
Accommodation Provision in Dornoch



North Highland Initiative
Success is in our nature

Dornoch Accommodation Survey

Introduction

In early 2013, Highlands and Islands Enterprise released an Economic Masterplan for the Future of Dornoch. Designed to build upon the town's unique setting and qualities, the aim of the masterplan is to ensure that by 2023 Dornoch will be:

- A First Class Quality Destination
- A Distinct and Rich Tourism Product
- A Place for Business & Investment

The Masterplan has a number of objectives:

1. Build brand profile – a 'Quality Destination'
2. Increase number of visitors to Dornoch and South East Sutherland.
3. Enable business development, entrepreneurship and private sector investment.
4. Build a local destination supported by community and academic infrastructure.
5. Secure effective Partnership Delivery.

As part of this, knowledge of the current accommodation provision in the town was identified as a key element of building the town brand profile. This report, along with a survey of current visitors, and a report from the Highland Retail Academy on how visitors view the town; will combine to form part of the strategic marketing plan for the town.

Objective

To identify the current level of accommodation provision in the town of Dornoch and the occupancy rate of such provision.

Methodology

Initially, all accommodation providers in the Dornoch area were identified through desk based research. All providers were asked to complete a survey which included questions identified by Dornoch Area Community Interest Company as important to the strategic marketing plan. The survey was undertaken by a variety of methods, including: self-completion, phone interviews and face to face interviews.

Accommodation was split into 3 categories: hotels, guesthouses/B & Bs and self-catering. Of the 78 properties identified across the Dornoch area, there were 43 responses to the survey, giving a survey response rate of 55%. When compared to an average external response rate of 10-15% (Sacks, 2010), this is very high, showing the accommodation providers of Dornoch to be motivated with regards to working with the town itself. For those properties who did not reply to the survey, desk based research was utilised to discover the total number of bedrooms in the town.

The survey was split into three sections, outlined below:

1. The Property – to discover the number of rooms available in the town
2. The Customers – exploring whether visitors come to Dornoch as couples, as a group, or as a single or business travel; what brings visitors to Dornoch and where they are from.
3. Open Ended Questions - designed by Dornoch Area Community Interest Company (DACIC) to learn more about the local business people's opinions on a number of issues related to DACIC's activities.

A copy of the survey can be found in Appendix 1.

Results and Analysis

When displaying the results of the survey, the original structure has been kept, separating questions relating to the properties, customers and DACIC itself.

1. The Property

Total number of bedrooms: Through both the survey, and desk based research, 355 bedrooms across Dornoch were identified from all 77 properties. Of these, 178 are in hotels, 129 are in self-catering accommodation, and 48 are in guest houses/B&Bs.

Type of property: When looking at the type of properties across Dornoch, 3 key categories were identified: Self-catering accommodation, Hotels and B&B/Guest Houses. In figure one it can be seen that the majority of properties (60%) across Dornoch are self-catering accommodation.

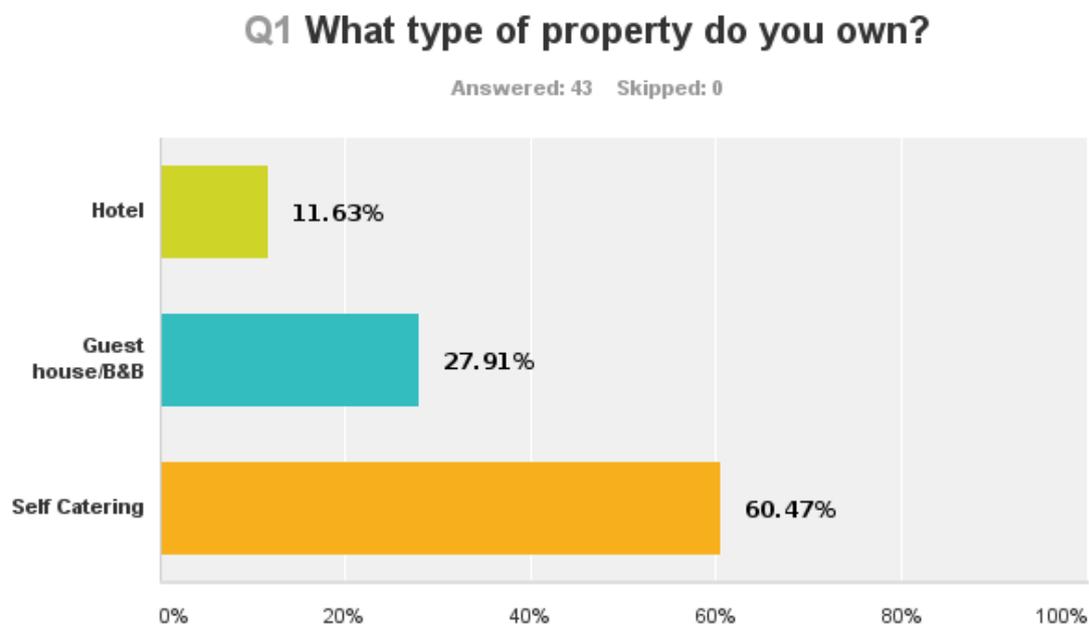
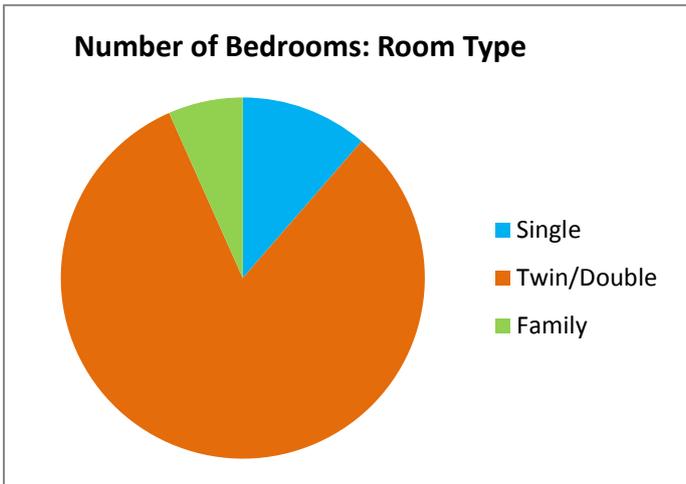


Figure 1 - Showing a breakdown of 43 properties across Dornoch by accommodation type.

The properties can be further broken down into room numbers and type.

Room Type: When looking into 'types' of bedroom (i.e. whether a room is classified as single, twin/double or a family room), it can be seen from Figure 2 that there are significantly higher numbers of twin/double rooms. 82% of the rooms surveyed in Dornoch are classed as twin/double rooms, with single and family rooms making up the remaining 11% and 7% respectively. The total number of rooms surveyed was 257. Of these 257 rooms, 147 are located in hotels, 33 are in guest houses/B&Bs, and the remaining 76 are in self-catering accommodation. This can be seen in figure 3 and table 2.



Type of Bedroom	Number of Bedrooms	Percentage of Bedrooms
Single	29	11%
Twin/Double	211	82%
Family	17	7%
Total	257	100%

Table 1- Showing the breakdown of bedrooms by room type

Figure 2 - Showing the number of bedrooms by room type.

Ensuite: When looking at the number of ensuite bedrooms, it can be seen that 190 of the total bedrooms surveyed (74%) are ensuite, with the majority of hotel rooms (96%) and guest house/B&B rooms (79%) being en suite. A difference is seen with ensuite bedrooms in self-catering accommodation, which falls to 30%.

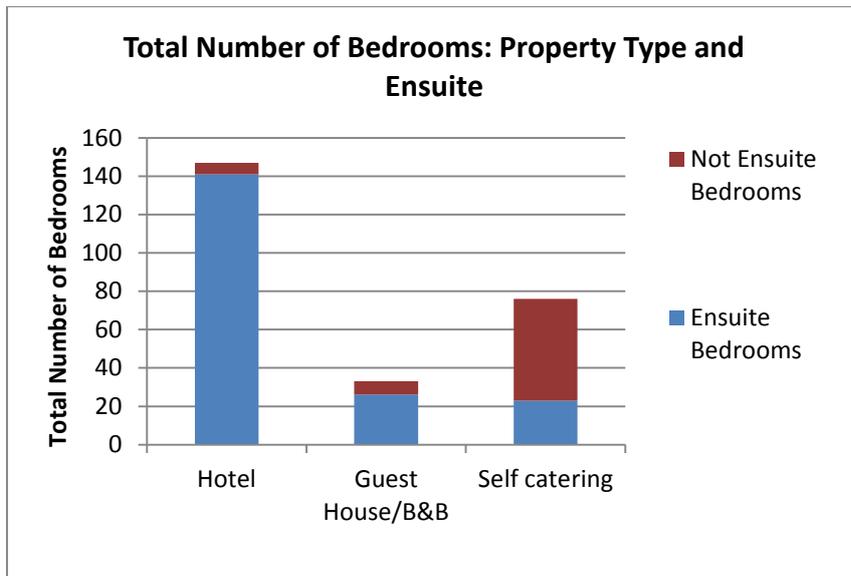


Figure 3 - Showing the breakdown of bedrooms into both property type and whether they are ensuite.

Type of Property	Ensuite Bedrooms	Percentage of Bedrooms Ensuite	Not Ensuite Bedrooms	Total Number of Bedrooms
Hotel	141	96 %	6	147
Guest House/B&B	26	79%	7	33
Self-catering	23	30%	53	76
Total	190	74%	67	257

Table 2 - Showing the number of ensuite bedrooms, broken down by property type.

Opening Period: Properties were asked to identify how much of the year that their property was open. Of the 43 responses, 79% stated that they were open all year round, with 21% being open only part of the year. The opening times of these properties can be seen in table 3.

Responses of Properties Not Open Year Round	
<ul style="list-style-type: none"> Property is closed in January and February Property is closed from November – March Property is closed between October – March. Property is closed for 3 weeks of December Property is only open from June-August Property is closed from September till May Property is closed from November – April Property is closed from October – April Property is closed from November 	<ul style="list-style-type: none"> Property is let as a B&B from June till August, then as a permanent let to students from September till May. Property is let as a B & B from May till September, and as a permanent let to students from September till May.

Table 3 - Open ended Responses from Properties not open year round.

Without exception, those properties which close for part of the year are shut during the winter months.

Percentage Occupancy by Month: Properties were asked to indicate their average monthly occupancy rates. The results can be seen below in figure 4.

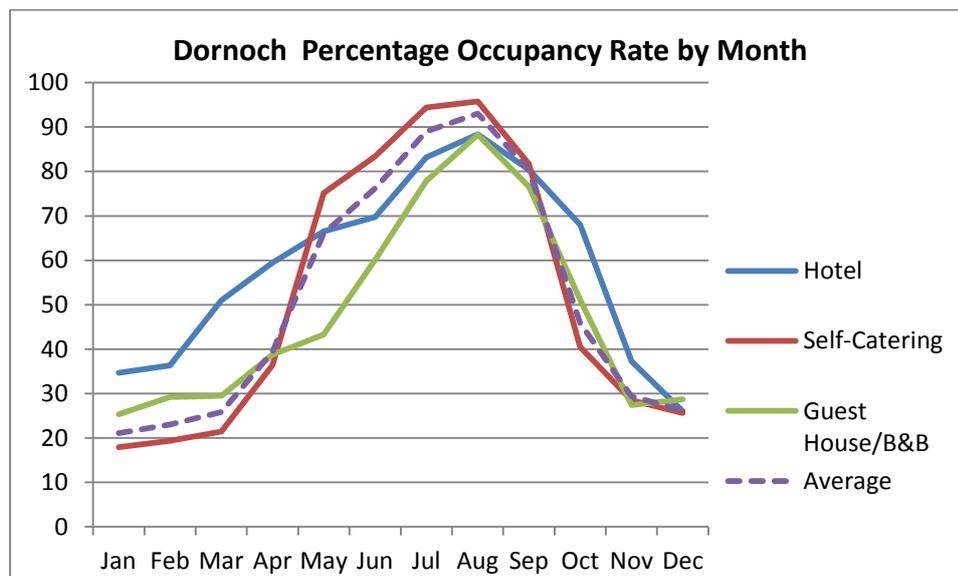


Figure 4 - Showing the Percentage occupancy rate per month in Dornoch.

From figure 4, it can clearly be seen that the occupancy rates follow a bell curve, peaking in the summer months, and dropping to less than 30% during the tourism ‘off’ season, i.e. winter. Self catering has the highest peak in August at 96%, but also had the lowest drop to below 20% in the winter months.

When comparing this with figures taken from Visit Scotland’s Key Facts on Tourism from 2012 (figure 5), it can be seen that accommodation in Dornoch reflects the national trend of having a higher percentage occupancy rate in summer than winter. Dornoch also has a higher occupancy rate in the summer months than the national average, with all accommodation in Dornoch peaking higher than

85%. Nationally, hotels peak at 79%, self-catering accommodation at 69%, and guest houses/B&Bs peak at 68%. In the winter months, average occupancy rates for self-catering and guest houses/B&Bs are approximately the same in Dornoch and nationally, converging between 20-25%. However, hotels in winter have much higher occupancy rates nationally than in Dornoch, lying between 45-50% nationally and below 35% in Dornoch.

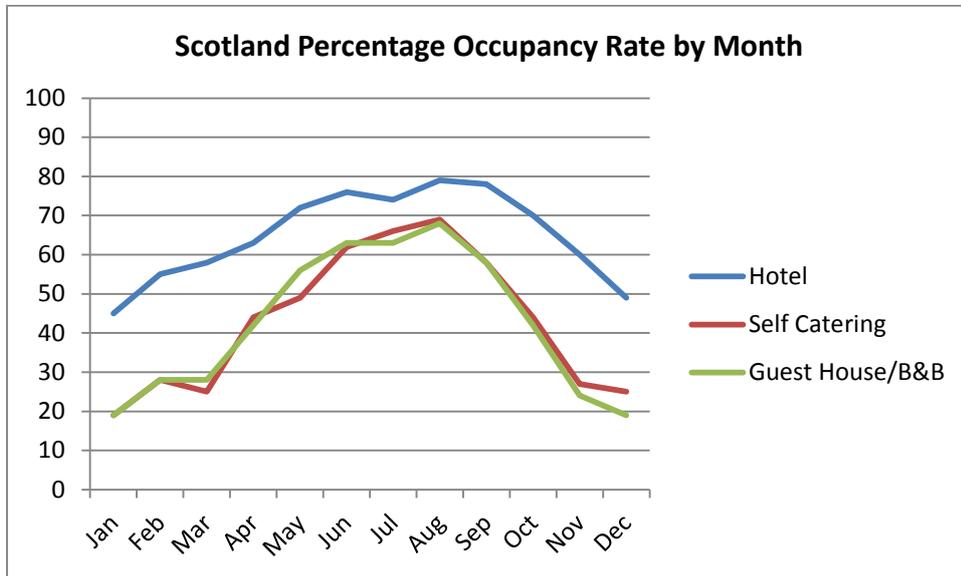


Figure 5 - Scottish Percentage Occupancy Rate by Month, broken down by accommodation type. These figures were taken from the Visit Scotland's paper 'Scotland: The key facts on tourism 2012'.

2. The Customers

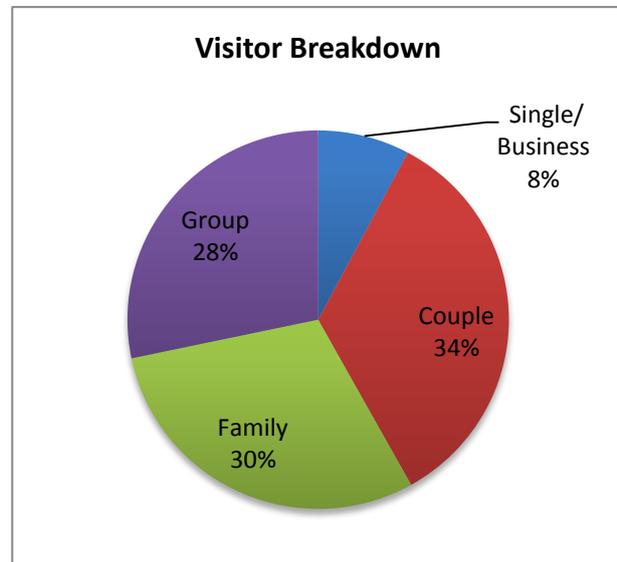
The portion of the survey examining the customers looked at whether customers were couples, families, groups or single travellers, what brought them to Dornoch, and where the customers were from. A full breakdown of this can be found in appendix 3.

Group Type: Properties were asked to estimate the percentage of their customers who fell into the following categories:

- Single/Business traveller
- Couple
- Family
- Group

As can be seen in figure 6, single or business travellers make up a notably low percentage of the overall visitors to Dornoch at 8%. Groups, couples and families make up the other 92%, with a fairly even 28% 34% and 30% respectively.

Figure 6 - Showing the percentage of visitors in a variety of categories.

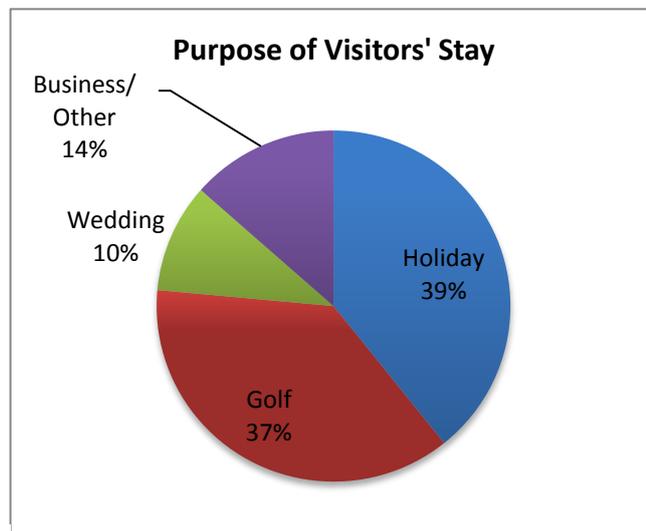


What brings your customers to Dornoch? Properties were asked to identify the percentage of their guests who came to Dornoch for specific purposes, such as:

- Holiday (excluding golf)
- Golf
- Wedding
- Business/Other

Figure 7 breaks down the average percentage of visitors in each category. Visitors to the area coming specifically for holidays (39%) or to play golf (37%) make up a markedly large proportion of visitors to the area; together they total at just over $\frac{3}{4}$ of visitors to Dornoch (76%).

Figure 7 - Showing the breakdown of visitors' purpose in visiting Dornoch.



According to the Visit Scotland Key Facts on Tourism 2012 paper, 17% of visitors to Scotland were business travellers, which is similar to Dornoch's business traveller level of 14%. The Visit Scotland

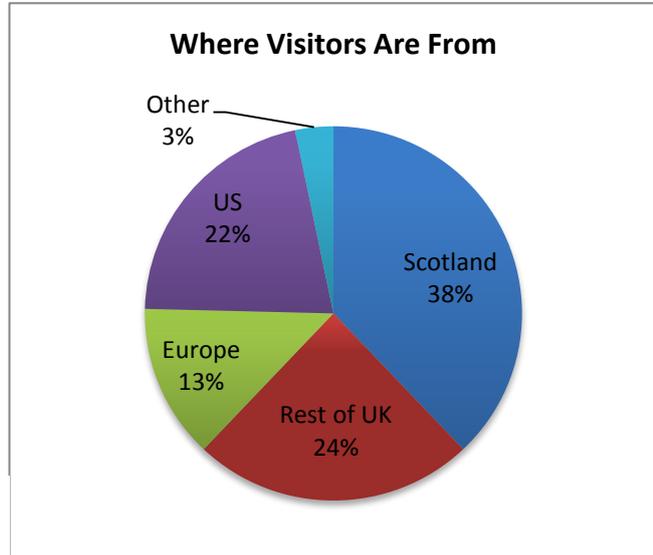
paper identifies alternative categories for visitor purpose than the Dornoch survey, so further comparison is not possible.

Where are your visitors from? Properties were asked to estimate the percentage of their guests who came from specific geographic areas:

- Scotland
- The Rest of the United Kingdom
- Europe
- United States
- Other

As can be seen in figure 8, visitors from the UK make up the bulk (62%) of guests, combining Scottish visitors (38%) and visitors from the rest of the UK (24%).

Figure 8 - Showing the breakdown of where visitors to Dornoch are coming from.



However, when comparing this data with that from the Scotland Visitor Survey 2011 regional results for the Highlands (Figure 9), it can be seen that 47% of visitors to the Highlands are from Scotland, with 32% coming from other regions of the UK. 62% of visitors to Dornoch were from within the UK as a whole, compared to 79% of visitors to the Highlands. Figure 9 also identifies 21% of visitors to the Highlands coming from Overseas, which is equitable to combining the 'Europe', 'US' and 'Other' sections from the Dornoch Survey. This found that 38% of visitors to Dornoch were from 'Overseas'. Therefore, Dornoch attracts a lower proportion of Scottish and UK visitors, and a higher proportion of overseas visitors when compared to the Highlands as a whole.

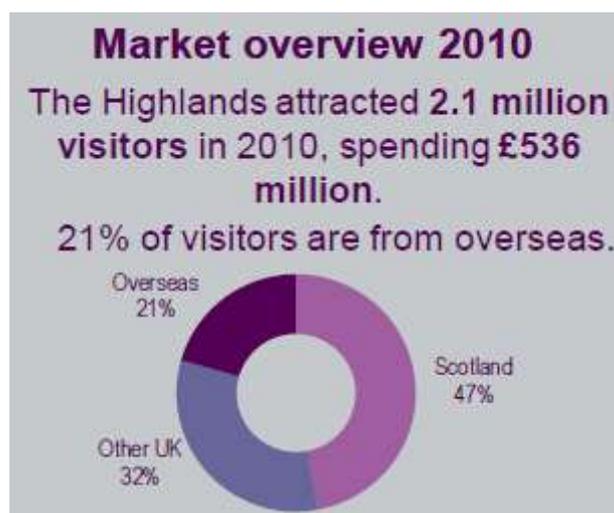


Figure 9 - Taken from the Scotland Visitor Survey 2011, Regional Results: Highlands.

3. Open Ended Questions

The open ended questions were designed by DACIC to cover issues such as the Visit Dornoch Website, marketing of Dornoch as a whole, and whether availability of training would be useful. As these answers were open ended, responses have been sorted into positive, neutral and negative answers.

DACIC promotes Dornoch via the www.visitdornoch.org.uk website. Are you happy with that site? If not, please suggest any improvements.

Positive Responses	Neutral Responses/Further Comments	Negative Responses
<ul style="list-style-type: none"> • Yes, good value • Happy Enough • Fairly happy • Very happy • Yes • Yes • Happy • Yes • Now that listings are 'rolling, it's a lot better, alphabetical didn't work. • Quite happy • Yes • Very Happy • Yes • Very happy, great value. • Yes • Very happy 	<ul style="list-style-type: none"> • I like the website, but it would be useful to get more traffic through it. • It is adequate as it is. • Don't actually know how helpful it is. Confess to being poor at paying attention to which marketing works for us. Glad to have links there though. • It's OK • Generally happy, the only criticism is that distance from the centre of town should be more prevalent – esp. important for golfers and those expecting to walk. This was received feedback from customers in the B+B. • I would like to see more online availability for self-catering. • It's ok • The old site concentrated more on the visitor aspect. The new site is more wide ranging on whole of Dornoch. Think people should have to pay for advert and all receive same benefits. I.e. no free entries. • More good pictures would help. Also weather data to show season is longer than people from other areas appreciate. • No suggestions, its ok as it is. • Preference should be given to those in the middle of town as that is what the customer wants. The major feedback received is that people want to walk to eat and golf etc. 	<ul style="list-style-type: none"> • Most customers come through business and not tourism. Do not use the site and do not want to. • Didn't like it in the past, not advertised this year due to the format.
Total: 16	Total: 11	Total: 2

Should DACIC be promoting Dornoch more widely as a visitor destination?

Positive Responses	Neutral Responses/Further Comments	Negative Responses
<ul style="list-style-type: none"> • Yes, Dornoch is not just a golf destination. Very popular with dog owners, walkers, etc. • seems to be doing quite well, but yes is always the answer • Yes • I think they probably could. • perhaps that would be one of the reasons for DACIC existence • Yes • Yes we have had guests who have been advised by the Inverness Tourism Information that there is no point going and further north. Obviously there is a large issue here. • good to see you promoting the area more in England • Probably, yes. • yes special events for shoulder months • Yes • Persuading Visit Scotland to do more for the Highlands • Yes • I think they probably could. • All publicity is good. Generally DACIC are doing pretty well with resources available. • Probably • It all helps. • Anything helps, the whole area needs promoting in a unified fashion 	<ul style="list-style-type: none"> • More promotion is always key, but not necessarily DACIC's responsibility. • not sure what the current level is but more promotion can only be a good thing • Depends on overall accommodation availability/capacity within the town/surrounding area. Yes it would be good to increase visitor numbers but will they all just be competing for the same weeks in July/August? • Not sure how. US golfers enjoy our house as it is central and near the golf club and eateries. • not sure this a DACIC role of that DACIC have the resources to do but DACIC could put pressure on Visit Scotland to champion the Highlands more and better and to provide training for hospitality providers (especially IT) • Most people that come already know and like Dornoch, and come as repeat customers. • If they can. • I don't know how widely it is done currently 	<ul style="list-style-type: none"> • Most customers come through business and not tourism. • No • No • Other agencies are already promoting Dornoch without any need for DACIC to do extra promotion.
<p>Total: 18</p>	<p>Total: 8</p>	<p>Total: 4</p>

Would access to relevant training, e.g. IT or World Host, be helpful?

Positive Responses	Neutral Responses/Further Comments	Negative Responses
<ul style="list-style-type: none"> • Training can always be helpful • Yes, IT and website design. • Training can always be useful • Yes • Yes, I would like to have details of availability. • Enquired HIE and VS about training for cooking ideas. Previously attended IT sessions. • Probably yes • Yes (World Host) • Yes • Yes 	<ul style="list-style-type: none"> • In general the staff know what they are doing • We don't live locally so not helpful to us but yet, IT knowledge is essential in selling accommodation. 100% of our business comes through online sales • It might well be. • Maybe • Possibly 	<ul style="list-style-type: none"> • No, thank you. • No • No • No • Personally, No. • No • No • No • We are doing as much as we can cope with, so not for us. • Not really • Not for me • No
Total: 10	Total: 5	12

May

June

July

Aug

Sept

Oct

Nov

Dec

DACIC promotes Dornoch via the www.visitdornoch.org.uk website. Are you happy with that site? If not, please suggest any improvements.

Should DACIC be promoting Dornoch more widely as a visitor destination?

Would access to relevant training, e.g. IT or World Host, be helpful?

Thank you for your help with this survey.

Dornoch Area Community Interest Company
A company registered by guarantee
Registered in Scotland No 327565
Registered office, Whinhill, Dornoch IV25 3RW

Appendix 2 – Percentage Occupancy Rate by Month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Hotel				85	85	95	95	95	95	85		
Hotel	15	20	35	38	50	65	95	95	95	75	50	30
Hotel							36	56	45	40	2	1
Hotel	59	54	83	75	86	74	90	96	87	72	57	48
Hotel	30	35	35	40	45	45	100	100	80		40	25
Self-catering	5	5	20	20	90	100	90	100	100	80	5	5
Self-catering				30	30	30	100	100	50	20		
Self-catering	20	20	20	20	20	80	80	80	80	20	20	20
Self-catering						100	100	100				
Self-catering				75	50	80	100	100	50	50		
Self-catering	100	100	100	100	100	80	80	80	100	100	100	100
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering			10	10	25	40	85	100	50	10		
Self-catering	26	11	6	60	74	73	100	100	93	87	33	13
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	100	100	100	100	100	100	100	100	100	100	100	100
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	0	20	50	75	100	100	100	100	75	75	25	25
Self-catering	5	5	20	20	90	100	90	100	100	80	5	5
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	0	0	0	0	50	75	100	100	75	75	45	25
Self-catering	0	25	25	50	50	50	100	100	50	25	25	25
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering				30	30	30	100	100	50	20		
Self-catering	20	20	20	20	20	80	80	80	20	20	20	20
Self-catering	0	0	0	100	100	100	100	100	100	50	20	0
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Self-catering	10	10	10	20	95	95	95	95	95	20	20	20
Guesthouse/B&B	25	25	25	25	50	75	100	100	100	75	25	25
Guesthouse/B&B				20	40	50	90	95	75	20	10	
Guesthouse/B&B	2	10	12	18	34	48	69	78	65	44	17	8
Guesthouse/B&B	15	20	25	37	42	68	20	88	62	40	10	10
Guesthouse/B&B	10	10	10	25	37	60	85	87	74	66	30	29
Guesthouse/B&B					50	50	100	100	100			
Guesthouse/B&B	100	100	100	100	80	80	80	80	100	100	100	100
Guesthouse/B&B	0	10	5	35	50	50	60	75	50	50	0	0
Guesthouse/B&B					10	60	95	95	70	10		
Guesthouse/B&B				50	40	60	80	85	70	55		

Appendix 3 - Visitor Breakdown

Type	Type of Visitor				What Visitors Come to Dornoch For				Where Visitors are From				
	Single/ Business	Couple	Family	Group	Holiday	Go lf	Wedding	Business/ Other	Scotland	Rest of UK	Europe	US	Other
Hotel	15	83	2	0	50	0	0	50	0	0	0	0	100
Hotel	80	0	10	10	10	10	0	80	66	33	0	0	0
Hotel	0	20	0	80	15	85	0	0	20	10	10	60	0
Hotel	33	33	17	17	36	17	15	33	25	50	10	5	0
Hotel	0	0	40	60	70	30	0	0	0	20	80	0	0
Self-catering	0	60	10	30	70	30	0	0	40	40	10	10	0
Self-catering	0	0	50	50	30	40	30	0	25	25	0	50	0
Self-catering	0	100	0	0	100	0	0	0	100	0	0	0	0
Self-catering	0	10	90	0	50	50	0	0	50	50	0	0	0
Self-catering	0	60	30	10	95	0	0	5	70	30	0	0	0
Self-catering	0	0	60	40	20	20	0	60	50	20	0	30	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	40	40	20	60	35	5	0	55	15	10	20	0
Self-catering	0	14	72	14	86	8	3	3	75	22	0	3	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	0	100	0	0	0	0	100	100	0	0	0	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	40	30	30	100	50	10	40	60	30	0	10	0
Self-catering	0	60	10	30	70	30	0	0	40	40	10	10	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	80	0	20	70	20	10	0	50	15	15	20	0
Self-catering	0	30	40	30	20	70	10	0	20	35	5	40	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	0	50	50	30	40	30	0	25	25	0	50	0
Self-catering	0	100	0	0	100	0	0	0	100	0	0	0	0
Self-catering	0	100	0	0	80	20	0	0	80	15	0	5	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Self-catering	0	0	45	55	0	80	20	0	30	10	10	50	0
Guesthouse/ B&B									44	30	11	14	0
Guesthouse/ B&B	10	80	0	0	50	0	50	0	0	80	0	0	0
Guesthouse/ B&B	15	70	10	5	75	10	0	15	30	20	40	5	5
Guesthouse/ B&B	15	15	35	35	40	30	10	20	15	64	21	0	0
Guesthouse/ B&B									20	60	10		
Guesthouse/ B&B	85	14	1	0	15	0	0	85	50	40	10	0	0
Guesthouse/ B&B	10	80	5	5	30	50	10	10	20	20	40	0	0
Guesthouse/ B&B	5	40	20	25	35	40	5	20	25	25	25	25	0
Guesthouse/ B&B	42	61	12	8	24	29	15	32	68	31	58	42	31
Guesthouse/ B&B	2	75	10	13	83	15		2	5	60	20	15	0
Guesthouse/ B&B	0	100	0	0	100	0	0	0	35	35	30	0	0
Guesthouse/ B&B									3	21	70	2	4

Further Reading

Sacks, D. (2010, 01 28). *Survey Response Rates*. Retrieved 11 04, 2013, from Survey Gizmo:
<http://www.surveygizmo.com/survey-blog/survey-response-rates/>

Visit Scotland. (2012). *Scotland: The Key Facts on Tourism in 2012*. Edinburgh: Visit Scotland.