

Caithness & Sutherland Tourism factsheet 2005

Introduction

The counties of the Caithness and Sutherland Enterprise (CASE) area, at the far north of mainland Scotland, encompass a diverse area with many distinct communities. The unique landscape and culture of CASE are two of the area's most valuable assets. Key visitor attractions include John O'Groats, Dunrobin Castle, the Falls of Shin and Dornoch Cathedral. The area attracts a low proportion of overseas visitors with those from other parts of the UK and Scotland the main groups visiting the area.

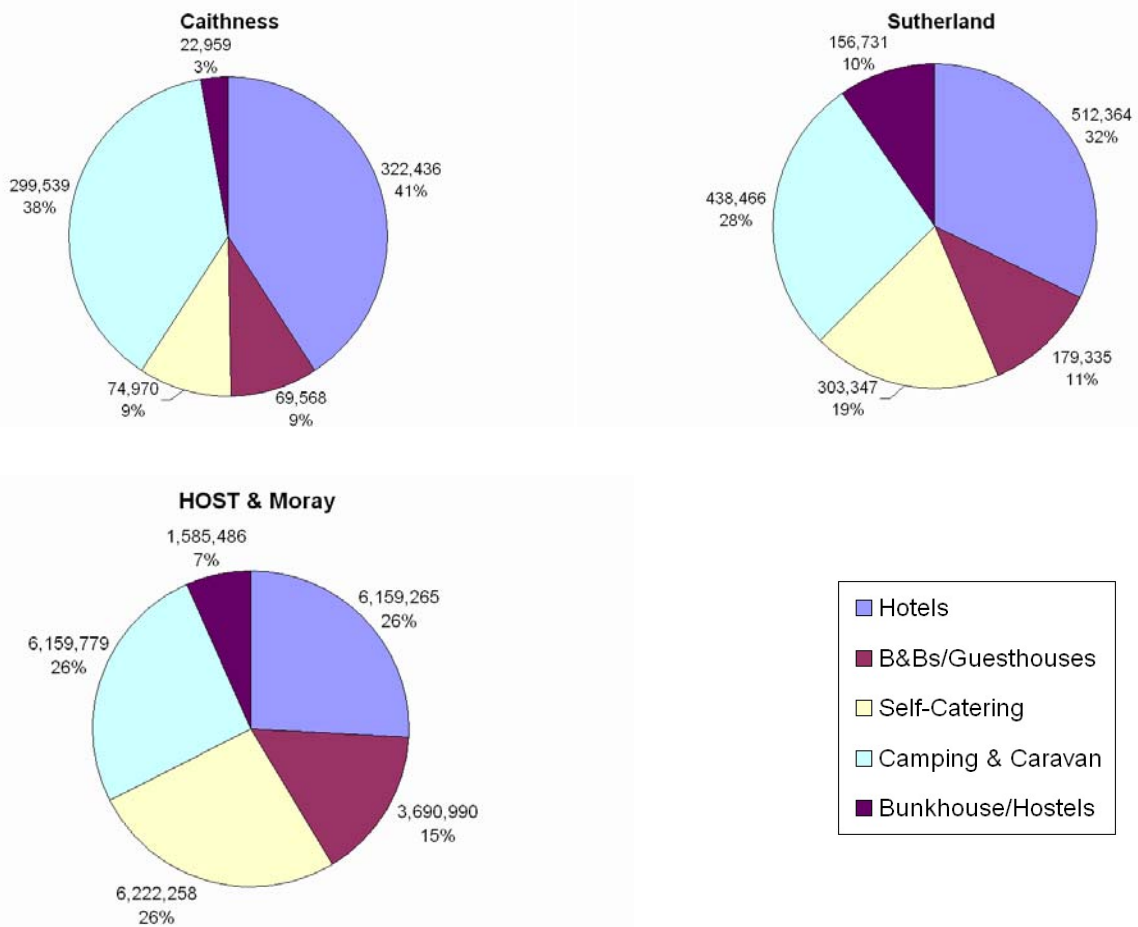
This tourism factsheet pulls together tourism information from a number of surveys for the CASE area, comparing it to information from the overall Highlands of Scotland (HOST) & Moray area. Information is included on the accommodation stock and occupancy rates in addition to the volume and value of tourism.



Accommodation availability and occupancy rates

The diagrams in figure 1 show the annual number of bedspaces along with percentage of overall bedspaces for each accommodation type in Caithness, Sutherland and the overall HOST & Moray area in 2004.

Figure 1 – Annual bedspaces in Caithness, Sutherland and the HOST & Moray area (2004)



The pie charts in Figure 1 show that in Caithness and Sutherland, the majority of bedspaces are provided by hotels (41% and 32% respectively), compared to only 26% in the HOST & Moray area. In Caithness and Sutherland there is also higher than average provision of bedspace by camping & caravanning (38% and 28% respectively), compared to 26% in the HOST & Moray area. There is a lesser proportion of bedspace provided by self-catering and B&B/guesthouse accommodation in Caithness and Sutherland compared to the HOST & Moray area.

Table 1 shows the occupancy rates in the CASE and HIE areas for different accommodation types in 2004.

Table 1 – Occupancy rates in CASE and HIE for different accommodation types (2004)

	Hotel				Self-catering		B&B and Guesthouse			
	Bed Occupancy %		Room Occupancy %		Unit Occupancy %		Bed Occupancy %		Room Occupancy %	
	CASE	HIE	CASE	HIE	CASE	HIE	CASE	HIE	CASE	HIE
January	18	22	28	31	17	17	9	11	14	15
February	26	29	37	40	14	31	7	15	12	18
March	33	37	46	44	14	28	11	15	17	21
April	40	48	51	55	54	57	24	33	29	36
May	49	52	65	65	58	60	33	48	36	53
June	54	60	70	73	70	72	40	58	48	64
July	59	66	71	76	79	83	51	65	52	68
August	61	71	74	82	80	88	56	73	57	76
September	57	59	75	72	56	70	32	50	36	56
October	40	47	54	58	50	58	17	25	19	31
November	27	28	37	39	17	27	9	14	14	18
December	19	24	25	32	14	29	9	10	14	15

Source: Scottish Accommodation Occupancy Survey 2004

The information in Table 1 shows that the occupancy rates within hotel, self-catering and B&B/guesthouse accommodation are generally lower in CASE compared to HIE in 2004. August had the highest occupancy rates across all accommodation types for both CASE (with the exception of hotel room occupancy which peaked in September) and HIE. December, January, February and March witnessed the lowest occupancy rates.

Volume and value of tourism

Table 2 shows the volume of trips and expenditure by tourists in Caithness and Sutherland in 2002/03.

Table 2: Volume of trips and expenditure in Caithness and Sutherland (2002/03)

	Caithness			Sutherland			Caithness & Sutherland		
	Number of bednights	Average spend per capita	Total expenditure (£)	Number of bednights	Average spend per capita (£)	Total expenditure (£)	Number of bednights	Average spend per capita (£)	Total expenditure (£)
Tourists staying overnight in the area									
Hotels	131,960	72.20	9,527,514	209,690	82.38	17,274,255	341,650	78.45	26,801,769
B&Bs/Guesthouses	23,617	59.63	1,408,268	60,880	81.88	4,984,851	84,497	75.66	6,393,119
Self-Catering	37,333	63.57	2,373,281	151,059	50.11	7,569,560	188,392	52.78	9,942,842
Camping & Caravan	83,786	33.53	2,809,352	122,647	40.20	4,930,392	206,433	37.49	7,739,744
Bunkhouse/ Hostels	11,306	53.34	603,067	77,183	48.52	3,744,923	88,489	49.14	4,347,990
Staying with Friends/ Relatives	48,290	27.99	1,351,635	104,201	22.72	2,367,449	152,491	24.39	3,719,084
Timeshare/ Second Home	5,906	48.16	284,431	12,744	48.16	613,752	18,650	48.16	898,183
Other	5,211	44.27	230,697	11,245	44.27	497,804	16,456	44.27	728,501
Sub-total	347,410	53.51	18,588,247	749,648	56.00	41,982,985	1,097,058	55.21	60,571,232
Day trips by tourists staying overnight away from home									
	Number of trips	Average spend per capita	Total expenditure (£)	Number of trips	Average spend per capita	Total expenditure (£)	Number of trips	Average spend per capita	Total expenditure (£)
Sub-total	61,214	14.94	914,826	97,767	14.92	1,458,216	158,981	14.93	2,373,043
Total			19,503,073			43,441,201			62,944,275

Source: Volume and Value of Tourism in the HOST/Moray Areas (2004)

The information in Table 2 shows that both the total number of bednights (749,648) and the average spend per capita (£56.00) are higher in Sutherland than in Caithness (347,410 and £53.51 respectively) for 2002/03. The highest average spend per capita is incurred by tourists staying in hotel accommodation (£72.20 in Caithness and £82.38 in Sutherland) and the lowest when tourists are staying with friends/relatives (£27.99 in Caithness and £22.72 in Sutherland). Total expenditure by tourists staying overnight in Caithness & Sutherland is estimated at £60,571,232 in 2002/03 or £62,944,275 if day trips by tourists staying overnight away from home are included.

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