

O1 – 202500453114 – Q2 – Information being disclosed

Q2. Could you supply all analysis undertaken by or for the Scottish Government about how well it has went and/or the impact it has had on businesses?

Cover sheet/ Summary page

1.	Scottish Government - Social Media Marketing Analysis 2022-23
2.	Short Term Lets Licensing – Implementation Update Report – published - Short-Term Let Licensing Implementation Update Report 2024 - gov.scot
3.	Scottish Government - Tourism Sector Briefing - November 2024
4.	Scottish Government - Short Term Lets Licensing Scheme - Tourism and Hospitality Economics Briefing – June 2024
5.	Scottish Government published impact assessments for the 2024 Scottish Statutory Instrument - The Civic Government (Scotland) Act 1982 (Licensing of Short-term Lets) (Amendment) Order 2024: Impact Assessments - Civic Government (Scotland) Act 1982 (Licensing of Short-term Lets) (Amendment) Order 2024: impact assessments - gov.scot
6.	Scottish Government Business and Regulatory Impact Assessment (BRIA) 2024 Civic Government (Scotland) Act 1982 (Licensing of Short-term Lets) (Amendment) Order 2024: business and regulatory impact assessment - gov.scot
7.	Scottish Government Business and Regulatory Impact Assessment (BRIA) 2021 Short-term lets: business and regulatory impact assessment - gov.scot
8.	Scottish Government published short-term lets licensing statistics – to 30 June 2024 – https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-30-june-2024/
9.	Scottish Government published short-term lets licensing statistics – to 31 December 2023 – https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-31-december-2023/
10.	Scottish Government published short-term lets licensing statistics – to 30 June 2023 – https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-30-june-2023/
11.	Scottish Government published short-term lets licensing statistics – 31 March 2023 https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-31-march-2023/
12.	Scottish Government - Overview of short-term lets sector and wider tourism sector - 27 June 2023



Short-term Lets

Social media analysis report

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Short-term Lets

An analysis of all mentions on the topic of the new short-term lets
licensing scheme in Scotland

1 September 2022 – 25 January 2023

Short-term Lets

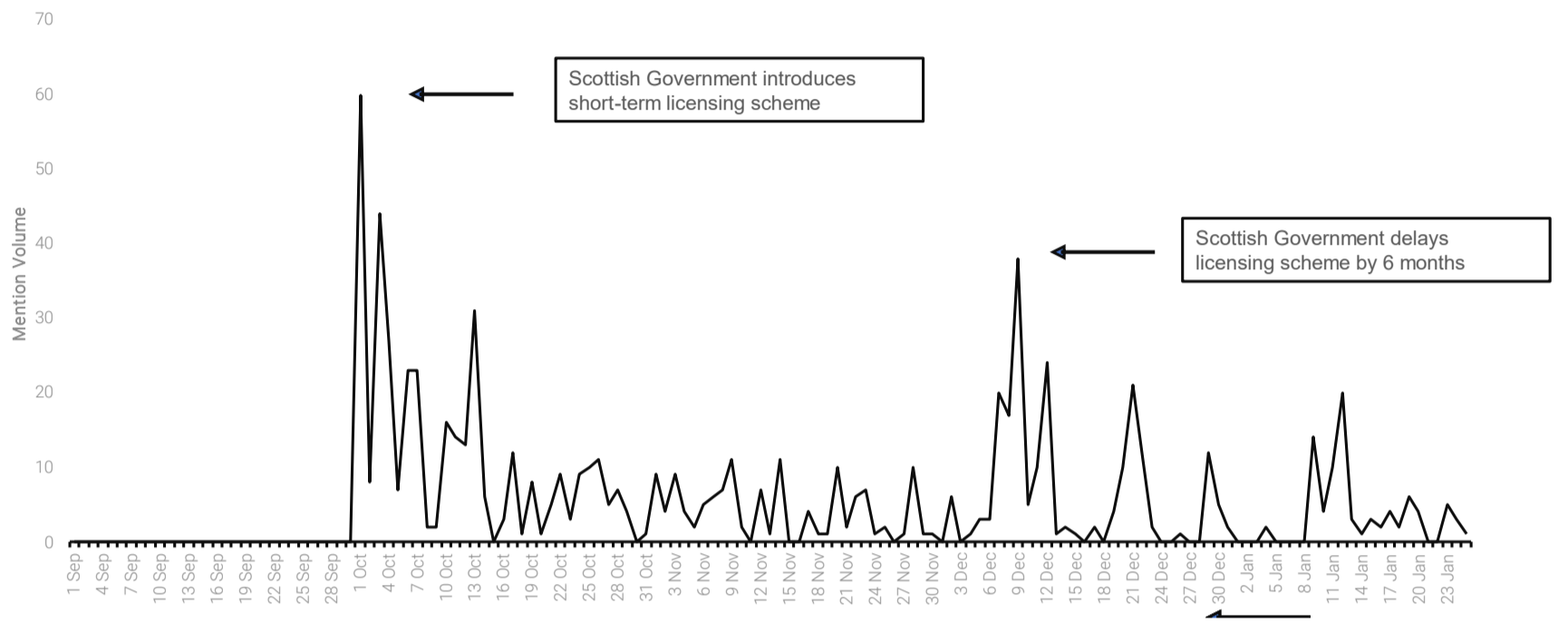
Using social media monitoring tool Brandwatch, we have analysed 776 mentions from a range of sources on the topic of the new short-term lets licensing scheme in Scotland.

All mentions are from public accounts from 1 September 2022 until 25 January 2023.

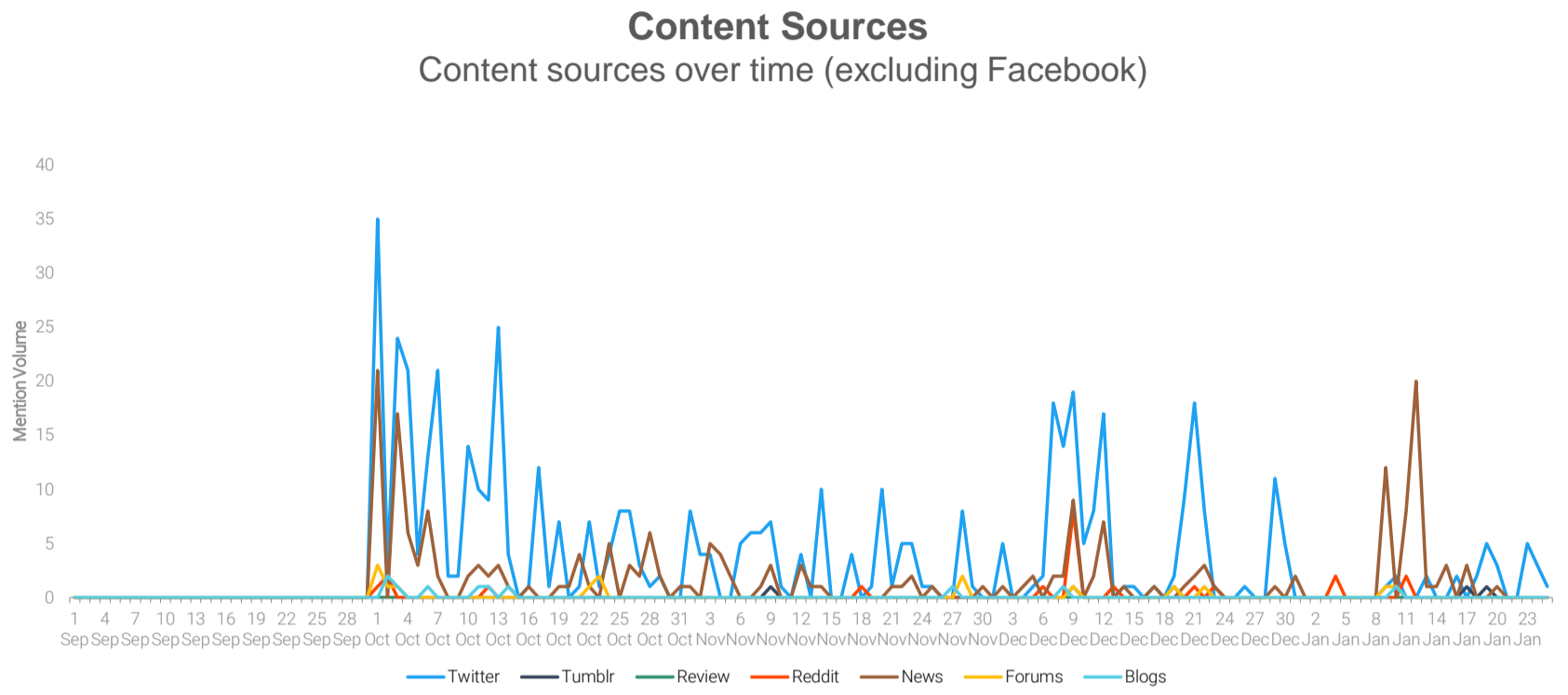
Content sources include Twitter, Blogs, News, Forums, Reddit and Facebook (owned-accounts).

The peak on 1 October was due to the short-term lets licensing scheme coming into effect that day

Volume History
Mention volume over time

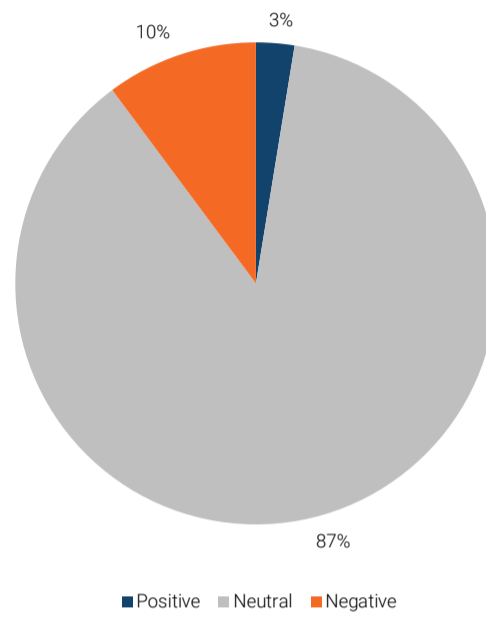


Twitter is the main way that people engaged on the new short-term lets licensing scheme, followed by News sources



The majority of the sentiment towards the short-term lets licensing scheme is neutral, however, around one in ten is negative

Volume History – Sentiment
Mention volume for days broken down by sentiment



*Please note that the use of negative language, even if what's being said is positive, is classified as negative sentiment.

Scottish Government's tweets on this topic had the furthest reach

Top Tweets Ranked by Reach

Author	Volume of Tweets	Twitter Followers	Reach
Scotgov	3	436931	42828
BBCScotland	2	594523	37176
Edinburgh_CC	8	134994	22205
heraldscotland	2	122224	18892
ScotNational	1	130273	18541
Glasgow_Times	2	92271	16272
UKHofficial	1	31365	14134
nlcpeople	1	46548	13348
bellacaledonia	1	62794	13092
In2townmagazine	1	59666	12782

The majority of tweets linked to the Scottish Government's marketing campaign page, followed by Edinburgh City Council's consultation hub

Top stories
Sorted by Impressions

Top Stories	Tweets	Retweets	All Tweets	Impressions
shorttermlets.campaign.gov...	10	37	47	1625450
consultationhub.edinburgh.g...	9	38	47	1154479
bbc.co.uk/news/uk-scotland-...	1	1	2	595991
bbc.co.uk/news/uk-scotland-...	1	1	2	589064
heraldscotland.com/news/230...	2	1	3	245378
visitscotland.org/supportin...	4	5	9	204068
glasgowtimes.co.uk/news/sco...	2	1	3	186061
thenational.scot/news/23007...	2	1	3	136683
edinburghnews.scotsman.com/...	1	15	16	83047
west-dunbarton.gov.uk/busin...	5	2	7	59893

Mention list

Top mentions Ranked by Reach



scotgov (Scottish Government) @scotgov | 6th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info see <https://t.co/G0rxEsSPPk> <https://t.co/QGY2ikhV2K>



scotgov (Scottish Government) @scotgov | 25th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more information visit <https://t.co/G0rxEsSPPk> <https://t.co/VGIYGU1V1K>



scotgov (Scottish Government) @scotgov | 13th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info visit <https://t.co/G0rxEtaqGS> <https://t.co/eT3nBVJFEO>



BBCScotlandNews (BBC Scotland News) @BBCScotlandNews | 9th Dec 2022
Six month delay to Scottish short-term lets licensing scheme <https://t.co/AocnuPdSSJ>



BBCScotlandNews (BBC Scotland News) @BBCScotlandNews | 1st Oct 2022
Licensing scheme for short-term lets comes into effect across Scotland <https://t.co/LfWQqAbpb>



ASSCnews (ASSC News) @ASSCnews | 7th Dec 2022
!!As a result of persistent pressure from the ASSC & industry partners, the ASSC has received official notification from the Scottish Government announcing that short-term let licensing has been delayed by 6 months. @st_alliance...



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 9th Nov 2022
Come along to our drop-in session today (9 Nov) on proposed new planning guidance for short term lets as Edinburgh is now a control area - 1-4.30pm - Waverley Court, 4 East Market Street. We'll answer your questions + you can have your...



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 22nd Oct 2022
Scottish Government approved Edinburgh's short-term let control area. This means if you offer a flat or a house that is not the home you live in for a short-term let you'll need planning permission. Give your views on the proposed...



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 7th Nov 2022
Come along to our drop-in session on proposed new planning guidance for short term lets as Edinburgh is now a control area. 1-4.30pm, 9 November Waverley Court, 4 East Market Street We'll answer your questions + you can have your say....



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 6th Nov 2022
Come along to our drop-in session on proposed new planning guidance for short term lets as Edinburgh is now a control area. 1-4.30pm, 9 November Waverley Court, 4 East Market Street We'll answer your questions + you can have your say....

Mention list

Top mentions Ranked by Reach



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 1st Nov 2022
 Come along to our drop-in session on proposed new planning guidance for short term lets as Edinburgh is now a control area. 1-4.30pm, 9 November Waverley Court, 4 East Market Street We'll answer your questions + you can have your say....



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 24th Oct 2022
 Scottish Government approved Edinburgh's short-term let control area. This means if you offer a flat or a house that is not the home you live in for a short-term let you'll need planning permission. Give your views on the proposed...



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 23rd Nov 2022
 Scottish Government approved Edinburgh's short-term let control area. This means if you offer a flat or a house that is not the home you live in for a short-term let you'll need planning permission. Give your views on the proposed...



Edinburgh_CC (The City of Edinburgh Council) @Edinburgh_CC | 8th Nov 2022
 Come along to our drop-in session tomorrow (9 Nov) on proposed new planning guidance for short term lets as Edinburgh is now a control area - 1- 4.30pm - Waverley Court, 4 East Market Street. We'll answer your questions + you can have...



heraldscotland (The Herald) @heraldscotland | 1st Oct 2022
 The move has proven controversial in the tourism industry
<https://t.co/l0mGoXrN0D>



heraldscotland (The Herald) @heraldscotland | 1st Oct 2022
 The scheme means the owner of any Airbnb-style, short-term let must possess a licence by April 1 of next year <https://t.co/l0mGoXrN0D>



ScotNational (The National) @ScotNational | 1st Oct 2022
 Short-term let operators have been given until April 1 to apply for licences <https://t.co/OZDZ9SCruN>



The Scottish Government facebook.com | 13th Oct 2022
The new licensing scheme for short-term lets is now open. If you are a host of a short-term let in Scotland, you can now apply for a licence. All existing hosts must apply by 1 April 2023 and all new hosts must obtain a licence before...

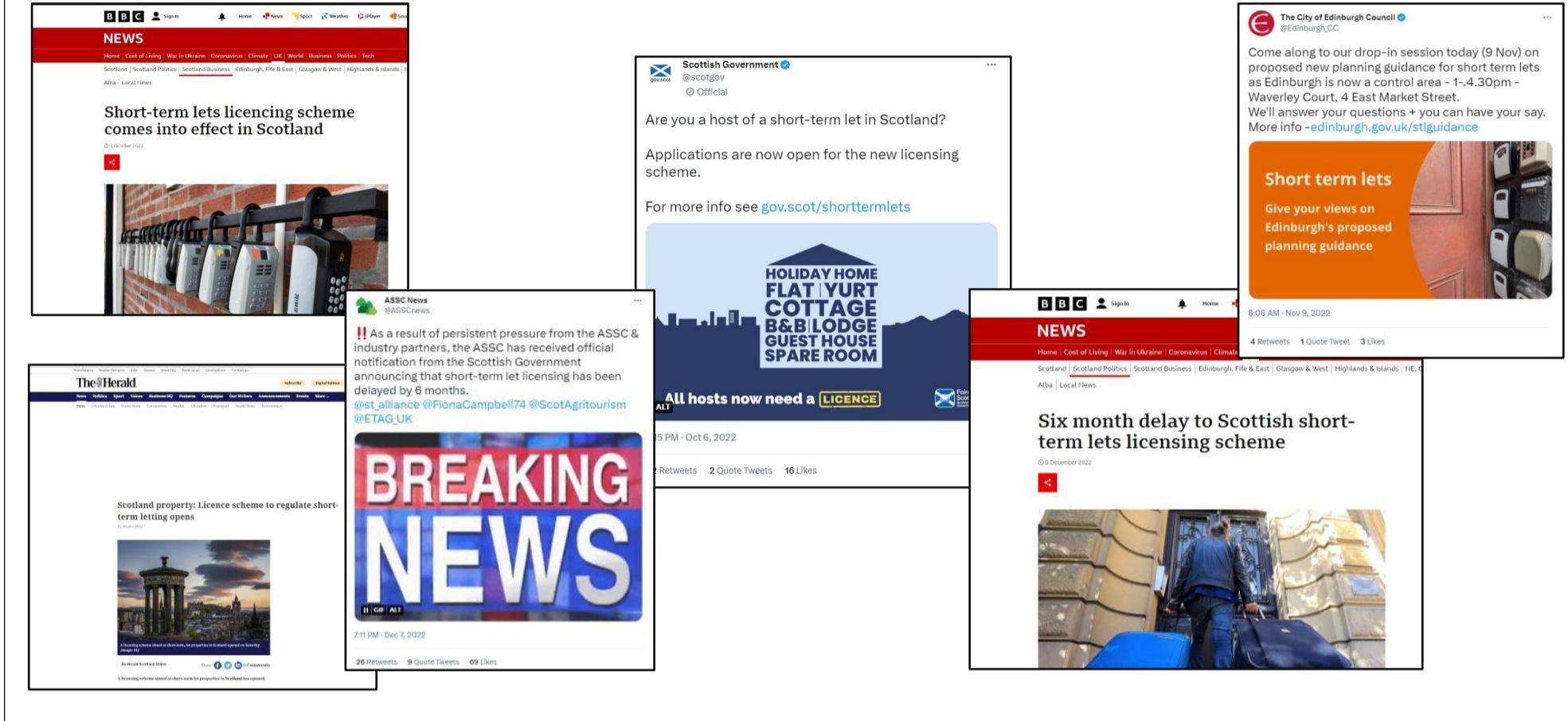


PLACEEdinburgh (PLACE, Edinburgh) @PLACEEdinburgh | 29th Dec 2022
 Imagine how many of these children could have lived in the properties used by tourists, where residential homes are used solely as short term lets in #Edinburgh, outwith the law. Edinburgh homelessness: 2,265 children in temporary...



Glasgow_Times (Glasgow Times) @Glasgow_Times | 1st Oct 2022
 A licensing scheme aimed at short-term let properties in Scotland has opened. <https://t.co/hfz4RoHHeq>

Examples of the top mentions



Comments

[Redacted]

[Redacted] - Is breaking news one a negative mention?

27 January 2023, 16:03

Scottish Government Social Media Channels

An analysis of Scottish Government's posts on Twitter, Facebook and Instagram on the topic of the new short-term lets licensing scheme in Scotland.

1 September 2022 – 25 January 2023

Main Scottish Government Facebook



All Scottish Government Facebook Posts Ranked by Reach

Facebook	Likes	Comments	Shares	Reach
Post 1 13 October	196	140	106	18080
Post 2 6 October	209	106	92	15120
Post 3 25 October	147	74	36	10020

Fairer Scotland Facebook



All Fairer Scotland Facebook Posts
Ranked by Reach

Facebook	Likes	Comments	Shares	Reach
Post 1 3 October	0	0	9	180
Post 2 16 October	0	0	0	0

Main Scottish Government Twitter



All Scottish Government Tweets Ranked by Reach

Twitter	Retweets	Replies	Reach
Post 1 6 October	14	4	43984
Post 2 25 October	12	6	43961
Post 3 13 October	9	4	40541

Main Scottish Government Instagram



All Scottish Government Instagram Posts Ranked by Reach

Instagram	Likes	Comments	Reach
Post 1 13 October	166	6	4199
Post 2 25 October	132	2	3094

Scottish Government Marketing Campaign

An analysis of mentions relating to the Scottish Government's marketing campaign on the topic of the new short-term lets licensing scheme in Scotland.

1 October – 22 October 2022

Marketing campaign overview

50
mentions

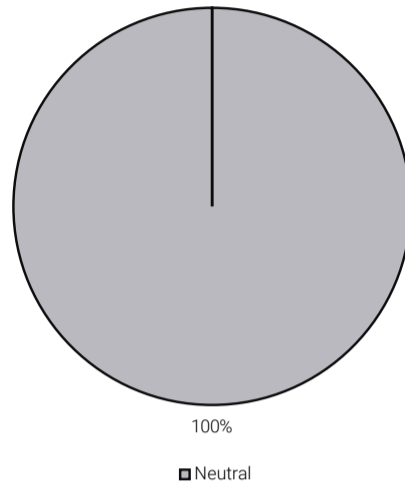
32
retweets

251.13k
reach

1.46m
impressions

All of the sentiment towards the short-term lets licensing scheme campaign is neutral. Most of the mentions are (re)tweets from stakeholders (e.g. councils)

Volume History – Sentiment
Mention volume for days broken down by sentiment



*Please note that the use of negative language, even if what's being said is positive, is classified as negative sentiment.

Top mentions – ranked by reach (1)



scotgov (Scottish Government) @scotgov | 6th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info see <https://t.co/G0rxEsSPPk> <https://t.co/QGY2ikhV2K>



scotgov (Scottish Government) @scotgov | 13th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info visit <https://t.co/G0rxEtaqGS> <https://t.co/eT3nBVJFEO>



The Scottish Government facebook.com | 13th Oct 2022
The new licensing scheme for short-term lets is now open. If you are a host of a short-term let in Scotland, you can now apply for a licence. All existing hosts must apply by 1 April 2023 and all new hosts must obtain a licence before...



The Scottish Government facebook.com | 6th Oct 2022
The new licensing scheme for short-term lets is now open. If you are a host of a short-term let in Scotland, you can now apply for a licence. All existing hosts must apply by 1 April 2023 and all new hosts must obtain a licence before...



VisitScotland News (VisitScotland News) @VisitScotlandNews | 10th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info see: <https://t.co/Nrox9GpylW> <https://t.co/lxAnjqUEJP>



VisitScotland News (VisitScotland News) @VisitScotlandNews | 13th Oct 2022
Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info <https://t.co/Nrox9GpylW> <https://t.co/ZVM98AG5XO>



VisitScotland News (VisitScotland News) @VisitScotlandNews | 17th Oct 2022
Are you a host of a short-term let in Scotland? Learn more about the new licensing scheme, applying for a licence and answers to frequently asked questions on our website <https://t.co/qv5D6nusI5> <https://t.co/7Sp0VHWHm>



VisitScotland News (VisitScotland News) @VisitScotlandNews | 7th Oct 2022
RT @scotgov Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info see <https://t.co/G0rxEsSPPk> <https://t.co/QGY2ikhV2K>



Angus Council (Angus Council) @AngusCouncil | 17th Oct 2022
RT: BusinessAngus: Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. Existing hosts must apply by 1 April 2023, and new hosts must obtain a licence before they can accept bookings....



ArgylSeaGlass (ArgylSeaGlass) @ArgylSeaGlass | 6th Oct 2022
RT @scotgov Are you a host of a short-term let in Scotland? Applications are now open for the new licensing scheme. For more info see <https://t.co/G0rxEsSPPk> <https://t.co/QGY2ikhV2K>

Mike - ArgylSeaGlass (Mike - ArgylSeaGlass)

Top mentions – ranked by reach (2)



EastAyrshire (East Ayrshire) @EastAyrshire | 14th Oct 2022
RT @scotgov Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. For more info visit <https://t.co/G0rxEtaqGS> <https://t.co/eT3nBVJFEO>



EastAyrshire (East Ayrshire) @EastAyrshire | 10th Oct 2022
RT @scotgov Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. For more info see <https://t.co/G0rxEsSPPk> <https://t.co/QGY2ikhV2K>



AngusCouncil (Angus Council) @AngusCouncil | 11th Oct 2022
RT: BusinessAngus: Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. Existing hosts must apply by 1 April 2023, and new hosts must obtain a licence before they can accept bookings....



WDCouncil (West Dunbartonshire Council) @WDCouncil | 19th Oct 2022
Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. To apply for a licence or for further information visit ; <https://t.co/uUJ9kTAaOb> <https://t.co/HbN8g6d114>



WDCouncil (West Dunbartonshire Council) @WDCouncil | 7th Oct 2022
Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. To apply for a licence or for further information visit ; <https://t.co/uUJ9kTizpB> <https://t.co/cpt31ep7y9>



OrkneyCouncil (Orkney Islands Council) @OrkneyCouncil | 3rd Oct 2022
Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. For more info see: <https://t.co/pzg1ZpcKt> <https://t.co/kPB6FKXEA>



scotgov instagram.com | 13th Oct 2022
The new licensing scheme for short-term lets is now open. If you are a host of a short-term let in Scotland, you can now apply for a licence. All existing hosts must apply by 1 April 2023 and all new hosts must obtain a licence before...



BusinessAngus (Invest in Angus) @BusinessAngus | 6th Oct 2022
Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. Existing hosts must apply by 1 April 2023, and new hosts must obtain a licence before they can accept bookings. See...



ETAG_UK (Edinburgh Tourism Action Group (ETAG)) @ETAG_UK | 7th Oct 2022
RT @scotgov Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. For more info see <https://t.co/G0rxEsSPPk> <https://t.co/QGY2ikhV2K>



k107radio (K107 FM) @k107radio | 16th Oct 2022
Are you a host of a short -term let in Scotland? Applications are now open for the new licensing scheme. For more info see: <https://t.co/Jd8jetFah> <https://t.co/J4w3Y1F8pp>

Item 2

[Short-Term Let Licensing Implementation Update Report 2024 - gov.scot](#)

Short-term lets in Scotland

Summary

- The number of short-term lets (STLs) in Scotland has fallen slightly (by 1 - 2%) from the prior year. This is in contrast to trends in GB/UK as a whole where the number of STLs has increased over the year.
- Edinburgh and Glasgow account for the vast majority of the fall in the number of STLs from the prior year which is to be expected given Edinburgh's designation as an STL control area and the existing planning policies in place in Glasgow to manage the overprovision of short-term lets.
- Demand for STLs, in terms of the number of nights reserved, is down from the prior year in Scotland, in contrast to GB as a whole where the demand is in-line with the prior year.
- STL occupancy rates are broadly in line with the prior year and occupancy is higher in Scotland than in GB as a whole .
- While STL rates have risen more sharply in Scotland than in GB as a whole in the last year, rates in Scotland remain lower than in GB indicating Scotland is more price competitive.

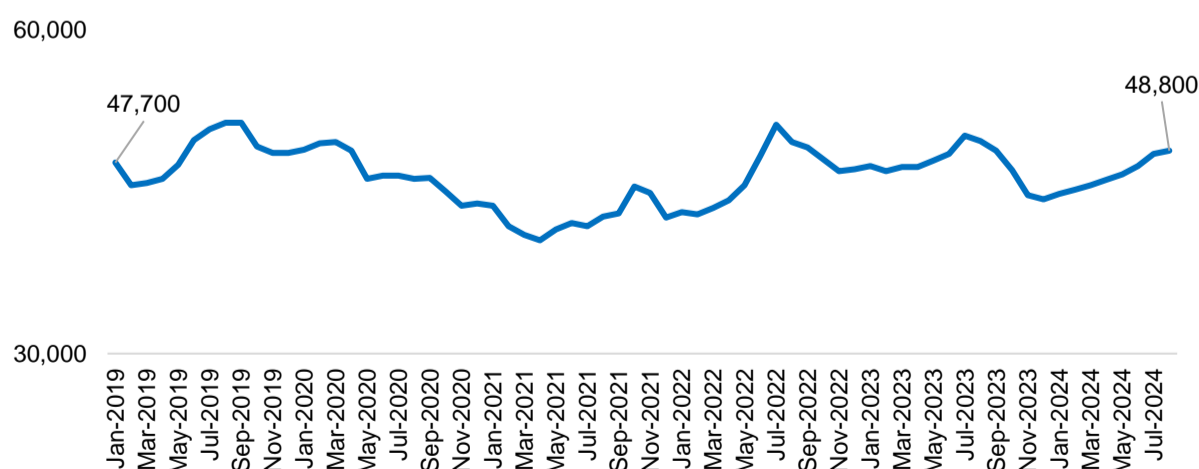
1. Context

- While it is useful to monitor trends in the short-term lets (STL) sector, it is too early to assess any impact of the STL licensing scheme given the short period of time the scheme has been in place.
- It is also important to consider the trends seen in the context of the performance of the wider tourism sector and broader macroeconomic trends.
- The tourism sector has faced significant challenges in recent years as a result of Brexit, the pandemic and the cost crisis. While there are encouraging signs of in terms output and overseas visit numbers, domestic visit numbers are down and the sector continues to be more impacted than average by rising costs which is affecting business viability and pushing up prices. A period of high inflation and continued high interest rates are suppressing households' disposable income, impacting on household trip intentions and spending patterns.

2. Number of short-term lets in Scotland

- There is currently no single definitive source of data on the number of STLs. A range of sources, which differ in methodology and coverage, can therefore be used to provide insight on the size of the sector.
- **Lighthouse data, published by VisitBritain:**
- Data from Lighthouse, published by VisitBritain, provides monthly estimates of the number of listings on four major online platforms (Airbnb, Booking.com, Vrbo and Trip Advisor). The listings data is deduplicated and therefore the source provides an estimate of the number of unique STLs listings.
- It is estimated that there were 48,800 unique STL listings in Scotland in August 2024, accounting for 10% of the UK's STL listings.
- The number of STL listings in Scotland was 2% lower than in the prior year (August 2023) and 5% lower than in 2019, prior to the pandemic. The fall in the number of listings from the prior year was primarily driven by falls in Edinburgh and Glasgow. This is to be expected given Edinburgh's designation as an STL control area and the existing planning policies in place in Glasgow to manage the overprovision of short-term lets.
- In contrast, the number of STL listings in the UK as a whole in August 2024 (471,300) was 11% higher than in the prior year (August 2023) and 33% higher than in 2019.
- City of Edinburgh had the highest proportion (16%) of all STL listings in Scotland by local administrative unit (LAU), followed by Glasgow City (7%).
- The data demonstrates the continued concentration of STLs in Scotland in a small number of areas with eight of Scotland's 41 local administrative units (LAUs) (Edinburgh, Glasgow, Inverness and Nairn, Fife, Dumfries and Galloway, Argyll and Bute Mainland, Perth and Kinross, and Skye and Lochalsh) accounting for over half (55%) of all STL listings in August 2024, with Edinburgh alone accounting for 15%.

Number of unique STL listings, Scotland, Jan 2019-Aug 2024



Short-term lets through online collaborative platforms, Office for National Statistics

- Data from the Office for National Statistics (ONS) provides monthly estimates of the number of STL hosts and listings on three major online platforms (Airbnb, Booking.com and Expedia Group) for 2023 – data for prior years is not yet available. The number of hosts differs to the number of listings as one host may have more than one listing. This data is aggregated across

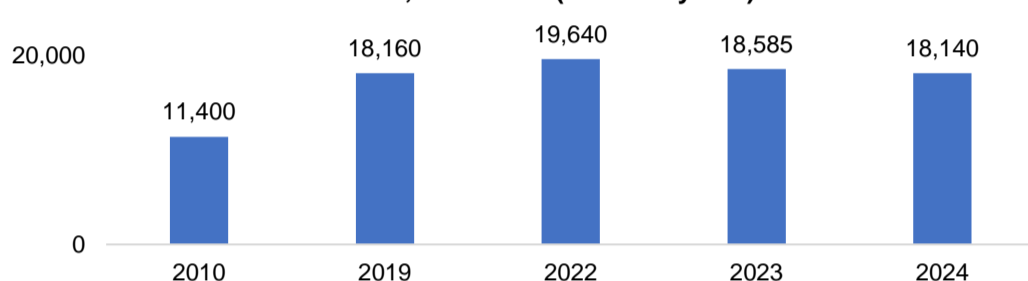
providers so there may be duplication if a host advertises listings on more than one site so the data should be seen as an upper bound and the number of unique hosts may be much lower.

- The latest available data estimates there were 37,200 STL hosts and 64,500 listings across the three platforms in Scotland in December 2023, accounting for 10% of both hosts and listings across the UK as a whole.
- Compared to January 2023, when the data series began, the number of STL hosts in Scotland was up 2% but the number of listings was down by 1%. The fall in the number of listings in Scotland was primarily driven by falls in Edinburgh and Glasgow.
- In comparison, across the UK as a whole, the number of STL hosts (358,900) and listings (625,300) in December 2023 were up 24% and 16% respectively compared to January 2023.
- As with the Lighthouse data, the ONS data demonstrates the concentration of hosts and listings in a small number of areas in Scotland, with eight LAUs accounting for over half (58%) of both hosts and listings in December 2023, with Edinburgh alone accounting for 23% of hosts and 19% of listings.

Non-domestic Rates Valuation Roll, Scottish Government

- Data from the non-domestic rates (NDR) valuation roll provides only a partial picture, capturing only STL businesses that are registered for NDR and excluding those that operate out of premises registered for council tax.
- As of 1st October 2024, there were 18,100 self-catering and B&B/guesthouse properties registered on the NDR roll in Scotland, 2% lower than in the prior year (October 2023), broadly in line with 2019 (0.1% lower) but 59% higher than in 2010.
- The highest proportion of all properties on the NDR roll in Scotland by local authority area (LAA) was Highland (28%) followed by Argyll & Bute (12%).

Number of self-catering properties on the NDR roll as of October, Scotland, 2010-2024 (selected years)



3. Short term let licensing statistics

- The latest Short-term Let Licensing Statistics show that at the end of December 2023, there were at least 23,576 applications comprising 14,539 validated applications across all 32 local authorities and at least an additional 9,000 unvalidated applications across the 23 authorities who supplied data.
- It is important to note that:
 - these statistics do not include all applications received in this period as local authorities are not required to provide data on incomplete applications or those not yet reviewed however, some authorities voluntarily provided this information
 - the number of licensing applications does not equal the number of STL accommodation units/listings as one licensing application may cover more than one STL listing (e.g. separate bookable rooms within one property or separate lodges within a field). The number of applications will therefore be lower than the number of STL units/listings.

4. Number of nights and stays in short-term lets

- The latest data from Lighthouse, which provides monthly estimates of the number of nights reserved on four major online platforms (Airbnb, Booking.com, Vrbo and Trip Advisor). estimates there were 664,000 nights reserved in STLs in Scotland in September 2024, accounting for 10% of all nights reserved across the UK as a whole. The number of nights reserved in STLs in Scotland in September 2024 was down 10% from the prior year but up 3% from 2019 (pre-pandemic). In contrast, the number of nights reserved across GB as a whole was in-line with the prior year and up 43% from 2019.
- The latest data from ONS, which provides data on the number of short term let stays and nights in the UK offered via three of the major online platforms (Airbnb, Booking.com and Expedia), showed that there were 210,000 stays in Scotland from October to December 2023 with guests staying for 708,000 nights. The data series began in Q3 2023 so no comparisons can be made between years. Of the 210,000 stays in Scotland, 130,000 were domestic, and 80,000 were non-domestic. Edinburgh had the highest proportion (35%) of all stays in Scotland by LAU, followed by Glasgow (8%).

5. Short term lets occupancy rates

- The latest data from VisitScotland's Scottish Accommodation Occupancy Survey estimates the occupancy rate for self-catering accommodation in Scotland was 59% in August 2024, broadly in line with the prior year (58%).
- Data from Lighthouse estimates the average STL occupancy rate in Scotland in September 2024 was 56%, down 1 percentage point from the prior year but up 2 percentage points from 2019 (pre-pandemic). The average occupancy rate in Scotland was higher than in GB as a whole, where it stood at 46%, down 4 percentage points from the prior year and down 6 percentage points from 2019.

6. Short term lets average daily rates

- Data from Lighthouse suggests the average daily rate (ADR) for STLs in Scotland is lower than in the UK as a whole, indicating Scotland is more competitive on price, but that Scotland has seen a marginally higher increase in the ADR from the prior year.
- The latest available data shows that in August 2024 the ADR in STLs in Scotland was £265, up 24% (in nominal terms) from the prior year and up 90% from 2019. In GB as a whole, the ADR in August 2024 was higher at £284, but the increases from the prior year and from 2019 were marginally lower at 18% and 83% respectively (in nominal terms).

Item 4 - Scottish Government - Short Term Lets Licensing Scheme - Tourism and Hospitality Economics Briefing – June 2024

Please see Attachment A

Item 5

Civic Government (Scotland) Act 1982 (Licensing of Short-term Lets) (Amendment) Order 2024: business and regulatory impact assessment - [The Civic Government \(Scotland\) Act 1982 \(Licensing of Short-term Lets\) \(Amendment\) Order 2024: Impact Assessments - Civic Government \(Scotland\) Act 1982 \(Licensing of Short-term Lets\) \(Amendment\) Order 2024: impact assessments - gov.scot](#)

Item 6

Business and Regulatory Impact Assessment (BRIA) 2024 [Civic Government \(Scotland\) Act 1982 \(Licensing of Short-term Lets\) \(Amendment\) Order 2024: business and regulatory impact assessment - gov.scot](#)

Item 7

Business and Regulatory Impact Assessment (BRIA) 2021 [Short-term lets: business and regulatory impact assessment - gov.scot](#)

Item 8

Published short-term lets licensing statistics – to 30 June 2024 –
<https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-30-june-2024/>

Item 9

Published short-term lets licensing statistics – to 31 December 2023 –
<https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-31-december-2023/>

Item 10

Published short-term lets licensing statistics – to 30 June 2023 –
<https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-30-june-2023/>

Item 11

Published short-term lets licensing statistics – to 31 March 2023 –
<https://www.gov.scot/publications/short-term-lets-licensing-statistics-scotland-to-31-march-2023/>

Item 12 - Overview of short-term lets sector and wider tourism sector - 27 June 2023

Please see Attachment B