SCOTTISH ENTERPRISE

ST ANDREWS WORLD CLASS

ACCOMMODATION AUDIT

December 2007

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Management Consultancy and Research Services

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Mr Martin Grigg
Scottish Enterprise Fife
Kingdom House
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13th December 2007

Dear Mr Grigg

<u>ST ANDREWS WORLD CLASS ACCOMMODATION AUDIT</u>

We have pleasure in presenting our report that provides a comprehensive audit of the supply of tourism accommodation in St Andrews and the demand characteristics of the area.

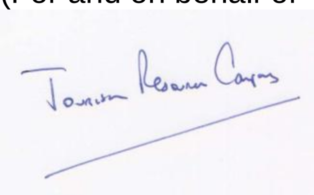
The scope of our work on this project is detailed in our proposal (Ref: P1327-REV).

The content of this report has been conscientiously prepared based on our research and information provided to us from various sources at the time of our study. As is customary with such documents, the contents should be regarded as valid for a limited period of time and should be subject to examination and update at regular intervals.

This report has been prepared for use by the study sponsors and no liability to third parties can be accepted.

We have welcomed the opportunity of preparing this report on your behalf.

Yours sincerely
(For and on behalf of Tourism Resources Company)



Sandy Steven
Director

Ref: SS/IMac/MTM/0722-R1

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1 INTRODUCTION

1.1 Background

Scottish Enterprise commissioned Tourism Resources Company (TRC) to undertake a comprehensive review of tourist accommodation supply and demand in the destination of St Andrews. The aim of this review is to provide reliable information which will better inform public and private sector investment and policies affecting the Town and wider area's tourist accommodation sector.

It was considered an up to date review of the sector was required to fill important market intelligence and information gaps. The establishment of a database, an essential part of this study, provides an important tool and benchmark against which to compare future activity / development. Similarly, an understanding of profiles and levels of demand for accommodation is essential, if future policies and investment in accommodation supply are to be targeted in an appropriate manner.

1.2 Study Objectives and Approach

The study was commissioned to address the information shortfall in the tourism accommodation sector across the area. It was a requirement of the study to report on supply within two specific postcode districts ie KY16 8, and KY16 9, which combined form the Town of St Andrews for the purposes of this study. The consultants were commissioned to create a new database of tourism accommodation in the area and to utilise as a base data produced earlier in a study into the self-catering market across Scotland as a whole, and update this where appropriate during the searches for the other types of accommodation.

In summary, the study objectives were to:

- assess volume of available accommodation by type, split between Serviced and Non-Serviced accommodation types as utilised by VisitScotland's Quality Assurance (QA) Scheme;
- establish the quality composition of supply;
- establish the levels and profile of demand for accommodation across the wider geographic area;

- establish with qualitative research the perceptions and needs of key buyers responsible for 'delivering' business to accommodation operators from the following sources ie the end user's assessment of current provision:
  - corporate;
  - conference organisers;
  - accommodation agents;
  - tour / specialist groups;
  - the short break markets.

The consultancy reviewed published material and undertook general research to establish the stock position. Later phases of work into the demand side of the equation involved more in-depth analysis of the market dynamics and included consultations, face-to-face and telephone interviewing, questionnaire surveying etc. Information to date on the nature and quality of accommodation provision has been limited to those businesses that 'engage' with VisitScotland where an accepted form of quality measurement is in place. A wide range of research source material had to be used to inform this study. This includes:

- VisitScotland.com;
- Kingdom of Fife Accommodation Guide (now replaced by VisitScotland Fife);
- Thomson Local Directory;
- Yellow Pages;
- AA / RAC Guides;
- NTS Guide;
- Landmark Trust Guide;
- A plethora of web directories (indicative list provided in Appendix I).

These sources were used to help identify the overall tourist accommodation supply situation in the study area.

1.3 Report Format

This report adopts a format that seeks to display clearly the key relevant supply data uncovered by the audit. In addition to this report, a full electronic database of the stock findings has been provided to the client separately. This report takes into account some operations which, although featuring prominently on certain websites etc, have ceased to operate.

The electronic database is presented in a format that allows the data to be interrogated further by the client, to provide additional information on structure of the stock if it is required, in addition to that presented in tabular format in this report.

This study adopted the VisitScotland categories (types) of accommodation which have been used for reporting purposes throughout the document. Stock levels as presented exclude the temporarily available stock which is known to come into the market during large-scale events in the Town such as the Open Championship. However, the seasonally available accommodation stock owned by the University in particular, which is significant, is accounted for as commercial tourism stock.

Note this audit does not include the portfolio of ‘built’ holiday / second homes in St Andrews which is likely to be fairly high, nor does it include any properties in the ‘buy to let’ market, again expected to be significant given the shortfall in University-provided accommodation bed spaces, compared to the overall student population.

2 ANALYSIS OF SUPPLY

2.1 Introduction

This section presents an analysis of the existing tourism accommodation supply in St Andrews (KY16 8 and KY16 9) in all recognised accommodation categories. The supply is analysed by type of accommodation, adopting the same categories as used by the VisitScotland QA Scheme. Where a property is not a member of the Scheme, an assessment based on how the property is listed or marketed elsewhere has allowed the consultants to make an informed decision and apply a ‘type’ designator (however no attempt has been made to ‘grade’ non-members). Analysis is provided of:

- operation type and numbers;
- number of available rooms;
- total bed space capacity.

The analysis also provides a breakdown of the categories of accommodation into Serviced and Non-Serviced totals. Accommodation categories in each of the sectors are as follows:

Serviced Accommodation Sector

- Hotel
- International Resort Hotel
- Small Hotel
- Guest House
- B&B
- Inn

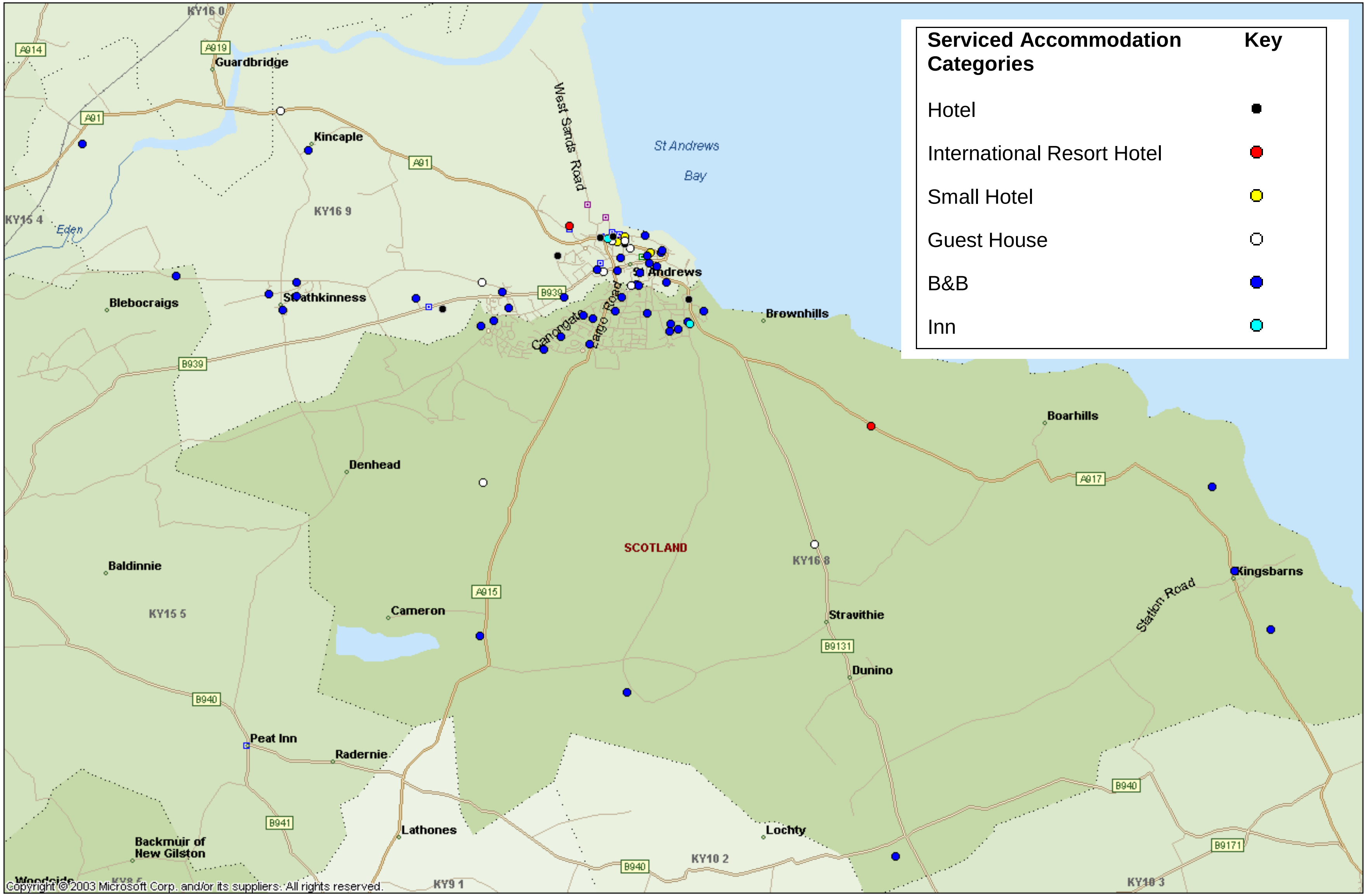
Non-Serviced Accommodation Sector

- Campus
- Self-Catering
- Hostel
- Exclusive Use

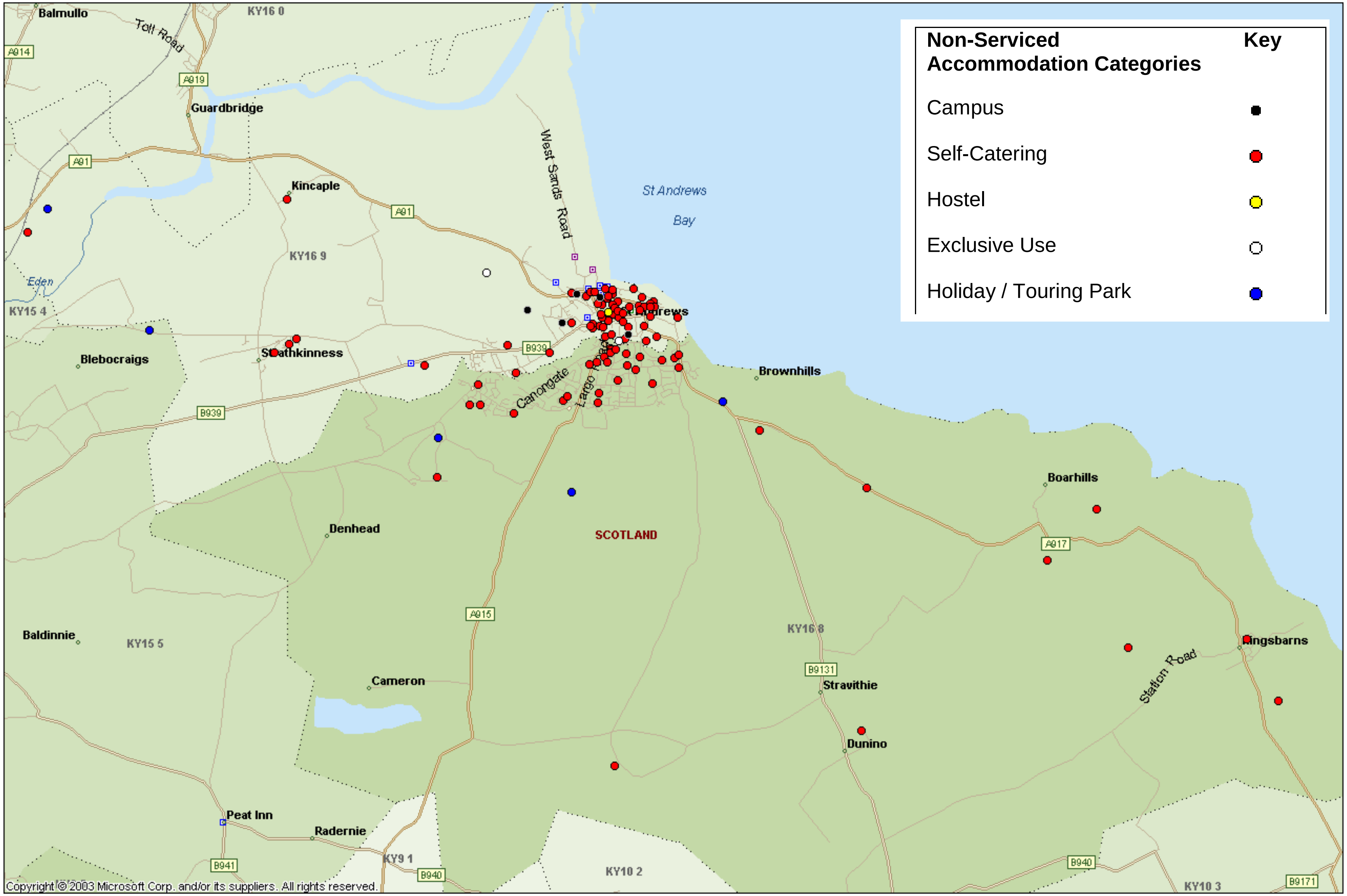
Note: Holiday / Touring Parks as a category are recorded separately.

Visual representations of the geographical distribution of accommodation supply within the area are provided overleaf. Two accommodation distribution charts have been prepared: one set identifies the distribution of Serviced accommodation; and the other, Non-Serviced accommodation across the postal code areas.

AREA-WIDE SERVICED ACCOMMODATION



AREA-WIDE NON-SERVICED ACCOMMODATION



2.2 Profile of Provision (Businesses)

The table below provides analysis of the research findings in terms of number of accommodation operations within each category across the geography of the area under study. The majority of the VisitScotland accommodation categories are represented within the area apart from lodge, restaurant with rooms, and serviced apartment. (The complete list of accommodation categories used by VisitScotland and a brief description of each is provided in Appendix III). Over recent years, the number of tourism accommodation categories used by VisitScotland, has increased to take account of evolving product and shifts in market demand. The categories of: small hotel; restaurant with rooms; lodge; and serviced apartment are all relatively new designations.

NUMBER OF OPERATIONS / BUSINESSES BY ACCOMMODATION CATEGORY			
Sector / Category	**Number of Operations**	**% Sector Mix**	**% Overall Mix**
Serviced Sector			
Hotel	6	6.5%	2.2%
International Resort Hotel	2	2.2%	0.7%
Small Hotel	5	5.4%	1.8%
Guest House	27	29.3%	9.8%
B&B	49	53.3%	17.8%
Inn	3	3.3%	1.1%
Serviced Sector Sub-Totals	**92**	**100.0%**	**33.5%**
Non-Serviced Sector			
Campus	1	0.6%	0.4%
Self-Catering	174	97.8%	63.3%
Hostel	1	0.6%	0.4%
Exclusive Use	2	1.1%	0.7%
Non-Serviced Sector Sub-Totals	**178**	**100.0%**	**64.7%**
Holiday / Touring Park	5		1.8%
TOTALS	**275**		**100.0%**

The table above displays the scale and mix of the tourism accommodation sector in the St Andrews area. In total there are around some 275 tourism accommodation businesses in the Town (however in certain instances, one 'business' can in effect own more than one site / establishment / accommodation category). Serviced accommodation providers represent around one-third of all businesses with the remaining two-thirds being Non-Serviced accommodation providers.

In St Andrews, the Serviced sector accommodation provision is dominated by the B&B sector and guest house sector where operations account for 76 units or over 80% of the Serviced supply sector. (It should be remembered however that this is the number of operations and in this category the majority are small units). In the Town, the stock of hotels combined (categories including hotel, international resort hotel, small hotel and inn) equate to 16 operations, 17% of Serviced operations and 6% of all operations. However this figure only takes on any significance when the relative bedroom / bed space analysis is made.

In the Non-Serviced sector the supply of accommodation is dominated by the self-catering category accounting for over 97% of this type of accommodation and around 63% of overall operations. (Later analysis clearly shows that this is influenced to a great extent by one provider / operator ie University of St Andrews).

It is to be noted the previous table disguises the scale of seasonally available accommodation, particularly in this case, campus accommodation. Of note is the fact that the University of St Andrews also owns a property classified and graded by VisitScotland as a hotel as well as accommodation graded as self-catering.

The area is also host to five ‘holiday parks’.

Not represented or available locally in the supply mix are lodge, serviced apartment, or restaurant with rooms. Timeshare also does not currently feature in the tourism accommodation mix to our knowledge.

2.3 Analysis of Bedroom Supply

Overall the St Andrews Town area has nearly 1,000 bedrooms in the Serviced sector of which 670 are hotel and related room types. Guest houses provide 156 rooms and B&B a further 138 rooms. This sees hotel and related types providing around 70% of rooms stock to the guest house and B&B combined bedroom stock of 30% of the Serviced sector. (Unusually for Scotland, the University of St Andrews owns a property which is categorised and graded as a hotel – New Hall. This is available only during the summer vacation months and has the effect of inflating the generally available hotel bedroom stock total by 72 rooms. The overall seasonal availability of the differing categories of accommodation is analysed later in this document).

NUMBER OF AVAILABLE BEDROOMS BY ACCOMMODATION CATEGORY – ST ANDREWS			
Sector / Category	**Number of Bedrooms**	**% Sector Mix**	**% Overall Mix**
Serviced Sector			
Hotel	241	25.0%	5.2%
International Resort Hotel	343	35.6%	7.4%
Small Hotel	66	6.8%	1.4%
Guest House	156	16.2%	3.4%
B&B	138	14.3%	3.0%
Inn	20	2.1%	0.4%
Serviced Sector Sub-Totals	**964**	**100.0%**	**20.9%**
Non-Serviced Sector			
Campus	871	36.5%	18.9%
Self-Catering(1)	1,492	62.6%	32.3%
Hostel	8	0.3%	0.2%
Exclusive Use	14	0.6%	0.3%
Non-Serviced Sector Sub-Totals	**2,385**	**100.0%**	**51.6%**
Holiday / Touring Park(2)	1,269		27.5%
TOTALS	**4,618**		**100.0%**

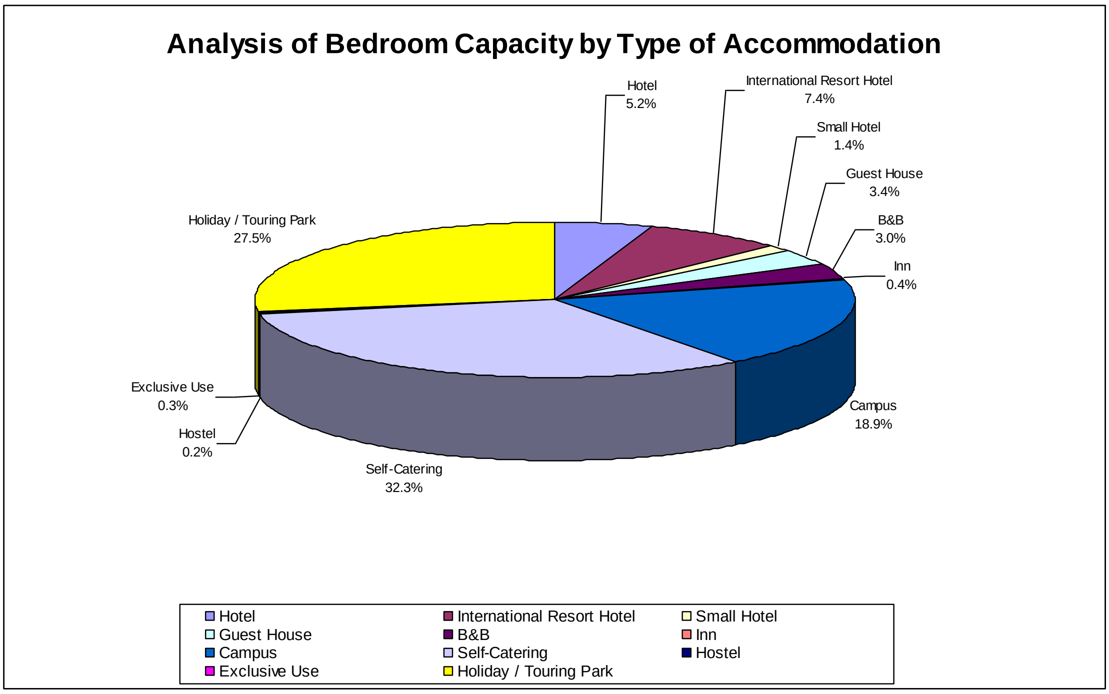
Notes: (1) 421 self-catering units.
(2) Pitches (tent and camping pitches – no allowance made for bed spaces at this time).

The Non-Serviced sector provides almost 2,400 rooms with the self-catering supply comprising nearly 1,500 rooms (over 62%), with campus accounting for a further 871 rooms (nearly 37%). The campus rooms as the name suggests are primarily for student use focused on satisfying their needs during term-times and brought to the commercial marketplace predominantly at Easter and during the summer vacation months. (Again unusually included within the self-catering supply are some 140 units offering a total of 700 bedrooms provided by the University and only available during the vacation period. These units are known as the David Russell Apartments and each consists of five bedrooms and a living space. In total there are 421 self-catering units in the St Andrews area including the 140 University Apartments).

Holiday parks provide 1,269 pitches in a mix of touring pitches, seasonally licensed static pitches and caravans available for hire.

In overall terms the Serviced bedroom stock represents 20.9% of bedroom stock, with Non-Serviced bedrooms accounting for 51.6% of bedroom stock and holiday park pitches the reminding 27.5%.

The pie chart below provides a visual representation of the mix of bedroom types and proportions.



2.4 Analysis of Bed Space Capacity

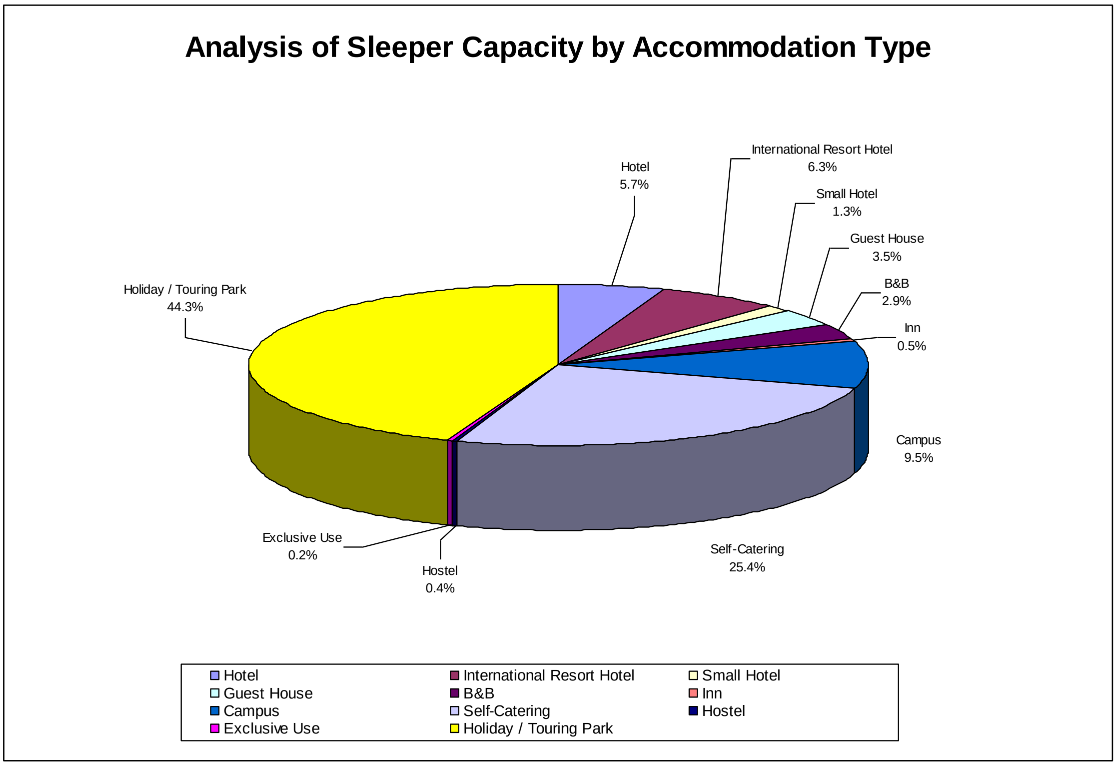
NUMBER OF SLEEPERS / AVAILABLE BED SPACES BY ACCOMMODATION CATEGORY			
Sector / Category	**Number of Sleepers**	**% Sector Mix**	**% Overall Mix**
Serviced Sector			
Hotel	649	28.1%	5.7%
International Resort Hotel	720	31.2%	6.3%
Small Hotel	153	6.6%	1.3%
Guest House	400	17.3%	3.5%
B&B	337	14.6%	2.9%
Inn	52	2.3%	0.5%
Serviced Sector Sub-Totals	**2,311**	**100.0%**	**20.2%**
Non-Serviced Sector			
Campus	1,093	26.8%	9.5%
Self-Catering	2,916	71.6%	25.4%
Hostel	44	1.1%	0.4%
Exclusive Use	21	0.5%	0.2%
Non-Serviced Sector Sub-Totals	**4,074**	**100.0%**	**35.5%**
Holiday / Touring Park(1)	5,076		44.3%
TOTALS	**11,461**		**100.0%**

Note: (1) An allowance of four bed spaces per pitch has been made at this time.

Overall St Andrews offers nearly 11,500 bed spaces for visitors, a not insubstantial total. However, availability across the year fluctuates due to the University activities in the main. (See later section on seasonality). In the Serviced sector, the sleeper capacity amounts to 2,311 spaces which represents just over 20% of the overall sleeper capacity of the area. Hotel and related types accounting for 1,574 sleepers which is 68.1% of Serviced sleeper capacity, but only 13.7% of overall sleeper capacity. Non-Serviced sleeper capacity is 4,078 at peak which includes the seasonally available stock previously identified. This number of sleepers equating to 35.5% of overall sleeper stock.

The consultants have assumed that on average a caravan / tent pitch offers sleeping accommodation for four people, in this way, the 1,269 available pitches could accommodate over 5,000 sleepers, or over 44% of the overall sleeper capacity total. In summary the St Andrews area, as defined by the KY16 8 and KY16 9 has a potential sleeper capacity of nearly 11,500 in a typical peak season.

The pie chart below provides a visual representation of the sleeper capacity in each accommodation category.



2.5 Holiday / Touring Park Supply

ANALYSIS OF PITCH TYPE IN HOLIDAY PARKS IN ST ANDREWS AREA					
Park Name	Number of Touring Pitches	Number of Tent Pitches	Number of Seasonal Static Pitches	Holiday Caravans to Hire	Total Units and Pitches
Cairnsmill Caravan Park	50	30	180	5	265
Craigtoun Meadows Holiday Park	54	8	130	21	213
Knockhill of Nydie Camping Site	10	30	0	0	40
Clayton Caravan Park	30	0	350	8	388
Kinkell Braes Caravan Park	80	0	270	13	363
TOTALS	**224**	**68**	**930**	**47**	**1,269**
%	**17.6%**	**5.4%**	**73.3%**	**3.7%**	**100%**

The table above displays the breakdown of caravan pitches by holiday park. Touring pitch supply appears to be satisfactorily catered for in this area which is unusual given there is a trend in this industry to see a move away from the provision of touring pitches to the often higher yielding seasonal static lets.

As in other audits concluded by TRC, this supply audit of pitches comes with a ‘health warning’. The consultants cannot respond with accuracy as to which parts of the stock operate solely as surrogate ‘second homes’ and which are owned caravans placed on seasonal static pitches and used by owners, but also let out by some, to friends, relatives and others as commercial lets, thereby entering the tourism accommodation sector and therefore included in this audit.

2.6 Average Size of Operation

The table overleaf profiles the ‘average size’ of operation. The average size of hotel in St Andrews is very small at only 40 rooms. When each category of hotel-type property are combined (to include the international resort hotel, small hotel and inn) the average is still modest at 42. The average size of hotels of other cities / towns TRC has studied include Glasgow 136, Edinburgh 84, Aberdeen 55 and Perth 41.

AVERAGE SIZE OF OPERATION			
Average Size of Operations	**Number of Operations**	**Number of Units / Rooms**	**Average**
Serviced Sector			
Hotel	6	241	40
International Resort Hotel	2	343	172
Small Hotel	5	66	13
Guest House	27	156	6
B&B	49	138	3
Inn	3	20	7
Serviced Sector Sub-Totals	**92**	**964**	**10**
Non-Serviced Sector			
Campus	1	871	871
Self-Catering	281	792 (1)	3
Hostel	1	8	8
Exclusive Use	2	14	7
Non-Serviced Sector Sub-Totals	**285**	**1,685**	**6**
Holiday / Touring Park	5	1,269 (2)	254
TOTALS	**382**	**3,918**	**10**

Notes: (1) Units excluding University stock of 140 units and 700 rooms.
(2) Pitches.

2.7 Seasonality of Supply

Already commented upon is the impact of the 'ownership' types on the stock in St Andrews. Most notably in the marketplace is the influence of the University. This takes two forms: the University stock that comes into play as campus accommodation during the vacation periods, essentially the months of June, July and August (dependent on term start and finish dates); and other University stock categorised as self-catering and hotel which is also available only at these times. This stock of currently comprises 1,643 rooms, in the month of August, which equates to almost 50% of total room stock available (excluding holiday park pitches). The stock made available by the University represents around 51% of its total portfolio, the remainder subject to maintenance and refurbishment, or not considered suitable to be marketed.

The table overleaf provides information on the seasonality of supply in the St Andrews area which in itself may be an issue for the destination. This has been prepared from information gleaned from various sources during the compilation of the database of operators. Whilst not comprehensively covering all operators, it does provide insight into the make up of tourism accommodation supply for those operations where the information was available.

The supply of each type of accommodation is provided month by month along with an analysis of accommodation excluding all University stock and holiday park stocks which have constraints placed upon them not of their own making. (This includes, for the University, student use during term-times and the park's restricted operating licenses).

SEASONAL AVAILABILITY OF ROOMS (2007)

Sector / Category	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug (peak supply)	Sep	Oct	Nov	Dec
Serviced Sector												
Hotel	169	169	169	169	169	241	241	241	241	169	169	169
International Resort Hotel	343	343	343	343	343	343	343	343	343	343	343	343
Small Hotel	58	66	66	66	66	66	66	66	66	66	66	66
Guest House	119	119	139	139	139	139	139	139	139	139	139	113
B&B	104	109	111	109	111	111	116	116	116	116	114	104
Inn	20	20	20	20	20	20	20	20	20	20	20	20
Serviced Rooms Sub-Totals	**813**	**826**	**848**	**846**	**848**	**920**	**925**	**925**	**925**	**853**	**851**	**815**
Non-Serviced Sector												
Campus	0	0	0	0	0	871	871	871	871	0	0	0
Self-Catering	265	267	276	288	309	1,245	1,277	1,280	1,164	299	285	269
Hostel (Beds)	0	8	8	8	8	8	8	8	8	8	8	8
Exclusive Use	0	7	7	7	7	7	7	7	7	7	7	7
Non-Serviced Rooms Sub-Totals	**265**	**282**	**291**	**303**	**324**	**2,131**	**2,163**	**2,166**	**2,050**	**314**	**300**	**284**
Overall Number of Rooms Available	1,078	1,108	1,139	1,149	1,172	3,051	3,088	3,091	2,975	1,167	1,151	1,099
Percentage of Total Stock Available	**34.9%**	**35.8%**	**36.8%**	**37.2%**	**37.9%**	**98.7%**	**99.9%**	**100.0%**	**96.2%**	**37.8%**	**37.2%**	**35.6%**
Availability Exc. University Campus Room Accommodation	1,078	1,108	1,139	1,149	1,172	2,180	2,217	2,220	2,104	1,167	1,151	1,099
Percentage of Available Stock (Exc. University Campus Rooms)	**48.6%**	**49.9%**	**51.3%**	**51.8%**	**52.8%**	**98.2%**	**99.9%**	**100.0%**	**94.8%**	**52.6%**	**51.8%**	**49.5%**
Availability Excluding All University Room Accommodation	1,078	1,108	1,139	1,149	1,172	1,408	1,445	1,448	1,332	1,167	1,151	1,099
Percentage of Available Stock (Excluding All University Rooms)	**74.4%**	**76.5%**	**78.7%**	**79.4%**	**80.9%**	**97.2%**	**99.8%**	**100.0%**	**92.0%**	**80.6%**	**79.5%**	**75.9%**
Overall Availability of Holiday / Touring Park Pitches(1)	0	0	641	906	1,269	1,269	1,269	1,269	1,269	1,269	0	0
Percentage	**0.0%**	**0.0%**	**50.5%**	**71.4%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**0.0%**	**0.0%**
Overall Percentage	24.7%	25.4%	40.8%	47.1%	56.0%	99.1%	99.9%	100.0%	97.3%	55.9%	26.4%	25.2%

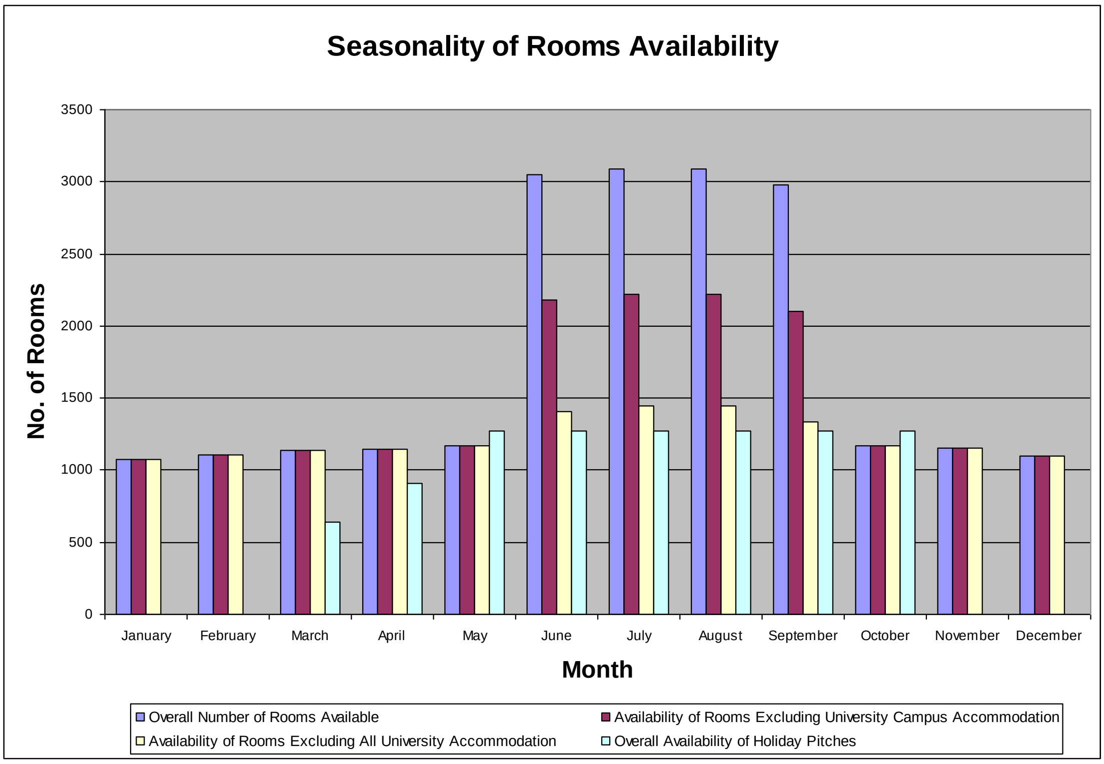
Note: (1) Differences reflect site operating license restrictions.

Our analysis suggests that in terms of overall Serviced and Non-Serviced stock including campus-based accommodations (but excluding holiday park pitches) the ‘available’ stock level varies from 34.9% of all stock in January to full availability of stock only apparent in August.

If the stock is analysed excluding the campus designated accommodation, the percentage available in January is higher at 48.6% of that available in the height of the summer. This substantial seasonal contrast in supply is affected in a large way by the designation and grading of the University’s two properties New Hall as hotel and David Russell Apartments as self-catering, operations both of which are seasonal in nature – dictated by the education term-times. If these are stripped from the analysis there is still a seasonal pattern of opening among accommodation businesses. 74.4% of rooms are available in January in this scenario compared with August.

In some areas of Scotland there is occasional demand for accommodation, usually driven by a particular large-scale event. This situation can see otherwise private residential accommodation brought to the marketplace eg Edinburgh’s Festivals period, Fort William’s Mountain Bike Championships, The Open at Carnoustie / Muirfield / Turnberry. It is to be noted that in St Andrews, when the Town hosts, for example, the Open Championship, there is an initiative undertaken by VisitScotland Fife to encourage residential property owners to offer B&B accommodation for the duration of the event. There is also the coordination of property owners willing to let their properties on a self-catering basis. Anecdotally for the last Open which was hosted by St Andrews in 2005, 170 B&B temporary members were added to the VisitScotland supply database on this occasional basis – albeit only around 20-30 were in St Andrews itself. We understand that further houses / apartments became available via a self-catering letting agent based in St Andrews. (It is to be assumed that a proportion of these will be primary residences as well as second / holiday homes not normally let out commercially).

The following graphically represents the seasonality of bedrooms supply in the St Andrews area.



2.8 Ownership of Supply

OWNERSHIP PROFILE OF ACCOMMODATION OPERATIONS (2007)				
Sector / Category	**Total Operations**	**Company**	**Private**	**University**
Serviced Sector				
Hotel	6	2	3	1
International Resort Hotel	2	2		
Small Hotel	5		5	
Guest House	27		27	
B&B	49	1	48	
Inn	3		3	
Serviced Sector Sub-Totals	**92**	**5**	**86**	**1**
Non-Serviced Sector				
Campus	1			1
Self-Catering	174	8	165	1
Hostel	1		1	
Exclusive Use	2		2	
Non-Serviced Sector Sub-Totals	**178**	**8**	**168**	**2**
Holiday / Touring Park	5		5	
TOTALS	**275**	**13**	**259**	**3**
%	**100.0%**	**4.6%**	**95.0%**	**0.4%**

The previous table demonstrates the concentration of tourism accommodation businesses that are in private ownership / partnership as opposed to those in the ‘corporate’ sector.

2.9 Stock Comparison with Other Areas

TRC have undertaken a number of in-depth tourism accommodation supply and demand audits in recent years in various parts of Scotland. The methodology in each case has been standardised and replicated to allow for comparison in an area over time or comparison between different areas. A number of comparative tables have been prepared for this report and are provided in Appendix II. We provide comparison of stock between St Andrews and several other urban locations across Scotland as well as that representative of some of the six key tourism locations identified by Scottish Enterprise, Perthshire, Glasgow, Edinburgh, Forth Valley, Grampian, Ayrshire and Arran, Royal Deeside and Edinburgh & the Lothians. Care needs to be taken in terms of the different years in which the research for each was undertaken. (Obviously in some, significant levels of new supply have been added, most notably in the main, city conurbations which have affected overall counts). Essentially each profile provides a snapshot of the accommodation mix and scale at the time of study.

3 QUALITY STANDARDS IN ST ANDREWS ACCOMMODATION SECTOR

3.1 Graded Properties Profile

Information on the VisitScotland quality grading of accommodation properties in St Andrews has been compiled and is provided in the following section. Information on the national picture as at the end of 2006 has also been secured via VisitScotland's Quality Assurance team to provide a yardstick to judge the quality attributes of the St Andrews tourism accommodation supply.

The table below provides analysis of the grading status by category. Of the 275 operations identified in St Andrews, 221 are graded, 15 were awaiting an inspection visit to assess a grade, and 39 were not graded. In our experience this level, of over 80%, of identified properties actively participating in the VisitScotland scheme and being graded is higher than in many other areas.

Similar to other areas the take up by the B&B and inn sector is less than other sectors and perhaps unusually the holiday / touring park sector is also low albeit from a low total number of operations.

The campus accommodation is not graded by VisitScotland, which again is not unusual nor are either of the two exclusive use venues – Monarchs House and Strathtyrum House. The exclusive use category is one of the most recently introduced by VisitScotland.

ACCOMMODATION GRADING ANALYSIS BY CATEGORY – ALL STOCK (2007)

Sector / Category	Total Properties	% Sector Mix	Not Graded	% of Category	Awaiting Inspection	% of Category	Total Graded	% of Category
Serviced Sector								
Hotel	6	6.5%	0	0.0%	1	16.7%	5	83.3%
International Resort Hotel	2	2.2%	0	0.0%	0	0.0%	2	100.0%
Small Hotel	5	5.4%	0	0.0%	0	0.0%	5	100.0%
Guest House	27	29.3%	1	3.7%	0	0.0%	26	96.3%
B&B	49	53.3%	8	16.3%	3	6.1%	38	77.6%
Inn	3	3.3%	1	33.3%	0	0.0%	2	66.7%
Serviced Sector Sub-Totals	**92**	**100.0%**	**10**	**10.9%**	**4**	**4.3%**	**78**	**84.8%**
Non-Serviced Sector								
Campus	1	0.6%	1	100.0%	0	0.0%	0	0.0%
Self-Catering	174	97.8%	25	14.4%	10	5.7%	139	79.9%
Hostel	1	0.6%	0	0.0%	0	0.0%	1	100.0%
Exclusive Use	2	1.1%	2	100.0%	0	0.0%	0	0.0%
Non-Serviced Sector Sub-Totals	**178**	**100.0%**	**28**	**15.7%**	**10**	**5.6%**	**140**	**78.7%**
Holiday / Touring Park	5	100.0%	1	20.0%	1	20.0%	3	60.0%
TOTALS	**275**	**100.0%**	**39**	**14.2%**	**15**	**5.5%**	**221**	**80.4%**

3.2 Graded Property Analysis by Star Rating

ANALYSIS OF SERVICED AND NON-SERVICED PROPERTIES BY STAR GRADING – ALL STOCK (2007)												
Sector / Category	**Total Graded**	**%**	**1 Star**	**%**	**2 Star**	**%**	**3 Star**	**%**	**4 Star**	**%**	**5 Star**	**%**
Serviced Sector												
Hotel	5	83.3%	1	20.0%	0	0.0%	1	20.0%	2	40.0%	1	20.0%
International Resort Hotel	2	100.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	2	100.0%
Small Hotel	5	100.0%	0	0.0%	0	0.0%	5	100.0%	0	0.0%	0	0.0%
Guest House	26	96.3%	0	0.0%	0	0.0%	13	50.0%	13	50.0%	0	0.0%
B&B	38	77.6%	0	0.0%	3	7.9%	16	42.1%	19	50.0%	0	0.0%
Inn	2	66.7%	0	0.0%	0	0.0%	2	100.0%	0	0.0%	0	0.0%
Serviced Sector Sub-Totals	**78**	**84.8%**	**1**	**1.3%**	**3**	**3.8%**	**37**	**47.4%**	**34**	**43.6%**	**3**	**3.8%**
Non-Serviced Sector												
Campus	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Self-Catering	139	0.0%	3	2.2%	39	28.1%	60	43.2%	32	23.0%	5	3.6%
Hostel	1	79.9%	0	0.0%	0	0.0%	1	100.0%	0	0.0%	0	0.0%
Exclusive Use	0	100.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Non-Serviced Sector Sub-Totals	**140**	**0.0%**	**3**	**2.1%**	**39**	**27.9%**	**61**	**43.6%**	**32**	**22.9%**	**5**	**3.6%**
Holiday / Touring Park	3	78.7%	0	0.0%	0	0.0%	1	33.3%	1	33.3%	1	33.3%
TOTALS	**221**	**60.0%**	**4**	**1.8%**	**42**	**19.0%**	**99**	**44.8%**	**67**	**30.3%**	**9**	**4.1%**

The table above shows the spread of Star grades across each category of accommodation for those participating in the scheme, alongside the number of properties of each type in total graded.

In the Serviced sector the bulk of properties are at 3 and 4 Star grades 46% and 44% respectively 1, 2 and 5 Star properties are few in number, but the bedroom stock of same is a different story. In the Non-Serviced sector there is a greater proportion of 2 Star at 28% of total, with 3 Star properties amounting to 43.6% and 4 Star 22.9%.

The available stock, however, does have a number of 5 Star properties in several categories eg hotel, international resort hotel, self-catering and holiday park categories. The table overleaf provides the rooms available by Star grading.

ANALYSIS OF SERVICED AND NON-SERVICED BEDROOMS BY STAR GRADING – ALL STOCK (2007)												
Category	**Total Graded**	**%**	**1 Star**	**%**	**2 Star**	**%**	**3 Star**	**%**	**4 Star**	**%**	**5 Star**	**%**
Serviced Sector												
Hotel	221	91.7%	6	2.7%	0	0.0%	102	46.2%	89	40.3%	24	10.9%
International Resort Hotel	343	100.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	343	100.0%
Small Hotel	66	100.0%	0	0.0%	0	0.0%	66	100.0%	0	0.0%	0	0.0%
Guest House	154	98.7%	0	0.0%	0	0.0%	79	51.3%	75	48.7%	0	0.0%
B&B	105	76.1%	0	0.0%	7	6.7%	44	41.9%	54	51.4%	0	0.0%
Inn	19	95.0%	0	0.0%	0	0.0%	19	100.0%	0	0.0%	0	0.0%
Serviced Sector Sub-Totals	**908**	**94.2%**	**6**	**0.7%**	**7**	**0.8%**	**310**	**34.1%**	**218**	**24.0%**	**367**	**40.4%**
Non-Serviced Sector												
Campus	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Self-Catering	1,390	93.2%	25	1.8%	123	8.8%	937	67.4%	284	20.4%	21	1.5%
Hostel	8	100.0%	0	0.0%	0	0.0%	8	100.0%	0	0.0%	0	0.0%
Exclusive Use	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Non-Serviced Sector Sub-Totals	**1,398**	**58.6%**	**25**	**1.8%**	**123**	**8.8%**	**945**	**67.6%**	**284**	**20.3%**	**21**	**1.5%**
Holiday / Touring Park[1]	841	66.3%	0	0.0%	0	0.0%	363	43.2%	265	31.5%	213	25.3%
TOTALS	**3,147**	**68.1%**	**31**	**1.0%**	**130**	**4.1%**	**1,618**	**51.4%**	**767**	**24.4%**	**601**	**19.1%**

Note: (1) Pitches.

In terms of Serviced bedrooms graded, the distinctive feature is the proportion of graded stock at a 5 Star level which far exceeds any other Scottish area in terms of proportion within the Serviced sector mix at 40%. This is accounted for by the two international resort hotels, The Old Course Hotel and the Fairmont St Andrews.

The Serviced bedroom stock also noticeably lacks stock at 1 Star and 2 Star levels, with less than 2% of rooms at these grades.

Non-Serviced bedroom accommodation provides 68% of stock at 3 Star level, 20% at 4 Star, and a more modest 1.5% of bedrooms at 5 Star grade.

Holiday parks are graded at 3, 4 and 5 Star grades only.

In overall terms, the proportion of stock at 3 Star and above is high, with 95% of stock so graded.

3.3 Comparison of St Andrews and National Grading Profiles (Properties)

GRADING PROFILE BY PROPERTY – ST ANDREWS Vs NATIONAL (2006)				
Star Grade	**St Andrews Properties Total**	**% of Total Graded**	**National Profile Properties Total**	**% of Total Graded**
1	4	1.8%	271	2.9%
2	42	19.0%	1,273	13.7%
3	99	44.8%	4,538	48.7%
4	67	30.3%	2,849	30.6%
5	9	4.1%	388	4.2%
TOTALS	**221**	**100.0%**	**9,319**	**100.0%**

The previous analysis provides comparison between the St Andrews stock identified by the consultants and the national picture as at the end of 2006.

The similarity between the two profiles is evident although St Andrews stock does have a greater proportion of 2 Star properties that the national picture and slightly less proportionally in the 1, 3 and 5 Star grades. (As noted above, the 5 Star bedroom stock proportion in St Andrews is greatly enhanced by the two international resort hotels).

3.4 Achieved Quality Standards – St Andrews / National Comparison

The following table provides analysis of the average grades achieved in St Andrews by each category of accommodation compared to the national picture. The Serviced sector shows an overall average grade in excess of the national average, however the Non-Serviced sector is below the national average in most categories, the exception being holiday parks.

AVERAGE GRADING SCORES – ST ANDREWS Vs NATIONAL [PROPERTIES] (2006)		
Sector / Category	**St Andrews Average(1)**	**National Average(2)**
Serviced Sector		
Hotel	3.33	3.22
International Resort Hotel	5.00	5.00
Small Hotel	3.00	2.99
Guest House	3.50	3.12
B&B	3.42	3.24
Inn	3.00	2.51
Serviced Sector Average	**3.44**	**3.14**
Non-Serviced Sector		
Campus	0.00	1.77
Self-Catering	3.00	3.29
Hostel	3.00	3.08
Exclusive Use	0.00	4.88
Holiday / Touring Park	4.00	3.91
Non-Serviced Sector Average	**3.02**	**3.19**
OVERALL AVERAGE	**3.17**	**3.18**

Notes: (1) Calculated by TRC.
(2) Source – VisitScotland, recalculated by TRC to exclude categories not present in the St Andrews profile.

3.5 Conclusion

The level of participation in the VisitScotland grading scheme in St Andrews is commendably high with nearly 85% of identified properties graded or awaiting inspection.

The quality level across the Serviced sector is in excess of the national averages although the Non-Serviced sector in some categories performs less well. The result of this is an overall average score marginally below the national average but this is possibly a function of wider spread participation by operators in St Andrews than the national average.

4 DEMAND AND TRADING OVERVIEW

4.1 Introduction

In this section we provide an overview of the demand profile for the different types of accommodation in the St Andrews area. This information has been gathered through face-to-face interviews with operators, telephone interviews and responses to questionnaires circulated to operators where we have recorded a valid email address. In order to respect commercial confidentiality, performance information is discussed in broad terms only. As with many previous studies, the quality of information from sectors, other than the hotel sector, was patchy. Generally small businesses see less of a need to monitor performance, which results in little information on business type, nationality average rates, seasonality etc.

4.2 Annual Bedroom Occupancy and Achieved Annual Room Rates

Bedroom Occupancy Levels

The table overleaf gives a very broad indication, where possible from the research, of the level of annual bedroom occupancy achieved in the St Andrews area. Within the categories, there are obviously operations performing higher and lower than the averages. In order to respect the commercial sensitivity of operators in such a small sample, we have combined all hotel types into a single category and similarly combined guest house and B&B. Note some operations were reluctant to discuss trading figures and others do not monitor these statistics, particularly lifestyle guest house and B&B businesses. St Andrews is no different in this from other areas of Scotland and the UK. The response to our email survey forms, despite reminders to request completion, remained very disappointing.

It is estimated that across the region the overall Serviced sector achieves a highly respectable 68% annual room occupancy level (weighted average of survey returns from hotel and related types and guest house / B&B – figures calculated by TRC). This is high when compared to the calculation from the TNS VisitScotland figures for the whole of Scotland, around 53.5%, and the TNS results for Fife in 2005 at 56.8%. It is to be noted that the figures published for Fife as a whole are also now based on very small sample sizes, the performance of this small sample of St Andrews is not unexpected given the reported ‘full for the season’ comments from operators interviewed.

The occupancy data in this section has been derived from information provided by individual operators. An issue in some categories is the number of representatives in the category and that a proportion of the stock is seasonal or playing, in the case of some self-catering stock, part year as student lets and part year as tourist stock. Despite discussions with a representative of the University, we were unable to secure any performance information on its summer accommodation. As yet, reporting systems are not in place to record this information.

The table below provides a comparison of the 2006 bedroom occupancy level monitored by the audit and those prepared by VisitScotland for the wider Scottish Enterprise Network office geography and the national averages.

COMPARATIVE BEDROOM OCCUPANCY PERCENTAGES BY CATEGORY – EXCLUDING FESTIVAL STOCK			
Category	**This Audit 2006/7**	**SE Fife VisitScotland Survey**	**VisitScotland National Average**
Serviced Sector			
Hotel and Related	63.3%	63.0%	67.0%
Guest House / B&B	76.1%	56.0%	46.0%
Overall Simple Arithmetic Average Occupancy in Serviced Sector	**67.9%**	**56.8%**	**53.5%**
Non-Serviced Sector			
Self-Catering (Unit Occupancy)	67.8%	54.0%	55.0%
Hostel (Bed Occupancy)	Bed Occupancy under 50% (single operator)	37.0%*	44.0%
Holiday / Touring Park (Pitch Occupancy April to October)	N/A	44.0%	45.0%

Note: * Bed occupancy of 'other' locations ie not city or large town.

Of note, the Town's accommodation performance compared to figures published by VisitScotland for the Fife region and nationally, shows not unexpectedly that St Andrews outperforms these averages.

Discussions with a number of accommodation operators and agencies representing self-catering operations suggest that occupancy levels of 70% plus are common across the Town.

Average Achieved Room Rate

Another key measurement in the hospitality industry of trading performance is the annual average achieved room rate. This is the revenue achieved from the sale of each room net of breakfast, VAT etc. Displayed below are the 'averages' achieved by the different categories of Serviced accommodation across the region. Again, caution is recommended given the size of the sample, however it provides an insight into the key economic category, hotels and opportunity to consider performance against other areas.

AVERAGE ACHIEVED ROOM RATES (£) – SERVICED SECTOR	
Category	**2006/7**
Hotel *(Sample Size 6)*	£137.75
Guest House / B&B *(Sample Size 4)*	£54.99

4.3 Demand for Hotels in St Andrews

The St Andrews study area has a very limited supply of hotel-type bedrooms – 670 bedrooms and around 1,580 bed spaces. Within these totals are 72 rooms and 144 bed spaces graded and classified within the hotel category but as they are under University ownership, and dual use, are only available during the summer vacation period.

The area experiences significant seasonality with the focus on leisure demand, especially golf-related. This sees a season focused on April / May to October. The high season extends from May to late September with June, July and August the peak months.

Golf tour operators play a prominent role in the supply and demand chain in St Andrews and each hotel works with a number of tour operators. The benefit for the hotel is that no resources are expended trying to secure golf tee-off times at the courses, long lead bookings are secured and committed to and booking management is simplified. The tour operator benefits from modest discounts on the rack room tariffs and a commission element rolled into their package prices.

One of the key characteristics of the visitor profile to St Andrews' concentrated geography, not readily visible in other comparable Scottish coastal destinations, remains the high level of American business. This can be attributed almost exclusively to the long golfing tradition in St Andrews and the area's overall status as something of a golfing 'Mecca', containing as it does the world-famous Old Course and several 'must play' and superior quality golf courses in a relatively small area. For many Americans, a trip to St Andrews is the culmination of long-held desires to visit and hence long lead-times are not unusual and currency fluctuations and terrorist activity are reported to have had less impact on visits to St Andrews than other Scottish destinations.

Golf tour operators aid this flow of American visitors by targeting the relatively affluent North American market with some either having bases over in the States or representation by organisations in the USA. The Old Course Experience, the company set up to sell and market the guaranteed tee-off times made available by the St Andrews Links Trust to commercial enterprises nationally and internationally, has offices in New York, Germany, Tokyo and Taiwan.

The company administers around 4,000 tee-off times annually and creates packages around this key element of a visit. Packages can include rounds of golf at other courses in St Andrews, but equally incorporate a visit to other areas of Scotland, and frequently Scotland and Ireland, as a 'double destination' visit. Overseas visits are typically three to five night trips and the keenest golfers are often reported as playing as many as three rounds per day for the duration of their visits.

UK golf societies are also visitors to St Andrews and for most societies, a visit requires an overnight stay, such is the appeal from societies further afield. Those closer eg North-East England golf societies tend to visit East Lothian which can be visited as a day trip rather than involve an overnight stay. Such groups tend to be below 20 in number but the University did report a forthcoming golf event of 350 people from Liverpool celebrating the centenary of their organisation.

Membership of the Hotels and Guest House Association does confer on the member's property, rights to a very limited number of guaranteed tee-off times on the Old Course across a season.

The St Andrews Links Trust also works with local accommodation operators to bring golf packages together during the off / shoulder seasons comprising three-day breaks with three rounds of golf including the guarantee of one round on the Old Course. Rates for this package are only available to individual purchasers, not wholesale to tour operators. The golf component (ie three rounds of golf) alone ranges in price from £120 to £175 depending on the month of play, with accommodation priced according to the accommodation chosen.

Shoulder season months in the larger hotels see demand shift from leisure / golf-related to residential conference business. This conference business is, in the main, national or regional domestic in nature which sees St Andrews in competition with the other main players Birmingham, Edinburgh, Bournemouth etc. To this end sales and marketing personnel or teams are employed by the key conference hotels to secure such business.

There are no hotels in the area able to accommodate conferences of above 250 delegates in a single hotel venue. These would tend to be the large regional or national conferences.

On occasion when the Town is the chosen venue, a number of hotels will be used with one as the 'headquarter' hotel and overspill guests placed in other hotels in the immediate area. A number of the smaller hotels have welcomed the Fairmont St Andrews Hotel as such a 'source' of new business.

The corporate sector of demand in St Andrews is very modest in scale with only a few significant demand generators in the area identified by hotels eg Quaker Oats, RAF Leuchars, the University, and a local IT company. A number of hotels offer local corporate rates to these companies but the scale of use in most cases is modest. Any corporate demand in the area will tend to be booked directly by commercial visitors or booked on an occasional / infrequent basis by local companies.

Many corporate hotel companies, mirroring the airline industry, have now adopted flexible pricing strategies (rate manipulation reflecting different levels of demand). It is increasingly difficult to secure a quote for a room booking unless specifying number required and date. The impact of this on hotels in St Andrews sees a wide difference in prices quoted for the high season compared to those available in the low season.

Hotel revenues are further lifted, at certain times of the year, by operators only offering dinner, bed and breakfast rates (or a package rate with several meals as an obligatory part of the deal).

Hotel occupancies are not as robust as those in Scottish cities where stronger demand from corporate users is apparent and leisure demand can also reliably be secured at the weekends ie Central Belt sites. That said, the achieved average room rate is buoyed by very strong leisure demand in the high season. Demand and a high multiple occupancy factor are considerably better than most hotels in most Scottish cities.

The hotel stock in St Andrews is generally of good quality with the stock largely 4 or 5 Star, and the hotels with widespread profile and history. However, the gap between accommodation of this standard and the lower end of the accommodation stock, ie B&Bs and guest houses, is relatively wide. This is not a major concern during low season, but becomes somewhat pronounced during the busier summer months, when the highest quality accommodation options are at a premium, and the poorest quality stock which offer few facilities are offered at high price levels not considered value for money (high season supply and demand imbalance).

Such properties give the Town a ‘bad name’ and with little in the way of alternatives, visitors are forced to ‘like it or lump it’. Not a healthy operator attitude in trying to promote a world class visitor destination.

The prices charged by some hotels in St Andrews are likely to be beyond the reach of many domestic holidaymakers and this is perhaps a factor in the continuing success of the caravan sector. Indeed, high room rates are observable across the spectrum of accommodation types, with B&Bs and guest houses able to charge rates during peak months that hotels in some locations would struggle to achieve.

St Andrews still appears to have a longer than average length of stay compared to many other destinations in Scotland, the wider area has been a traditional holidaying location for those on the West Coast of Scotland and the tradition appears to be trans-generational. This phenomenon sees high levels of repeat business reported by many operators.

Despite this role as a traditional holiday location, the point was made on a number of occasions by operators about the lack of things for families to do in the area, particularly wet weather activities. With such strong non-family demand generators – the University, golf-related visits and RAF Leuchars, this may be the case?

The hotel operators benefit in no small way from the University's day-to-day activities and visits by parents to students (VFR). Two big peaks of demand are generated by the Graduation ceremonies staged over four days in June and Fresher's Week. Although when contacted directly, the RAF base suggested it did not use local hotels, discussions with local operators suggested that certainly in the low season, considerable numbers of training courses / meetings are hosted where overnight accommodation is a requirement.

4.4 Demand for Guest Houses and Bed & Breakfasts

Similar to the hotel and other accommodation types, the guest house and B&B sectors exhibit the same pattern of demand with the May to October period, that of greatest demand with operators, suggesting most businesses achieve close to maximum occupancy, particularly in the months of July, August and September.

At other times of the year for those businesses remaining open, occupancies are much weaker, both in terms of poorer demand volumes and shorter lengths of stay. Operators report visitors in the high season staying for an average of between two to five days depending on the particular visitor mix achieved by the specific business. Outwith the high season, length of stay tends to be shorter when the corporate demand becomes a larger proportion of each operator's mix. Corporate overnight stays in general are likely to be only one or two nights.

It is notable that those able to provide an estimate of their business mix in this sector estimated corporate demand to be as much as 30%-40% of their business mix compared to the hotels where 5%-10% was more typical (excluding discretionary corporate demand – conferences).

In this sector, demand also comes from general leisure tourists, golf-related and university-related (ie visiting parents, lecturers etc). Double occupancy is high with some reports of between 75% and 90% of all room booking for two person occupation. Similarly businesses are able to generate good levels of repeat business with reports as high as 50% of visitors returning.

It is evident in this sector that high levels of occupancy can be achieved year round if the 'effort' is put into promoting and professionally operating the business. In general 60%-80% annual room occupancy levels were reported year-on-year in a number of cases, whereas in contrast, one long-established operator winding their business down reported less than 50%.

Also notable of those reporting an achieved average room rate was the wide range of the results. Some businesses reported averages of £25-£30 with others at £60-£80 (higher than many areas of Scotland, but perhaps reflecting the high double occupancy levels achieved). In VisitScotland's Occupancy Survey 2006, Fife had the highest double occupancy level of any Tourist Board or Local Enterprise Company area.

Across the whole sample of guest houses and B&Bs, the simple average of low and high season published tariffs per person per night sharing is as follows:

GUEST HOUSES AND B&Bs – LOW AND HIGH SEASON AVERAGE PUBLISHED TARIFFS		
	High Rate £ pppn	**Low Rate £ pppn**
Guest House	47.18	33.15
B&B	40.19	30.35

By grade, 3 Star guest houses and B&Bs' weighted average for low season is £31.23 and high season £39.11 per person per night sharing. In comparison, 4 Star properties, similarly calculated, produces a low season weighted average of £33.55 and high season of £48.83. This sees a £3.30 and a £9.70 differential between 3 and 4 Star properties for low and high season. (There is no meaningful stock levels at 1, 2 or 5 Stars).

4.5 Demand for University Accommodation

The University owns over 3,300 bed spaces across the Town, some of which are offered to the commercial market during the summer months. The University has differentiated the bed stock it chooses to market into hotel, self-catering and campus / group-type accommodations.

New Hall is a student residence comprising individual en suite bedrooms not dissimilar to a budget lodge property. 72 of these rooms are offered as hotel accommodation. David Russell Apartments comprise 140 units each comprising five bedrooms around shower and lounge facilities. One block of 12 apartments, 60 rooms are leased on a temporary basis to the Scottish Youth Hostel Association (SYHA) as a summer hostel for backpackers etc.

A number of residences are used for University-generated group business during the summer, for example English as a Foreign Language summer schools, and further residences are not considered suitable for commercial use because of operational issues, location, poor facilities, decorative state etc. The University suffers from an inability to host large meetings and cater for large groups simultaneously. It is also difficult to ‘sell’ the idea of catering in one of the local hotels, to either the prospective client or hotel, particularly at the time of year when the University is able to host such meetings.

A further impediment to securing conference bookings is the lack of large-scale flat floor space for exhibitions, which for most conferences / association meetings of scale is an important part of securing a financially successful event (through the letting of exhibition space to interested companies / sponsors).

The planned new Institute for Medicine and Sciences aimed at releasing the Bute Medical Building for art education use, it is anticipated, will ease this situation somewhat. St Andrews University compared to campus-based ones does suffer from dispersed meeting space, bedroom accommodation and catering facilities.

The quality of much of the University bedroom stock and the high demand for rooms in the summer months sees the University able to charge higher rates than is seen in other University towns and cities in Scotland.

The University is in somewhat of an invidious position in not having residential conferencing facilities available year-round, unlike many UK Universities. Hotels are not attracted to working with the University as its facilities only come into the marketplace for the peak season when the hotels are already busy with leisure demand at full rate. The University is perhaps late in waking up to the commercial potential of its assets during vacation periods as it has never needed to in the past.

The University does perform a ‘service’ to the local hospitality industry in two ways: it augments the supply of hotel-type accommodation when the demand is at its highest, absorbing demand which would otherwise be turned away, leaking away from the Town and possibly Fife; and provides accommodation at the budget-price end of the market, allowing the hotels to hold out for business at peak rates. The absence of the University room stock, and other seasonal operators, through quieter demand periods, allows accommodation providers that do stay open to see less diluted levels of demand and rates than would be the case if the whole stock was available throughout the year. The lack of a strong corporate market and lack of leisure markets in winter and shoulder seasons sees winter demand levels poor.

4.6 Demand for Self-Catering Accommodation

A number of properties straddle the tourist and the buy to let markets in this sector. A number of self-catering properties in term-time are let to students as residential accommodation. Graduates largely do not stay over the summer so these properties come into the marketplace to coincide with the Scottish school holidays and are let on a weekly basis to Scottish holidaymakers / University graduates returning with families etc. There is much repeat business reported and bookings rolling from one year to the next. The desirability of a long let from students on a 37-week academic year sees some properties only available to let for 12-15 weeks per annum in the tourism marketplace. This sees such accommodation available for the absolute peak season weeks but withdrawn when tourist demand is beginning to soften in a similar manner to the University accommodation itself.

The nature of the leisure golf market, with typical stays of two, three and five nights in St Andrews as part of a wider tour, sees little of the golf market accommodated by the self-catering sector who seek full week lets and in the high season are able to secure them.

Aside from the properties playing in the student and tourist markets, the number of weeks sold is dependent very much on the specific property, most will see around 25-30 weeks let per annum. The bulk of demand is for two to three bedrooms although properties on offer range from one to five bedrooms.

Several specific weeks could be sold many times over eg CLAN (Christians Linked across the Nation) Week, Graduation and Freshers' Weeks. We did unexpectedly find one operator who expressed surprise at having no booking over the St Andrews Open Championship despite being competitively priced and similarly having no enquiries for the Carnoustie Open either.

Discussion with a managing agent responsible for around 100 properties in St Andrews rural hinterland shed light onto the marketplace around the Town. The market is characterised by three types of property – modern minimalist, traditional and old world. Key selling features – sea view, ground floor space / bedrooms and outdoor space garden or patio.

There is a buoyant letting market in the wider area in high season and very buoyant demand for second home properties. Not all properties are available year-round for letting but 50%-60% of the portfolio is.

Those on offer all year will normally see a 'longer lease' demand in the winter from contractors in the area or, on occasion, lecturers from the University in the process of relocating.

It is notable that the hinterland of St Andrews appears to attract a different market to the Town. Students tend not to stray out of Town to find accommodation and only rarely will events in Town impact on properties in the locale. The Open Championship and annual CLAN Gathering were the only ones of scale to have an immediate impact.

Other local events of note in the wider area are the Pittenweem Festival, the East Neuk Festival and those created by the Fence Collective, musical events hosted in the village of Anstruther.

There is a lack of properties offering good quality accommodation but still remaining pet-friendly.

Prices range from £180 per week low season, to £650 per week high season for a two-bedroom property, but with the high season average being around £550 in the wider area.

As in other parts of Scotland, a trend has been the increasing demand for short breaks in the self-catering sector although demand is such that June, July and August are still sold on a full-week basis, and there are many instances of multiple week bookings up to a month in some cases. At the other end of the scale, some will even entertain single night bookings if the rate negotiated is respectable and it is not at peak time.

Whilst the bulk of bookings are of domestic origin, a number do come from overseas, especially for the shoulder seasons when Germans and Americans in particular are in evidence and during the Alfred Dunhill Links Championship, Swedish nationals. Depending on the time of the year, the mix of visitors will change, families in line with the Scottish versus the English school holidays for example, and in May and September a greater proportion of elderly couples.

High levels of repeat business were noted and second generations of families. The general trend towards later (shorter lead) bookings was reported by the agent in line with the trend across Scotland.

4.7 Demand for Hostel Accommodation

St Andrews has a single small independent backpackers hostel operating year round in the Town Centre. This accommodation is augmented during the peak season July and August each year by the SYHA leasing a portion of the University's David Russell Apartments and branding them as a SYHA summer hostel. This takes the bed spaces from 44 to 164 for those two months (SYHA take 60 double en suite rooms).

The private hostel charges £13.50 to £14.50 per person per night with a weekly reduced rate available in the shoulder and winter periods. The SYHA's rate was £17 to £25 per person adult or junior in 2007, SYHA offering is en suite double room in contrast to the conventional offering of the private hostel.

The nature of demand for the two hostels is similar, both busy over the peak months with short stay visitors including overseas groups – Spanish, Italian, American etc all figuring in the mix.

The difference is seen out of season when the SYHA's presence is gone and the market moves to longer stay visitors, stays in excess of a month reported on occasion. Despite this, the shoulder and winter period sees demand fall to a fraction of the rest of the year.

One interesting source of demand for the hostel is some of the trainee caddies trained each year by the Links Trust who are required to spend one season on completion of their course servicing the St Andrews courses once certified.

4.8 Demand for Caravan / Holiday Park Accommodation

Each of the area's caravan parks offer a mix of static van pitches, touring pitches and hire fleet between March and November. A small number of residential pitches are licensed by the Local Authority at the local holiday parks. Demand for static pitches, where owners keep their own vans for personal and family use, is robust with parks reporting sufficient demand to keep such pitches full each season and indeed a number indicating expansion plans or plans to scale up to current planning permission.

The rental charge for a season is between £1,500 and £2,000 on top of which charges for electricity consumption are levied. The equivalent charge for a touring pitch for a single night is £17 to £25.

Demand generating source for static seasonal pitches is predominantly the Central Belt of Scotland with the West being particularly well represented. Operators reported that golf was not a significant motivator in people's choice, considering St Andrews and the surrounding countryside and coast to be the main appeal.

In terms of touring pitch usage and hire van rentals, demand is much more diverse and sporadic. Peak of demand coincides with the Scottish and English school holidays – Easter, summer and October. Not unnaturally golfing events and other large-scale events eg CLAN Gathering do create spikes in demand for touring pitches and hire caravans.

One positive aspect of the caravan sector in this particular area is the scale of provision of touring pitches and hire vans and lodges, satisfying strong summer demand. This provision in most areas of Scotland is increasingly being eroded as park owners elect to change traditional touring pitches to seasonal pitches.

One operator in St Andrews was able to provide an indication of the mix of business by type, 40% generated by owner occupiers, 30% by the hire fleet and 30% from the touring pitches. A static pitch commanding a rental of £1,500 to £2,000 per season contrasts with the potential of 242 overnight lets of a touring pitch at say £18 per day. This potential touring pitch occupancy would only generate £4,300 per annum. Based on the information provided, we estimate that the touring pitch occupancy is in the order of 30% and the hire fleet occupied for 10 weeks each. The 30% occupancy of a touring pitch is therefore generating 30% of £4,300 ie £1,290. The logic / financial appeal of selling the touring pitch to a single seasonal user for £1,500 is clear. It is not known how often caravan owners visit this area, but in other areas this can be as much as 50-70 days a year.

As in other studies, operator's ability to provide any occupancy statistics was lacking. Anecdotally static pitches across the area are fully occupied each season while touring and hire vans achieve similar occupancy levels during the peak season as described above, but much more variable at other times.

4.9 Other Accommodation-Related Issues

One of the main issues to emerge from the research undertaken, particularly with regard to the major hotels in the area, is that of staffing difficulties. This was identified as one of the major constraints on business by the majority of hotel operators in the area to varying degrees of severity.

Although St Andrews holds tremendous appeal among destinations in Scotland, it is relatively small and inaccessible (in comparison to other major Scottish destinations), thus making it somewhat unattractive as an area in which to live and work. Moreover, although the Town is relatively compact, a percentage of the area's main accommodation providers lie outside the main urban area, which further intensifies the problem when the poor provision of public transport is considered.

Some establishments are able to provide onsite accommodation for staff, but still experience problems. Although the difficulty of recruitment of suitable staff in the tourism and hospitality industries is a widely reported and common phenomenon throughout Scotland and the UK as a whole, it appears to be particularly acute in St Andrews as a result of these, and various other factors. The University-generated student population in St Andrews might, as in other Scottish locations, be considered as a ready pool of part-time labour. It is considered by operators that as the oldest University in Scotland, and one of the most highly regarded educational institutions in the UK, it tends to attract students of relative affluence not inclined to subsidise their study through part-time work.

The recent expansion of the European Union has seen St Andrews follow the trend of most other UK destinations by attracting numbers of migrant workers from Eastern Europe, the majority of who occupy unskilled positions in the area's hotels and restaurants. While this has had advantages in the immediate short-term in terms of filling vacant positions, it has exacerbated the difficulty of the long-term ambitions of most establishments to recruit employees with the necessary skills for more specialised positions, eg chefs and supervisors. Indeed, the majority of respondents during the course of research identified this factor as one of the main constraints on their businesses.

Recruitment of cleaning staff for those self-catering owners who do not live in the area is an issue with the University considered to be responsible for absorbing cleaning staff. To secure a Saturday cleaner one self-catering operator was paying £15 per hour and a £100 bonus in an attempt to ensure reliability during the high season. A cleaning staff agency was noted to have had to cease operation in St Andrews (Cupar-base) because of its inability to secure staff for the area.

5 CONSUMER RESEARCH FINDINGS

5.1 Introduction

As part of this study a number of local companies, and third party placement / booking agents were consulted to ascertain from the consumer perspective the issues surrounding the tourist accommodation sector in the St Andrews area. The following paragraphs provide summary of the findings among different user groups.

5.2 Company Accommodation Buyers – Non-Discretionary Business Demand

We undertook a broad sweep of telephone calls among local businesses to identify accommodation users but were unable to identify any beyond those that had been identified through operator interviews. As discussed in the previous section, the demand generators of scale identified by our research are few in number in the area with only Quaker Oats, a local IT company and RAF Leuchars figuring specifically amongst operators as notable users of accommodation. In addition, the University's presence and demand from those connected with the commercial side of golf have to be acknowledged as drivers of corporate demand. The bulk of corporate demand for accommodation would appear to be generated infrequently by a plethora of small and medium organisation in and around the area rather than a number of large organisations with significant accommodation needs.

5.3 Conference Organisers

Of all the conference organisers consulted, several reported having organised an event or conference of some type and scale in the St Andrews area in the recent past, although few reported having done so on a regular basis. Those who indicated that they organise events and conferences in the area with any kind of frequency reported an average of around two or three per year. Respondents reported having organised conferences and other events in St Andrews for groups of anything between eight and 250 people for one to two nights; overall budget varies depending on the scale of the event, with an average in the range of around £70 to £150 per person.

Types of events also vary widely, although given the fact that the area is renowned for its golfing tradition and facilities a significant number are reported as golfing-related. Other types include corporate hospitality, dinners, conferences, staff training / teambuilding events and off-site meetings.

Considering the fact that most organisers do not report operating in the area on a regular basis, and the majority organise events and conferences throughout the UK at all times of year as well as in the St Andrews area, seasonality was not reported as a major issue. Organisers generally do not work in the area regularly enough to be in a position to be able to report on this, nor on any other long terms trends in supply or demand. However, conferences and major events are most frequently reported as being held outside of the peak summer season, typically during the quieter autumn months of September, October and November. This has the overall effect of boosting the so-called ‘shoulder season’ and lessening slightly the severity of seasonal impacts on the area’s major hotels.

In the main, the larger hotels in the St Andrews area, ie the Old Course and Fairmont St Andrews Hotels are almost exclusively preferred for events of any significant scale, although other smaller establishments such as Rufflets and Rusacks are occasionally used. The latter operations however can be used to accommodate the ‘overspill’ from larger events, when the area’s resort hotels are fully occupied. Occasionally, smaller establishments such as B&Bs and guest houses are also used, but this generally tends to be something of a ‘last resort’ when preferred accommodation options are fully booked, or done on the very rare occasion that the client is operating on a tighter budget. In the main, the key considerations for conference organisers when operating in the St Andrews area tend to be availability and quality; price does not seem to be a major factor generally as clients are prepared to spend the extra money required to secure a booking in the destination.

The overall emerging picture seems to be that the existing stock of large-scale accommodation capable of hosting sizeable events and catering to guests is sufficient in terms of quality; the area’s two 5 Star international resorts are more than capable of accommodating large-scale, high profile events and generally satisfaction levels with both are high.

However, the St Andrews area is reported as sorely lacking in terms of quantity and choice of accommodation, particularly when it comes to hotels and larger establishments. Although this is not much of an issue during the low tourist season, it becomes particularly pertinent during the busy summer months, when the Old Course and Fairmont St Andrews fill up very quickly, with no options of comparable standard available. In a town which regularly hosts golfing events on a significant scale, this would appear to be an important issue.

Furthermore, while the Old Course and Fairmont St Andrews Hotels are happy to accommodate large numbers of delegates for conferences and events, they tend not to negotiate for smaller parties. This is understandable given the relative exclusivity of these hotels and the destination itself, however the overall shortage of medium and large hotels of around 4 Star standard in the area has resulted in the situation that St Andrews is not always an attractive destination for those who wish to organise any kind of event of a relatively small scale.

5.4 Golf Tour Operators

Interviews were undertaken with a number of the main Scottish specialist golf tour operators based in the St Andrews area. Operators reported that tours are undertaken almost exclusively during the 'golfing season', which is reported to run from April at the earliest to late September or early October, peaking in the summer months of July and August. This demand focus is the main contributor to the highly seasonal nature of demand experienced by the bulk of St Andrews' accommodation providers. There are no tours on any significant scale outside these months; the remainder of the year is generally spent by tour operators in preparing for the following peak season, ie arranging bookings and customising packages offered.

Operators reported that the clientele for golfing tours in the St Andrews area is predominantly from the United States, with North American business accounting for up to 95% of all golfing tours in some operators' experience. Some have office / agency representation in the United States. Other golfers come from a wide array of countries, most notably Japan, Scandinavia, South Africa, Australia and Spain.

Most of these golfers are males in the 40-70 age bracket. In general, golfers remain in the area for an average of three nights four days, before moving on to other areas of Scotland and the rest of the UK, typically as part of a 'Grand Tour' of well-known golfing destinations. These tours are generally offered by the same organisation as part of a package generally lasting around seven to eight days, and usually costing in the region of £2,200-£3,000. It is not unusual for two or even three rounds of golf to be completed each day by the keenest golfers. The appeal of St Andrews as a golfing 'mecca' should not be underestimated. For many / most keen golfers the opportunity to visit and play golf in the area is a long held ambition, even once in a lifetime proposition which sees American demand 'hold up' in St Andrews better than other areas in times of adversity.

All of the operators consulted tend to operate at the mid to high quality end of the golf market, ie catering to a relatively affluent American client base, which is generally not overly concerned about financial considerations and more likely to require good quality accommodation. Indeed, all consultees indicated that, in the main, hotel accommodation ranging from medium sized to international resort of at least a 3 Star quality standard is a minimum requirement for this client base. The most frequently mentioned hotels used by operators were as follows:

- The Old Course;
- Fairmont St Andrews Hotel;
- Hazelbank Hotel;
- Albany Hotel;
- Ardgowan Hotel;
- Rufflets Hotel;
- Rusacks Hotel;
- The Scores Hotel;
- St Andrews Golf Hotel;
- The Inn on North Street.

Some operators reported the occasional need to use local B&Bs / guest houses, especially during the peak summer months when high quality accommodation is at a premium, however it was generally stated that hotels are their clients preferred choice when available. Respondents also reported a very high level of repeat and referral business, ie clients who have visited previously or are visiting as a result of a recommendation by a friend or family member, and are thus likely to make the same choices in terms of accommodation each time. This of course has the overall effect of increasing operators' reliance on the usual options, making it potentially difficult for new entrants to the market to establish themselves.

Operators were asked about any particular issues relating to accommodation in the St Andrews area which affect their businesses in any way. Most felt that while the general quality of the hotel accommodation used meets needs and expectations of individual clients, the overall level of supply and breadth of choice is not sufficient to satisfy demand, especially during the peak season. It was noted that a significant gap exists in the pricing continuum between the area's premium hotels, such as the Old Course and Fairmont St Andrews, which command very high room tariffs and the 'budget offerings' satisfied by the B&B and guest house sector, The gap in supply is for medium to large hotels in the mid-market price range. This supply gap has been exacerbated further in recent times due to a number of owners of small hotel properties reconfiguring their properties as apartments and flats in the residential sector (taking them out of the tourism sector).

Accommodation tariffs and achieved annual room rates in the St Andrews area tend to be significantly higher than the Scottish average, and although tour operators report clients generally do not flinch at paying, it is felt that they are not receiving value for money during peak season when the best accommodation is fully booked at premium rates and those who find themselves in establishments of a lower quality that are still charging relatively high rates.

Finally, tour operators were asked to comment on overall trends which have been taking place in the St Andrews area in terms of the demand for accommodation, and any other issues of significance. All operators commented on the impact of the magnitude of depreciation of the value of the US dollar against Sterling in recent times to varying degrees; it was felt overall that because most golf tour operators consulted cater to a higher end of the market, and because many customers are fulfilling a lifelong ambition to play golf in St Andrews, expense is less of a factor than may have been anticipated in determining levels of demand. However, it was noted anecdotally that golfers are tending to spend less on ancillary items during their stay, such as golfing equipment. Only one respondent reported a significant downturn in the overall number of US clients as a direct result of the dollar's weakness against the Pound.

It is generally accepted that the year 2000 was a peak year for the golf touring business in St Andrews in terms of bookings and overall expenditure; since this time the market has been struggling to recover from the adverse effects of a series of significant national and international events, such as the September 11th 2001 terrorist attacks on the United States.

Other trends commented on were the affect of budget flights increasing levels of visitation when services are introduced in certain countries, such as one noted example of an increase in Swedish golfers as a result of a cheap service from Sweden to Prestwick Airport, as well as an overall increase in the numbers of European golfers and in the general diversity of the market.

5.5 Conclusions

The corporate demand for St Andrews accommodation is much weaker than the main towns and cities of the Central Belt, although it does benefit from conference business in the shoulder seasons, those of large-scale, attracted by the destination, and large quality resort hotels.

Those consulted during this phase of research suggested that there was a good quality product at the top end of the market, but a shortage of supply at peak times of the year and a lack of choice. There is a gap reported for a product of a 3 / 4 Star standard between the resort hotels and the guest house / B&B offerings. This is both in terms of price and quality.

The golf operators, in general, see seasonal demand from their primary targeted North American market.

6 CONCLUSION

The tourism accommodation supply for the KY16 8 and KY16 9 postcode areas of Fife are presented in the previous sections. These have been collated and analysed by category of accommodation, number of properties, room stock and bed stock. These postcodes which equate to destination St Andrews host a range of different accommodation types, although there are currently a number of categories and types of accommodation offered elsewhere which are absent from this range of accommodation types. These include: Serviced apartments; restaurant with rooms; and lodge-type accommodation.

In total there are around 280 tourism accommodation businesses in the Town and its environs. In the Serviced sector the accommodation provision in terms of operations is dominated by the B&B sector with 50 operators, over 50% of Serviced providers and guest house operators account for a further 27 units, 29% of Serviced sector businesses. Hotels combined (hotel, international resort hotel, small hotel and inn) equate to 17 operations, 18% of Serviced operations and 6% of all operations.

In the Non-Serviced sector the supply of accommodation is dominated by the self-catering category accounting for over 97% of the sector and nearly 64% overall re all operations.

Overall the St Andrews area offers in the region of nearly 1,000 Serviced bedrooms of which 680 are hotel and related type rooms. In terms of scale of bedroom stock the Non-Serviced sector offer a further 2,400 rooms in total with self-catering supply providing 1,500 of these rooms, and campus accounting for a further 871 rooms.

The University of St Andrews, similar to other Universities across Scotland, provides significant levels of stock at different times of the year, but unusually the University of St Andrews owns property which is graded by VisitScotland as hotel (one unit, 72 bedrooms) and self-catering (140 units, 700 bedrooms) as opposed to the main core campus rooms. When combined with the other campus accommodation, this influences seasonal supply with a highly fluctuating volume of supply between low and high seasons.

In St Andrews, the average grade of Serviced tourism accommodation compares well with the national average but the Non-Serviced stock averages slightly below. This may be due to the commendably high participation rates among local operators.

In summing up, the overall scale of accommodation supply (bedrooms and bed spaces) in St Andrews is fairly significant in comparison to the size of the Town. However, the availability of the majority of the stock varies significantly because of the influence University operations have over availability of student accommodation which it introduces into the commercial tourism accommodation stock at times when it is not needed for academic use.

There is also an effect among some self-catering stock which is occupied by students for the 37-week academic year and comes into the tourist market for the remaining 15 weeks.

APPENDICES

APPENDIX I

Website Directories Reviewed

MAIN DIRECTORY STYLE WEBSITES USED IN COMPILING THE DATABASE

- www.visitscotland.com
- www.holidaylets.net
- www.selfcatering-directory.co.uk
- www.standrewsbandbs.co.uk
- www.standrewsdirectory.com
- www.standrews-cottages.com
- www.standrewsopen.com
- www.roomfinderscotland.com
- www.smoothhound.co.uk
- www.yell.com
- www.undiscoveredscotland.co.uk
- www.visit-standrews.co.uk
- www.jollyinteresting.co.uk
- www.milford.co.uk
- www.theaa.com
- www.scotland2000.com
- www.cottagesandcastles.co.uk
- www.touristnetuk.com
- www.holidayhomerental.co.uk
- www.premiertravelinn.com
- www.travelodge.com
- www.landmarktrust.org.uk
- www.nts.org.uk

APPENDIX II

Tables of Comparative Accommodation Mixes in Other Areas and Cities Across Scotland

OPERATIONS / BUSINESSES ANALYSIS COMPARATIVE AREAS										
Sector / Category	St Andrews (2007)	%	Glasgow City (2005)	%	Edinburgh City (2005)	%	Urban Perth (2007)(1)	%	Rural Perthshire (2007)(1)	%
Serviced Sector										
Hotel	6	7%	61	51%	79	15%	8	20%	41	17%
International Resort Hotel	2	2%					0	0%	1	0%
Small Hotel	5	5%			32	6%	2	5%	22	9%
Guest House	27	29%	36	30%	231	43%	12	30%	53	22%
B&B	49	53%	14	12%	179	33%	16	40%	99	41%
Lodge			7	6%	9	2%	1	3%	4	2%
Inn	3	3%			4	1%	1	3%	19	8%
Restaurant with Rooms			1	1%	2	0%				
Serviced Sector Sub-Totals	**92**	**100%**	**119**	**100%**	**536**	**100%**	**40**	**100%**	**239**	**100%**
Non-Serviced Sector										
Campus	1	1%	16	13%	2	0%	0	0%	1	0%
Self-Catering	174	98%	89	70%	447	89%	3	75%	246	94%
Serviced Apartment			13	10%	24	5%	1	25%	1	0%
Timeshare							0	0%	6	2%
Hostel	1	1%	8	6%	24	5%	0	0%	4	2%
Exclusive Use	2	1%			1	0%	0	0%	1	0%
Other			1	1%	3	1%	0	0%	2	1%
Non-Serviced Sector Sub-Totals	**178**	**100%**	**127**	**100%**	**501**	**100%**	**4**	**100%**	**261**	**100%**
Holiday / Touring Park	5				3		1		15	
TOTALS	**275**		**246**		**1,040**		**45**		**515**	

Note: (1) Urban Perth and Rural Perthshire columns have been disaggregated from the study's Overall Totals in this table to provide figures for the Key Tourism Location 'Rural Perthshire', one of the six being championed by SE.

OPERATIONS / BUSINESSES ANALYSIS COMPARATIVE AREAS										
Sector / Category	**Edinburgh and Lothians (2005)**	**%**	**Grampian (2002)**	**%**	**Forth Valley (2005)**	**%**	**Royal Deeside (2005)**	**%**	**Ayrshire and Arran (2005)**	**%**
Serviced Sector										
Hotel	110	15%	91	29%	50	13%	23	23%	114	25%
International Resort Hotel									1	0%
Small Hotel	47	7%	29	9%	38	10%	9	9%	32	7%
Guest House	246	35%	43	14%	52	14%	13	13%	78	17%
B&B	285	40%	135	43%	210	56%	55	54%	206	46%
Lodge	13	2%			6	2%			4	1%
Inn	10	1%	15	5%	10	3%	1	1%	15	3%
Restaurant with Rooms	3	0%	1		6	2%	1	1%		
Serviced Sector Sub-Totals	**714**	**100%**	**314**	**100%**	**372**	**100%**	**102**	**100%**	**450**	**100%**
Non-Serviced Sector										
Campus	7	1%			1	0%			3	1%
Self-Catering	795	92%	391	97%	250	92%	291	97%	514	97%
Serviced Apartment	25	3%								
Hostel	24	3%	5	1%	9	3%	5	2%	6	1%
Exclusive Use	6	1%								
Other	6	1%	8	2%	11	4%	3	1%	6	1%
Non-Serviced Sector Sub-Totals	**863**	**100%**	**404**	**100%**	**271**	**100%**	**299**	**100%**	**529**	**100%**
Holiday / Touring Park	22		39		34		11		92	
TOTALS	**1,599**		**757**		**677**		**412**		**979**	

ROOM ANALYSIS COMPARATIVE AREAS										
Sector / Category	**St Andrews (2007)**	**%**	**Glasgow City (2005)**	**%**	**Edinburgh City (2005)**	**%**	**Urban Perth (2007)[1]**	**%**	**Rural Perthshire (2007)[1]**	**%**
Serviced Sector										
Hotel	241	25%	5,680	85%	6,591	63%	397	66%	1,450	48%
International Resort Hotel	343	36%							232	8%
Small Hotel	66	7%			438	4%	26	4%	282	9%
Guest House	156	16%	529	8%	1,640	16%	72	12%	341	11%
B&B	138	14%	44	1%	809	8%	55	9%	277	9%
Lodge			608	9%	890	9%	41	7%	300	10%
Inn	20	2%			83	1%	8	1%	115	4%
Restaurant with Rooms			12	0%	17	0%				
Serviced Sector Sub-Totals	**964**	**100%**	**6,873**	**100%**	**10,468**	**100%**	**599**	**100%**	**2,997**	**100%**
Non-Serviced Sector										
Campus	871	37%	3,123	82%	3,309	35%			45	2%
Self-Catering	1,492	63%	165	4%	5,022	53%	16	73%	1,469	61%
Serviced Apartment			226	6%	630	7%	6	27%	22	1%
Timeshare									790	33%
Hostel	8	0%	272	7%	474	5%			39	2%
Exclusive Use	14	1%			15	0%			9	0%
Other			9	0%	28	0%			18	1%
Non-Serviced Sector Sub-Totals	**2,385**	**100%**	**3,795**	**100%**	**9,478**	**100%**	**22**		**2,392**	**100%**
Holiday / Touring Park	1,269				491		50		2432	
TOTALS	**4,618**		**10,668**		**20,437**		**671**		**7,821**	

Note: (1) Urban Perth and Rural Perthshire columns have been disaggregated from the study's Overall Totals in this table to provide figures for the Key Tourism Location 'Rural Perthshire', one of the six being championed by SE.

ROOM ANALYSIS COMPARATIVE AREAS										
Sector / Category	**Edinburgh and Lothians (2005)**	**%**	**Grampian (2002)**	**%**	**Forth Valley (2005)**	**%**	**Royal Deeside (2005)**	**%**	**Ayrshire and Arran (2005)**	**%**
Serviced Sector										
Hotel	7,612	61%	1,388	60%	2,138	55%	528	63%	1,954	52%
International Resort Hotel									221	6%
Small Hotel	636	5%	248	11%	441	11%	73	9%	308	8%
Guest House	1,737	14%	243	11%	288	7%	79	9%	445	12%
B&B	1,126	9%	358	15%	653	17%	147	18%	557	15%
Lodge	1,118	9%			244	6%			155	4%
Inn	136	1%	72	3%	121	3%	5	1%	114	3%
Restaurant with Rooms	23	0%	3	0%	34	1%	2	0%		
Serviced Sector Sub-Totals	**12,388**	**100%**	**2,312**	**100%**	**3,919**	**100%**	**834**	**100%**	**3,754**	**100%**
Non-Serviced Sector										
Campus	3,550	34%			1,852	53%			298	12%
Self-Catering	5,578	54%	950	84%	1,141	33%	710	94%	1,971	81%
Serviced Apartment	634	6%								
Hostel	474	5%	22	2%	106	3%	17	2%	3	0%
Exclusive Use	81	1%								
Other	90	1%	158	14%	397	11%	30	4%	156	6%
Non-Serviced Sector Sub-Totals	**10,407**	**100%**	**1,130**	**100%**	**3,496**	**100%**	**757**	**100%**	**2,428**	**100%**
Holiday / Touring Park	2,226		2,296				998			
TOTALS	**25,021**		**5,738**		**7,415**		**2,589**		**6,182**	

SLEEPER ANALYSIS COMPARATIVE AREAS										
Sector / Category	**St Andrews (2007)**	**%**	**Glasgow City (2005)**	**%**	**Edinburgh City (2005)**	**%**	**Urban Perth (2007)(1)**	**%**	**Rural Perthshire (2007)(1)**	**%**
Serviced Sector										
Hotel	649	28%	11,563	82%	13,352	62%	838	64%	3,223	47%
International Resort Hotel	720	31%							496	7%
Small Hotel	153	7%			882	4%	56	4%	577	8%
Guest House	400	17%	980	7%	3,508	16%	161	12%	787	12%
B&B	337	15%	80	1%	1,632	8%	115	9%	633	9%
Lodge			1,455	10%	1,871	9%	128	10%	858	13%
Inn	52	2%			157	1%	15	1%	264	4%
Restaurant with Rooms			20	0%	34	0%				
Serviced Sector Sub-Totals	**2,311**	**100%**	**14,098**		**21,436**	**100%**	**1,313**	**100%**	**6,838**	**100%**
Non-Serviced Sector										
Campus	1,093	27%	3,240	67%	4,066	26%			150	3%
Self-Catering	2,916	72%	340	7%	7,356	46%	30	71%	2,948	58%
Serviced Apartment			452	9%	1,269	8%	12	29%	32	1%
Timeshare									1,590	31%
Hostel	44	1%	825	17%	3,071	19%			262	5%
Exclusive Use	21	1%			30	0%			18	0%
Other			12	0%	56	0%			60	1%
Non-Serviced Sector Sub-Totals	**4,074**	**100%**	**4,833**	**100%**	**15,848**	**100%**	**42**	**100%**	**5,060**	**100%**
Holiday / Touring Park	5,076				491		200		9,728	
TOTALS	**11,461**		**18,931**		**37,775**		**1,355**		**21,826**	

Note: (1) Urban Perth and Rural Perthshire columns have been disaggregated from the study's Overall Totals in this table to provide figures for the Key Tourism Location 'Rural Perthshire', one of the six being championed by SE.

SLEEPER ANALYSIS COMPARATIVE AREAS										
Sector / Category	**Edinburgh and Lothians (2005)**	**%**	**Grampian (2002)**	**%**	**Forth Valley (2005)**	**%**	**Royal Deeside (2005)**	**%**	**Ayrshire and Arran (2005)**	**%**
Serviced Sector										
Hotel	15,340	61%	2,790	59%	4,361	52%	1,074	62%	4,162	51%
International Resort Hotel									422	5%
Small Hotel	1,292	5%	492	10%	964	11%	164	9%	703	9%
Guest House	3,699	15%	545	11%	640	8%	174	10%	937	11%
B&B	2,038	8%	758	16%	1,440	17%	302	17%	1,199	15%
Lodge	2,327	9%			716	8%			576	7%
Inn	264	1%	161	3%	249	3%	12	1%	227	3%
Restaurant with Rooms	44	0%	6	0%	88	1%	4	0%		
Serviced Sector Sub-Totals	**25,004**	**100%**	**4,752**	**100%**	**8,458**	**100%**	**1,730**	**100%**	**8,226**	**100%**
Non-Serviced Sector										
Campus	1,105	11%			2,369	39%			339	7%
Self-Catering	4,081	41%	1,875	82%	2,469	40%	1,413	89%	4,173	84%
Serviced Apartment	1,275	13%								
Hostel	3,071	31%	130	6%	478	8%	126	8%	227	5%
Exclusive Use	155	2%								
Other	165	2%	281	12%	810	13%	57	4%	236	5%
Non-Serviced Sector Sub-Totals	**9,852**	**100%**	**2,286**	**100%**	**6,126**	**100%**	**1,596**	**100%**	**4,975**	**100%**
Holiday / Touring Park	2,226		2,296		1,989		3,326			
TOTALS	**37,082**		**9,334**		**16,573**		**6,652**		**13,201**	

APPENDIX III

VisitScotland Accommodation Categories

VISITSCOTLAND ACCOMMODATION CATEGORIES

1 Hotel

A hotel will normally have a minimum of twenty letting bedrooms, of which the majority will have en suite or private facilities. A hotel will normally have a drinks licence (may be a restricted licence) and will serve breakfast, dinner and normally lunch.

2 Small Hotel

A small hotel will normally have a maximum of twenty letting bedrooms and a minimum of six. The majority of the bedrooms will have en suite or private facilities. A small hotel will have a drinks licence (may be a restricted licence) and will serve breakfast, dinner and normally lunch. It will usually be run by the owner(s) and will reflect their style and personal input.

3 Guest House

A guest house is usually a commercial business and will normally have a minimum of four letting bedrooms, of which some will have en suite or private facilities. Breakfast will be available and evening meals may be provided.

4 Bed and Breakfast (B&B)

Accommodation offering bed and breakfast (B&B) is usually in a private house. A B&B will normally accommodate no more than six guests and may or may not serve an evening meal.

5 Inn

Bed and breakfast accommodation provided within a traditional inn or pub environment. A restaurant and bar will be open to non-residents and will provide restaurant or bar food at lunchtime and in the evening.

6 Lodge

Primarily purpose-built overnight accommodation often situated close to a major road or in a City Centre. Reception hours may be restricted and payment may be required on check in. There may be associated restaurant facilities.

7 Restaurant with Rooms

In a restaurant with rooms, the restaurant is the most significant part of the business. It is usually open to non-residents. Accommodation is available and breakfast is usually provided.

8 Campus

Campus accommodation is provided by Colleges and Universities for their students and is made available – with meals – for individuals, families or groups at certain times of the year. These typically include the main summer holiday period as well as Easter and Christmas.

9 Self-Catering

A house, cottage, apartment, chalet or similar accommodation, which is let normally on a weekly basis, though shorter stays, may be available where facilities are provided to cater for yourselves.

10 Hostel

Backpackers style accommodation provided by a private operator or non-profit making membership organisation. Normally let on a self-catering nightly basis where accommodation will often, but not exclusively, be in shared rooms. Larger hostels may also provide full catering or other extended services and facilities.

11 Holiday Park

A park which offers holiday homes and most likely touring and camping pitches.

12 Touring Park

A park which offers touring pitches and may offer camping pitches.

13 Exclusive Use Venue

Recently introduced category for venues of 4 and 5 Star quality where full service is offered on an exclusive use basis. Monarch’s House is a 2007 example in St Andrews.

APPENDIX IV

Properties Listing

PROPERTIES LISTING

Type of Operation	Property	Address	Grade 2007
Hotel	Best Western Scores Hotel	76 The Scores	3
Hotel	Greyfriars Hotel	129 North Street	AI
Hotel	New Hall – University of St Andrews	University of St Andrews, North Haugh	3
Hotel	Pilmour Hotel, The	1 Pilmour Place	1
Hotel	Rufflets Country House Hotel	Strathkinness Low Road	5
Hotel	Rusacks Hotel (Macdonald Hotels)	Pilmour Links	4
Hotel	St Andrews Golf Hotel	40 The Scores	4
International Resort Hotel	Fairmont St Andrews		5
International Resort Hotel	Old Course Hotel, Golf Resort & Spa		5
Small Hotel	Albany Hotel	56-58 North Street	3
Small Hotel	Ardgowan Hotel	2 Playfair Terrace, North Street	3
Small Hotel	Dunvegan Hotel	7 Pilmour Place, North Street	3
Small Hotel	Hazelbank Hotel	28 The Scores	3
Small Hotel	Russell Hotel	26 The Scores	3
Guest House	Aedel House	12 Murray Place	
Guest House	Amberside Guest House	4 Murray Park	3
Guest House	Annandale Guest House	23 Murray Park	3
Guest House	Arran House	5 Murray Park	3
Guest House	Aslar Guest House	120 North Street	4
Guest House	Beachway Guest House	6 Murray Park	3
Guest House	Bell Craig Guest House	8 Murray Park	3
Guest House	Brooksby House	Queen's Terrace	4
Guest House	Brownlees Guest House	7 Murray Place	4
Guest House	Burness House	1 Murray Park	4
Guest House	Cameron House	11 Murray Park	4
Guest House	Charlesworth House	9 Murray Place	3
Guest House	Cleveden House	3 Murray Place	3
Guest House	Craigmore Guest House	3 Murray Park	4
Guest House	Doune House	5 Murray Place	3
Guest House	Edenside House	Edenside	3
Guest House	Feddich Mansion Country Guest House		4
Guest House	Five Pilmour Place	5 Pilmour Place	4
Guest House	Glenderran	9 Murray Park	4
Guest House	Lorimer House	19 Murray Park	4
Guest House	Montague House	21 Murray Park	3
Guest House	Nethan House	17 Murray Park	4
Guest House	Old Station Country House, The	Stravithie Bridge	4
Guest House	Riverview Guest House	Edenside	3
Guest House	Shandon House	10 Murray Place	3
Guest House	Whitecroft Guest House	33 Strathkinness High Road	4
Guest House	Yorkston House	68-70 Argyle Street	3
B&B	11 Queens Gardens	11 Queens Gardens	4
B&B	18 Queen's Terrace	18 Queen's Terrace	4
B&B	Abbey Cottage	Abbey Walk	2
B&B	Abbeyview	18 Priestden Place	AI
B&B	Abbotsview	31 Kinkell Terrace	3
B&B	Acorn B&B	16 Priestden Road	4
B&B	Anderson House	122 Lamond Drive	3
B&B	Anlaw House	21 Nelson Street	3
B&B	Arden House	2 Kilrymont Place	3
B&B	Balrymonth B&B	6 Balrymonth Court	3
B&B	Barnhay	Kinaldy Meadows	4
B&B	Bay Trees B&B, The	21 Cant Crescent	AI
B&B	Beveridge House	25 North Street	3
B&B	Birchlea Bed & Breakfast	8 Horseleys Park	4
B&B	Bowmore	32 St Mary Street	3
B&B	Braeside House	25 Nelson Street	4
B&B	Bramley House	10 Bonfield Road	4
B&B	Cairnsden	2 King Street	2
B&B	Cambo House	Kingsbarns	4
B&B	Castlemount	2 The Scores	3
B&B	Coppercantie	8 Lawhead Road West	
B&B	Deveron House	64 North Street	
B&B	Drumcarrow Road	30 Drumcarrow Road	3
B&B	Ducks Crossing	5 Dempster Terrace	3

PROPERTIES LISTING			
Type of Operation	**Property**	**Address**	**Grade 2007**
B&B	East Lodge	Clayton	
B&B	Fairnie House	10 Abbey Street	3
B&B	Hawthorne House	33 Main Street, Radernie	4
B&B	Hillwood House	Cameron	3
B&B	Hoppity House	Market Street	3
B&B	Jules House	22 Lindsay Gardens	
B&B	Kinburn Guest House	5 Kinburn Place, Double Dykes Road	4
B&B	Kingsbarns B&B	3 Main Street, Kingsbarns	3
B&B	Kingsmuir Old Schoolhouse		
B&B	Kinkell House		
B&B	Little Carron Cottage	Little Carron Gardens	4
B&B	Millhouse	2 Cauldside Farm Steadings, Strathkinness High Road	4
B&B	Mrs Margaret Gourlay – Spinkieden	25 North Street	3
B&B	Newton of Nydie Farmhouse B&B	The High Road	3
B&B	No 1 The Grove	1 High Road	4
B&B	Old Fishergate House	North Castle Street	4
B&B	Paddock, The	Sunnyside	4
B&B	Parkway	9B Kilrymont Place	
B&B	Pitmilly West Lodge	Kingsbarns	4
B&B	Spinkstown Farmhouse		4
B&B	St Nicholas Farmhouse	The Steading, East Sands	2
B&B	Struan	20 Priestden Road	
B&B	Vardon House	22 Murray Park	3
B&B	West Park House	5 St Mary's Place	4
B&B	West Port Bar	170 South Street	AI
B&B	Westacres	2 Westacres	4
B&B	White Lodge, The	94 Hepburn Gardens	AI
Inn	1 Golf Place – Links Hotel	1 Golf Place	3
Inn	Grange Inn	Grange Road	
Inn	Inn on North Street	127 North Street	1
Campus	Andrew Melville Hall – University of St Andrews	North Haugh	
Campus	John Burnet Hall – University of St Andrews	Links Crescent	
Campus	McIntosh Hall – University of St Andrews	Abbotsford Crescent	
Campus	St Regulus Hall	Queen's Terrace	
Campus	St Salvator's Hall	North Street	
Campus	University Hall	Kennedy Gardens	
Self-Catering	1 Greenside Court	1 Greenside Court	3
Self-Catering	11 Park Gardens	11 Park Gardens	AI
Self-Catering	11 Park Street	11 Park Street	2
Self-Catering	116H Market Street	116H Market Street	
Self-Catering	12 Golf Place	12 Golf Place	
Self-Catering	12 Kinnessburn Road	12 Kinnessburn Road	1
Self-Catering	12 Langlands Road	12 Langlands Road	4
Self-Catering	12 Largo Road	12 Largo Road	3
Self-Catering	12 Logie's Lane	12 Logie's Lane	
Self-Catering	13 Hayfleming Avenue	13 Hayfleming Avenue	2
Self-Catering	143 Market Street	143 Market Street	3
Self-Catering	15 Greyfriars Gardens	15 Greyfriars Gardens	3
Self-Catering	150A North Street	150A North Street	4
Self-Catering	16 Claybraes	16 Claybraes	1
Self-Catering	16 Greenside Court	16 Greenside Court	4
Self-Catering	16 Kilrymont Road	16 Kilrymont Road	3
Self-Catering	16 Southgait Hall	118 South Street	3
Self-Catering	17 Churchill Crescent	17 Churchill Crescent	3
Self-Catering	17 Queens Gardens	17 Queens Gardens	AI
Self-Catering	18 James Robb Avenue	18 James Robb Avenue	4
Self-Catering	18 Pilmour Links	18 Pilmour Links	3
Self-Catering	18 The Scores	18 The Scores	4
Self-Catering	185 South Street	185 South Street	2
Self-Catering	19 Pilmour Links	19 Pilmour Links	3
Self-Catering	193 South Street	193 South Street	2
Self-Catering	1C, Bridge Street	1C Bridge Street	
Self-Catering	2 College St, 16 Crails Lane, 48 Hepburn	2 College St, 16 Crails Lane, 48 Hepburn	2-3
Self-Catering	2 Ellice Place	2 Ellice Place	3
Self-Catering	2 Kennedy Gardens	2 Kennedy Gardens	2
Self-Catering	2 Kidston Court	2 Kidston Court	4
Self-Catering	2 Kidston Court – Simply Letting		4

PROPERTIES LISTING			
Type of Operation	**Property**	**Address**	**Grade 2007**
Self-Catering	2 North Street	2 North Street	AI
Self-Catering	2 Radernie Place	2 Radernie Place	
Self-Catering	2 Westport Mews	2 Westport Mews	3
Self-Catering	20 College Street	20 College Street	3
Self-Catering	21 Chamberlain Street	21 Chamberlain Street	3
Self-Catering	21 Kilrymont Road	21 Kilrymont Road	
Self-Catering	22 Nelson Street	22 Nelson Street	3
Self-Catering	23 Argyle Street	23 Argyle Street	
Self-Catering	23 Greenside Court	23 Greenside Court	4
Self-Catering	23A Argyle Street	23A Argyle Street	
Self-Catering	24 Chamberlain Street	24 Chamberlain Street	AI
Self-Catering	24 Golf Place	24 Golf Place	
Self-Catering	25 City Road	25 City Road	4
Self-Catering	26 Crawford Gardens	26 Crawford Gardens	2
Self-Catering	28A Market Street	28A Market Street	3
Self-Catering	2A Alexandra Place	2A Alexandra Place	3
Self-Catering	2A College Street	2A College Street	2
Self-Catering	2B Albany Place	2B Albany Place	5
Self-Catering	2B College Street	2B College Street	3
Self-Catering	32 Nelson Street – Lynnwood Self-Catering	32 Nelson Street	
Self-Catering	33c North Castle Street	33C North Castle Street	3
Self-Catering	36 Crawford Gardens	36 Crawford Gardens	2
Self-Catering	38 Warrack Street	38 Warrack Street	4
Self-Catering	3C Gillespie Terrace	3C Gillespie Terrace	3
Self-Catering	4 & 5 Abbotsford Place (Unique Cottages)	4 & 5 Abbotsford Place	4
Self-Catering	4 Hope Street	4 Hope Street	2
Self-Catering	4 Mount Melville Crescent	4 Mount Melville Crescent	
Self-Catering	42 Pipeland Road	42 Pipeland Road	3
Self-Catering	5 Golf Place	5 Golf Place	4
Self-Catering	5 West Grange Steadings	5 West Grange Steadings	3
Self-Catering	5 West Port Court	5 West Port Court	3
Self-Catering	58 Argyle Street	58 Argyle Street	AI
Self-Catering	6 James Robb Avenue	6 James Robb Avenue	4
Self-Catering	7 Ellice Place	7 Ellice Place, 12 Largo Road	3
Self-Catering	8 Shorehead	8 Shorehead	4
Self-Catering	8B Howard Place	8B Howard Place	3
Self-Catering	90 Scooniehill Road	90 Scooniehill Road	3
Self-Catering	Anderson House	122 Lamond Drive	3
Self-Catering	Argyle House		
Self-Catering	Argyle Street	18 Argyle Street	3
Self-Catering	ASJ Properties	37 St Mary's Street	4
Self-Catering	Balfour House Apartment	34A High Road	
Self-Catering	Balkaithly Farm, Bramble Knowe		3
Self-Catering	Balmashie Holiday Cottages	Balmashie Holiday Cottages, Balmashie	4
Self-Catering	Cambo Estate Self-Catering Apartments		3
Self-Catering	Cambo Estate Self-Catering Cottages		3
Self-Catering	Carron Place	Carron Place	2
Self-Catering	Cobwebs	40 North Street	3
Self-Catering	Cottage		3
Self-Catering	Creel Cottage	1 Smiddy Burn	3
Self-Catering	David Russell Hall / Apartments, University of St Andrews	Buchanan Gardens	3
Self-Catering	Dron Court		4
Self-Catering	Flat		3
Self-Catering	Flat 1, Block 1 Southgaithall		3
Self-Catering	Flat 17 Southgait Hall		AI
Self-Catering	Flat 2		2
Self-Catering	Flat B & C, Gerrards Cross		3-4
Self-Catering	Flowers of May Cottage		3
Self-Catering	Garden Flat & 1st Floor Flat		2
Self-Catering	Garden Flat & The Coach House		2-3
Self-Catering	Gerrards Cross	Flat C	3
Self-Catering	Gerrards Cross	Flat B	3
Self-Catering	Gleniffer		2
Self-Catering	Greyfriars Garden & 17A Queens Gardens	Greyfriars Garden & 17A Queens Gardens	3
Self-Catering	Hepburn Gardens	91A Hepburn Gardens	3-4
Self-Catering	Hirsel Cottage, The	50 The Scores	3

PROPERTIES LISTING			
Type of Operation	**Property**	**Address**	**Grade 2007**
Self-Catering	Holly Cottage		
Self-Catering	Howard Place Golf Lodge	3A Howard Place	
Self-Catering	Inchdairnie Properties	50 Argyle Street	4
Self-Catering	Ivybank		2
Self-Catering	Kildonan House	4 Links Crescent	3
Self-Catering	Kilrymont		
Self-Catering	Kilrymont Road	Kilrymont Road	3
Self-Catering	Kingask Cottages – Bell Street	Bell Street	4
Self-Catering	Kingask Cottages – 3 Kennedy Gardens	3 Kennedy Gardens	4
Self-Catering	Kingask Cottages – 6 Howard Place	6 Howard Place	4
Self-Catering	Kingask Cottages – 8 Kinness Place	8 Kinness Place	4
Self-Catering	Kingask Cottages – Garden Flat, The	2b Howard Place	4
Self-Catering	Kingask Cottages – Kingask House		4
Self-Catering	Kingask Cottages – Kittocks Corner		4
Self-Catering	Kingask Cottages – Kittocks Den		4
Self-Catering	Kingask Cottages – Kittocks Muir		4
Self-Catering	Kingask Cottages – Rosebank		4
Self-Catering	Kinglassie House		4
Self-Catering	Kinnessburn Cottages	1 Kinnesburn Cottages	4
Self-Catering	Kittocks Cottage		4
Self-Catering	Lady Brand		3
Self-Catering	L'Ancresse		2
Self-Catering	Laura Hunter		2
Self-Catering	Law Park Cottage	122 Hepburn Gardens	
Self-Catering	Lawson Lets		3
Self-Catering	Learmonth Place	Learmonth Place	4
Self-Catering	Links Crescent	Links Crescent	3
Self-Catering	Linskill House		3
Self-Catering	Lock Lamond	Lamond Drive	3
Self-Catering	Longmuir House	Longmuir, by Strathkinness	
Self-Catering	Mim's Place	34 St Mary Street	
Self-Catering	Morton of Pitmilly Self-Catering Cottages		4
Self-Catering	Mr & Mrs Gray		3
Self-Catering	Mr & Mrs Overend		1
Self-Catering	Mr Angus Roger		2
Self-Catering	Mr D Rennie		3
Self-Catering	Mr D Sinclair		4
Self-Catering	Mr D Sinclair		4
Self-Catering	Mr David McGruther	41 Auld Burn Park	2
Self-Catering	Mr Huscroft	2 Chamberlain Street	2
Self-Catering	Mr Iain Johnston		3
Self-Catering	Mr Ian MacClure		2
Self-Catering	Mr Steven Scott		2
Self-Catering	Mrs A Paterson		2
Self-Catering	Mrs Cowie		2
Self-Catering	Mrs Donohoe		AI
Self-Catering	Mrs E Thomson		3
Self-Catering	Mrs Hill		2
Self-Catering	Mrs J Aitken		2
Self-Catering	Mrs J Crichton		3
Self-Catering	Mrs J Sproson		2
Self-Catering	Mrs June		2
Self-Catering	Mrs M Campbell		2
Self-Catering	Mrs M McCallum	6 Livingstone Place	3
Self-Catering	Mrs Norma Donahoe	20 Abbey Court	2
Self-Catering	Mrs Osborne		AI
Self-Catering	Mrs Patricia Simpson		2-3
Self-Catering	Mrs R Prudhoe		2
Self-Catering	Mrs Shaw	2 Kinnessburn Cottages	4
Self-Catering	Mrs Shona Grant		2
Self-Catering	Mrs Stormonth		2
Self-Catering	Ms Louise Davidson		3
Self-Catering	Ms Susan Shedden		2
Self-Catering	Ms Susan Sinclair		1-2
Self-Catering	North Street	North Street	4
Self-Catering	North Street	North Street	4
Self-Catering	Number 2 Kinaldy Farm Cottages		

PROPERTIES LISTING

Type of Operation	Property	Address	Grade 2007
Self-Catering	Other Poffle, The	Sunnyside	
Self-Catering	Park Mill Cottage & Park Mill House		2
Self-Catering	Parkview	58 St Nicholas Street	
Self-Catering	Patricia		3
Self-Catering	Poffle, The	Sunnyside	
Self-Catering	Prospect House – Elie Cottages		
Self-Catering	Rigg's End	Queen's Terrace	5
Self-Catering	Rockview	15 The Scores	3
Self-Catering	Rockview Coach House	15 The Scores	2
Self-Catering	Royal George	12 Shorehead	
Self-Catering	Rufflets Country House Hotel – Burnside Lodge	Strathkinness Low Road	
Self-Catering	Rufflets Country House Hotel – Kinness Lodge	Strathkinness Low Road	4
Self-Catering	Sandyhill Crescent Self-Catering	8 Sandyhill Crescent	AI
Self-Catering	Scribbles	40 North Street	3
Self-Catering	Southerly View	20 Queens Terrace	2
Self-Catering	Southfield	12 Southfield	
Self-Catering	St Andrews Country Cottages – Braeface & Midloan		3
Self-Catering	St Andrews Country Cottages – East o'Eden & Middlewell Cottage		4
Self-Catering	St Andrews Country Cottages – Knockhill of Nydie House		3
Self-Catering	St Andrews Country Cottages – Nydie Mains Farm		5
Self-Catering	St Andrews Country Cottages – Westrigg Cottage		3
Self-Catering	St Andrews Country Cottages – Doo' cot		5
Self-Catering	St Andrews Golfing Lodge		5
Self-Catering	St Mary's Street	St Mary's Street	4
Self-Catering	Strathkinness Lodge	Strathkinness House, Sunnyside	4
Self-Catering	Sunnybraes		3
Self-Catering	Sutherland	Mount Melville Crescent	2
Self-Catering	Sweethope Cottage		2
Self-Catering	Swilken View		4
Self-Catering	Templars		4
Self-Catering	Ten Links Crescent	10 Links Crescent	
Self-Catering	Vardon House	22 Murray Park	3
Self-Catering	Vine Leaf Restaurant, The	131 South Street	
Self-Catering	West Port Court		3
Self-Catering	Whins, The	1 Chambers Place, Melville Park	4
Self-Catering	White Lodge, The	94 Hepburn Gardens	AI
Self-Catering	Woodburn Terrace – Eastsands Holiday Letting	Woodburn Terrace	
Self-Catering	Woodland Holidays	Woodland Holidays, Kincaple	3
Self-Catering	Yeoman Properties (The Keep, Haven, Dunes)		4
Hostel	St Andrews Tourist Hostel	Inchcape House, St Mary's Place	3
Exclusive Use	Monarchs House	26 Queens Terrace	
Exclusive Use	Strathtyrum House		
Holiday Park	Cairnsmill Caravan Park	Largo Road	4
Holiday Park	Clayton Caravan Park		
Holiday Park	Craigtoun Meadows Holiday Park	Mount Melville	5
Holiday Park	Kinkell Braes Caravan Park	Kinkell Braes	3
Holiday Park	Knockhill of Nydie Camping Site	Knockhill of Nydie Lodge	AI