1	22	47%
East Dunbartonshire		1	1					2	13%
East Lothian	2	2	12		2		1	19	22%
East Renfrewshire			2					2	18%
Edinburgh, City of	18	43	19		6		3	89	17%
Eilean Siar	6	11	4					21	13%
Falkirk		2	10		3			15	31%
Fife	16	11	45	2	3		5	82	24%
Glasgow City	1	15	19		4			39	26%
Highland	100	114	124	1	5	1	13	358	26%
Inverclyde		2	3		1			6	33%
Midlothian	4	1	7					12	31%
Moray	4	23	29	2	1		2	61	37%
North Ayrshire	4	9	17					30	23%
North Lanarkshire	2	5	11		3			21	38%
Orkney Islands	3	4	2					9	8%
Perth & Kinross	14	9	39	2	3		5	72	18%
Renfrewshire	1	2	5		1			9	20%
Scottish Borders	12	12	21				1	46	16%
Shetland Islands	1	5	4					10	14%
South Ayrshire	10	14	15		2		1	42	24%
South Lanarkshire	6	6	15		2		2	31	30%
Stirling	8	14	19		2		1	44	16%
West Dunbartonshire	1	3	5		1			10	15%
West Lothian	3	3	14		2			22	42%
Total	275	453	687	9	56	1	44	1525	23%

Table 14 The breakdown of properties with missing capacity data by locality for 2005

Council Area	B&B	Guest House	Hotel	Inn	Lodge	Restaurant	Small Hotel
Aberdeen City	6%	44%	27%		60%		11%
Aberdeenshire	8%	58%	73%	10%	75%		5%
Angus	15%	56%	67%	100%	100%		6%
Argyll & Bute	6%	20%	41%				3%
Clackmannanshire			80%				
Dumfries & Galloway	11%	31%	61%		50%		2%
Dundee City	17%	31%	43%		100%		14%
East Ayrshire	8%	50%	86%		50%		17%
East Dunbartonshire		100%	100%				
East Lothian	5%	18%	60%		100%		7%
East Renfrewshire			40%				
Edinburgh, City of	15%	16%	21%		55%		8%
Eilean Siar	6%	39%	31%				
Falkirk		33%	50%		100%		
Fife	10%	19%	63%	17%	60%		13%
Glasgow City	7%	37%	27%		57%		
Highland	16%	35%	53%	5%	71%	14%	8%
Inverclyde		100%	50%		100%		
Midlothian	20%	25%	64%				
Moray	6%	68%	67%	33%	100%		11%
North Ayrshire	9%	26%	55%				
North Lanarkshire	15%	45%	58%		75%		
Orkney Islands	4%	29%	17%				
Perth & Kinross	9%	11%	47%	11%	50%		8%
Renfrewshire	8%	29%	31%		50%		
Scottish Borders	8%	38%	53%				3%
Shetland Islands	3%	36%	36%				
South Ayrshire	14%	34%	42%		100%		5%
South Lanarkshire	13%	55%	50%		67%		15%
Stirling	7%	24%	46%		67%		4%
West Dunbartonshire	3%	30%	36%		100%		
West Lothian	13%	60%	67%		100%		
Total	10%	31%	50%	5%	66%	3%	6%

Table 15 The number of properties with missing capacity data as a percentage of the total number of properties for that type and location for 2005.

Since, the population of serviced accommodation providers has not been established for 2007, no effort has been made to calculate the capacity of serviced accommodation provision for the whole of Scotland for 2007.

The calculated capacity of serviced accommodation provision in Scotland by accommodation type is presented in Table 16 and a breakdown by geographical location is presented in Table 17. A more complete breakdown by accommodation type is presented in Appendix 3. Whilst the Highlands have the highest capacity, when the size of the geographical area is taken into account (last column, Table 17), there is one room per 1.45 square kilometres highlighting its rural status. This contrasts with Edinburgh, which as a geographical locality has the second highest capacity for serviced accommodation but has one room per 0.02 square kilometres or 50 rooms per square kilometre. Household statistics[4] are used to determine the number of households per serviced accommodation property for each location (Table 17). Assuming that smaller businesses tend to be household units, this perhaps reveals the propensity of a household in a particular locality to operate as a serviced accommodation provider and the dependency of a locality upon this type of business. Four areas are clearly highlighted on this basis: the Highlands, Eilean Siar, Argyll & Bute and the Orkneys.

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[4] statistics for the year 2005 from "*Table 1: Household estimates for Scotland by local authority area, June 1991-2005*", General Register Office for Scotland [www.gro-scotland.gov.uk/files/he-05-table1.xls,

	number of sites	number of people	number of rooms
B&B	2,643	17,460	8,174
Campus	17	7,938	5,507
Guest House	1,475	20,350	9,947
Hotel	1,363	150,772	73,470
Inn	173	3,213	1,522
International Resort Hotel	4	1,894	866
Lodge	85	8,544	3,893
Restaurant	29	367	167
Small Hotel	733	17,285	8,496
Grand Total	6,522	227,823	112,042

Table 16 The capacity of serviced accommodation provision in Scotland for 2005 by accommodation type.

	number of sites	number of people	number of rooms	sq km per room	households per site
Highland	1,396	36,202	17,706	1.45	68
Edinburgh, City of	533	29,059	14,524	0.02	397
Glasgow City	148	18,137	9,288	0.02	1,856
Aberdeenshire	342	13,801	6,741	0.94	285
Argyll & Bute	569	13,290	6,628	1.04	72
Perth & Kinross	399	13,070	6,359	0.83	154
Dumfries & Galloway	437	12,887	6,253	1.03	152
Fife	346	11,391	5,445	0.24	451
Aberdeen City	181	10,608	5,288	0.04	548
Stirling	267	7,608	3,756	0.58	138
Scottish Borders	284	5,828	2,855	1.66	174
South Ayrshire	178	5,693	2,751	0.44	283
Moray	165	5,397	2,658	0.84	227
Renfrewshire	44	4,258	2,005	0.13	1,750
South Lanarkshire	104	4,068	1,962	0.90	1,260
North Ayrshire	129	4,029	1,915	0.46	468
Angus	133	3,816	1,849	1.18	366
North Lanarkshire	55	3,461	1,627	0.29	2,534
Dundee City	61	3,431	1,679	0.04	1,111
Falkirk	48	2,820	1,367	0.22	1,372
West Lothian	53	2,744	1,330	0.32	1,308
East Ayrshire	47	2,659	1,278	0.99	1,095
East Lothian	87	2,652	1,290	0.53	457
Eilean Siar	163	2,137	1,087	2.83	70
West Dunbartonshire	65	1,885	916	0.17	628
Shetland Islands	70	1,484	757	1.94	134
Orkney Islands	114	1,387	711	1.39	77
Midlothian	39	1,249	604	0.59	857
Inverclyde	18	1,168	642	0.25	2,038
Clackmannanshire	20	661	324	0.49	1,080
East Dunbartonshire	16	496	225	0.78	2,662
East Renfrewshire	11	447	222	0.78	3,228
TOTALS	6,522	227,823	112,042	0.70	348

Table 17 The capacity of serviced accommodation provision in Scotland for 2005 broken down by council area.

7. THE QUALITY OF ACCOMMODATION PROVISION IN SCOTLAND

The quality of the accommodation available can be assessed using the grading system information reported in the accommodation brochures and on the visitscotland.com website. It must be noted that this information pertains solely to those accommodation providers who have sought to be members of their local ATB or, since their dissolution, have representation in the marketing activities of VisitScotland, since grading has been a criteria in both circumstances for acceptance. Summary information is presented in Table 18 and Table 19 and details by accommodation type and council area are presented in Appendix 4.

One distinctive feature of the grading pattern is the low number of one-star businesses (2% of all properties) across all accommodation types except for campuses, which, as student accommodation during term time, might be expected. This can be interpreted as suggesting that businesses that offer the equivalent of a one star level of service do not necessarily see any value in the cost of being graded and promoted at this level of grading. Alternatively B&Bs may decide to be graded to legitimise their service and distinguish themselves from those “rogue” or “illegitimate” properties that take guests, but allegedly fail to deliver a service[5].

This contrasts with the high number of three-star service accommodation providers (49%) and four-star providers (23%). However, the low level of five-star businesses (1%) does raise the question of whether there is a perception that the return or benefit from raising quality from a four -star to a five star service does not merit the cost and effort of achieving and maintaining this.

There is a question of whether there is longer-term polarisation towards three and four star properties. It is an important issue in that it raises the question of whether distinctions are being wiped out as properties adopt a prescriptive standard of accommodation quality. Alternatively does this reflect a broadening variation within a particular grading band? This possible polarisation will be considered in the later section, which examines change over time in the population. Although the data was not collected for 2003, change from 2005 to 2007 is examined.

One issue to consider is the reason why serviced accommodation providers do not wish to be graded. Table 18 suggests that, perhaps surprisingly, B&B find more value in being graded than other types of accommodation, notably hotels. The interpretation of this data is open to speculation. For example, it can be argued that hotels do not perceive value in grading, based on only 43% being graded. Indeed, it can be argued that businesses claming to be a “hotel” in the Yellow Pages may not actually provide accommodation and are merely licensed premises, trading upon their ‘hotel’ designation. The validity of this statement is open to interpretation. However, as raised in section 4, a hotel liquor licence is awarded to hotels, which, by definition, provide residential accommodation, though whether this is rigorously upheld in the awarding or renewal of licences is open to debate. This raises the issue of the meaning of the title. As Table 64 in Appendix 4 reveals, having the title “guest house” or “hotel” does not necessarily reflect the type of business as viewed by the grading system. Indeed the nature of the grading system might account for reclassifications as noted in Table 34 and subsequent tables.

	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
graded	1,864	16	820	585	107	4	19	23	494	3,932
total (table 11)	2643	17	1475	1363	173	4	85	29	733	6522
graded as percentage of total	71%	94%	56%	43%	62%	100%	22%	79%	67%	60%

Table 18 The level of grading for each accommodation type for 2005 as a percentage of the calculated population for 2005 (sourced from the 2005 accommodation brochures)

5 William Lyons (2007) “Small businesses urge VisitScotland to 'weed out cowboys' in B&B sector”, 7th Jan 2007, The Scotsman

	GRADING (stars)						
	1	2	3	4	5	Un-graded	Total
B&B	25	235	946	467	18		1,691
Campus	9	7	1				17
Guest House	22	117	430	184	6		759
Hotel	7	62	221	125	15		430
Inn	12	54	60	6			132
International Resort Hotel					4		4
Lodge	1	6	20				27
Restaurant		1	17	9	3		30
Small Hotel	14	118	239	106	6		483
serviced apartments			1	2			3
awaiting						323	323
Un-graded						33	33
Total per Star Grading	**90**	**600**	**1,935**	**899**	**52**	**356**	**3,932**
Total as % of all properties graded	**2%**	**15%**	**49%**	**23%**	**1%**	**9%**	**100%**

Table 19 A summary of the grading for each accommodation type for 2005 (sourced from the 2005 accommodation brochures)

8. THE SEASONALITY OF SERVICED ACCOMMODATION PROVISION IN SCOTLAND

The seasonal nature of serviced accommodation providers is revealed in Table 20. A seasonal business is defined as one that closes down for one or more months. This table presents a breakdown of seasonal accommodation, by accommodation type for the years 2005 and 2007 using the information provided in the regional accommodation brochures. Campuses dominate as seasonal businesses, with rooms, in the main, being occupied by students during term-time. "Restaurants with rooms" is the most likely type of serviced accommodation provider to be seasonal, whilst Bed and Breakfasts (B&B) form the largest group of serviced accommodation provider with seasonal tendencies.

	2005 brochure		2007 brochure	decrease
B&B	440	23.6%	19.7%	3.9%
Campus	12	75.0%	57.1%	17.9%
Guest House	115	14.0%	12.4%	1.6%
Hotel	55	9.4%	7.7%	1.7%
Inn	6	5.6%	4.8%	0.8%
Lodge	2	10.5%	7.1%	3.4%
Restaurant	7	30.4%	25.0%	5.4%
Small Hotel	67	13.6%	12.5%	1.1%
Total	704	17.9%	15.4%	2.5%

Table 20 The composition of seasonal businesses in Scotland based upon accommodation brochure entries for 2005 and 2007

One question is how to interpret the drop from 2005 to 2007. Does it reflect a decline in the number of actual businesses operating on a seasonal basis or alternatively a decline in the perceived value of being represented by VisitScotland. A latter interpretation is proposed based upon the proposition that seasonal businesses are particularly cost conscious and expect a return for costs incurred. It is further proposed that having already operated as a seasonal business, these businesses are unlikely to discontinue due to the ease of continuing. If this is the case then this suggests that these figures are conservative estimates of the number of seasonal serviced accommodation providers in Scotland.

It can be argued that these seasonal businesses provide the slack to cope with the heavy demand during the season that cannot be met by full time businesses. Alternatively, they may provide relatively low cost accommodation provision to the detriment of more established businesses. The evidence from Table 21 perhaps supports both views. The quality of accommodation does not appear to be a criterion for being a seasonal business. Three-star and four-star bed and breakfasts constitute at least fifty percent of all seasonal serviced accommodation providers and thereby provide slack to absorb the seasonal demand. This contrasts with the low number of one-star bed and breakfasts, which have a higher likelihood to be seasonal. Does this imply that there are a lot of seasonal businesses that are of one-star quality but which are un-graded, perhaps for cost reasons?

	2005			2007			
	number	% of grade	% of total seasonal businesses	number	% of grade	% of total seasonal businesses	change 2005 to 2007
no grading info	4	12%	0.6%	1	33%	0.2%	-3
QAAwait	40	12%	5.7%	11	6%	2.1%	-29
QABB1	8	32%	1.1%	6	32%	1.1%	-2
QABB2	49	21%	7.0%	27	18%	5.1%	-22
QABB3	228	24%	32.4%	175	19%	32.8%	-53
QABB4	122	26%	17.3%	112	23%	21.0%	-10
QABB5	9	50%	1.3%	9	32%	1.7%	
QACA1	7	78%	1.0%	5	83%	0.9%	-2
QACA2	5	71%	0.7%	2	50%	0.4%	-3
QACA3	1	100%	0.1%	1	50%	0.2%	
QAGH2	7	6%	1.0%	8	9%	1.5%	1
QAGH3	54	13%	7.7%	45	11%	8.4%	-9
QAGH4	41	22%	5.8%	38	18%	7.1%	-3
QAGH5	2	33%	0.3%	1	17%	0.2%	-1
QAH1	2	29%	0.3%				-2
QAH2	9	15%	1.3%	1	3%	0.2%	-8
QAH3	27	12%	3.8%	14	7%	2.6%	-13
QAH4	9	7%	1.3%	7	7%	1.3%	-2
QAH5	1	7%	0.1%				-1
QAI2	3	6%	0.4%	2	4%	0.4%	-1
QAI3	1	2%	0.1%	2	4%	0.4%	1
QAI4	1	17%	0.1%				-1
QAL3	1	5%	0.1%				-1
QARR3	5	29%	0.7%	2	13%	0.4%	-3
QARR4	2	22%	0.3%	4	31%	0.7%	2
QARR5				1	50%	0.2%	1
QASH2	8	7%	1.1%	7	9%	1.3%	-1
QASH3	30	13%	4.3%	32	13%	6.0%	2
QASH4	27	25%	3.8%	21	23%	3.9%	-6
QASH5	1	17%	0.1%				

Table 21 The seasonality of businesses according to grading

The seasonality of businesses by locality is presented in Table 22. Perhaps unsurprisingly the remoter locations (e.g. Highlands, Argyll & Bute, Eilean Siar) have among the largest number and concentration of seasonal businesses. However, Edinburgh also rates as having a large number of seasonal businesses, but this is a relatively low share (~10%) of the local population of serviced accommodation providers. There are a number of areas that do not appear to have any seasonal businesses, e.g. Shetland. Is this actually the case or does it reflect the local policy about the information presented in the accommodation brochure? North Ayrshire is conspicuous with its relatively low number of seasonal businesses, but which account for around 30% of all serviced accommodation providers in that locality.

	2005		2007		
Council Area	number	% of total for area	number	% of total for area	change
Highland	218	29%	181	31%	-37
Argyll & Bute	116	27%	79	32%	-37
Perth & Kinross	47	19%	30	20%	-17
Edinburgh, City of	44	12%	27	14%	-17
Stirling	37	20%	27	25%	-10
Eilean Siar	36	27%	34	29%	-2
Dumfries & Galloway	34	13%	29	15%	-5
Fife	29	13%	24	15%	-5
Scottish Borders	24	13%	21	16%	-3
North Ayrshire	23	29%	19	36%	-4
Aberdeenshire	23	15%	13	16%	-10
South Ayrshire	11	11%	6	13%	-5
Moray	9	12%	8	15%	-1
East Lothian	9	17%	6	20%	-3
Glasgow City	8	9%	5	11%	-3
Orkney Islands	8	9%	4	10%	4
South Lanarkshire	7	13%	2	16%	-5
Angus	4	6%	7	7%	3
West Dunbartonshire	4	8%	4	9%	
Midlothian	4	17%	3	19%	-1
Dundee City	3	9%		11%	-3
Clackmannanshire	2	18%		22%	-2
Aberdeen City	1	1%	1	1%	
Falkirk	1	4%	1	6%	
Renfrewshire	1	4%	1	6%	
West Lothian	1	4%	1	4%	
East Dunbartonshire			1		1
East Ayrshire					
East Renfrewshire					
Inverclyde					
North Lanarkshire					
Shetland Islands					
Grand Total	704	18%	534	20%	170

Table 22 The geographical distribution of seasonal businesses in Scotland based upon accommodation brochure entries

The number of open months is subject to wide variation (Table 23), though seven months appears to be the most popular duration with April to October (Table 24) being the most popular period to open over. An analysis of the relationship between the number of months open and both grading and locality is presented in Appendix 5. Those serviced accommodation providers likely to open for only two or three months are campuses and bed and breakfasts, but represent an insignificant proportion of all accommodation providers. Those bed and breakfasts most likely to be seasonal (i.e. three or four stars) tend to be open for at least six months of the year (Table 25). This possibly highlights a crucial distinction between seasonal businesses who, perhaps, are open only for the few busiest months of the year and those who are committed to the provision of a accommodation service for a longer period yet still want to retain a period of privacy. When the duration open is examined by locality (Table 26), Argyll and the Highlands dominate in the number of seasonal businesses. A similar picture is presented with these businesses being open for at least six months, with seven months being the most popular duration. A similar but perhaps not so dramatic a pattern can be observed for Edinburgh. It is clear that those businesses that might be viewed as ‘rogue’ or ‘illegitimate’ and only open for a few months at the busiest time of the year are certainly not visible through the grading scheme. However, evidence needs to be sought to establish whether or not they are providing a quality of service that does equate with their counterparts who are open for seven or so months. Further, do they have need for the expense of a directory presence and if so, are they using alternative directories or can they rely on word-of-mouth, passing trade and overspill during peak periods when demand for accommodation exceeds supply?

Number of months open	2005 Number of sites	2007 Number of sites
2	4	4
3	3	1
4	11	6
5	21	19
6	57	36
7	171	130
8	131	87
9	105	87
10	85	78
11	117	86
Total	705	534

Table 23 The number of months open for all serviced accommodation providers

	2005	2007
jan oct	1	5
jan nov	27	23
feb oct	10	6
feb nov	64	59
feb dec	69	49
mar sep	2	3
mar oct	112	73
mar nov	89	76
mar dec	19	13
mar jan	11	7
apr sep	36	23
apr oct	168	126
apr nov	19	14
apr dec	6	5
apr jan	1	1
may sep	20	16
may oct	21	13
may nov	1	1
may mar	2	
jun aug	2	1
jun sep	10	6
jun oct	1	3
jul aug	4	4
jul sep	2	
nov sep	1	1
nov oct		
dec oct	6	6

Table 24 The months open for all serviced accommodation providers

		Number of months open									
Year	**Grading**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**
2005	QABB3				11	28	66	42	33	29	19
	QABB4	1		1	2	10	37	33	18	7	13
2007	QABB3				9	18	49	27	29	27	16
	QABB4	1		1	2	6	27	25	23	15	12

Table 25 The number of seasonal three and four star bed and breakfasts and the number of months they open for (extracted from Table 66 and Table 67 – Appendix 5)

		Number of months open									
Year	Council Area	2	3	4	5	6	7	8	9	10	11
2005	Argyll & Bute				5	6	34	18	18	13	22
	Highland	1		1	7	16	49	46	42	23	33
	Edinburgh, City of	1	2	1		2	19	6		6	7
2007	Argyll & Bute				3	4	19	11	16	11	15
	Highland	1		1	8	12	44	39	33	17	26
	Edinburgh, City of	1	1	1		1	10	5	1	5	2

Table 26 The number of seasonal three and four star bed and breakfasts in the Highlands, Argyll & Bute and Edinburgh and the number of months they open for (extracted from Table 68 and Table 69 – Appendix 5)

9. CHANGES WITHIN THE POPULATION

It is useful to position the findings of this study within a longer time frame. Unfortunately, historical information relating to the composition of the serviced accommodation sub-sector and how it has changed over time is not readily available. Morrison (1998[6]) in her examination of the Scottish accommodation sector draws upon statistics from a 1996 STB report on registered accommodation providers. This notes that, over the period 1990 and 1996, there was a reduction in the number of rooms available in hotels (11%), guest houses (12%) and bed and breakfasts (21%). Details for subsequent years are provided by the STB and latterly VisitScotland in their annual "Tourism in Scotland" report (Table 27).

	1996	Jan1999	2000	2001	2002	2003	2004	2005
Number of Sites	7,529	9,621	5,698	6,438	4,442	4,487	-	5,631
B&B	4,271	5,693	3,229	3,569	2,286	2,075		2,430
Guest House	1,178	1,420	1,136	1,229	934	885		1,248
Hotel	2,080	2,508	1,333	1,640	1,222	1,527		1,953
Number of bed spaces	121,984	73,351	60,787	132,664	97,511	135,546	-	199,071
B&B	21,172	14,081	11,415	19,755	11,871	12,619		14,716
Guest House	13,741	7,972	8,336	17,542	12,316	13,440		19,508
Hotel	87,071	51,298	41,036	95,367	73,324	109,487		164,847
Number of rooms	61,216	147,180	33,152	63,729	49,795	329,409	-	93,074
B&B	10,332	28,666	6,774	9,203	6,244	*49,651*		6,677
Guest House	6,567	16,420	4,577	7,954	6,060	*37,839*		8,720
Hotel	44,317	102,094	21,801	46,572	37,491	*241,919*		77,677

Table 27 The change in serviced accommodation providers registered with the STB 1996. 1999, VisitScotland (2000) and visitscotland.com (2001, 2002, 2003 and 2005) [sourced from Morrison (1998[7]), the "Tourism in Scotland" Report published by STB (1999) and VisitScotland (2000, 2001, 2002, 2003 and 2005)] NOTE: the data presented for the number of rooms for 2003 is assumed to be misprinted due to its anomalous nature.

Whilst this limited data-set perhaps can provide insight into change occurring within this sub-sector, inspection suggests that there are issues affecting this data-set. Unfortunately, there does not appear to be any record of how the data was compiled. However, it has been advocated that in 1999 and prior years all known serviced accommodation was reported. At that time, there was a voluntary registration scheme, which did not require the property to be QA graded. In 2000 it was decided to report only QA graded properties, a policy which has remained in place with the exception of 2001, when ungraded properties listed in the "Where-To-Stay-Guide" were also incorporated. The data for the number of rooms in 2003 is assumed to be a misprint due to its anomalous nature.

Interpretation of this data-set is problematic. The period between 1996 and 1999 appears associated with an increase in serviced accommodation providers. This contrasts with Morrison's (1998) observations for 1990 to 1996 and the data for 2000 to 2005, which both appear to be periods in which there is an overall decline in the number of serviced accommodation providers. However, caution has to be exercised about using this latter data to infer about changes in the population, since the data for 2000 onwards (with the exception of 2001), relates solely to those serviced accommodation providers participating within the QA scheme.

Conversion of the data in Table 27 into the ratios *people-per-site* and *rooms-per-site* is perhaps more revealing. Reassuringly, the *rooms-per-site* figures for 2005 are comparable to those presented in Table 13. One possible interpretation of these ratios is that there appears to be an overall trend for capacity to increase per site particularly for the hotels. However, the transition from 1999 to 2000 is problematic. If the figures in Table 27 for 1999 and 2000 are correct then, even though there is a methodological change, this

[6] Morrison A (1998) "The Tourist Accommodation Sector in Scotland", *in* MacLellan R, Smith R (eds) "Tourism in Scotland", London: International Thomson Business Press

[7] Morrison A (1998) "The Tourist Accommodation Sector in Scotland", *in* MacLellan R, Smith R (eds) "Tourism in Scotland", London: International Thomson Business Press

should not create such a difference. With regard to the overall increase in capacity, one possible explanation is that this reflects attitudes about being represented by the STB / VisitScotland and that smaller businesses i.e. B&Bs and guest houses, are disassociating themselves. This does raise the issue of whether the *capacity-per-site* estimates in section 6 are overestimated and if so by how much.

	1996	Jan1999	2000	2001	2002	2003	2004	2005
Number of bed spaces per site								
B&B	5.0	2.5	3.5	5.5	5.2	6.1		6.1
Guest House	11.7	5.6	7.3	14.3	13.2	15.2		15.6
Hotel	41.9	20.5	30.8	58.2	60.0	71.7		84.4
Number of rooms per site								
B&B	2.4	5.0	2.1	2.6	2.7			2.7
Guest House	5.6	11.6	4.0	6.5	6.5			7.0
Hotel	21.3	40.7	16.4	28.4	30.7			39.8

Table 28 Capacity of registered serviced accommodation providers for period 1999 to 2005 based on data from Table 27. NOTE: no calculation is presented for the number of rooms in 2003 as is assumed to be a misprint.

If it is accepted that there is an overall decline over the long-term, as the evidence above suggests, then this raises the question of why. The emergence of the budget hotel sector, the tendency of universities to open their campuses to visitors during holiday periods and the growth in low cost hostels, particularly in cities are clearly factors. However, this is perhaps only part of the overall picture, which may have local variation. The decline may be confined to city locations with peripheral smaller businesses withdrawing from the market as larger accommodation providers establish themselves on city centres. Nevertheless, this is speculation and does suggest that the long-term change in the profile of serviced accommodation in Scotland does not appear to be clearly understood.

10. CHANGE IN THE CAPACITY OF SERVICED ACCOMMODATION PROVIDERS (2005 TO 2007)

An examination of the change in the capacity of serviced accommodation providers has been attempted using the available data for providers who are present in both the 2005 and 2007 regional accommodation brochures. This provides a sample of 2808 serviced accommodation providers or 43% of the calculated population. Of these, 543 (19.3% of this sample) had a change in the number of en-suite facilities available and 566 (20.2%) had a change in the number of rooms available.

The nature of these change are presented in the following tables. Table 29 presents an analysis by accommodation type of whether the number of rooms of providers have increased (9.6% of the sample) or decreased (9.7%). It is perhaps surprising that providers can both increase and withdraw the availability of rooms with equal frequency. Adding a room may involve capital expenditure and disruption, whilst withdrawing a room is merely decommissioning it, but will reduce income. The greatest level of change (181) appears to be associated with B&Bs, which perhaps is unsurprising since they represent 45.9% of the sample (Table 30), though as a percentage of all B&Bs changes in the number of rooms available is less common (~7%) than for all other accommodation types.

Rooms coded	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Grand Total
decrease in rooms	96		74	45	4		2	2	50	273
increase in rooms	85	2	80	47	9	2	2		43	270
Total number of changes	181	2	154	92	13	2	4	2	93	543
Total for the sample	1,289	13	649	392	63	2	13	13	374	2,808

Table 29 Increase or decrease in the number of rooms available by accommodation type

Rooms coded	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Grand Total
decrease in rooms	7.4%		11.4%	11.5%	6.3%		15.4%	15.4%	13.4%	9.7%
increase in rooms	6.6%	15.4%	12.3%	12.0%	14.3%	100.0%	15.4%		11.5%	9.6%
Total	14.0%	15.4%	23.7%	23.5%	20.6%	100.0%	30.8%	15.4%	24.9%	19.3%
Total for the sample	45.9%	0.5%	23.1%	14.0%	2.2%	0.1%	0.5%	0.5%	13.3%	100.0%

Table 30 Percentage increase or decrease in the number of rooms available by accommodation type

An analysis of the number of rooms changed is presented in Table 31 and Table 32. Single room changes account for 60% of all room changes (Table 31). This increases to 84% for room changes of three or less rooms. A more detailed analysis (Table 32) reveals that, in terms of absolute values, the average number of rooms changed by B&Bs and restaurants is one, whilst guest houses and inns change two rooms and small hotels change three rooms. This contrasts with the net effect of increases and decreases in the number of rooms. These averages are seen to both lower and take a negative value for a number of accommodation types (e.g. B&Bs, guest houses and small hotels) highlighting the decommissioning of rooms. The campus category perhaps distorts the overall picture. There are 13 campuses in the sample with two campuses having 674 room changes out of a total of 4875 rooms. Removal of the campus category changes the overall effect to a decrease in the average number of rooms available (from 0.4 to -0.88) by all remaining serviced accommodation providers. This raises the question of whether there is real decline in the number of rooms available, particularly in smaller serviced accommodation providers, though the preceding analysis suggests that at least for B&Bs the number is remaining relatively stable. Geographical variation is noted (Table 33), with some localities experiencing more change than others, e.g. Falkirk in contrast to Aberdeen. North Lanarkshire stands out but examination of this change (Appendix 6) reveals that this is due to one hotel that has downsized. This highlights the need to be cautious with the interpretation of this dataset. Changes that are large for the less numerous larger properties, does distort a simple interpretation.

number of rooms changed	Number of sites	% ofsites
>-10	15	3%
-10	2	0%
-8	3	1%
-7	3	1%
-6	4	1%
-5	4	1%
-4	18	3%
-3	24	4%
-2	49	9%
-1	151	28%
1	174	32%
2	39	7%
3	20	4%
4	9	2%
5	6	1%
6	7	1%
7	2	0%
8	2	0%
9	3	1%
10	1	0%
>10	7	1%

Table 31 The frequency of the number of rooms changed

Type	Number of sites with changes in the number of rooms	Net change in the number of rooms	Average (abs) change in the number of rooms	Average (net) change in the number of rooms	Max number of rooms changed at one site	Min number of rooms changed at one site	Total number of sites surveyed	Number of sites affected by room changes as % of sites surveyed
B&B	181	-38	1.3	(0.2)	5	-6	1289	14%
Campus	2	674	337.0	337.0	666	8	13	15%
Guest House	154	-80	2.1	(0.5)	6	-57	649	24%
Hotel	92	-251	6.4	(2.7)	12	-50	392	23%
Inn	13	13	2.2	1.0	4	-4	63	21%
International Resort Hotel	2	23	11.5	11.5	22	1	2	100%
Lodge	4	-97	43.3	(24.3)	37	-132	13	31%
Restaurant	2	-3	1.5	(1.5)	-1	-2	13	15%
Small Hotel	93	-43	3.0	(0.5)	14	-14	374	25%
Total	543	198	4.3	0.4	666	-132	2808	19%

Table 32 An analysis of the number of rooms changed by accommodation type

Council Area	Number of sites with changes in the number of rooms	Net change in the number of rooms	Average (abs) change in the number of rooms	Average (net) change in the number of rooms	Max number of rooms changed at one site	Min number of rooms changed at one site	Total number of sites surveyed	Number of sites affected by room changes as % of sites surveyed
Aberdeen City	7	-43	7.9	(6.14)	2	-44	62	11%
Aberdeenshire	31	-27	2.0	(0.87)	3	-17	112	28%
Angus	13	-8	1.7	(0.62)	3	-3	47	28%
Argyll & Bute	66	25	2.0	0.38	10	-6	300	22%
Clackmannanshire	3	-1	1.0	(0.33)	1	-1	8	38%
Dumfries & Galloway	38	1	2.2	0.03	14	-7	186	20%
Dundee City	7	-53	7.9	(7.57)	1	-44	25	28%
East Ayrshire	4		1.0	-	1	-1	14	29%
East Dunbartonshire							8	
East Lothian	8	-8	1.5	(1.00)	1	-4	37	22%
East Renfrewshire							4	
Edinburgh, City of	57	-155	5.6	(2.72)	37	-132	273	21%
Eilean Siar	17	-12	2.7	(0.71)	9	-8	98	17%
Falkirk	3	8	4.0	2.67	7	-2	11	27%
Fife	31	-38	4.4	(1.23)	22	-44	148	21%
Glasgow City	10	-70	7.8	(7.00)	3	-31	63	16%
Highland	92	6	1.9	0.07	12	-10	545	17%
Inverclyde	2		1.0	-	1	-1	6	33%
Midlothian	3	1	1.0	0.33	1	-1	16	19%
Moray	9	1	1.2	0.11	2	-2	47	19%
North Ayrshire	8	-1	1.6	(0.13)	2	-4	57	14%
North Lanarkshire	1	-50	50.0	(50.00)	-50	-50	14	7%
Orkney Islands	12	-5	1.4	(0.42)	2	-3	65	18%
Perth & Kinross	38	34	2.3	0.89	7	-12	192	20%
Renfrewshire							12	
Scottish Borders	24	-22	2.3	(0.92)	4	-12	125	19%
Shetland Islands	7	-8	2.0	(1.14)	2	-4	41	17%
South Ayrshire	13		2.2	-	6	-8	68	19%
South Lanarkshire	9	-28	6.0	(3.11)	9	-28	36	25%
Stirling	20	-16	5.6	(0.80)	14	-57	120	17%
West Dunbartonshire	4	-3	1.8	(0.75)	1	-4	36	11%
West Lothian	4	-4	2.0	(1.00)	1	-4	19	21%
Total	541	-476	3.1	(0.88)	37	-132	2795	19%

Table 33 An analysis of the number of rooms changed by geographical locality with removal of the campus type

11. CHANGE IN THE QUALITY OF SERVICED ACCOMMODATION PROVIDERS (2005 AND 2007)

The often repeated message that serviced accommodation providers must improve their quality has more recently been promoted by the Scottish Executive in a tourism strategy document[8]. Further, it presents the view that ***"****every tourism and related Business… will be strongly encouraged to become part of VisitScotland's Quality Assurance (QA)*", setting a target that "*VisitScotland will increase the proportion of businesses in their accommodation QA schemes to 90% by the end of 2008*"

This raises the question of whether there is an overall rise in the quality of serviced accommodation in Scotland. An analysis similar to that for the change in room capacity was carried out using the accommodation brochures for 2005 and 2007. This provides a sample of 2808 serviced accommodation providers (43% of the calculated population). Of these, 2250 (80.1% of this sample) experienced no change in their grading (Table 34). The remaining properties (558) have experienced change of some sort. Receiving a grading is the largest sub-group, seconded by properties receiving an increase in their stars. Many of remaining 7.3% of properties have experienced both a change in grade and type, though only 5 properties have both upgraded and increased the level of type. The down-classification is interesting in that there are four major reclassification patterns: hotel to small hotel (12 properties), guest house to B&B (11), small hotel to inn (8) and small hotel to guest house (8). The dominant trend for up classification is the shift from B&B to guest house (22 properties). The underlying message is perhaps that businesses realign themselves through reclassification, whilst the underlying trend is that there is only a margin net improvement in quality.

change in grading 2005 - 7	Total	Total as a % of Grand Total
No change	2,250	80.1%
Await grading	65	2.3%
Upgraded (increase on stars)	165	5.9%
Downgraded (decrease in stars)	50	1.8%
Down-classified (decrease in type)	37	1.3%
Down-classified and upgraded	9	0.3%
Down-classified and downgraded	2	0.1%
Up-classified (increase in type)	35	1.2%
Up-classified and upgraded	5	0.2%
Since graded	188	6.7%
Still ungraded	2	0.1%
Total	2,808	

Table 34 Change in the grading of serviced accommodation providers

A breakdown of this change in grading by accommodation type (Table 35) highlights the upgrading of B&Bs and guest houses. These tend to be two and three star properties (appendix 7). One possible interpretation is that a number of smaller serviced accommodation providers are concerned with improving quality, whilst a relative few allow quality standards to slip. This contrasts to the equal number of hotels who upgraded and downgraded. However appendix 7 reveals that those hotels that are downgraded tend to be predominantly four star (14 out of a total of 17). Does this reveal a degree of complacency in the hotel sub-group?

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[8] Scottish Executive (2006) "The Next Decade: A Tourism Framework For Change", Edinburgh: Scottish Executive

change in grading 2005 - 7	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
No change	1,071	10	527	299	41	2	11	12	277	2,250
Await grading	15	2	15	13	5				15	65
Upgraded	84	1	37	19	6				18	165
Downgraded	12		6	20	1				11	50
Down-classified			7	13	1				16	37
Down-classified and downgraded			1						1	2
Down-classified and upgraded			3	3	2				1	9
Up-classified	18		6	1	5		1		4	35
Up-classified and upgraded	3		1	1						5
Since graded	85		46	23	2		1	1	30	188
Still ungraded	1								1	2
Total	1,289	13	649	392	63	2	13	13	374	2,808

Table 35 Change in the grading of serviced accommodation providers by accommodation type

Whilst there are many approaches to improving quality, does this relate to the expenditure incurred in increasing room numbers or an increase in the time available to commit to service quality as a result of reducing the number of rooms? Is an increase or decrease in the number of rooms an indicator of possible quality improvements? Table 36 suggests that an increase or decrease in the number of rooms is not an indicator that that quality will change for the better or for the worse.

change in grading 2005 – 7	decrease in rooms	increase in rooms	Total
No change	14	5	19
Await grading	8		8
Upgraded	2	9	11
Downgraded	27	24	51
Down-classified	1	1	2
Down-classified and upgraded	192	203	395
Up-classified	16	24	40
Up-classified and upgraded	5	4	9
Since graded	4		4
Still ungraded	1	3	4
Total	270	273	543

Table 36 Change in room capacity of providers and change in grading

There is a view that the installation of en-suite facilities can lead to an improvement in quality. This is aligned with the view that guests expect en-suite as opposed to public facilities and that the grade awarded will reflect this. In this respect, the addition of en-suite facilities possibly can be viewed as a surrogate measure of an improvement in quality of service.

A sample of 2808 serviced accommodation providers was produced, these being the serviced accommodation providers present in both the 2005 and 2007 regional accommodation brochures. Of this group, 530 experienced some change in the number of en-suite facilities provided. Table 37 provides a breakdown of these changes by accommodation provider. Four categories of change are identified including withdrawal. The one instance of withdrawal relates to a property that took its only en-suite room out of service, leaving the two remaining rooms to share facilities. Hotels and small hotels appear the most likely to engage in a change in the provision of en-suite facilities, with B&Bs the least – perhaps understandable given the constraints upon B&Bs to effect changes.

ES coded	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
New	43	1	11	6	2			1	3	67
Increase	96		68	54	6		2	1	52	279
Decrease	41	1	53	42	5	2	2		37	183
Withdrawal	1									1
Total of ES changes	181	2	132	102	13	2	4	2	92	530
Total for the sample	1,289	13	649	392	63	2	13	13	374	2,808

Table 37 The change in the provision of en-suite facilities by accommodation type

Table 38 reveals that whilst the installation of new or additional en-suite facilities has little impact upon grading, if it is going to have an effect it is more likely to be positive than negative. However this is not sufficient to support the earlier proposition that the addition of en-suite facilities can be viewed as a surrogate measure of an improvement in quality of service.

change in grading 2005 - 7	new	increase	Decrease	withdrawal	Grand Total
No change	48	213	124	1	386
Await grading	2	4	13		19
Upgraded	5	24	7		36
Downgraded		2	6		8
Down-classified		3	7		10
Down-classified and upgraded			4		4
Up-classified	3	8	1		12
Up-classified and upgraded	1	2	1		4
Since graded	8	22	20		50
Still ungraded		1			1
Total	67	279	183	1	530

Table 38 Changes in grading by the provision of en-suite facilities

However, there appears to be a strong association between a change in rooms and a corresponding change in en-suite (Table 39). This is perhaps not surprising. If a room is taken out of service then this implies the withdrawal of an en-suite facility. However this is not always the case with 24 instances (15%) where en-suite facilities have been withdrawn or rooms without en-suite are taken out of service, for whatever reason, of which guest houses represent 50% (12). In terms of the number of facilities withdrawn, B&B are most likely to withdraw one en-suite facility with guest houses extending this to two (Table 40).

ES coded	decrease in rooms	increase in rooms	no change in number of rooms	Grand Total
New	9	11	47	67
Increase	19	186	74	279
Decrease	156	4	23	183
Withdrawal	1			1
Total	185	201	144	530

Table 39 Changes in the provision of en-suite facilities by change in number of rooms

	Number of en-suite facilities withdrawn						
	≥10	5 to 9	4	3	2	1	Total
B&B				1	7	24	32
Campus	1						1
Guest House			2	3	13	28	46
Hotel	3	11	1	4	9	11	39
Inn			2	1		1	4
International Resort Hotel	2						2
Lodge	1					1	2
Small Hotel	2	6	4	2	3	13	30
Total	9	17	9	11	32	78	156

Table 40 Number of en-suite facilities withdrawn by accommodation type

A similar picture is presented for the addition of en-suite facilities. If a new room is added it can be expected to have en-suite facilities, leading to a corresponding increase in en-suite facilities. For 81% of instances, this is the case. However, for the remainder (35), there is an equal spilt between those who increase the number of rooms but do not provide en-suite facilities in all of these rooms (18) and those where the increase the number of en-suite facilities exceeds the increase in the number of rooms. This suggests addition of en-suite facilities to existing rooms (17). B&Bs (13) and guest houses (15) dominate this group. This behaviour perhaps reflects the small nature of the business, where rooms are added and upgraded as the opportunity arises.

	Number of en-suite facilities installed							
	1	**2**	**3**	**4**	**5**	**6 to 10**	>10	Total
B&B	34	9	7	1		1		52
Guest House	19	12	4	3	2	3	2	45
Hotel	10	7	4	4	1	3	10	39
Inn	2	1		1				4
Lodge			1				1	2
Restaurant	1							1
Small Hotel	14	10	5	2	2	7	2	42
Total	80	39	21	11	5	14	15	185

Table 41 Number of en-suite facilities added by accommodation type

In the case where there is an increase in en-suite facilities and a decrease in the number of rooms (38 instances), this can take the form of either the provision of en-suite for a limited number of the rooms or a total refurbishment of all rooms. For 11 properties only one en-suite facility was added, but this appears to be at the expense of one room. In 7 other cases, all rooms were refurbished with en-suite, whilst 4 properties only added en-suite to a limited number of rooms. In these cases, this was at the expense of mainly one room (8) but up to three rooms (1). This raises the issue of whether the sacrifice of capacity merits the return due to the provision of en-suite facility. The average number of rooms, of a property that sacrifices room to install en-suite facilities, is 6. This suggests that for smaller older properties with spatial constraints, the addition of en-suite facilities may not be a viable option.

12. CHANGES IN REPRESENTATION BY THE STB / VISITSCOTLAND

Whilst the current data set cannot provide a meaningful insight into change within the population of serviced accommodation providers, it can provide an insight into changes in their representation by the STB / VisitScotland. It is postulated that if a VisitScotland representation will benefit businesses then it can be expected that there will be a desire to be represented in STB and latterly VisitScotland promotional material.

An analysis of the regional accommodation brochures produced by the Area Tourist Boards (ATB) and latterly by VisitScotland is presented in Table 42. It reveals that between 2003 and 2007 there has been a net fall of 24% in the number of serviced accommodation providers represented in the accommodation brochures. The most significant fall in terms of overall numbers is that of B&Bs. International Resort Hotels are ignored due to their small number. Lodges and Inns both have a relatively high drop. Lodges perhaps can be explained by the argument that they tend to be part of large budget hotel groups and as such have their own online presence and a strong brand, therefore do not need VisitScotland. However, it has since been reported[9] that Premier Travel Inn (Table 6) is to sign up to VisitScotland's services, which includes their grading scheme.

	2003	**2005**	**2007**	**net change 2003 to 2007**	**% net change**
B&B	2239	1864	1708	531	23.7%
Campus	15	16	14	1	6.7%
Guest House	921	820	733	188	20.4%
Hotel	592	585	467	125	21.1%
Inn	143	107	83	60	42.0%
International Resort Hotel	4	4	2	2	50.0%
Lodge	25	19	14	11	44.0%
Restaurant	21	23	20	1	4.8%
Small Hotel	575	494	417	158	27.5%
TOTAL	4535	3932	3458	1077	23.7%

Table 42 An analysis of serviced accommodation provider's representation in the regional accommodation brochures for 2003, 2005 and 2007

Whilst there has been a drop in the number of businesses represented in the accommodation brochure, there appears to be a high proportion (2454) of 'loyal' business who have retained a presence in the three years 2003, 2005 and 2007. However, whilst this represents 71% of those in the 2007 brochure, this is only 54% of those represented in the 2003 brochure. Why this is the case is open to speculation.

A breakdown of this loyal' group by grade as reported in the 2007 brochure, is presented in Table 43. A significant proportion of those 'loyal' are three and four star properties, accounting for 79% (1929 properties) of the 'loyal' population. This contrasts with 'loyal' two star B&Bs and guest houses who represent ~80% of all two star B&Bs and guest houses represented in the 2007 brochure, but only 8% (193 properties) of the 'loyal' population. The actual number of one star properties, irrespective of type is low, e.g. B&Bs (11), guest houses (14), small hotels (5), hotels (3). Does this reinforce the view that one star properties have derived little value in their association with the former STBs and VisitScotland? There does appear to be a polarisation towards three and four star properties.

When change is examined on a geographical basis (Table 44), this reveals wide variation. Whilst two locations display a serious reduction of the order of 50% (Renfrewshire and Falkirk), two localities show no change (East Dunbartonshire and Midlothian) and one locality shows a small increase (West Lothian). Despite this, it s clear that many regions have experienced a consistent fall over the five year period 2003 to 2007. It can be speculated that this variation reflects local issues as much as nation-wide issues.

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[9] VisitScotland Media Office News, "UK's biggest hotel chain joins Britain-wide Quality Assurance scheme", 1st March 2007 [www.visitscotland.org/news_item.htm?newsID=43944, accessed 5th July 2007]

ALL (2007)	Number all years	Total for 2007	% of 2007
qal1	1	1	100%
qagh5	5	6	83%
qabb2	120	149	81%
qarr2	4	5	80%
qagh2	73	92	79%
qagh4	162	207	78%
qah4	72	95	76%
qah1	3	4	75%
qash4	68	91	75%
qabb3	669	904	74%
qagh3	308	417	74%
qabb4	351	490	72%
qai1	5	7	71%
qah3	134	188	71%
qagh1	14	20	70%
qash3	165	239	69%
qac1	4	6	67%
qairh5	2	3	67%
qash5	2	3	67%
qash1	5	8	63%
qaawait	107	173	62%
qabb1	11	19	58%
qabb5	16	28	57%
qah5	9	16	56%
qash2	45	80	56%
qai2	28	50	56%
qal3	7	13	54%
qarr4	7	13	54%
qarr3	8	15	53%
qah2	17	32	53%
qac2	2	4	50%
qac3	1	2	50%
qai4	3	6	50%
qai3	24	53	45%
no grading	2	6	33%
qal2	1	5	20%
qal4		1	
qarr1		1	
qarr5		2	
qasa4		3	
exclusive use		1	
Grand Total	2455	3458	71%

Table 43 Grading of accommodation providers presented in the accommodation brochures for all three years 2003, 2005 and 2007

	2003	2005	2007	net change 2003 to 2007	% net change
Renfrewshire	33	23	16	17	51.5%
Falkirk	32	23	16	16	50.0%
Aberdeen City	110	88	67	43	39.1%
South Lanarkshire	67	56	43	24	35.8%
Scottish Borders	227	189	152	75	33.0%
Clackmannanshire	13	11	9	4	30.8%
Stirling	210	181	146	64	30.5%
Dundee City	39	34	28	11	28.2%
North Lanarkshire	25	25	18	7	28.0%
East Lothian	62	54	45	17	27.4%
Moray	84	73	61	23	27.4%
Angus	82	70	60	22	26.8%
Dumfries & Galloway	315	253	231	84	26.7%
Edinburgh, City of	423	372	313	110	26.0%
Highland	939	750	712	227	24.2%
North Ayrshire	84	80	64	20	23.8%
South Ayrshire	110	99	84	26	23.6%
Glasgow City	98	91	76	22	22.4%
Argyll & Bute	457	427	357	100	21.9%
West Dunbartonshire	56	49	44	12	21.4%
East Ayrshire	20	16	16	4	20.0%
Aberdeenshire	175	155	143	32	18.3%
Orkney Islands	94	91	77	17	18.1%
Fife	234	222	193	41	17.5%
Shetland Islands	59	50	50	9	15.3%
East Renfrewshire	7	5	6	1	14.3%
Perth & Kinross	275	245	240	35	12.7%
Inverclyde	9	11	8	1	11.1%
Eilean Siar	139	131	125	14	10.1%
East Dunbartonshire	10	11	10		
Midlothian	21	23	21		
West Lothian	26	24	27	-1	-3.8%
TOTAL	4535	3932	3458	1077	23.7%

Table 44 An analysis of serviced accommodation provider's representation in the regional accommodation brochures for 2003, 2005 and 2007 by geographical location

However it must be noted that these changes are net changes. Examination of these net changes reveals both additions and departures (Table 45). Detailed information was not available for the losses in 2005 from 2003 as the grading information for 2003 was not tabulated. Nevertheless, these losses have been calculated to be 1158 sites (Appendix 8). Appendix 8 provides a detailed breakdown of the gains:losses by geographic location and reveals variation, which reinforces the possibility that local issues are intrinsic to changes. Collectively, the data suggests that, for the period 2003 to 2007, losses for each year are around twice the gains. This raises the interesting question about why is this the case?

The main movements relate to three star properties irrespective of accommodation type, with B&Bs (particularly three star) being the dominant and most active accommodation type, with a relatively high gain:loss ratio (~0.8). Although low grade accommodation has a relatively low gain:loss ratio (<0.33) indicating a propensity to depart, possibly due the lack of appeal of being viewed as poor quality accommodation, this is not exclusive to low grades, e.g. five star small hotels. This contrasts with the low number of five star B&Bs who have a very high gain:loss ratio (8).

It appears that the main serviced accommodation providers with an interest in being promoted in the regional accommodation brochures are B&Bs, particularly those properties that can aspire to three or four stars. However this interest is disproportionate to the B&B share of the serviced accommodation sub-sector (Table 16). Further, for every property added, there is at least one property, which leaves for whatever reason.

GRADE	gains 2005 over 2003	gains 2007 over 2005	losses 2007 from 2005	net gain in 2007 over 2005	2007 ratio gain:loss
no grading info	22	2	16	-14	0.13
QAAwait	163	96	135	-39	0.71
QABB1	7	1	10	-9	0.10
QABB2	35	28	91	-63	0.31
QABB3	122	206	269	-63	0.77
QABB4	76	107	133	-26	0.80
QABB5	3	8	1	7	8.00
QACA1	1		2	-2	
QACA2	1		1	-1	
QAGH1		2	4	-2	0.50
QAGH2	10	16	32	-16	0.50
QAGH3	22	36	82	-46	0.44
QAGH4	7	17	28	-11	0.61
QAGH5		2	4	-2	0.50
QAH1		1	3	-2	0.33
QAH2	2	6	28	-22	0.21
QAH3	12	16	61	-45	0.26
QAH4	3	11	32	-21	0.34
QAH5	2	1	2	-1	0.50
QAI1	1	1	5	-4	0.20
QAI2	8	20	24	-4	0.83
QAI3	10	9	20	-11	0.45
QAI4	1	1		1	
QAL1		1	1		1.00
QAL2		1	3	-2	0.33
QAL3	1	1	6	-5	0.17
QAL4		1		1	
QARH5		1	2	-1	0.50
QARR1		1		1	
QARR2		2		2	
QARR3	3	3	8	-5	0.38
QARR4	5	4	3	1	1.33
QARR5			1	-1	
QASH1	1	1	6	-5	0.17
QASH2	16	11	38	-27	0.29
QASH3	19	25	51	-26	0.49
QASH4	2	10	19	-9	0.53
QASH5		1	3	-2	0.33
	555	650	1124	-474	0.58

Table 45 Gains – losses by grading for the years 2003, 2005 and 2007

When one examines the additions, are these all new businesses? Whilst new businesses do emerge, particularly within the B&B group, there are businesses that have discontinued their association then re-established their presence, perhaps due to change in ownership or oversight / difficulties in paying their subscription or change of attitude. There are 122 serviced accommodation providers who had a presence in both the 2003 and 2007 accommodation brochures but not the 2005 brochure!

The reasons for departure are varied and include retirement, transfer of ownership, dissatisfaction and failure to pay. Whilst discontinuation of business may be one reason for departure, if the departures are still operating as serviced accommodation providers, but un-graded, then have they found effective alternative channels for engaging with potential and actual customers?

Whilst there has been a notable decline in representation in accommodation brochures, there is a clear need to understand why this is occurring. Is there a shift away from printed material to an online presence? Or are there other reasons for the change? The dynamics of this change have important ramifications regarding government policy and how this is translated into a meaningful service to serviced accommodation providers.

13. THE ONLINE PRESENCE OF SERVICED ACCOMMODATION PROVIDERS

There is an argument that all businesses should be online as more and more people seek to buy online. This argument has been extended to the tourism sector where this view is expressed in the National Tourism Strategy document as "*Tourists increasingly want to find out about trips and activities online, and to book them online in real time*"[10]. However this raises many questions: What is to be online? What are the options available to provided on-line booking? How does this fit with business practices? Will all customers book online? Instead of attempting to address these questions, this examination of online practices will be confined to descriptive account of the data available in the sources being analysed. An explanatory account will be presented elsewhere.

The assumedly most obvious online location for a serviced accommodation provider is the national DMS - visitscotland.com. It is postulated that a national DMS will provide an impartial service to any stakeholders within the tourism sector, exposing these individual stakeholders to the international online community and increasing the possibility of commercial transactions. As such, a national DMS will be attractive to those wishing to exploit this access.

When the visible inventory of serviced accommodation providers on the national DMS, visitscotland.com website[11] (Table 46), is examined, it reveals a net decline between February 2006 and February 2007 of 10%. Over the next three months there was a further net decline by 1.4%.

	23rd February 2006	**21st February 2007**	**reduction since Feb 2006**	**16th May 2007**	**reduction since Feb 2007**
Hotel	615	451	164	461	-10
Small Hotel	484	464	20	439	25
Guest House	860	821	39	816	5
Bed & Breakfast	1,954	1,785	169	1,756	29

Table 46 An analysis of visible online inventory from the visitscotland.com website

If serviced accommodation providers are withdrawing from the services of VisitScotland, then what alternatives are there? Of the sources examined here (reference the section 2 "Data Sources", Table 1,Figure 1), Table 47a reveals that only 20.3% of the total calculated population of serviced accommodation providers in 2005 confine themselves solely to an online presence with visitscotland.com and/or a representation in the accommodation brochure published by the then local ATB. This 20.3% comprises mainly B&Bs (15%) highlighting the dependency of these businesses upon a single channel.

In contrast, only 35.5% of the total calculated population do not adopt an online presence with visitscotland.com and/or a representation in the accommodation brochure published by the then local ATB. For this group Yellow Pages is the dominant mode of representation, with hotels (11% of the calculated population) then guest houses (7%) dominating this channel. The most popular mix is visitscotland.com, the accommodation brochure and Yellow Pages (19%). Only 17% of the total calculated population use all four sources.

[10] Scottish Executive (2006) "The Next Decade: A Tourism Framework For Change", Edinburgh: Scottish Executive

[11] Accommodation search of the "full directory" on the visitscotland.com website http://guide.visitscotland.com/vs/guide/5,en,SCH1/objectId,RGN20vs,curr,GBP,folder,ACCOMMODATION,season,at1,selectedEntry,acco/acco.html [accessed 12th July 2007]

A)	ALL	B	D	S	Y	DB	BY	YS	DY	DS	BS	BYS	DBS	DBY	DYS	misc	Grand Total
B&B	3.0%	0.6%	1.8%	3.4%	4.0%	15.0%	0.3%	1.7%	0.6%	0.2%	0.1%	0.0%	2.5%	7.1%	0.1%	0.2%	40.5%
Campus		0.2%			0.0%		0.1%				0.0%	0.0%					0.3%
Guest House	5.7%	0.0%	0.1%	0.6%	7.2%	1.3%	0.1%	1.7%	0.2%	0.1%	0.0%	0.1%	0.9%	4.5%	0.1%		22.6%
Hotel	4.4%	0.0%	0.0%	0.1%	10.8%	0.4%	0.2%	0.6%	0.2%	0.0%		0.1%	0.3%	3.5%	0.2%	0.0%	20.9%
Inn	0.5%		0.0%	0.2%	0.2%	0.1%	0.1%	0.3%	0.1%	0.0%		0.0%	0.1%	0.9%	0.0%		2.7%
International Resort Hotel	0.0%													0.0%			0.1%
Lodge	0.0%	0.1%			0.8%	0.0%	0.1%	0.1%				0.1%				0.1%	1.3%
Restaurant		0.2%		0.0%	0.0%		0.1%	0.0%			0.0%	0.0%					0.4%
Small Hotel	3.6%	0.0%	0.1%	0.5%	0.5%	0.3%	0.1%	2.1%	0.2%	0.0%		0.0%	0.2%	3.4%	0.3%		11.2%
Grand Total	17.2%	1.1%	2.1%	4.8%	23.6%	17.1%	1.0%	6.4%	1.3%	0.3%	0.2%	0.4%	3.8%	19.4%	0.8%	0.4%	100%

B)	ALL	B	D	S	Y	DB	BY	YS	DY	DS	BS	BYS	DBS	DBY	DYS	misc	Grand Total
B&B	7.5%	1.6%	4.5%	8.4%	10.0%	37.0%	0.6%	4.1%	1.4%	0.4%	0.2%	0.1%	6.1%	17.4%	0.3%	0.4%	100%
Campus		58.8%			5.9%		23.5%				5.9%	5.9%					100%
Guest House	25.1%	0.1%	0.5%	2.7%	31.9%	5.6%	0.4%	7.3%	1.0%	0.4%	0.2%	0.3%	3.9%	19.9%	0.5%		100%
Hotel	21.3%	0.1%	0.2%	0.3%	51.5%	1.8%	1.0%	2.7%	0.9%	0.1%		0.4%	1.3%	16.9%	1.2%	0.2%	100%
Inn	17.3%		1.7%	8.1%	9.2%	4.6%	2.9%	12.1%	5.2%	0.6%		0.6%	2.3%	34.1%	1.2%		100%
International Resort Hotel	75.0%													25.0%			100%
Lodge	2.4%	5.9%			61.2%	1.2%	7.1%	5.9%				5.9%				10.6%	100%
Restaurant		34.5%		6.9%	6.9%		31.0%	6.9%			3.4%	10.3%					100%
Small Hotel	31.8%	0.4%	0.8%	4.1%	4.2%	2.6%	0.7%	18.8%	2.0%	0.1%		0.4%	1.6%	29.9%	2.5%		100%
Grand Total	17%	1%	2%	5%	24%	17%	1%	6%	1%	0%	0%	0%	4%	19%	1%	0%	100%

Table 47 **An evaluation of the level of representation in the four "directories" for 2005 and the degree of overlap by accommodation provider a) as a percentage of population and b) as a percentage of accommodation type**

ALL = all four sources B = accommodation brochure D = visitscotland.com database S = smoothhound.co.uk Y = Yellow Pages
misc = accommodation providers randomly found during the initial database compilation

	ALL	B	D	S	Y	DB	BY	YS	DY	DS	BS	BYS	DBS	DBY	DYS	misc	TOTAL
Highland	3.1%	0.1%	0.8%	1.6%	5.0%	3.7%	0.1%	1.5%	0.6%	0.1%	0.0%		1.0%	3.5%	0.3%	0.0%	21.4%
Aberdeenshire	0.6%	0.0%	0.1%	0.3%	2.0%	0.8%	0.0%	0.5%	0.0%				0.1%	0.9%			5.2%
Dumfries & Galloway	1.0%	0.0%	0.0%	0.3%	1.9%	1.2%	0.0%	0.5%	0.1%		0.0%	0.0%	0.3%	1.3%	0.0%	0.0%	6.7%
Argyll & Bute	1.5%	0.2%	0.1%	0.2%	1.4%	2.2%	0.2%	0.4%	0.0%	0.0%	0.0%	0.1%	0.3%	2.1%	0.0%	0.0%	8.7%
Edinburgh, City of	2.5%	0.0%	0.1%	0.3%	1.3%	1.0%	0.1%	0.6%	0.1%	0.0%		0.0%	0.3%	1.8%	0.1%	0.0%	8.2%
Fife	1.1%	0.1%	0.0%	0.3%	1.2%	0.9%	0.0%	0.3%	0.0%	0.0%		0.0%	0.3%	1.0%	0.0%	0.0%	5.3%
Aberdeen City	0.6%	0.0%		0.1%	1.1%	0.1%	0.1%	0.3%	0.0%		0.0%		0.0%	0.6%	0.0%		2.8%
Perth & Kinross	1.2%	0.0%	0.2%	0.2%	1.0%	0.9%	0.1%	0.6%	0.1%	0.0%	0.0%	0.1%	0.2%	1.2%	0.1%	0.0%	6.1%
Moray	0.4%	0.0%	0.0%	0.1%	0.9%	0.2%		0.3%					0.1%	0.5%	0.0%	0.0%	2.5%
Scottish Borders	0.8%	0.0%	0.1%	0.2%	0.8%	1.0%	0.0%	0.2%		0.0%		0.0%	0.2%	0.8%	0.0%	0.0%	4.4%
Stirling	0.6%	0.1%	0.1%	0.2%	0.8%	1.0%	0.1%	0.2%	0.0%		0.0%	0.0%	0.2%	0.7%	0.0%		4.1%
South Ayrshire	0.5%		0.0%	0.2%	0.7%	0.3%	0.0%	0.2%					0.1%	0.5%		0.0%	2.7%
Glasgow City	0.7%	0.1%	0.0%	0.1%	0.6%	0.1%	0.0%	0.1%	0.0%		0.0%	0.1%	0.0%	0.3%	0.0%		2.3%
Angus	0.3%	0.0%	0.2%	0.1%	0.5%	0.3%	0.0%	0.1%	0.0%	0.0%			0.1%	0.3%	0.0%	0.0%	2.0%
North Ayrshire	0.4%	0.0%	0.0%	0.1%	0.5%	0.3%		0.1%	0.0%				0.1%	0.4%			2.0%
South Lanarkshire	0.2%	0.1%	0.1%	0.0%	0.4%	0.1%	0.1%	0.1%	0.0%	0.0%			0.0%	0.4%		0.0%	1.6%
East Ayrshire	0.1%	0.0%		0.1%	0.3%	0.1%		0.1%					0.0%	0.1%			0.7%
East Lothian	0.2%			0.1%	0.3%	0.3%	0.0%	0.1%	0.0%				0.1%	0.2%			1.3%
Eilean Siar	0.2%	0.0%	0.0%	0.1%	0.3%	0.9%		0.0%	0.0%		0.0%		0.1%	0.8%			2.5%
North Lanarkshire	0.1%	0.0%	0.0%		0.3%	0.1%	0.0%	0.1%	0.0%			0.0%		0.2%	0.0%		0.8%
West Lothian	0.1%		0.0%	0.0%	0.3%	0.1%		0.0%	0.0%				0.0%	0.1%		0.0%	0.8%
Dundee City	0.2%	0.0%	0.0%	0.0%	0.3%	0.1%		0.0%	0.0%					0.3%	0.0%		0.9%
Falkirk	0.1%	0.0%			0.3%	0.1%	0.0%	0.0%	0.0%			0.0%	0.0%	0.1%	0.0%		0.7%
West Dunbartonshire	0.1%	0.0%		0.0%	0.2%	0.3%							0.1%	0.3%		0.0%	1.0%
Shetland Islands	0.1%		0.0%	0.0%	0.2%	0.3%	0.0%	0.0%	0.0%				0.0%	0.4%			1.1%
Orkney Islands	0.2%		0.1%	0.1%	0.2%	0.6%			0.0%				0.0%	0.5%	0.0%	0.0%	1.7%
Renfrewshire	0.2%	0.0%	0.0%		0.2%	0.0%	0.1%	0.0%	0.0%	0.0%			0.0%	0.0%	0.0%	0.0%	0.7%
Midlothian	0.0%			0.1%	0.1%	0.1%		0.0%					0.0%	0.2%			0.6%
Clackmannanshire	0.0%		0.0%		0.1%	0.1%		0.0%					0.0%	0.1%			0.3%
Inverclyde	0.1%	0.0%			0.1%	0.0%	0.0%	0.0%				0.0%		0.0%		0.0%	0.3%
East Dunbartonshire		0.0%		0.0%	0.0%	0.0%	0.0%	0.0%						0.1%			0.2%
East Renfrewshire	0.0%		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%								0.2%
TOTAL	17.2%	1.1%	2.1%	4.8%	23.6%	17.1%	1.0%	6.4%	1.3%	0.3%	0.2%	0.4%	3.8%	19.4%	0.8%	0.4%	100%

Table 48 **An evaluation of the level of representation on the four "directories" and the degree of overlap for 2005 (sorted by Y)**

	ALL	B	D	S	Y	DB	BY	YS	DY	DS	BS	BYS	DBS	DBY	DYS	misc	TOTAL
East Ayrshire	10.6%	2.1%		8.5%	46.8%	8.5%		10.6%					2.1%	10.6%			100%
North Lanarkshire	7.3%	1.8%	1.8%		40.0%	7.3%	1.8%	7.3%	1.8%			3.6%		23.6%	3.6%		100%
Falkirk	14.6%	6.3%			39.6%	10.4%	2.1%	4.2%	4.2%			2.1%	4.2%	8.3%	4.2%		100%
Aberdeen City	21.5%	0.6%		2.2%	38.7%	2.2%	2.2%	9.4%	0.6%		0.6%		0.6%	21.0%	0.6%		100%
Aberdeenshire	10.8%	0.3%	1.5%	5.0%	38.6%	14.6%	0.3%	9.1%	0.6%				2.6%	16.7%			100%
West Lothian	15.1%		3.8%	1.9%	37.7%	7.5%		3.8%	1.9%				5.7%	17.0%		5.7%	100%
Moray	17.0%	0.6%	1.2%	4.8%	37.0%	6.1%		10.9%					2.4%	18.2%	0.6%	1.2%	100%
Dundee City	18.0%	1.6%	1.6%	3.3%	31.1%	6.6%		3.3%	1.6%					29.5%	3.3%		100%
Dumfries & Galloway	15.1%	0.7%	0.2%	3.9%	28.8%	17.8%	0.5%	6.9%	1.4%		0.2%	0.5%	3.9%	19.2%	0.2%	0.7%	100%
Inverclyde	22.2%	5.6%			27.8%	5.6%	5.6%	5.6%				11.1%		11.1%		5.6%	100%
Glasgow City	31.8%	5.4%	0.7%	2.7%	27.0%	5.4%	1.4%	4.7%	1.4%		0.7%	3.4%	0.7%	12.8%	2.0%		100%
North Ayrshire	22.5%	0.8%	0.8%	5.4%	26.4%	14.7%		4.7%	0.8%				3.1%	20.9%			100%
Angus	15.0%	1.5%	7.5%	4.5%	26.3%	16.5%	1.5%	3.0%	2.3%	1.5%			4.5%	13.5%	1.5%	0.8%	100%
South Lanarkshire	11.5%	5.8%	6.7%	1.9%	26.0%	7.7%	3.8%	7.7%	1.9%	1.0%			2.9%	22.1%		1.0%	100%
East Lothian	12.6%			4.6%	25.3%	24.1%	1.1%	5.7%	2.3%				8.0%	16.1%			100%
South Ayrshire	19.7%		1.1%	9.0%	25.3%	12.4%	0.6%	8.4%					3.9%	19.1%		0.6%	100%
Renfrewshire	22.7%	4.5%	2.3%		25.0%	4.5%	9.1%	4.5%	4.5%	4.5%			6.8%	4.5%	4.5%	2.3%	100%
Clackmannanshire	5.0%		5.0%		25.0%	20.0%		15.0%					5.0%	25.0%			100%
Highland	14.3%	0.5%	3.9%	7.3%	23.6%	17.3%	0.4%	7.1%	2.7%	0.4%	0.1%		4.7%	16.4%	1.3%	0.1%	100%
Midlothian	5.1%			10.3%	23.1%	23.1%		7.7%					2.6%	28.2%			100%
Fife	21.7%	1.7%	0.3%	6.4%	22.3%	16.5%	0.6%	5.2%	0.6%	0.3%		0.6%	5.2%	17.9%	0.3%	0.6%	100%
West Dunbartonshire	9.2%	1.5%		1.5%	21.5%	29.2%							6.2%	29.2%		1.5%	100%
Stirling	15.0%	2.2%	1.5%	4.1%	19.9%	23.2%	2.6%	5.2%	1.1%		0.7%	0.4%	5.6%	18.0%	0.4%		100%
Scottish Borders	18.0%	1.1%	1.8%	5.3%	19.0%	23.6%	0.7%	5.3%		0.4%		0.4%	5.3%	17.6%	1.1%	0.7%	100%
East Dunbartonshire		12.5%		6.3%	18.8%	12.5%	18.8%	6.3%						25.0%			100%
East Renfrewshire	18.2%		9.1%	9.1%	18.2%	18.2%	9.1%	9.1%	9.1%								100%
Shetland Islands	8.6%		4.3%	2.9%	17.1%	24.3%	1.4%	1.4%	2.9%				1.4%	35.7%			100%
Perth & Kinross	20.1%	0.5%	4.0%	4.0%	16.3%	15.3%	1.0%	10.0%	2.0%	0.8%	0.8%	1.3%	3.5%	19.0%	1.3%	0.3%	100%
Argyll & Bute	16.9%	1.8%	1.2%	2.6%	15.8%	25.1%	2.1%	4.2%	0.4%	0.2%	0.2%	0.7%	3.7%	24.6%	0.4%	0.2%	100%
Edinburgh, City of	30.8%	0.2%	1.1%	4.1%	15.4%	11.8%	0.9%	7.1%	0.8%	0.6%		0.2%	3.9%	22.0%	0.9%	0.2%	100%
Eilean Siar	8.0%	1.8%	1.2%	2.5%	13.5%	36.8%		1.8%	0.6%		0.6%		3.1%	30.1%			100%
Orkney Islands	14.0%		3.5%	3.5%	9.6%	36.0%			1.8%				0.9%	28.9%	0.9%	0.9%	100%

Table 49 **An evaluation of the geographical variation in the level of representation in the four "directories" and the degree of overlap for 2005 (sorted by Y)**

Table 47b reveals the preferred manner of representation for each accommodation type. It suggests that lodges, hotels and guest houses tend to use Yellow Pages, whilst campuses promote themselves through the accommodation brochures. Small hotels use all four channels.

When Table 48 is examined, this suggests that the more sophisticated serviced accommodation providers (using all four sources) are to be found in the Highlands and Edinburgh. However, the more traditional serviced accommodation providers (using Yellow Pages or visitscotland.com /brochure mix) are also in the Highlands. Table 49, which reveals the preferred mode of representation by geographical location, suggests that urban areas (especially Glasgow and Edinburgh) are more likely to use all modes of representation.

In all instances, SmoothHound, as an independent online presence, had less engagement than the other modes of representation. However, that does not diminish its importance as a medium for the serviced accommodation provider to engage with and enrol the customer.

The limitation of this analysis is that it examines merely four channels. However, as dominant channels in 2005 they perhaps can give insight into the overall picture. If the uptake of all four sources is contrasted, it is evident that there is still a traditional attitude to the use of channels for engaging with potential and actual customers. Using a mix of channels is not pervasive and there appears to be a legacy of reliance upon old 'proven' methods.

However, assuming that online engagement and enrolment is 'the way forward' then how is this developing?

Third party (intermediaries) web-sites

A number of online options for online engagement are available which include:

- international 'dynamic packaging' intermediation, e.g. Expedia.com
- international accommodation review e.g. TripAdvisor.co.uk
- international accommodation intermediation, e.g.Smoothhound.co.uk
- national promotion and intermediation, e.g. undiscoveredscotland.co.uk

The four examples reveal different characteristics:

Expedia (www.expedia.com) provides an online booking engine and works on the basis of allocation of inventory. A search on the 13th July 2007 revealed 322 serviced accommodation providers in Scotland, which excluded apartments.

TripAdvisor (www.tripadvisor.co.uk) is an online facility that "*provides unbiased reviews, articles, recommendations and opinions*" about serviced accommodation submitted by guests based on their experiences. It also allows responses from the reviewed properties. A search for accommodation in Scotland on the 14th June 2007 revealed 280 locations with 2,692 listed properties of which 1586 were hotels, 1,106 were "B&Bs / inns" and 186 were "other accommodation. The full spectrum of accommodation is represented. Cities dominated the listing with Edinburgh, Glasgow, Aberdeen and Inverness accounting for around 30% of the listings. This perhaps reflects the most likely destinations of the visitor, with Edinburgh and Glasgow together attracting a significant proportion of visitors staying in Scotland (Table 50). It must be noted that some properties do appear in more than one location so the figures presented are inflated. Nevertheless, this does highlight the significant role that this manner of promotion represents.

	UK visitors		Overseas visitors	
	nights	spend	nights	spend
Cities of Edinburgh & Glasgow	23%	40%	47%	49%

Table 50 The percentage of visitors to the cities of Edinburgh and Glasgow as a percentage of the total visitors to Scotland for both domestic and overseas visitors for 2005[12]

[12] Statistics derived from the "Tourism in XXX 2005" factsheets available from www.visitscotland.org/research_and_statistics/regional_facts___figures.htm [accessed 14th July 2007]

SmoothHound (www.smoothhound.co.uk) provides both an online booking engine and an email based booking facility with an international inventory. It is an annual subscription based facility which can cost as little as £30 per annum[13] for UK properties. In April 2005, 2,215 serviced accommodation providers were listed for Scotland. When the site was revisited on the 27th May 2007, it was calculated that there was a net decline since 2005 of 173 properties (8% of the count).

Undiscovered Scotland (www.undiscoveredscotland.co.uk) is an information website which provides free listings with direct links (email and website) to the accommodation providers. For those that request it, there are various options to increase the profile of the property, which includes banners and photos. This also includes the option of a link to www.laterooms.com, a commission (15%) based on-line booking website, allowing the allocation of 'distressed' or discounted accommodation. There is also a link to an independent review website www.hotelreviewscotland.com. The UndiscoveredScotland website listed 2,591 properties on the 29th May 2007.

The uptake of the three websites, Expedia.com, Smoothhound.co.uk and UndiscoveredScotland.co.uk, by Scottish serviced accommodation providers has been examined. Table 51 presents a breakdown of each property by the number of rooms available at the time of enquiry. Accommodation data is provided from the regional accommodation brochures. This analysis reveals that the three websites attract different types of accommodation provider based upon the number of rooms available to guests. Expedia has an average of 77 rooms per property excluding campuses. Of the 121 properties for which there are no room details, 40 properties are represented by 11 national and international brands. The other two websites have averages of 17 (UndiscoveredScotland) and 19 (SmoothHound) rooms per property excluding campuses. There is a skew towards higher room capacity properties for SmoothHound.

Number of rooms	Expedia 13 July 2007	SmoothHound April 2005	UndiscoveredScotland 29 May 2007	Expedia 13 July 2007	SmoothHound April 2005	UndiscoveredScotland 29 May 2007
1	-	8	12	0.0%	0.4%	0.5%
2	-	85	140	0.0%	3.8%	5.4%
3	-	225	328	0.0%	10.2%	12.7%
4	-	105	86	0.0%	4.7%	3.3%
5	-	104	110	0.0%	4.7%	4.2%
6	2	150	124	0.6%	6.8%	4.8%
7	3	86	96	0.9%	3.9%	3.7%
8	2	74	72	0.6%	3.3%	2.8%
9	1	52	59	0.3%	2.3%	2.3%
10	5	51	53	1.6%	2.3%	2.0%
11	3	29	33	0.9%	1.3%	1.3%
12	-	43	39	0.0%	1.9%	1.5%
13	2	20	21	0.6%	0.9%	0.8%
14	2	25	23	0.6%	1.1%	0.9%
15-19	12	70	83	3.7%	3.2%	3.2%
20-49	61	146	145	18.9%	6.6%	5.6%
50-99	54	81	61	16.8%	3.7%	2.4%
100-199	41	46	39	12.7%	2.1%	1.5%
>199	13	13	13	4.0%	0.6%	0.5%
no details	121	802	1,054	37.6%	36.2%	40.7%
	322	2,215	2,591	100.0%	100.0%	100.0%

Table 51 Accommodation by room capacity represented on the three websites Expedia.com, Smoothhound.co.uk and UndiscoveredScotland.co.uk

Table 52 presents a breakdown of each property by grading as at the time of enquiry. Again data is provided from the regional accommodation brochures. This again reveals the distinction between Expedia and the other two websites. Expedia comprises of a relatively high proportion of three and four star hotels (38% of the inventory listed for Scotland). SmoothHound attracts predominantly three star guest houses, followed

[13] SmoothHound order form http://www.smoothhound.co.uk/order.html [accessed 14th July 2007]

by three and four star bed and breakfasts. UndiscoveredScotland attracts predominantly three star bed and breakfasts followed by four star bed and breakfasts and three star quest houses.

Number of rooms	Expedia 13 July 2007	SmoothHound April 2005	UndiscoveredScotland 29 May 2007	Expedia 13 July 2007	SmoothHound April 2005	UndiscoveredScotland 29 May 2007
no grading information	-	7	3		0.3%	0.1%
qaawait	9	78	52	2.8%	3.5%	2.0%
qabb1	-	-	2			0.1%
qabb2	-	41	23		1.9%	0.9%
qabb3	-	174	239		7.9%	9.2%
qabb4	-	120	212		5.4%	8.2%
qabb5	-	6	17		0.3%	0.7%
qac1	-	1	4		0.0%	0.2%
qac2	-	1	3		0.0%	0.1%
qac3	1	-	1	0.3%		0.0%
qagh1	2	13	5	0.6%	0.6%	0.2%
qagh2	2	54	31	0.6%	2.4%	1.2%
qagh3	3	245	207	0.9%	11.1%	8.0%
qagh4	2	109	132	0.6%	4.9%	5.1%
qagh5	-	1	3		0.0%	0.1%
qah1	1	6	2	0.3%	0.3%	0.1%
qah2	9	38	19	2.8%	1.7%	0.7%
qah3	69	129	121	21.4%	5.8%	4.7%
qah4	54	75	64	16.8%	3.4%	2.5%
qah5	14	5	13	4.3%	0.2%	0.5%
qai1	-	5	3		0.2%	0.1%
qai2	-	23	14		1.0%	0.5%
qai3	2	19	29	0.6%	0.9%	1.1%
qai4	1	2	5	0.3%	0.1%	0.2%
qairh5	3	3	2	0.9%	0.1%	0.1%
qal2	1	4	2	0.3%	0.2%	0.1%
qal3	3	9	7	0.9%	0.4%	0.3%
qal4	-		1			0.0%
qarr2	-	-	2			0.1%
qarr3	-	4	9		0.2%	0.3%
qarr4	-	2	9		0.1%	0.3%
qarr5	-	-	2			0.1%
qasa4	3	-	2	0.9%		0.1%
qash1	-	5	5		0.2%	0.2%
qash2	1	55	48	0.3%	2.5%	1.9%
qash3	9	120	167	2.8%	5.4%	6.4%
qash4	11	56	74	3.4%	2.5%	2.9%
qash5	1	3	3	0.3%	0.1%	0.1%
no details available	121	802	1,054	37.6%	36.2%	40.7%
	322	2,215	2,591	100.0%	100.0%	100.0%

Table 52 Accommodation by grading represented on the three websites Expedia.com, Smoothhound.co.uk and UndiscoveredScotland.co.uk

The names of the properties were used to establish consortia associations for the set of Expedia listings. Recognising that there are properties in the Expedia listings whose association has not been identified, nevertheless, a significant proportion (>41%) of properties can be clearly identified as having a consortia association. This contrasts with SmoothHound, which has 8.5% of its properties listed in 2005, and Undiscovered, which has 6.3% of its properties listed in 2007.

From this brief review of three known websites, it is apparent that each has a different attraction to its client base. Expedia attracts the large hotel groups, whilst SmoothHound appears to attract the guest house and UndiscoveredScotland the smaller bed and breakfast, though these websites are clearly not exclusive to these types of accommodation. This does raise the question of what attracts clients to a particular website? How important is content or can this be explained by the charging structure of the respective websites and the pursuit of value for money by the serviced accommodation providers?

On-line booking practices using visitscotland.com

At the micro-level of the individual business the preferred manner of taking a booking when there is an option to use an on-line booking engine, can be gleaned by examining the way serviced accommodation providers engage with the national portal of visitscotland.com for the handling of enquiries and bookings. The visible inventory of visitscotland.com was examined in February 2007 to establish whether providers choose to use the online booking facility or whether they opt for emails or telephone bookings via the central reservations system. Table 53 reveals that 57% of the serviced accommodation providers use the default email facility, whilst 25% prefer a telephone call. Of the 17% (642) who are presented as offering the booking facility only 9% (347) actually allocate rooms (green). The remainder (295) provide rooms on a call-to-book basis (blue) or they indicate that rooms are unavailable (grey). In other words, 46% of the 642 who are presented as offering on-line booking do not use on-line booking. Table 54 provides the detail behind Table 53. This reveals that within the 9% that offer an online booking facility, 55% (green-blue, green-blue-grey) allocate only some of their rooms to the on-line booking engine. For the remainder, they require customers to call-to-book (blue) or their rooms are unavailable (grey). The seasonal impact of businesses being closed during the time of the search is marginal, since seasonal businesses account for only 2% of this group. Thus, only 45% (156) use the on-line booking facility on its own. Unexplained are the four properties that have made rooms available for booking online, yet are presented as call-to-book.

	book by email	book online	call to book
blue		270	832
green		347	4
grey		25	103
not available	2,127		
	2127	642	939

	book by email	book online	call to book
blue		7%	22%
green		9%	0%
grey		1%	3%
not available	57%		
	57%	17%	25%

Table 53 Uptake of the different booking options on the visitscotland.com website (February 2007)

blue = call or mail (using enquiry form) to book green = available to book online
grey = unavailable

	be	bo	bo - be	c	Total
blue		105		392	497
blue grey		165		440	605
green		25			25
green blue		16		1	17
green blue grey		175		2	177
green grey		131		1	132
grey		24	1	103	128
(blank)	2,127				2,127
Total	2,127	641	1	939	3,708

Table 54 Manner of uptake of the different booking options

be = book by email bo = book online c = call to book
bo – be = assumed to be a set-up error

To get an insight into how accommodation size affects booking practices, the different booking options were mapped against property room capacity (Table 55). This reveals that email is the main mode of use by properties with one to three rooms. These are also more likely to select the call-to-book option (blue). Interestingly, the number of rooms is not a deterrent for the use of the on-line booking facilities (green). Indeed, examination of the room capacity of properties which use the on-line booking facility exclusive to the other options highlights uptake by smaller serviced accommodation providers (Table 56). Whilst 51% of those using the online booking facilities had 20 rooms or over, 23% had four rooms or less. Those using the on-line booking facilities in association with other modes tend to be smaller properties. Only 32% of properties have 20 rooms or more and 47.4% of properties have ten rooms or less. This suggests that whilst smaller capacity properties can use the online booking facilities, larger organisations are more likely to have the capability to manage an online booking engine and use it exclusively.

Number of rooms	blue	green	green blue	grey	email	Total
1	16	3	1	4	54	78
2	162	5	7	18	405	597
3	340	21	28	27	604	1,020
4	87	7	10	6	120	230
5	91	2	6	4	112	215
6	74	5	15	10	132	236
7	67	4	7	7	105	190
8	54	7	8	2	69	140
9	25	3	10	3	48	89
10-14	71	12	29	9	188	309
15-19	38	8	11	3	66	126
20-49	50	28	28	17	116	239
50-99	19	20	17	8	71	135
100-199	6	22	14	8	24	74
>199	2	10	3	2	13	30

Table 55 The room capacity of properties for different modes of receiving a booking through the visitscotland.com website

Rooms range	% green	% green – blue
1-4	22.9%	23.7%
5-9	13.4%	23.7%
10-19	12.7%	20.6%
20-49	17.8%	14.4%
50-99	12.7%	8.8%
100-199	14.0%	7.2%
>199	6.4%	1.5%

Table 56 The room capacity of properties using the visitscotland.com online booking facilities

When the accommodation type (Table 57) is examined in terms of booking preferences, hotels emerge as the dominant users of the on-line booking facilities. For the 65 hotels that there is room capacity and grading information, 31 are three star hotels and 27 are four star hotels (Table 58). The average room capacity is 95.7, though the numbers of rooms range from 2 to 319 rooms. The 34 B&Bs have an average room capacity of 3.1 rooms and range from 1 room to 6 rooms and include 23 three star B&Bs and 8 four star B&Bs (Table 58).

	blue	green	green blue	grey	email	Total
B&B	581	34	44	51	1,099	1,809
Campus	1	1	-	2	9	13
Guest House	290	19	52	24	382	767
Hotel	92	80	64	40	262	538
Inn	20	2	2	2	70	96
International Resort Hotel	1	-	1	-	2	4
Lodge	1	-	-	-	13	14
Restaurant	4	1	-	-	18	23
Small Hotel	112	20	31	9	272	444
Grand Total	1,102	157	194	128	2,127	3,708

Table 57 Booking options on the visitscotland.com online by accommodation type

	blue	green	green blue	grey	email	Total
h3	1	-	-	-	-	1
await	15	6	5	5	52	83
bb1	3	-	-	-	14	17
bb2	36	-	1	13	106	156
bb3	298	23	18	22	581	942
bb4	197	8	16	14	305	540
bb5	5	1	3	3	13	25
c1	-	-	-	-	5	5
c2	1	1	-	2	4	8
c3	-	-	-	-	1	1
euv5	-	-	-	-	1	1
gh1	3	2	-	-	12	17
gh2	34	1	3	3	54	95
gh3	173	6	33	15	211	438
gh4	87	10	24	4	86	211
gh5	1	-	-	-	4	5
h1	2	1	-	-	4	7
h2	7	4	4	5	19	39
h3	38	31	27	17	90	203
h4	13	28	20	5	37	103
h5	3	2	4	2	7	18
i1	2	-	-	-	2	4
i2	12	3	2	1	39	57
i3	8	1	4	2	47	62
i4	-	1	-	-	4	5
ii3	-	-	-	-	1	1
irh5	1	-	1	-	2	4
rr2	1	-	-	-	4	5
rr3	3	-	-	-	18	21
rr4	2	-	1	-	8	11
rr5	2	-	-	-	1	3
sh1	3	-	-	-	3	6
sh2	17	1	-	4	59	81
sh3	69	13	19	5	143	249
sh4	21	8	4	2	65	100
sh5	-	1	-	-	3	4
no grading details	44	5	5	4	122	180
	1,102	157	194	128	2,127	3,708

Table 58 The grading of properties for different modes of receiving a booking through the visitscotland.com website

When geographic location is examined (Table 59) one locality stands out with regard to the adoption of on-line booking facilities – the City of Edinburgh. One likely reason for this is the presence of national and international hotel brands, e.g. Sheraton, which have experience of dealing with on-line booking engines

	Blue	green	green blue	grey	email	Total
Aberdeen City	15	2	4	5	47	73
Aberdeenshire	37	2	8	5	105	157
Angus	24	1	-	1	46	72
Argyll & Bute	75	8	5	13	264	365
Clackmannanshire	-	-	-	-	11	11
Dumfries & Galloway	105	6	13	5	117	246
Dundee City	10	1	2	3	14	30
East Ayrshire	1	2	-	-	13	16
East Dunbartonshire	1	-	-	1	7	9
East Lothian	14	-	-	2	33	49
East Renfrewshire	3	-	-	-	3	6
Edinburgh, City of	114	46	49	13	118	340
Eilean Siar	13	-	-	9	106	128
Falkirk	5	-	-	-	14	19
Fife	51	12	15	7	114	199
Glasgow City	21	9	8	4	36	78
Highland	269	32	44	33	419	797
Inverclyde	2	1	-	-	3	6
Midlothian	3	1	2	1	14	21
Moray	21	1	3	1	40	66
North Ayrshire	18	6	1	2	44	71
North Lanarkshire	6	2	-	-	20	28
Orkney Islands	28	-	-	6	45	79
Perth & Kinross	88	11	13	5	133	250
Renfrewshire	1	1	3	-	13	18
Scottish Borders	54	1	5	6	91	157
Shetland Islands	30	1	1	1	15	48
South Ayrshire	28	6	10	-	50	94
South Lanarkshire	6	2	-	-	40	48
Stirling	36	1	6	4	111	158
West Dunbartonshire	13	-	-	1	30	44
West Lothian	10	2	2	-	11	25
	1,102	157	194	128	2,127	3,708

Table 59 The different modes of receiving a booking through the visitscotland.com website by geographical location

An examination of seasonal business use reveals that it is predominantly by email (72.7% of all seasonal businesses). Only 2.6% of all seasonal businesses use the on-line booking facility, but these combine its use with the call-to-book option.

The preceding analysis of the on-line booking preferences of serviced accommodation providers suggests that whilst smaller providers have adopted the vistitscotland.com on-line booking facilities, these facilities appear to be more readily adopted by larger organisations, who have the capability to use online booking facilities exclusively without recourse to other contact approaches.

14. CONCLUSION

This is an exploratory study, which had no prior expectations about the findings. The aim has been to let the data talk for themselves through their presentation in the form of a simple analysis. The analysis has been mainly descriptive. The limited interpretation offered is open to debate. Nevertheless, there are a number of observations:

- to establish the population of serviced accommodation providers requires a variety of directory sources, since no directory will capture all population members,
- serviced accommodation provision is a heterogeneous sub-sector of the tourism sector comprising a wide variety of players
- the majority of serviced accommodation providers are small:
    - 6% of all serviced accommodation providers have 50 rooms or more.
    - 10% have between 15 and 49 rooms.
    - 84% have 14 or fewer rooms
    - providers with 2 and 3 rooms represent 42% of all accommodation providers
    - single room providers represent a mere 2% of all accommodation providers.
- there are two principle lanes in the provision of serviced accommodation – the corporate lane and the MSE (micro-small enterprises) lane:
    - the corporate lane comprises of regional, national and international multi-site organisations, but represent less than 6% of all serviced accommodation providers,
    - the MSE (micro-small enterprises) lane are represented by single site businesses, which are assumed not to fall into the "medium-sized" bracket [50 to 249 employees and £5.6m to £22.8m turnover (Statutory Instrument 2004/16[14])]
- 49% of graded accommodation is three star; 23% of graded accommodation is four star
- 15.5% of all graded serviced accommodation is seasonal, with "Restaurants with rooms" as the most likely type of serviced accommodation provider to be seasonal; seven months (April to October) appears to be the most popular period for graded accommodation
- 20.3% of the total calculated population of serviced accommodation providers for 2005 confine their promotional activity (of the sources examined) to an online presence with visitscotland.com and/or a representation in the accommodation brochure published by the then local ATB. This comprises mainly B&Bs (15%) highlighting the dependency of these businesses upon a single channel
- whilst smaller providers have adopted the vistitscotland.com on-line booking facilities, these facilities appear to be more readily adopted by larger organisations who can use these facilities exclusively without recourse to other contact approaches on the visitscotland.com website

Rather than answer questions, the benefit of this analysis is twofold. It presents a quantitative profile of the serviced accommodation provision sub-sector. More importantly, it reveals questions – some obvious, others perhaps less so.

[14] The Companies Act 1985 (Accounts of Small and Medium-Sized Enterprises and Audit Exemption) (Amendment) Regulations 2004

ERRATA

As the analysis proceeded and anomalies were checked out, occasional errors were identified and corrected. However there were five errors which I identified as I approached the end of this analysis. As they do not affect the results they have not been corrected for in the tables, but, on the principle of correctness, the details are presented here. Each property in the database has a unique id, which allows its details to be identified:

ID	error	correction	impact
ID=236	incorrect room details for 2007 - entered as 2D 4T 1F 3ES	should be 2D 1T 3ES	Over-statement of rooms by 4 for 2007
	incorrect grading for 2007 - entered as QAawait	should be QABB5	Error in grade for 2007
ID=990	incorrect room details for 2007 - entered as 2D 1T 3ES	should be 2D 2T 3F 7ES	Under-statement of rooms by 4 for and ES by 4 (2007)
	incorrect grading for 2007 - entered as QABB3	should be QAI3	Error in grade for 2007
ID=1887	incorrect room details for 2005 - entered as 2D 1T 3ES	should be no brochure entry for 2005	Over-statement of rooms by 3 for and ES by 3 (2005)
	incorrect grading for 2007 - entered as QABB3		Error in grade for 2005
	source = DB	source = D	Error in source field for 2005
ID=2687 (4100)	property entered twice: copy (4100) estimate for 2005 - people = 111, rooms = 54, source = Y	'4100' should be deleted and source for '2687' changed from DBS to ALL	Overestimate of capacity by 111 people and 54 rooms for 2005 Error in source field for 2005
ID=2923	incorrect grading for 2007 - entered as QAGH5	should be QAGH4	Error in grade for 2007
ID=5064	incorrect room details for 2005 - entered as 3D 2T 3ES	should be 1D 1T 0ES	Overestimate of rooms by 4 for and ES by 1 (2007)
	incorrect grading for 2005 - entered as QAawait	should be QABB3	Error in grade for 2007

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APPENDIX 1 – Hotel chains, Groups and Consortia

Table 60 **A list of the hotel chains, groups and consortia identified in Scotland** (note: this list was compiled in 2005 but since then, there have been a number of transfers of which the most significant is the acquisition by Crerer (British Trust) Hotels of 26 Swallow Hotels in 2007, which went into receivership in September 2006.

Name	Number of sites in Scotland	Website	Country (as of May 2007)	Location (as of May 2007)	Address (as of May 2007)	Postcode
Premier Travel Inn	50	www.premiertravelinn.com	England	Bedfordshire	Whitbread Group Plc Whitbread Court Houghton Hall Business Park Porz Avenue Dunstable Beds	LU5 5XE
Best Western	40	www.bestwestern.com	USA	Arizona	Best Western International, Inc. 6201 N. 24th Parkway Phoenix, AZ 85016 (602) 957-4200	USA
Travelodge	19	www.travelodge.co.uk	England	Oxfordshire	Travelodge Hotels Ltd., Sleepy Hollow, Aylesbury Road, Thame, Oxfordshire	OX9 3AT
British Trust Hotels	16	www.crerarhotels.com	Scotland	Edinburgh	Crerar Hotels 1 Queen Charlotte Lane Edinburgh	EH6 6BL
MacDonald	16	www.MacdonaldHotels.co.uk	Scotland	Bathgate	Macdonald Hotels Limited. Whiteside House, Whiteside Industrial Estate, Bathgate	EH48 2RX
Swallow Hotels	15	www.swallowhotels.com	Scotland	Edinburgh	Part Of Crerar Hotels	EH6 6BL
IC Holiday Inn - Express	14	www.ichotelsgroup.com	England	Berkshire	Intercontinental Hotels Group PLC 67 Alma Road Windsor Berkshire	SL4 3HD
Hilton	13	www.hilton.com/	USA	California	Hilton Hotels Corporation World Headquarters 9336 Civic Center Drive Beverly Hills, Ca 90210	USA
Festival Inns	12	www.festival-inns.co.uk/	Scotland	Loanhead	Festival Group, Po Box 12288, Loanhead	EH20 9YF
Shearings Holidays	11	www.washearings.com	England	Lancashire	Wa Shearings Miry Lane Wigan	WN3 4AG
Ramada Jarvis	8	www.ramadajarvis.co.uk	England	Buckinghamshire	Ramada Jarvis Hotels Castle House Desborough Road High Wycombe Buckinghamshire	HP11 2PR
Swallow Inns	8	www.swallowhotels.com	Scotland	Edinburgh	Part Of Crerar Hotels	EH6 6BL
Thistle Hotels	8	www.thistlehotels.com	England	Uxbridge	Thistle Hotels Corporate Office, Po Box 909, Bath Road, Uxbridge	UB8 9FH
Fox Inns Group	6	www.foxinns.com	Scotland	Edinburgh	87 Corstorphine Road, Edinburgh	EH12 5QE
IC Holiday Inn	6	www.ichotelsgroup.com	England	Berkshire	Intercontinental Hotels Group PLC 67 Alma Road Windsor Berkshire	SL4 3HD
Strathmore Hotels	6	www.strathmorehotels.com	Scotland	East Kilbride	Strathmore Hotels Ltd 116 Strathmore House, East Kilbride	G74 1LF
Accor	5	www.accor.com	France	Evry Cedex	2, Rue De La Mare-Neuve 91021 Evry Cedex, France	France

Name	Number of sites in Scotland	Website	Country (as of May 2007)	Location (as of May 2007)	Address (as of May 2007)	Postcode
Costley & Costley Hoteliers Ltd	5	www.costley-hotels.co.uk	Scotland	Ayrshire	Monktonhill Road Southwood Troon Ayrshire	KA10 7EN
Crerar Hotels	5	www.crerarhotels.com	Scotland	Edinburgh	Part Of Crerar Hotels	EH6 6BL
Highland Heritage	5	www.highlandheritage.co.uk	Scotland	Argyll	Highland Heritage Ltd, Central Admin Office, Dalmally, Argyll	PA33 1AY
Innkeepers Lodge	5	www.innkeeperslodge.com	England	Midlands	Mitchells & Butlers Plc 27 Fleet Street Birmingham	B3 1JP
Lochs and Glens	5	www.lochsandglens.com	Scotland	Dunbartonshire	Lochs And Glens Holidays School Road Gartocharn Dunbartonshire	G83 8RW
Maclay Inns	5	www.maclay.com	Scotland	Alloa	Maclay Inns Ltd. The E-Centre Cooperage Way Business Village Alloa	FK10 3LP
Marriott	5	www.marriott.com	USA	Washington	Marriott International, Inc. Marriott Drive Washington, Dc 20058	USA
Stonefield Castle Group	5	www.stonefieldhotels.com	Scotland	Renfrewshire	Castlehill, Howwood. Renfrewshire	PA9 1LA
Apex	4	www.apexhotels.co.uk	Scotland	Edinburgh	217 Gilmerton Road Edinburgh	EH16 5UD
Brudolff Hotels	4	www.shetlandhotels.com	Scotland	Shetland	Holmsgarth Road, Lerwick	ZE1 0PW
The Freedom of the Glen Family of Hotels	4	www.freedomglen.co.uk	Scotland	Kinlochleven	The Freedom Of The Glen Family Of Hotels Kinlochleven	PH50 4SH
The Town House Company	4	www.townhousecompany.com	Scotland	Edinburgh	35 Drumsheugh Gardens Edinburgh	EH3 7RN
Cala Hotels	3	www.calahotels.com	Scotland	Isle of Lewis	Cala Hotels Limited, Registered Office: 11 James Street, Stornoway Isle Of Lewis	HS1 2QN
Carlson Hotels	3	www.carlson.com	USA	Minnesota	Carlson Companies P.O. Box 59159 Minneapolis, Mn 55459	USA
Choice Hotels	3	www.choicehotels.com	USA	Maryland	Choice Hotels International 10750 Columbia Pike Silver Spring, Md, Us 20901	USA
Corstorphine Hotels	3	www.corstorphinehotels.co.uk	Scotland	Edinburgh	186-188 St Johns Road Edinburgh	EH12 8SG
Corus Hotels	3	www.corushotels.co.uk	England	Milton Keynes	Corus Hotels Blakelands House, Yeomans Drive, Milton Keynes	MK14 5HG
Cosmopolitan Hotels	3	www.cosmopolitan-hotels.com	Scotland	Erskine	Cosmopolitan Hotels Riverfront Erskine	PA8 6AN
Jurys Doyle Hotel Group	3	www.jurysdoyle.com	Ireland	Dublin	Jurys Doyle Hotel Group, 146 Pembroke Road, Ballsbridge, Dublin 4	Ireland
Paramount	3	www.paramount-hotels.co.uk	England	Leeds	Paramount Group Of Hotels, Fountain Court, 12 Bruntcliffe Way, Morley, Leeds	LS27 0JG
The Isles Hotel Group	3	www.isleshotelgroup.co.uk	Scotland	Benbecula	The Isle Of Benbecula House Hotel Creagorry Isle Of Benbecula The Hebrides Of Scotland	HS7 5PG

Name	Number of sites in Scotland	Website	Country (as of May 2007)	Location (as of May 2007)	Address (as of May 2007)	Postcode
The Townhouse Group	3	www.townhousehotels.co.uk	Scotland	Edinburgh	The Townhouse Group 9 Royal Terrace Edinburgh	EH7 5AB
G1 Group	2	www.g1group.co.uk	Scotland	Glasgow	G1 Group Plc Virginia House 62 Virginia Street Glasgow	G1 1TX
KGQ Hotels	2	www.kgqhotels.co.uk	Scotland	Shetland	J W G Plc, Gremista Industrial Estate, Gremista, Lerwick, Isle Of Shetland	ZE1 0PX
Macleod Hotels	2	www.macleodhotels.co.uk	Scotland	Inverness	Albyn House, Union Street, Inverness	IV1 1PL
Maksu Group	2	www.maksu-group.co.uk	?	?	?	?
Malmaison	2	www.malmaison.com	England	London	Malmaison Brand Limited 1 West Garden Place, Kendal Street, London	W2 2AQ
McQuade Group	2	www.glasgowhotelsandapartments.co.uk	Scotland	Glasgow	?	?
Menzies Hotel	2	www.menzies-hotels.co.uk	England	Derbyshire	Menzies Hotels, Bakum House, Etwall Road, Mickleover, Derbyshire	DE3 0DL
Millennium Hotels & Resorts	2	www.millenniumhotels.com	England	London	Millennium & Copthorne Hotels Plc Corporate Headquarters Scarsdale Place Kensington London	W8 5SR
Starwood	2	www.starwoodhotels.com	USA	White Plains	Starwood Hotels And Resorts Worldwide, Inc. 1111 Westchester Avenue White Plains, NY 10604	USA
The Ness Guest House Group	2		Scotland	Inverness		IV3 5NQ
The Waterfront	2		Scotland	Fife	The Waterfront 18/20 Shore Street Anstruther Fife	KY103EA
Welcome Break	2	www.welcomebreak.co.uk	England	Buckinghamshire	2 Vantage Court, Tickford Street, Newport Pagnell, Buckinghamshire	MK16 9EZ
Campanile	1	www.campanile.fr	France	Torcy	LOUVRE HOTELS 31, Avenue Jean Moulin Marne La Vallée 77200 Torcy	France
Classic Hotels	1	www.classic-hotels.net/	England	Worcestershire	Classic Hotels Head Office Dumbleton Hall Dumbleton Nr. Evesham Worcestershire	WR11 7TS
De Vere Hotels	1	www.devere.co.uk	England	Cheshire	2100 Daresbury Park, Daresbury, Warrington, Cheshire	WA4 4BP
Flagship Hotels	1	www.thebrucehotel.com/flagship.htm	Scotland	East Kilbride	35 Cornwall St, East Kilbride	G74 1AF
Globetrotter Inns	1	www.globetrotterinns.com	England	London		
Hand Picked Hotels	1	www.handpicked.co.uk	England	Kent	The Old Library, The Drive, Sevenoaks, Kent Tn13 3ab	TN13 3AB

Name	Number of sites in Scotland	Website	Country (as of May 2007)	Location (as of May 2007)	Address (as of May 2007)	Postcode
IC Intercontinental	1	www.ichotelsgroup.com	England	Berkshire	Intercontinental Hotels Group PLC 67 Alma Road Windsor Berkshire	SL4 3HD
Moat House Hotels	1	www.qmh-hotels.com	England	Essex	Queens Court 9-17 Eastern Road Romford Essex	RM1 3NG
Prima Hotels	1	www.primahotels.co.uk/	England	Cheshire	The Stanneylands Hotel, Wilmslow, Cheshire	SK9 4EY
Rocco Forte Hotels	1	www.roccofortehotels.com	England	London	Savannah House, 11 Charles II Street London	SW1Y 4QU
Royal Sailors's Rests	1	www.rsr.org.uk	England	n/a	N/A	n/a
The Eton Group	1	www.theetoncollection.com	England	London	5 Threadneedle Street, London	EC2R 8AY

Table 61 **Classification of the consortia inventory by VisitScotland grading scheme (based on the 2005 accommodation brochures)**

consortia 2005	no grading information	QAAwait	QABB2	QAGH2	QAGH3	QAH1	QAH2	QAH3	QAH4	QAH5	QAI1	QAI2	QAI3	QAL1	QAL2	QAL3	QARH5	QASH2	QASH3	QASH4	QASH5	not included in the grading scheme	Grand Total
Accor		1					2	1														1	5
Apex									4														4
Best Western							1	19	13										1	3		3	40
British Trust Hotels							6	8														2	16
Brudolff Hotels								3												1			4
Cala Hotels						1	1	1															3
Campanile								1															1
Carlson Hotels									2													1	3
Choice Hotels							1	1														1	3
Classic Hotels							1																1
Corstorphine Hotels					2														1				3
Corus Hotels							1	2															3
Cosmopolitan Hotels							1	2															3
Costley & Costley Hoteliers Ltd										1										1		3	5
Crerar Hotels							1	4															5
De Vere Hotels										1													1
Festival Inns						1	4	2				1							1			3	12
Flagship Hotels		1																					1
Fox Inns Group		2									1							2	1				6
G1 Group		1						1															2
Globetrotter Inns																						1	1
Hand Picked Hotels									1														1
Highland Heritage								5															5
Hilton									10	2												1	13
IC Holiday Inn								4	2														6

consortia 2005	no grading information	QAAwait	QABB2	QAGH2	QAGH3	QAH1	QAH2	QAH3	QAH4	QAH5	QAI1	QAI2	QAI3	QAL1	QAL2	QAL3	QARH5	QASH2	QASH3	QASH4	QASH5	not included in the grading scheme	Grand Total
IC Holiday Inn - Express								9								2						3	14
IC Intercontinental									1														1
Innkeepers Lodge													2									3	5
Jurys Doyle Hotel Group								3															3
KGQ Hotels								1	1														2
Lochs and Glens								3														2	5
MacDonald		2					1	3	7	1												2	16
Maclay Inns		1										1	1					1				1	5
Macleod Hotels									1										1				2
Maksu Group																						2	2
Malmaison									2														2
Marriott									4													1	5
McQuade Group								1											1				2
Menzies Hotel				1					1														2
Millennium Hotels & Resorts									2														2
Moat House Hotels									1														1
Paramount									3														3
Premier Travel Inn		4										1		1	1	4						39	50
Prima Hotels									1														1
Ramada Jarvis								8															8
Rocco Forte Hotels										1													1
Royal Sailors's Rests															1								1
Shearings Holidays							2	8														1	11
Starwood										1							1						2
Stonefield Castle Group			1					2	1				1										5
Strathmore Hotels	1					1	3	1															6
Swallow Hotels							1	6	3													5	15
Swallow Inns		1					2											1	1			3	8
The Eton Group		1																					1

consortia 2005	no grading information	QAAwait	QABB2	QAGH2	QAGH3	QAH1	QAH2	QAH3	QAH4	QAH5	QAI1	QAI2	QAI3	QAL1	QAL2	QAL3	QARH5	QASH2	QASH3	QASH4	QASH5	not included in the grading scheme	Grand Total
The Freedom of the Glen Family of Hotels									3											1			4
The Isles Hotel Group								2											1				3
The Ness Guest House Group					2																		2
The Townhouse Group									2	1						1			2		1		7
The Waterfront					2																		2
Thistle Hotels								4	4														8
Travelodge																1						18	19
Welcome Break															1	1							2
Total	1	14	1	1	6	3	28	105	69	8	1	3	4	1	3	9	1	4	10	6	1	97	375

APPENDIX 2 – Capacity of serviced accommodation providers

Table 62 The number of rooms for different accommodation types

Number of rooms per site	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
1	88		1							89
2	641		3	1	4			2	4	655
3	896		66	4	15			4	2	987
4	160		121	3	6			5	8	303
5	44		149	10	13				24	240
6	11		170	11	15			4	51	262
7	7		108	11	6		1		37	170
8	6		67	7	9		1	2	58	150
9	4		37	6	5		1	2	56	111
10	1		31	14	8			2	50	106
11			17	12	4			1	35	69
12			16	7	3		1		40	67
13	1		5	6	2		1		20	35
14			7	7	4			1	23	42
15		1	3	13	3				14	34
16			5	8					19	32
17			2	9					8	19
18			2	8	1				11	22
19			1	9			1		9	20
20				20	1		1		5	27
21			2	16					6	24
22			1	10					3	14
23			3	11	1				2	17
24				11	1				1	13
25				7	1				1	9
26				8						8
27			2	6	1		1			10
28				14	1					15
29				5						5
30				14						14
31				5						5
32				10						10
33				4						4
34				9					1	10
35				7						7
36				7						7
37				4			1			5
38				7					1	8
39	1			6						7
40		1		3			2			6
41				1					1	2
42				7						7
43				2						2
44				5						5
45	1	1		7			1			10
46				3						3

Number of rooms per site	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
47				5						5
48				5						5
49				3					1	4
50				7						7
52		1		7	1					9
53	2			3						5
54				2						2
55		1		5			1			7
56				2			1			3
57				1						1
58				1						1
59				1						1
60				2	1				1	4
61	1			2			1			4
62			1	3						4
63				1						1
64				6			1			7
65		1		6						7
66				1						1
67				2						2
68				3						3
70		1		3						4
72				7					1	8
73				1						1
75				1					1	2
76				2						2
77				2						2
78				4						4
79				1						1
80				2						2
81				4						4
82				2						2
83				1						1
84				4						4
85				2						2
86				2						2
87				1						1
88				1						1
89				3						3
90				3						3
91				3						3
94				2						2
95				2						2
96				3						3
97				3						3
98				2			1			3
99				1						1
100				4						4
101				2	1					3
102				1						1
103				2						2
104				1						1

Number of rooms per site	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
105				1						1
106				3						3
107				2						2
108				3						3
110				1						1
111				1						1
112				2						2
113				1						1
114				1						1
117				2						2
118				3						3
119				1						1
120		1		4						5
121				2						2
123				1						1
124				1						1
125				1						1
128				4						4
129				1						1
131				1						1
133				1						1
136				1						1
137				1						1
139		1		1						2
140				1						1
141				3						3
143				1						1
144				1						1
145				1						1
146				1						1
147				1						1
149							2			2
150				1						1
152				1						1
153				1						1
155				2						2
156				1						1
159				1						1
160				1						1
161				1						1
164		1		1						2
166						1				1
168				1						1
174				1						1
175				1						1
177				1						1
186				1						1
188				1						1
189				2						2
195				1						1
197				1						1
200		1								1

Number of rooms per site	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
206				1						1
209						1				1
213				1						1
215				1						1
218		1								1
220				1						1
221						1				1
222				1						1
231		1								1
237				1						1
238				1						1
239				1						1
245				1						1
250				1						1
256				1						1
260				1						1
270						1				1
275				1						1
278				1						1
283				1						1
297				1						1
300				2						2
303				1						1
319				2						2
464		1								1
1620		1								1
1626		1								1
Total	1864	16	820	585	107	4	19	23	494	3932

APPENDIX 3 – Geographical breakdown of capacity

Table 63 A breakdown of capacity by council area and accommodation type

Council Area	Accommodation type	Number of sites	Number of people	Number of rooms
Aberdeen City	B&B	16	863	235
	Campus	3	540	503
	Guest House	103	1,409	721
	Hotel	45	6,517	3,225
	Lodge	5	795	360
	Small Hotel	9	484	244
Aberdeen City Total		181	10,608	5,288
Aberdeenshire	B&B	109	791	384
	Guest House	65	857	420
	Hotel	113	10,906	5,318
	Inn	10	113	56
	Lodge	4	340	157
	Restaurant	1	4	2
	Small Hotel	40	790	404
Aberdeenshire Total		342	13,801	6,741
Angus	B&B	66	391	184
	Guest House	16	200	101
	Hotel	30	2,807	1,364
	Inn	1	19	9
	Lodge	1	101	46
	Restaurant	3	35	16
	Small Hotel	16	263	129
Angus Total		133	3,816	1,849
Argyll & Bute	B&B	261	1,682	807
	Guest House	111	1,528	749
	Hotel	87	7,964	4,029
	Inn	17	315	154
	Lodge	2	36	17
	Restaurant	3	40	19
	Small Hotel	88	1,725	853
Argyll & Bute Total		569	13,290	6,628
Clackmannanshire	B&B	10	75	37
	Hotel	5	489	238
	Small Hotel	5	97	49
Clackmannanshire Total		20	661	324
Dumfries & Galloway	B&B	179	1,051	507
	Guest House	70	894	430
	Hotel	103	8,881	4,353
	Inn	20	225	113
	Lodge	6	576	239
	Small Hotel	59	1,260	611
Dumfries & Galloway Total		437	12,887	6,253
Dundee City	B&B	12	70	38
	Guest House	16	203	97
	Hotel	21	2,601	1,283
	Lodge	4	404	184
	Restaurant	1	8	4
	Small Hotel	7	145	73
Dundee City Total		61	3,431	1,679

Council Area	Accommodation type	Number of sites	Number of people	Number of rooms
East Ayrshire	B&B	13	89	38
	Guest House	2	26	13
	Hotel	21	2,258	1,098
	Inn	3	41	19
	Lodge	2	128	58
	Small Hotel	6	117	52
East Ayrshire Total		47	2,659	1,278
East Dunbartonshire	B&B	10	63	28
	Guest House	1	14	7
	Hotel	1	111	54
	Inn	1	155	60
	Lodge	1	123	61
	Small Hotel	2	30	15
East Dunbartonshire Total		16	496	225
East Lothian	B&B	38	213	101
	Guest House	11	143	80
	Hotel	20	1,742	844
	Inn	2	34	17
	Lodge	2	202	92
	Restaurant			
	Small Hotel	14	318	156
East Lothian Total		87	2,652	1,290
East Renfrewshire	B&B	4	19	11
	Guest House	1	4	2
	Hotel	5	396	195
	Small Hotel	1	28	14
East Renfrewshire Total		11	447	222
Edinburgh, City of	B&B	124	735	346
	Campus	5	5,770	3,421
	Guest House	265	4,121	1,944
	Hotel	89	15,998	7,651
	Inn	3	90	44
	Lodge	11	1,437	685
	Small Hotel	36	908	433
Edinburgh, City of Total		533	29,059	14,524
Eilean Siar	B&B	108	565	277
	Guest House	28	314	163
	Hotel	13	988	507
	Inn	3	64	33
	Small Hotel	11	206	107
Eilean Siar Total		163	2,137	1,087
Falkirk	B&B	15	81	40
	Guest House	6	62	30
	Hotel	20	2,155	1,084
	Lodge	3	221	101
	Restaurant	1	39	14
	Small Hotel	3	262	98
Falkirk Total		48	2,820	1,367
Fife	B&B	153	1,291	617
	Campus	1	70	45
	Guest House	59	723	359
	Hotel	72	6,884	3,320
	Inn	12	210	98
	International Resort Hotel	2	880	375

Council Area	Accommodation type	Number of sites	Number of people	Number of rooms
	Lodge	5	371	172
	Restaurant	4	52	18
	Small Hotel	38	910	441
Fife Total		346	11,391	5,445
Glasgow City	B&B	15	212	106
	Campus	6	1,339	1,322
	Guest House	41	1,013	523
	Hotel	70	14,432	6,780
	Lodge	7	631	298
	Restaurant	1	19	11
	Small Hotel	8	491	248
Glasgow City Total		148	18,137	9,288
Highland	B&B	640	3,998	1,892
	Guest House	322	4,182	2,044
	Hotel	234	22,940	11,280
	Inn	22	415	201
	Lodge	7	588	262
	Restaurant	7	89	44
	Small Hotel	164	3,990	1,983
Highland Total		1,396	36,202	17,706
Inverclyde	B&B	5	24	12
	Campus	1	164	164
	Guest House	2	28	14
	Hotel	6	804	383
	Lodge	1	101	46
	Small Hotel	3	47	23
Inverclyde Total		18	1,168	642
Midlothian	B&B	20	125	60
	Guest House	4	49	23
	Hotel	11	1,009	489
	Inn	1	20	10
	Small Hotel	3	46	22
Midlothian Total		39	1,249	604
Moray	B&B	63	419	196
	Guest House	34	484	236
	Hotel	43	3,903	1,933
	Inn	6	91	43
	Lodge	1	101	46
	Small Hotel	18	399	204
Moray Total		165	5,397	2,658
North Ayrshire	B&B	44	271	127
	Guest House	34	422	204
	Hotel	31	2,828	1,352
	Inn	2	49	26
	Small Hotel	18	459	206
North Ayrshire Total		129	4,029	1,915
North Lanarkshire	B&B	13	80	42
	Campus	1	55	52
	Guest House	11	140	71
	Hotel	19	2,512	1,152
	Inn	2	33	16
	Lodge	4	445	195
	Small Hotel	5	196	99
North Lanarkshire Total		55	3,461	1,627

Council Area	Accommodation type	Number of sites	Number of people	Number of rooms
Orkney Islands	B&B	73	378	189
	Guest House	14	194	91
	Hotel	12	597	315
	Inn	5	58	31
	Restaurant			
	Small Hotel	10	160	85
Orkney Islands Total		114	1,387	711
Perth & Kinross	B&B	149	914	437
	Guest House	80	1,040	505
	Hotel	83	8,123	3,988
	Inn	18	326	156
	International Resort Hotel	1	572	270
	Lodge	6	601	269
	Restaurant	3	34	16
	Small Hotel	59	1,460	718
Perth & Kinross Total		399	13,070	6,359
Renfrewshire	B&B	13	196	88
	Guest House	7	85	46
	Hotel	16	3,242	1,552
	Inn	4	287	118
	Lodge	2	337	144
	Small Hotel	2	111	57
Renfrewshire Total		44	4,258	2,005
Scottish Borders	B&B	153	923	446
	Guest House	32	408	200
	Hotel	40	3,520	1,737
	Inn	19	208	95
	Restaurant	1	8	4
	Small Hotel	39	761	373
Scottish Borders Total		284	5,828	2,855
Shetland Islands	B&B	37	201	103
	Guest House	14	212	107
	Hotel	11	875	441
	Inn	2	15	9
	Small Hotel	6	181	97
Shetland Islands Total		70	1,484	757
South Ayrshire	B&B	74	433	203
	Guest House	41	513	247
	Hotel	36	3,600	1,748
	Inn	3	73	35
	International Resort Hotel	1	442	221
	Lodge	2	202	92
	Small Hotel	21	430	205
South Ayrshire Total		178	5,693	2,751
South Lanarkshire	B&B	45	248	116
	Guest House	11	127	63
	Hotel	30	3,095	1,492
	Inn	2	30	15
	Lodge	3	282	132
	Small Hotel	13	286	144
South Lanarkshire Total		104	4,068	1,962
Stirling	B&B	123	731	348
	Guest House	59	781	374
	Hotel	41	4,927	2,475

Council Area	Accommodation type	Number of sites	Number of people	Number of rooms
	Inn	11	255	124
	Lodge	3	219	99
	Restaurant	3	26	13
	Small Hotel	27	669	323
Stirling Total		267	7,608	3,756
West Dunbartonshire	B&B	35	184	91
	Guest House	10	108	52
	Hotel	14	1,368	668
	Inn	3	73	32
	Lodge	1	101	46
	Restaurant	1	13	6
	Small Hotel	1	38	21
West Dunbartonshire Total		65	1,885	916
West Lothian	B&B	23	144	68
	Guest House	5	66	31
	Hotel	21	2,300	1,122
	Inn	1	14	8
	Lodge	2	202	92
	Small Hotel	1	18	9
West Lothian Total		53	2,744	1,330
Grand Total		6,522	227,823	112,042

APPENDIX 4 – Accommodation quality

Table 64 The quality of accommodation by accommodation type for 2005 (sourced from the 2005 accommodation brochures)

	B&B	Campus	Guest House	Hotel	Inn	International Resort Hotel	Lodge	Restaurant	Small Hotel	Total
no grading info	18		3	5	1		2		4	33
QAAwait	148		64	53	7		1	3	47	323
QABB1	23		2							25
QABB2	232		3							235
QABB3	932		14							946
QABB4	454		12						1	467
QABB5	17		1							18
QACA1		9								9
QACA2		7								7
QACA3				1						1
QAGH1			22							22
QAGH2	4		110	3						117
QAGH3	24		402	3					1	430
QAGH4	6		177						1	184
QAGH5	1		5							6
QAH1				6					1	7
QAH2				60					2	62
QAH3				216	1				4	221
QAH4				124					1	125
QAH5				15						15
QAI1				1	9				2	12
QAI2				9	41		1		3	54
QAI3			1	8	41				10	60
QAI4					5				1	6
QAL1				1						1
QAL2				3			3			6
QAL3				6	1		12		1	20
QARH5						4				4
QARR2									1	1
QARR3			1	1				13	2	17
QARR4				3				5	1	9
QARR5	1							2		3
QASA3	1									1
QASA4	2									2
QASH1				1					13	14
QASH2				23	1				94	118
QASH3	1		1	27					210	239
QASH4			1	16					89	106
QASH5			1						5	6
Total	1,864	16	820	585	107	4	19	23	494	3,932

Code: BB: bed & breakfast CA: campus GH: guest house H: hotel I: inn L: lodge
RR: restaurant with rooms SA: serviced accommodation SH: small hotel

Table 65 The quality of accommodation by council area for 2005 (sourced from the 2005 accommodation brochures)

	Aberdeen City	Aberdeenshire	Angus	Argyll & Bute	Clackmannanshire	Dumfries & Galloway	Dundee City	East Ayrshire	East Dunbartonshire	East Lothian	East Renfrewshire	Edinburgh, City of	Eilean Siar	Falkirk	Fife	Glasgow City	Highland	Inverclyde	Midlothian	Moray	North Ayrshire	North Lanarkshire	Orkney Islands	Perth & Kinross	Renfrewshire	Scottish Borders	Shetland Islands	South Ayrshire	South Lanarkshire	Stirling	West Dunbartonshire	West Lothian	Total
no grading info				1													22				1		6	1		1				1			33
QAAwait	7	12	2	52	1	23	6	1	3	3	1	23	9	5	20	8	50		1	7	5	3	5	9	4	11	6	10	2	26	8		323
QABB1		1		2		3		1				2	1			2	2		1		1	1	1	1		1	1	2		1	1		25
QABB2	3	8	4	28		18		1	3	7		17	13	2	11	3	36	2	4	2	8		5	8		15	4	6	7	13	4	3	235
QABB3	4	37	24	115	4	64	6	3	2	15	3	43	52	6	54	3	203	1	4	23	15	5	27	55	1	57	14	23	16	46	13	8	946
QABB4	1	29	12	37	2	24	1	2	1	10		21	23	2	38	1	106	1	3	13	8	1	13	34	3	29	5	14	5	17	9	2	467
QABB5		4		3						1					1		4						1			1				2		1	18
QACA1												2				5		1				1											9
QACA2	2											3			1	1																	7
QACA3							1																										1
QAGH1				1			2					13				2	2									2							22
QAGH2	8	1	1	10		8	1	1		1		27			3	13	14				1	1	5	4	1	4	1	7		3	1	1	117
QAGH3	29	10	2	31		18	5			2		97	6	2	26	5	82		3	6	12	2	5	34		11	6	7	2	24	3		430
QAGH4	3	5	2	22		7	1					33	5		10		48		1	2	5		2	21		1		3		10	1	2	184
QAGH5				1								1					2									1		1					6
QAH1	1			1		1						1	1			1	1																7
QAH2	1		1	9		5	1	1		1		8	3	1	3	2	10						1	5	2	1	2	1	1	3			62
QAH3	13	8	3	15		8	4	1		2		17	4	1	10	17	36	3	1	6	7	3	5	17	7	5	4	5	4	9	3	3	221
QAH4	10	6	2	6		5	2	1		1		24		2	5	12	14		1	3	1	3	1	9	2	3	1	3	5	1	1	1	125
QAH5	1			1								6			1	2										1		2			1		15
QAI1				1		3											3								1	3				1			12

	Aberdeen City	Aberdeenshire	Angus	Argyll & Bute	Clackmannanshire	Dumfries & Galloway	Dundee City	East Ayrshire	East Dunbartonshire	East Lothian	East Renfrewshire	Edinburgh, City of	Eilean Siar	Falkirk	Fife	Glasgow City	Highland	Inverclyde	Midlothian	Moray	North Ayrshire	North Lanarkshire	Orkney Islands	Perth & Kinross	Renfrewshire	Scottish Borders	Shetland Islands	South Ayrshire	South Lanarkshire	Stirling	West Dunbartonshire	West Lothian	Total
QAI2		1	1	6		7		1				1	1		6		3		1	2	1		2	2		8	1	3	2	3	1	1	54
QAI3		2		8		4		1				1	4		5		7			2	1	1	1	8		8	1			3	3		60
QAI4		1		3											1									1									6
QAL1																						1											1
QAL2	1			1		1										2														1			6
QAL3				1		1			1			4				4	2				1	1		1	1				3				20
QARH5															2									1				1					4
QARR2																													1				1
QARR3		1	1	2			1					1		1	2	2	4							1						1			17
QARR4		1	2					1									1							2		2							9
QARR5												1			1		1																3
QASA3	1																																1
QASA4	2																																2
QASH1			1	2						2		3					3			1						2							14
QASH2		11	4	13		18	3			5		3		1	5	1	17	1	2	1	5	1	3	5		6	1	3	1	6		2	118
QASH3	1	15	7	34	4	26		1	1	2	1	15	7		16	4	44	2	1	2	7	1	6	16	1	6	1	5	6	7			239
QASH4		2	1	21		9				2		4	2		1	1	31			3			2	10		10	2	2	1	2			106
QASH5												1					2				1							1		1			6
Total	88	155	70	427	11	253	34	16	11	54	5	372	131	23	222	91	750	11	23	73	80	25	91	245	23	189	50	99	56	181	49	24	3,932

APPENDIX 5 – Seasonality

NOTE: When Easter has been given as the start of the period open this has been marked as starting in April, since Easter falls on the Sunday after the first full moon after the Spring equinox (~21st March).

Table 66 The number of months open by grade – 2005 (missing grades denote no businesses with these grades operating on a seasonal basis)

	Number of months										
Grading	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**Total**
no grading information					1		1	1		1	4
QAAwait			1	2	2	7	7	4	8	9	40
QABB1	1			1	2	2	1	1			8
QABB2				1	7	19	8	5	5	4	49
QABB3				11	28	66	42	33	29	19	228
QABB4	1		1	2	10	37	33	18	7	13	122
QABB5						3	1	4	1		9
QACA1	1	2	4								7
QACA2	1	2	2								5
QACA3			1								1
QAGH2						2	2		1	2	7
QAGH3				2	2	9	9	10	9	13	54
QAGH4					1	6	8	6	12	8	41
QAGH5								1	1		2
QAH1								1	1		2
QAH2						1	2	1	2	3	9
QAH3			1		1	2	5	6	3	9	27
QAH4						2		1		6	9
QAH5						1					1
QAI2				1					1	1	3
QAI3							1				1
QAI4						1					1
QAL3								1			1
QARR3						3				2	5
QARR4										2	2
QASH2				1	1	3	2	1			8
QASH3					1	3	7	5	3	11	30
QASH4					1	4	1	6	2	13	27
QASH5							1				1
Total	4	4	10	21	57	171	131	105	85	116	704

Table 67 The number of months open by grade – 2007 (missing grades denote no businesses with these grades operating on a seasonal basis)

	Number of months										
Grading	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**Total**
no grading							1				1
qaawait				1	2	3	1		1	3	11
qabb1	1				3	1	1				6
qabb2					3	14	2	3	2	3	27
qabb3				9	18	49	27	29	27	16	175
qabb4	1		1	2	6	27	25	23	15	12	112
qabb5						2	1	5	1		9
qac1	1	1	3								5
qac2	1					1					2
qac3			1								1
qagh2				1		3	1		3		8
qagh3				2		7	9	11	8	8	45
qagh4				1	1	7	7	3	11	8	38
qagh5									1		1
qah2						1					1
qah3			1			3	1	1		8	14
qah4						1		1	1	4	7
qai2				1					1		2
qai3								1		1	2
qarr3						2					2
qarr4									1	3	4
qarr5										1	1
qash2				1	1	2	1	1		1	7
qash3					1	4	9	4	5	9	32
qash4				1	1	3	1	5	1	9	21
Total	4	1	6	19	36	130	87	87	78	86	534

Table 68 The number of months open by geographical location – 2005

	Number of months										
Council Area	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**Total**
Aberdeen City		1									1
Aberdeenshire					2	7	5	4	2	3	23
Angus						2	1			1	4
Argyll & Bute				5	6	34	18	18	13	22	116
Clackmannanshire							1		1		2
Dumfries & Galloway					3	6	5	5	6	9	34
Dundee City			1				1			1	3
East Ayrshire											
East Dunbartonshire											
East Lothian					4	2	1	1	1		9
East Renfrewshire											
Edinburgh, City of	1	2	1		2	19	6		6	7	44
Eilean Siar				4	7	11	5	3	3	3	36
Falkirk									1		1
Fife			3		3	6	6	5	2	4	29
Glasgow City	1	1	4		1	1					8
Highland	1		1	7	16	49	46	42	23	33	218
Inverclyde											
Midlothian						1	1	1		1	4
Moray				1		3	1			4	9
North Ayrshire					2	4	9	2	4	2	23
North Lanarkshire											
Orkney Islands				2	2	3	1				8
Perth & Kinross	1				1	5	15	3	7	15	47
Renfrewshire									1		1
Scottish Borders						5	2	9	6	2	24
Shetland Islands											
South Ayrshire				1	1	3	2	1	1	2	11
South Lanarkshire					1			1	2	3	7
Stirling				1	5	10	5	8	4	4	37
West Dunbartonshire					1			1	2		4
West Lothian								1			1
Total	4	4	10	21	57	171	131	105	85	116	704

Table 69 The number of months open by geographical location - 2007

Council Area	Number of months										Total
	2	3	4	5	6	7	8	9	10	11	
Aberdeen City						1					1
Aberdeenshire					3	4	1	3	1	1	13
Angus						3		2		2	7
Argyll & Bute				3	4	19	11	16	11	15	79
Clackmannanshire											
Dumfries & Galloway					1	5	2	4	9	8	29
Dundee City											
East Ayrshire											
East Dunbartonshire						1					1
East Lothian					3	1	1		1		6
East Renfrewshire											
Edinburgh, City of	1	1	1		1	10	5	1	5	2	27
Eilean Siar				3	3	13	5	2	3	5	34
Falkirk									1		1
Fife			1		1	5	4	7	4	2	24
Glasgow City	1		3		1						5
Highland	1		1	8	12	44	39	33	17	26	181
Inverclyde											
Midlothian							1	1		1	3
Moray				1	1	1			1	4	8
North Ayrshire						6	5	1	4	3	19
North Lanarkshire											
Orkney Islands				2		2					4
Perth & Kinross	1			1	1	3	9	3	5	7	30
Renfrewshire									1		1
Scottish Borders						2		9	6	4	21
Shetland Islands											
South Ayrshire						2		1	2	1	6
South Lanarkshire					1					1	2
Stirling				1	3	7	4	3	5	4	27
West Dunbartonshire					1	1			2		4
West Lothian								1			1
Total	4	1	6	19	36	130	87	87	78	86	534

APPENDIX 6 – Changes in Room Capacity

Table 70 An analysis of the number of rooms changed by geographical locality with removal of the campus type

Council Area	Accommodation type	Number of sites with changes in the number of rooms	Net change in the number of rooms	Average (abs) change in the number of rooms	Average (net) change in the number of rooms	Max number of rooms changed at one site	Min number of rooms changed at one site	Total number of sites surveyed	Number of sites affected by room changes as % of sites surveyed
Aberdeen City	B&B							11	
	Guest House	3	-1	1.7	(0.33)	1	-3	28	11%
	Hotel	3	-44	16.0	(14.67)	2	-44	22	14%
	Small Hotel	1	2	2.0	2.00	2	2	1	100%
Aberdeenshire	B&B	13	-3	1.2	(0.23)	1	-3	54	24%
	Guest House	6	-1	1.2	(0.17)	1	-2	15	40%
	Hotel	5	-22	5.6	(4.40)	3	-17	18	28%
	Inn	1	1	1.0	1.00	1	1	3	33%
	Restaurant	1	-1	1.0	(1.00)	-1	-1	1	100%
	Small Hotel	5	-1	1.8	(0.20)	3	-3	21	24%
Angus	B&B	8	-1	1.4	(0.13)	3	-1	33	24%
	Guest House	2	1	1.5	0.50	2	-1	5	40%
	Hotel							1	
	Restaurant	1	-2	2.0	(2.00)	-2	-2	2	50%
	Small Hotel	2	-6	3.0	(3.00)	-3	-3	6	33%
Argyll & Bute	B&B	19	4	1.1	0.21	1	-2	145	13%
	Guest House	14	-4	1.7	(0.29)	3	-5	55	25%
	Hotel	12	33	3.9	2.75	10	-5	29	41%
	Inn	2	7	3.5	3.50	4	3	11	18%
	Lodge	1	1	1.0	1.00	1	1	2	50%
	Small Hotel	18	-16	1.8	(0.89)	3	-6	58	31%
Clackmannanshire	B&B	1	-1	1.0	(1.00)	-1	-1	5	20%
	Small Hotel	2		1.0	-	1	-1	3	67%
Dumfries & Galloway	B&B	15	-1	1.4	(0.07)	5	-3	88	17%
	Guest House	5	-6	2.8	(1.20)	4	-7	24	21%
	Hotel	7	1	1.6	0.14	2	-2	28	25%
	Inn							8	
	Small Hotel	11	7	3.4	0.64	14	-7	38	29%
Dundee City	B&B							4	
	Guest House	2	-4	2.0	(2.00)	-1	-3	8	25%
	Hotel	3	-49	16.3	(16.33)	-1	-44	9	33%
	Small Hotel	2		1.0	-	1	-1	4	50%
East Ayrshire	B&B	2	2	1.0	1.00	1	1	7	29%
	Guest House							1	
	Hotel							2	
	Inn	1	-1	1.0	(1.00)	-1	-1	2	50%
	Small Hotel	1	-1	1.0	(1.00)	-1	-1	2	50%
East Dunbartonshire	B&B							6	
	Lodge							1	
	Small Hotel							1	
East Lothian	B&B	3	1	1.0	0.33	1	-1	26	12%
	Guest House	2	-2	1.0	(1.00)	-1	-1	2	100%
	Hotel	2	-3	1.5	(1.50)	-1	-2	6	33%
	Small Hotel	1	-4	4.0	(4.00)	-4	-4	3	33%

Council Area	Accommodation type	Number of sites with changes in the number of rooms	Net change in the number of rooms	Average (abs) change in the number of rooms	Average (net) change in the number of rooms	Max number of rooms changed at one site	Min number of rooms changed at one site	Total number of sites surveyed	Number of sites affected by room changes as % of sites surveyed
East Renfrewshire	B&B							2	
	Guest House							1	
	Small Hotel							1	
Edinburgh, City of	B&B	10	-11	1.5	(1.10)	1	-4	53	19%
	Guest House	30	3	1.6	0.10	5	-4	148	20%
	Hotel	11	-43	6.8	(3.91)	5	-46	45	24%
	Inn							1	
	Lodge	2	-95	84.5	(47.50)	37	-132	3	67%
	Small Hotel	4	-9	3.3	(2.25)	1	-7	23	17%
Eilean Siar	B&B	7	-3	1.3	(0.43)	2	-2	67	10%
	Guest House	5	-7	2.2	(1.40)	1	-4	14	36%
	Hotel	2	1	8.5	0.50	9	-8	8	25%
	Inn							2	
	Small Hotel	3	-3	3.0	(1.00)	2	-6	7	43%
Falkirk	B&B	1	-2	2.0	(2.00)	-2	-2	7	14%
	Guest House							2	
	Hotel	2	10	5.0	5.00	7	3	2	100%
Fife	B&B	11	-7	1.5	(0.64)	2	-4	72	15%
	Guest House	11	-2	1.5	(0.18)	2	-2	38	29%
	Hotel	4	-32	14.5	(8.00)	12	-44	16	25%
	Inn							3	
	International Resort Hotel	1	22	22.0	22.00	22	22	1	100%
	Restaurant							2	
	Small Hotel	4	-19	5.8	(4.75)	2	-14	16	25%
Glasgow City	B&B							5	
	Guest House	6	-20	4.7	(3.33)	3	-19	17	35%
	Hotel	4	-50	12.5	(12.50)	-1	-31	35	11%
	Lodge							3	
	Restaurant							1	
	Small Hotel							2	
Highland	B&B	37	-14	1.5	(0.38)	2	-6	277	13%
	Guest House	28	5	1.4	0.18	3	-4	131	21%
	Hotel	9	21	3.4	2.33	12	-3	48	19%
	Inn	1	1	1.0	1.00	1	1	4	25%
	Lodge							1	
	Restaurant							5	
	Small Hotel	17	-7	3.0	(0.41)	6	-10	79	22%
Inverclyde	B&B							3	
	Hotel	2		1.0	-	1	-1	2	100%
	Small Hotel							1	
Midlothian	B&B	2		1.0	-	1	-1	7	29%
	Guest House							3	
	Hotel	1	1	1.0	1.00	1	1	3	33%
	Inn							1	
	Small Hotel							2	
Moray	B&B	6	3	1.2	0.50	2	-1	29	21%
	Guest House	1	1	1.0	1.00	1	1	5	20%
	Hotel	2	-3	1.5	(1.50)	-1	-2	9	22%
	Small Hotel							4	
North Ayrshire	B&B	3	-1	1.7	(0.33)	2	-2	27	11%

Council Area	Accommodation type	Number of sites with changes in the number of rooms	Net change in the number of rooms	Average (abs) change in the number of rooms	Average (net) change in the number of rooms	Max number of rooms changed at one site	Min number of rooms changed at one site	Total number of sites surveyed	Number of sites affected by room changes as % of sites surveyed
	Guest House	2	-3	2.5	(1.50)	1	-4	13	15%
	Hotel							8	
	Inn	1	1	1.0	1.00	1	1	1	100%
	Small Hotel	2	2	1.0	1.00	1	1	8	25%
North Lanarkshire	B&B							6	
	Guest House							3	
	Hotel	1	-50	50.0	(50.00)	-50	-50	3	33%
	Small Hotel							2	
Orkney Islands	B&B	5	2	1.2	0.40	1	-2	33	15%
	Guest House	3	-1	1.7	(0.33)	2	-2	10	30%
	Hotel	2	-4	2.0	(2.00)	-1	-3	10	20%
	Inn							2	
	Small Hotel	2	-2	1.0	(1.00)	-1	-1	10	20%
Perth & Kinross	B&B	5	6	1.2	1.20	2	1	76	7%
	Guest House	13	11	1.6	0.85	6	-2	51	25%
	Hotel	6	-8	4.0	(1.33)	7	-12	26	23%
	Inn	3	8	2.7	2.67	4	1	7	43%
	International Resort Hotel	1	1	1.0	1.00	1	1	1	100%
	Lodge	1	-3	3.0	(3.00)	-3	-3	1	100%
	Restaurant							2	
	Small Hotel	9	19	2.6	2.11	6	-2	28	32%
Renfrewshire	B&B							5	
	Guest House							1	
	Hotel							4	
	Lodge							1	
	Small Hotel							1	
Scottish Borders	B&B	12	-7	1.3	(0.58)	1	-3	72	17%
	Guest House	2	5	2.5	2.50	4	1	11	18%
	Hotel	5	-2	2.0	(0.40)	2	-4	17	29%
	Inn	2	1	2.5	0.50	3	-2	7	29%
	Small Hotel	3	-19	6.3	(6.33)	-3	-12	18	17%
Shetland Islands	B&B	3	2	1.3	0.67	2	-1	22	14%
	Guest House	4	-10	2.5	(2.50)	-1	-4	8	50%
	Hotel							6	
	Inn							1	
	Small Hotel							4	
South Ayrshire	B&B	2	-2	1.0	(1.00)	-1	-1	31	6%
	Guest House	6	3	1.5	0.50	2	-3	15	40%
	Hotel	2	-7	4.5	(3.50)	1	-8	11	18%
	Inn	1	-1	1.0	(1.00)	-1	-1	2	50%
	Small Hotel	2	7	3.5	3.50	6	1	9	22%
South Lanarkshire	B&B	4	2	1.0	0.50	1	-1	19	21%
	Guest House							4	
	Hotel	3	-18	12.7	(6.00)	9	-28	6	50%
	Small Hotel	2	-12	6.0	(6.00)	-2	-10	7	29%
Stirling	B&B	8	-1	1.1	(0.13)	2	-1	62	13%
	Guest House	7	-50	9.7	(7.14)	3	-57	29	24%
	Hotel	3	16	5.3	5.33	9	2	10	30%
	Inn							5	
	Lodge							1	

Council Area	Accommodation type	Number of sites with changes in the number of rooms	Net change in the number of rooms	Average (abs) change in the number of rooms	Average (net) change in the number of rooms	Max number of rooms changed at one site	Min number of rooms changed at one site	Total number of sites surveyed	Number of sites affected by room changes as % of sites surveyed
	Small Hotel	2	19	9.5	9.50	14	5	13	15%
West Dunbartonshire	B&B	2		1.0	-	1	-1	22	9%
	Guest House	1	1	1.0	1.00	1	1	5	20%
	Hotel							5	
	Inn	1	-4	4.0	(4.00)	-4	-4	3	33%
	Small Hotel							1	
West Lothian	B&B	2	-6	3.0	(3.00)	-2	-4	13	15%
	Guest House	1	1	1.0	1.00	1	1	2	50%
	Hotel	1	1	1.0	1.00	1	1	3	33%
	Small Hotel							1	
Total		541	-476	3.1	(0.88)	37	-132	2795	19%

APPENDIX 7 – Change in the quality of serviced accommodation providers

Table 71 Change in the grading of serviced accommodation providers by status of grade in 2005

2005 grading status	change in grading 2005 - 7	Total
no grading info	await grading	1
	since graded	15
	still ungraded	1
QAAwait	since graded	173
	still ungraded	1
	no change	14
QABB1	no change	10
	upgraded	5
QABB2	await grading	4
	up-classified	2
	no change	105
	upgraded	30
	downgraded	2
	up-classified and upgraded	1
QABB3	await grading	2
	up-classified	12
	no change	613
	upgraded	42
	downgraded	5
	up-classified and upgraded	3
QABB4	await grading	7
	up-classified	6
	no change	313
	upgraded	4
	downgraded	4
QABB5	await grading	1
	no change	15
	downgraded	1
QACA1	await grading	1
	no change	6
QACA2	await grading	1
	no change	4
	upgraded	1
QACA3	no change	1
QAGH1	down-classified	1
	no change	15
	upgraded	2
QAGH2	await grading	4
	no change	58
	upgraded	18
	downgraded	2
	down-classified and upgraded	2
	down-classified and downgraded	1
QAGH3	await grading	8
	down-classified	4

2005 grading status	change in grading 2005 - 7	Total
	up-classified	3
	no change	312
	upgraded	19
	downgraded	1
	down-classified and upgraded	1
QAGH4	await grading	4
	down-classified	2
	up-classified	1
	no change	144
	upgraded	2
	downgraded	3
QAGH5	no change	2
QAH1	await grading	2
	no change	2
QAH2	await grading	1
	down-classified	2
	no change	21
	upgraded	8
	down-classified and upgraded	2
QAH3	await grading	4
	down-classified	9
	no change	141
	upgraded	3
	downgraded	2
	down-classified and upgraded	1
QAH4	await grading	2
	no change	76
	upgraded	1
	downgraded	14
QAH5	no change	12
	downgraded	1
QAI1	await grading	1
	no change	2
	upgraded	3
	up-classified and upgraded	1
QAI2	await grading	1
	up-classified	2
	no change	20
	upgraded	5
	downgraded	1
	down-classified and upgraded	1
QAI3	await grading	4
	down-classified	1
	up-classified	2
	no change	29
	upgraded	1
	downgraded	2
	down-classified and upgraded	1
QAI4	await grading	1
	up-classified	1
	no change	4
QAL2	no change	3
QAL3	up-classified	2

2005 grading status	change in grading 2005 - 7	Total
	no change	12
QARH5	no change	2
QARR2	no change	1
QARR3	no change	9
QARR4	no change	6
QARR5	no change	2
QASA3	upgraded	1
QASA4	no change	2
QASH1	await grading	1
	down-classified	1
	no change	4
	upgraded	2
QASH2	await grading	4
	down-classified	6
	no change	52
	upgraded	16
	downgraded	2
QASH3	await grading	9
	down-classified	7
	up-classified	3
	no change	161
	upgraded	2
	downgraded	4
	down-classified and upgraded	1
	down-classified and downgraded	1
QASH4	await grading	2
	down-classified	4
	up-classified	1
	no change	75
	downgraded	5
QASH5	no change	2
	downgraded	1
Total		2,808

APPENDIX 8 – Change in serviced accommodation providers advertising in the regional accommodation brochures for 2003, 2005 and 2007

Table 72 The change in businesses advertising in the regional accommodation brochures by geographical area – sorted by gains in 2007 over 2003

	losses 2005 from 2003	gains 2005 from 2003	losses 2007 from 2005	gains 2007 from 2005	losses 2007 from 2003	gains 2007 from 2003	2003	2005	2007	losses 2005 from 2003	gains 2005 from 2003	losses 2007 from 2005	gains 2007 from 2005	losses 2007 from 2003	gains 2007 from 2003
Midlothian	4	6	7	5	10	10	21	23	21	19%	29%	30%	22%	48%	48%
Inverclyde		2	5	2	5	4	9	11	8		22%	45%	18%	56%	44%
Clackmannanshire	6	4	3	1	8	4	13	11	9	46%	31%	27%	9%	62%	31%
West Lothian	4	2	5	8	7	8	26	24	27	15%	8%	21%	33%	27%	31%
East Renfrewshire	3	1	1	2	3	2	7	5	6	43%	14%	20%	40%	43%	29%
Aberdeenshire	48	28	43	31	78	46	175	155	143	27%	16%	28%	20%	45%	26%
Fife	47	35	74	45	102	61	234	222	193	20%	15%	33%	20%	44%	26%
Angus	26	14	23	13	42	20	82	70	60	32%	17%	33%	19%	51%	24%
West Dunbartonshire	16	9	13	8	25	13	56	49	44	29%	16%	27%	16%	45%	23%
Perth & Kinross	68	38	53	48	98	63	275	245	240	25%	14%	22%	20%	36%	23%
Falkirk	16	7	12	5	23	7	32	23	16	50%	22%	52%	22%	72%	22%
Eilean Siar	22	14	33	27	44	30	139	131	125	16%	10%	25%	21%	32%	22%
East Lothian	17	9	17	8	30	13	62	54	45	27%	15%	31%	15%	48%	21%
Argyll & Bute	108	78	127	57	195	95	457	427	357	24%	17%	30%	13%	43%	21%
Highland	287	98	205	167	421	194	939	750	712	31%	10%	27%	22%	45%	21%
Shetland Islands	15	6	9	9	21	12	59	50	50	25%	10%	18%	18%	36%	20%
Moray	21	10	26	14	40	17	84	73	61	25%	12%	36%	19%	48%	20%
Dumfries & Galloway	96	34	67	45	146	62	315	253	231	30%	11%	26%	18%	46%	20%
Renfrewshire	12	2	11	4	23	6	33	23	16	36%	6%	48%	17%	70%	18%
South Lanarkshire	17	6	20	7	36	12	67	56	43	25%	9%	36%	13%	54%	18%
North Ayrshire	17	13	23	7	35	15	84	80	64	20%	15%	29%	9%	42%	18%
Scottish Borders	66	28	64	27	114	39	227	189	152	29%	12%	34%	14%	50%	17%
Stirling	56	27	61	26	100	36	210	181	146	27%	13%	34%	14%	48%	17%
Orkney Islands	20	17	26	12	33	16	94	91	77	21%	18%	29%	13%	35%	17%
South Ayrshire	23	12	31	16	44	18	110	99	84	21%	11%	31%	16%	40%	16%
Glasgow City	16	9	22	7	34	12	98	91	76	16%	9%	24%	8%	35%	12%
North Lanarkshire	4	4	10	3	10	3	25	25	18	16%	16%	40%	12%	40%	12%
Edinburgh, City of	80	29	95	36	160	50	423	372	313	19%	7%	26%	10%	38%	12%
Dundee City	10	5	9	3	15	4	39	34	28	26%	13%	26%	9%	38%	10%
East Ayrshire	7	3	2	2	6	2	20	16	16	35%	15%	13%	13%	30%	10%
East Dunbartonshire	1	2	3	2	1	1	10	11	10	10%	20%	27%	18%	10%	10%
Aberdeen City	25	3	24	3	49	6	110	88	67	23%	3%	27%	3%	45%	5%
Grand Total	1158	555	1124	650	1958	881	4535	3932	3458	26%	12%	29%	17%	43%	19%

Table 73 The change in businesses advertising in the regional accommodation brochures by geographical area – sorted by losses in 2007 over 2003

	losses 2005 from 2003	gains 2005 from 2003	losses 2007 from 2005	gains 2007 from 2005	losses 2007 from 2003	gains 2007 from 2003	2003	2005	2007	losses 2005 from 2003	gains 2005 from 2003	losses 2007 from 2005	gains 2007 from 2005	losses 2007 from 2003	gains 2007 from 2003
Falkirk	16	7	12	5	23	7	32	23	16	50%	22%	52%	22%	72%	22%
Renfrewshire	12	2	11	4	23	6	33	23	16	36%	6%	48%	17%	70%	18%
Clackmannanshire	6	4	3	1	8	4	13	11	9	46%	31%	27%	9%	62%	31%
Inverclyde		2	5	2	5	4	9	11	8		22%	45%	18%	56%	44%
South Lanarkshire	17	6	20	7	36	12	67	56	43	25%	9%	36%	13%	54%	18%
Angus	26	14	23	13	42	20	82	70	60	32%	17%	33%	19%	51%	24%
Scottish Borders	66	28	64	27	114	39	227	189	152	29%	12%	34%	14%	50%	17%
East Lothian	17	9	17	8	30	13	62	54	45	27%	15%	31%	15%	48%	21%
Midlothian	4	6	7	5	10	10	21	23	21	19%	29%	30%	22%	48%	48%
Moray	21	10	26	14	40	17	84	73	61	25%	12%	36%	19%	48%	20%
Stirling	56	27	61	26	100	36	210	181	146	27%	13%	34%	14%	48%	17%
Dumfries & Galloway	96	34	67	45	146	62	315	253	231	30%	11%	26%	18%	46%	20%
Highland	287	98	205	167	421	194	939	750	712	31%	10%	27%	22%	45%	21%
West Dunbartonshire	16	9	13	8	25	13	56	49	44	29%	16%	27%	16%	45%	23%
Aberdeenshire	48	28	43	31	78	46	175	155	143	27%	16%	28%	20%	45%	26%
Aberdeen City	25	3	24	3	49	6	110	88	67	23%	3%	27%	3%	45%	5%
Fife	47	35	74	45	102	61	234	222	193	20%	15%	33%	20%	44%	26%
East Renfrewshire	3	1	1	2	3	2	7	5	6	43%	14%	20%	40%	43%	29%
Argyll & Bute	108	78	127	57	195	95	457	427	357	24%	17%	30%	13%	43%	21%
North Ayrshire	17	13	23	7	35	15	84	80	64	20%	15%	29%	9%	42%	18%
North Lanarkshire	4	4	10	3	10	3	25	25	18	16%	16%	40%	12%	40%	12%
South Ayrshire	23	12	31	16	44	18	110	99	84	21%	11%	31%	16%	40%	16%
Dundee City	10	5	9	3	15	4	39	34	28	26%	13%	26%	9%	38%	10%
Edinburgh, City of	80	29	95	36	160	50	423	372	313	19%	7%	26%	10%	38%	12%
Perth & Kinross	68	38	53	48	98	63	275	245	240	25%	14%	22%	20%	36%	23%
Shetland Islands	15	6	9	9	21	12	59	50	50	25%	10%	18%	18%	36%	20%
Orkney Islands	20	17	26	12	33	16	94	91	77	21%	18%	29%	13%	35%	17%
Glasgow City	16	9	22	7	34	12	98	91	76	16%	9%	24%	8%	35%	12%
Eilean Siar	22	14	33	27	44	30	139	131	125	16%	10%	25%	21%	32%	22%
East Ayrshire	7	3	2	2	6	2	20	16	16	35%	15%	13%	13%	30%	10%
West Lothian	4	2	5	8	7	8	26	24	27	15%	8%	21%	33%	27%	31%
East Dunbartonshire	1	2	3	2	1	1	10	11	10	10%	20%	27%	18%	10%	10%
Grand Total	1158	555	1124	650	1958	881	4535	3932	3458	26%	12%	29%	17%	43%	19%