Scottish Accommodation Occupancy Survey

Annual Report 2020

Silver Sands Camping and Caravan Holiday Park
Image credit Kenny Lam/VisitScotland

Acknowledgements

The authors would like to acknowledge the support and assistance of the representatives and operators in the accommodation sector who submitted data to the Scottish Accommodation Occupancy Survey, without whose contribution this publication would not have been possible.

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List of Figures

1 Executive Summary 2020

The year 2020 saw the advent of a global pandemic and Coronavirus impacted negatively not only on Scottish tourism but on tourism worldwide. The medical emergency and attempts to control infection rates have precipitated the potential for an economic recession in many parts of the world. In Scotland, accommodation performance was decimated across all sectors. At the start of the year, the occupancy achieved largely equalled or exceeded performance in 2019. However, on the 23rd of March 2020, following the implementation of a 'Lockdown' to control infection rates the vast majority of UK tourism businesses were negatively impacted. It is noted that some operators remained closed for much of the remainder of 2020, which impacted on occupancy and rates achieved as well as survey participation.

The gradual easing of trading restrictions following the March lockdown saw at least partial reopening of the tourism and hospitality sector. The Phase 3 easing of lockdown started on the 15th of July, although some self-catering facilities were able to open from the 29th of June. On the 2nd of November 2020, the Scottish Government introduced the COVID-19 Protection Levels which further negatively impacted the accommodation industry. Furthermore, on the 26th of December, all of mainland Scotland entered Level 4 lockdown, islands moved into Level 3, except for Skye, which moved to Level 4.

The partial reopening did little to improve the performance of Scottish Cities and the downturn in the Meetings, Incentives, Conference and Events (MICE) sector along with the significant downturn in office and business occupancy saw demand continue to shrink in urban centres. In leisure terms, it was rural, highland, and coastal areas that experienced the most significant levels of demand. The majority of Scottish islands faced the further challenge of the requirement for social distancing on ferry crossings reducing transit capacity and demand accordingly.

The year 2020 has been the most challenging time for tourism and accommodation operators in decades. Many have been left in extreme uncertainty about their business future, with some ceasing to operate. The long-term impact of the pandemic on Scottish accommodation and tourism is less clear, although the sustained appeal of rural, highland, and coastal parts of Scotland is evidenced in reservations. International travel restrictions and uncertainty about the speed of vaccination rates in many overseas destinations suggests domestic demand will continue to be the primary source of income for accommodation operators as UK residents are unable or unwilling to holiday internationally. The slow recovery of urban tourism, the MICE sector, Night-time Economy and the decline of high street retail and hospitality have created a hugely challenging environment for Scottish cities. Furthermore, the struggle to control Covid-19 and related variants have somewhat overshadowed Brexit impacts which will also exert strong influences on international tourism to Scotland and Scottish residents ease and willingness to holiday internationally.

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2 Methodology

The Moffat Centre began managing VisitScotland's Scottish Accommodation Occupancy Survey in December 2016.

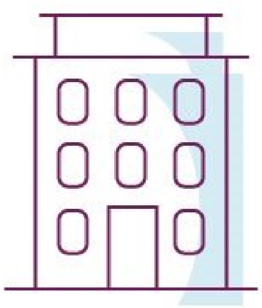
In respect of the 2020 survey, initial emails were circulated to all accommodation providers from February 2020 requesting January data. Accompanying this email were detailed instructions on submitting data onto the RIBOS platform. At the same time, telephone enquiries were answered, and participants offered assistance with navigating RIBOS. A reminder email was circulated 2 weeks later, with telephone chase ups beginning at the same time.

This data capture process was repeated each month to the following accommodation sectors: Serviced, Self-Catering, Touring and Hostels.

Data was collated via RIBOS, the online web platform; by email via excel/word documents and by telephone. Several intermediaries were used to provide Self-Catering accommodation data.

3 Highlights

Serviced Accommodation



All Serviced accommodation experienced a significant reduction in room occupancy, down 42.29 percentage points (pp) when comparing 2020 with 2019. Hotel room occupancy saw a 42.22 pp decrease when comparing 2020 with 2019. In 2020, Hotel room occupancy reached a peak in August at 53%, compared with a peak of 86% at the same time in 2019.

In 2020, the average peak tariff amongst participating hotels was £137.08, whilst the off-peak average tariff was £131.83. In 2019, the average peak tariff amongst participating hotels was £143.18, whilst the off-peak average tariff was £133.70. In 2020, 99.4% of all participating Hotels had their own website, with the majority also listing on TripAdvisor (84.3%).

Guest House, B&B room occupancy decreased by 37pp when comparing 2020 with 2019. In 2020, Guest House, B&B room occupancy peaked in August at 39%, compared with a peak of 70% at the same time in 2019.

In 2020, the average peak tariff amongst participating Guest House, B&B accommodation was £52.06 per person per night. In 2019, the average peak tariff amongst participating Guest House, B&B accommodation was £55.52 per person per night.

Self-Catering Accommodation

Self-Catering unit occupancy experienced a decrease of 27.09pp when comparing 2020 with 2019. In 2020, Self-Catering unit occupancy peaked in January at 47%, whilst in 2019; unit occupancy peaked at 55% in both January and February.

In 2020, 99% of all participating Self-Catering accommodation providers had their own website. Just under three quarters had a Facebook page and just under 60% were listed on Trip Advisor

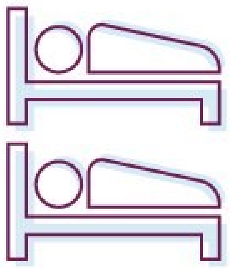
Touring Accommodation

Touring Accommodation experienced a reduction in Net Pitch Occupancy of 10.75pp when comparing 2020 with 2019.

In 2020, Direct booking methods were cited as most popular by 96% of Touring accommodation providers. ‘Other’ booking methods (51%) and ‘Walk in’ (22%) were less popular when booking touring pitches in 2020.

In 2020, 96% of all participating Touring accommodation providers had their own website. Just three quarters had a Facebook page.

Hostel Accommodation



Hostel accommodation suffered a decrease of 39.60pp in bed occupancy when comparing 2020 with 2019. In 2020, Hostel occupancy peaked in January at 31%, whilst in 2019 Hostel occupancy peaked in July at 78%.

Some 78% of all participating Hostel accommodation providers had their own website. Just over a fifth of Hostel accommodation providers also utilised Facebook and Trip Advisor (21%) with just over 15% using Twitter to promote their accommodation.

Impact of Covid-19: Time Frame

The table below illustrate the key dates and events related to Covid-19 which impacted Scotland's accommodation providers in 2020.

Table 1 **Covid-19 travel 4411200 00001200200restrictions in Scotland**

<table>
<tr><th>Month</th><th>January</th><th>February</th><th>March</th><th>April</th><th>May</th><th>June</th><th>July</th><th>August</th><th>September</th><th>October</th><th>November</th><th>December</th></tr>
<tr><td>Domestic (UK) travel</td><td colspan="2">Operating as normal (off-peak)</td><td colspan="4">UK wide “Lockdown” and “Stay at home” measures in place from 24/03/20 – severely limited domestic travel</td><td colspan="4">Domestic travel within Scotland permitted – no household mixing</td><td colspan="2">New local authority protection measures come in to force – limited movement between local authorities</td></tr>
<tr><td>International travel</td><td colspan="2">Reduced international travel as COVID-19 spreads internationally</td><td colspan="10">WHO declares COVID-19 pandemic - severely limited international travel globally</td></tr>
</table>

More detail on specific restrictions and wider context can be found in the [Timeline of Coronavirus (COVID-19) in Scotland – SPICe Spotlight | Solas air SPICe (spice-spotlight.scot)](spice-spotlight.scot).

4 Serviced Accommodation

4.1. Hotels

4.1.1. % Room Occupancy

Table 2 **Hotel % Room Occupancy Analysis 2020/2019**

Room Occupancy	2020	2019	20/19 Diff[1]
Hotel	24.22%	66.51%	-42.29pp
Former VisitScotland Area			
Aberdeen & Grampian	27.73%	56.46%	-28.73pp
ALLFV	44.22%	74.45%	-30.23pp
Angus & City of Dundee	27.48%	70.47%	-42.99pp
Ayrshire & Arran	17.23%	72.65%	-55.42pp
Dumfries & Galloway	32.95%	56.03%	-23.08pp
Edinburgh & Lothians	13.87%	74.26%	-60.39pp
Greater Glasgow & Clyde Valley	20.31%	78.92%	-58.61pp
Highlands of Scotland	31.99%	69.71%	-37.72pp
Kingdom of Fife	25.05%	58.81%	-33.76pp
Orkney	33.09%	67.08%	-33.99pp
Outer Hebrides	33.39%	69.45%	-36.06pp
Perthshire	38.27%	66.02%	-27.75pp
Scottish Borders	26.58%	56.70%	-30.12pp
Shetland Islands	*	*	*
Location			
Coastal	24.34%	60.72%	-36.38pp
Inland	29.41%	73.19%	-43.78pp
Island	32.96%	68.52%	-35.56pp
Tariff			
£30 - £39.99	*	56.19%	-56.19pp
£30 - £39.99	39.42%	65.47%	-26.05pp
£40 - £49.99	27.69%	49.47%	-21.78pp

Room Occupancy	2020	2019	20/19 Diff[1]
£50 - £59.99	44.54%	70.28%	-25.74pp
£60 - £69.99	23.62%	55.10%	-31.48pp
£70 +	27.18%	72.29%	-45.11pp
Size			
1 to 3	*	3.81%	-3.81pp
4 to 10	21.07%	52.68%	-31.61pp
11 to 25	27.33%	57.36%	-30.03pp
26 to 50	48.88%	78.39%	-29.51pp
51 to 100	24.66%	74.35%	-49.69pp
Over 100	18.90%	74.36%	-55.46pp
Urban/Rural			
Large Urban Areas	15.90%	75.55%	-59.65pp
Other Urban Areas	28.81%	68.74%	-39.93pp
Accessible Small Towns	54.41%	81.98%	-27.57pp
Remote Small Towns	35.15%	58.53%	-23.38pp
Accessible Rural	32.86%	65.67%	-32.81pp
Remote Rural	28.11%	58.66%	-30.55pp
Grading			
1 Stars	-	-	-
2 Stars	28.31%	61.64%	-33.33pp
3 Stars	29.17%	64.98%	-35.81pp
4 Stars	27.93%	76.90%	-48.97pp
5 Stars	18.28%	75.75%	-57.47pp
Unclassified	36.07%	64.61%	-28.54pp

[1] 20/19 Diff throughout this report is expressed by % Point Change

4.1.2. % Bed Occupancy

Table 3 Hotel % Bed Occupancy Analysis 2020/2019

Bed Occupancy	2020	2019	20/19 Diff
Hotel	15.37%	52.94%	-37.57pp
Former VisitScotland Area			
Aberdeen & Grampian	13.41%	33.01%	-19.60pp
ALLFV	22.21%	50.32%	-28.11pp
Angus & City of Dundee	25.62%	49.43%	-23.81pp
Ayrshire & Arran	15.13%	54.23%	-39.10pp
Dumfries & Galloway	8.22%	42.76%	-34.54pp
Edinburgh & Lothians	7.06%	58.13%	-51.07pp
Greater Glasgow & Clyde Valley	14.86%	57.83%	-42.97pp
Highlands of Scotland	26.84%	57.90%	-31.06pp
Kingdom of Fife	25.29%	52.64%	-27.35pp
Orkney	17.76%	48.21%	-30.45pp
Outer Hebrides	25.22%	53.96%	-28.74pp
Perthshire	8.75%	59.26%	-50.51pp
Scottish Borders	18.56%	43.78%	-25.22pp
Shetland Islands	*	*	*
Location			
Coastal	18.39%	45.67%	-27.28pp
Inland	13.95%	55.20%	-41.25pp
Island	25.25%	59.80%	-34.55pp
Tariff			
£20 - £29.99	*	38.14%	-38.14pp
£30 - £39.99	24.18%	47.98%	-23.80pp
£40 - £49.99	17.80%	34.55%	-16.75pp
£50 - £59.99	10.10%	61.53%	-51.43pp
£60 - £69.99	16.02%	38.06%	-22.04pp
£70 +	17.05%	54.08%	-37.03pp

Bed Occupancy	2020	2019	20/19 Diff
Size			
1 to 3	*	3.83%	-3.83pp
4 to 10	12.05%	33.58%	-21.53pp
11 to 25	17.70%	47.25%	-29.55pp
26 to 50	15.97%	57.60%	-41.63pp
51 to 100	19.48%	60.24%	-40.76pp
Over 100	12.39%	55.50%	-43.11pp
Urban/Rural			
Large Urban Areas	10.42%	57.15%	-46.73pp
Other Urban Areas	20.09%	56.81%	-36.72pp
Accessible Small Towns	9.37%	56.75%	-47.38pp
Remote Small Towns	25.02%	45.18%	-20.16pp
Accessible Rural	25.83%	51.61%	-25.78pp
Remote Rural	19.30%	45.83%	-26.53pp
Grading			
1 Stars	-	-	-
2 Stars	21.76%	50.87%	-29.11pp
3 Stars	21.56%	51.94%	-30.38pp
4 Stars	10.45%	58.02%	-47.57pp
5 Stars	16.99%	58.55%	-41.56pp
Unclassified	18.81%	36.23%	-17.42pp

* Sample size too small to be included

4.1.3. Hotel Monthly Distribution by % Occupancy 2020/2019

In April, May and June 2020 during the initial lockdown occupancy was less than 1%, with a gradual increase in July as the lockdown was being relaxed with it reaching a peak in August at 53.3% before dropping dramatically again when the Covid-19 Level system as introduced.
In 2019, Hotel room occupancy reached a peak in August at 86.2%, whilst maintaining a room occupancy rate of over 80% between May and September.

Table 4 **Monthly Distribution by % Room Occupancy 2020/2019**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	52.5	44.1	35.4	0.3	0.7	1.0	14.9	53.3	52.9	38.4	26.0	19.4
2019	47.6	58.3	63.3	70.5	80.6	83.6	82.8	86.2	82.4	72.2	61.0	54.4

Table 5 **Monthly Distribution by % Bed Occupancy 2020/2019**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	34.0	35.7	27.1	0.1	0.3	0.4	10.2	40.7	38.4	9.1	17.1	12.1
2019	31.9	38.1	41.6	53.7	60.9	64.3	66.4	70.4	64.0	55.1	45.2	44.5

Figure 1 **Hotel Monthly Distribution by % Room Occupancy 2020/2019**

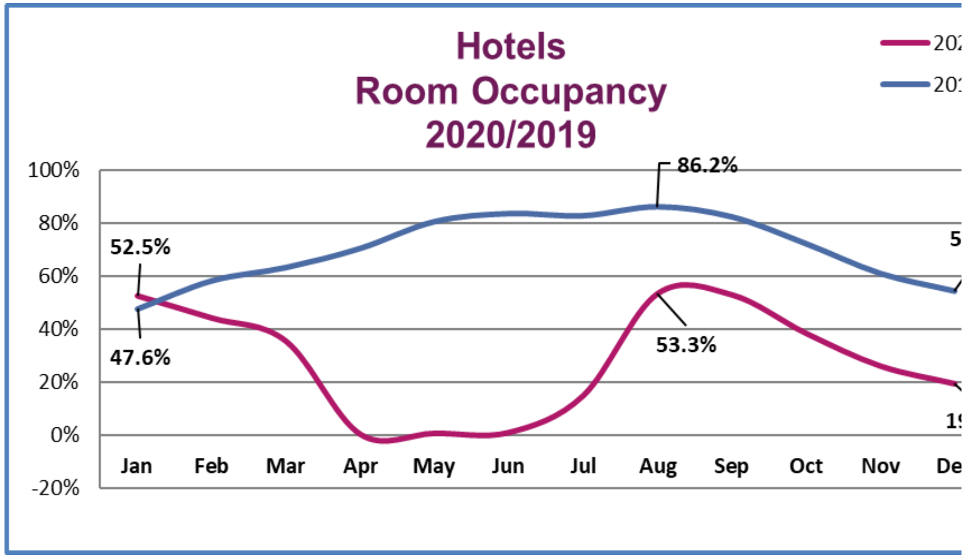
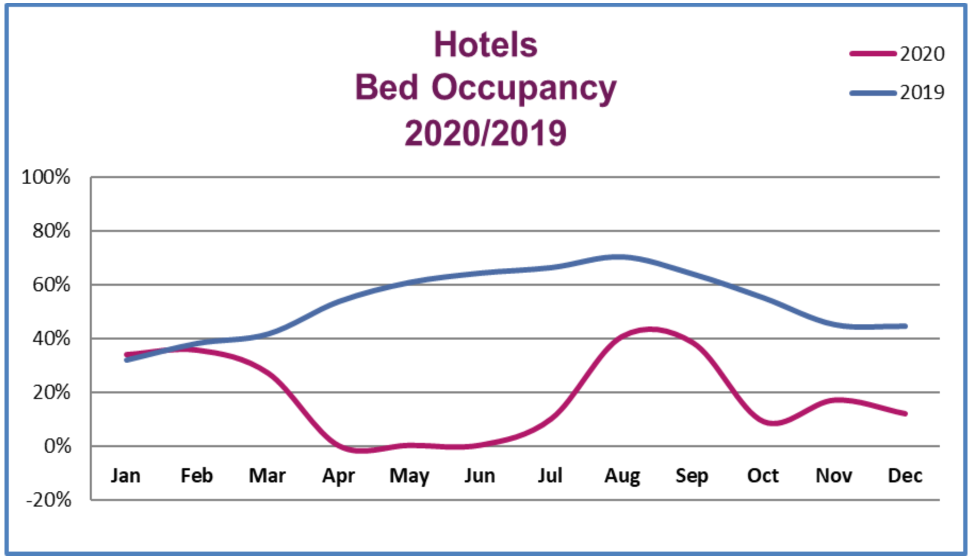


Figure 2 **Hotel Monthly Distribution by % Bed Occupancy 2020/2019**



4.1.4. Hotel Rev Par 2020/2019

In 2020, average peak Rev Par was £101.36, achieved in September 2020, compared with an average peak Rev Par of £168.78, achieved in June 2019.

In 2020, the average peak tariff amongst participating hotels was £137.08, whilst the off-peak average tariff was £131.83. In 2019, the average peak tariff amongst participating hotels was £143.18, whilst the off-peak average tariff was £133.70.

Figure 3 **Hotel Rev Par 2020/2019**

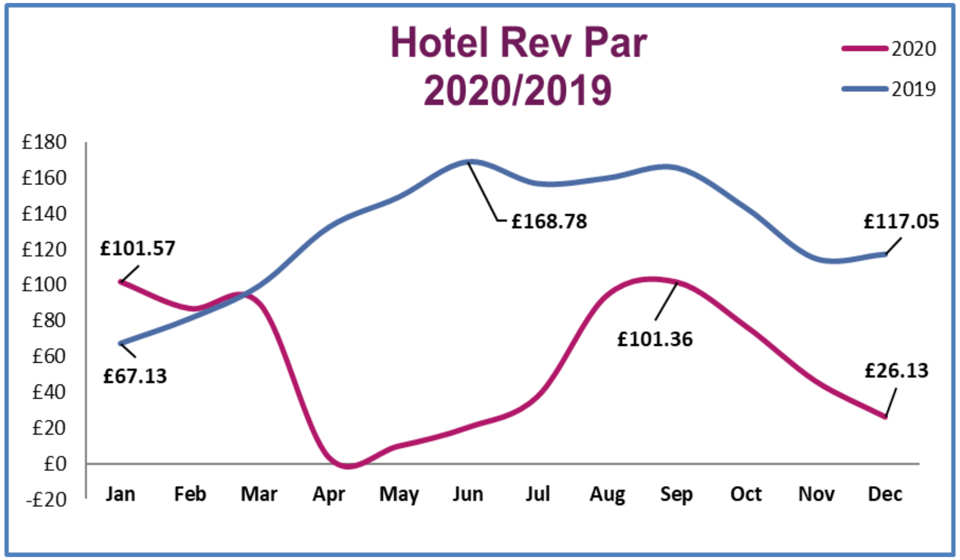
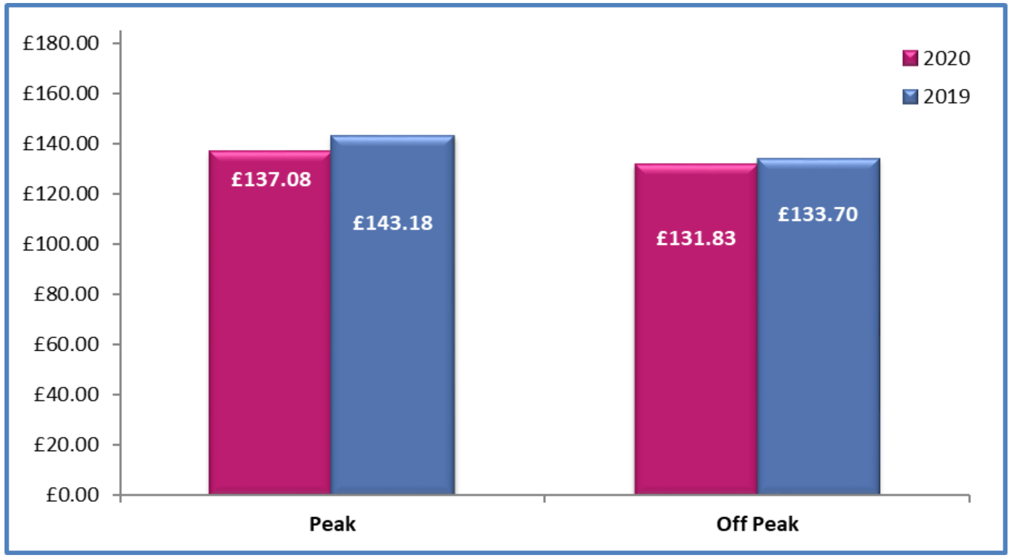


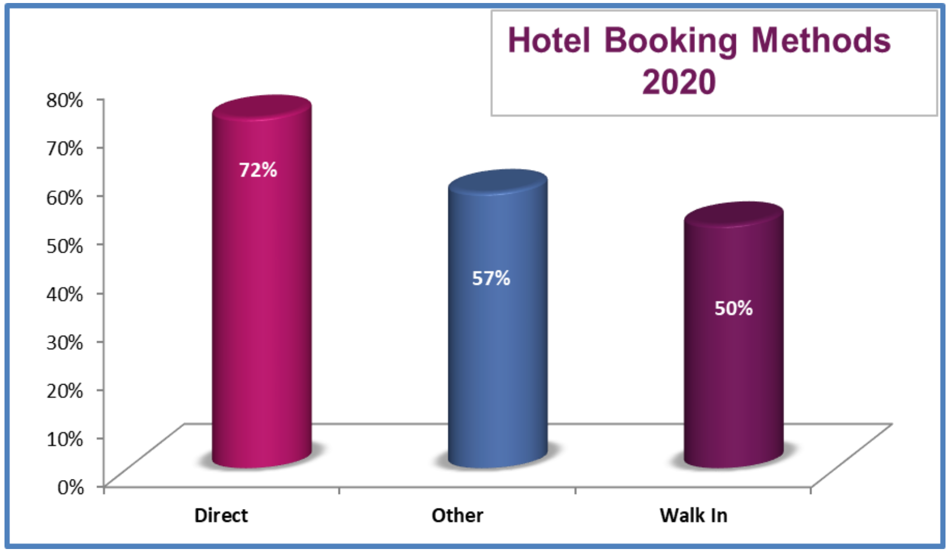
Figure 4 **Hotel Peak/Off-Peak Tariffs 2020/2019**



4.1.5. Hotel Booking Methods 2020

In 2020, the most popular booking method was directly with Hotel accommodation, followed by 'other', which includes booking sites, such as Booking.com; expedia, laterooms.com and agents. Half of all participating hotels welcomed 'walk-in' guests.

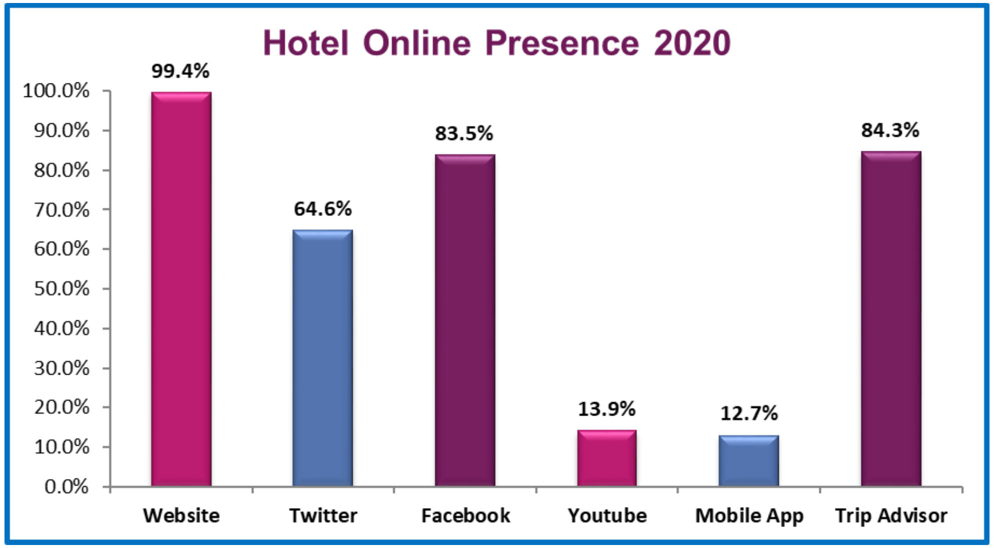
Figure 5 **Hotel Booking Methods 2020**



4.1.6. Hotel Online Presence 2020

In 2020, 99.4% of all participating Hotels had their own website, with the majority also listing on Trip Advisor (84%). Facebook was popular in 2020 with 84% having their own page to promote their accommodation. YouTube was only used by 14% of Hotels respectively in 2020.

Figure 6 **Hotel Online Presence 2020**



4.2. Guest House, B&B

4.2.1. % Room Occupancy

Table 6 **Guest House, B&B % Room Occupancy Analysis 2020/2019**

Room Occupancy	2020	2019	20/19 Diff
	13.04%	50.04%	-37.00pp
Former VisitScotland Area			
Aberdeen & Grampian	-	2.38%	-2.38pp
ALLFV	9.95%	51.55%	-41.60pp
Angus & City of Dundee	16.32%	29.67%	-13.35pp
Ayrshire & Arran	4.85%	33.79%	-28.94pp
Dumfries & Galloway	19.61%	51.44%	-31.83pp
Edinburgh & Lothians	19.03%	82.07%	-63.04pp
Greater Glasgow & Clyde Valley	17.19%	26.52%	-9.33pp
Highlands of Scotland	15.59%	44.07%	-28.48pp
Kingdom of Fife	-	-	-
Orkney	10.77%	50.18%	-39.41pp
Outer Hebrides	9.43%	39.24%	-29.81pp
Perthshire	4.16%	39.29%	-35.13pp
Scottish Borders	-	4.84%	-4.84pp
Shetland Islands	-	49.09%	-49.09pp
Location			
Coastal	10.31%	39.41%	-29.10pp
Inland	15.01%	55.45%	-40.44pp
Island	7.99%	50.87%	-42.88pp
Tariff			
£20 - £29.99	-	23.60%	-23.60pp
£30 - £39.99	4.74%	43.98%	-39.24pp
£40 - £49.99	17.45%	49.96%	-32.51pp
£50 - £59.99	26.81%	46.46%	-19.65pp
Tariff (Cont.)			
£60 - £69.99	11.81%	59.60%	-47.79pp
£70 +	10.31%	54.07%	-43.76pp
Size			
1 to 3	6.35%	34.21%	-27.86pp
4 to 10	18.66%	54.37%	-35.71pp
11 to 25	12.20%	87.93%	-75.73pp
26 to 50	-	-	-
51 to 100	-	-	-
Over 100	-	-	-
Urban/Rural			
Large Urban Areas	20.18%	70.86%	-50.68pp
Other Urban Areas	9.75%	63.22%	-53.47pp
Accessible Small Towns	9.66%	43.93%	-34.27pp
Remote Small Towns	19.89%	54.65%	-34.76pp
Accessible Rural	11.77%	26.24%	-14.47pp
Remote Rural	8.67%	36.07%	-27.40pp
Grading			
1 Star	-	-	-
2 Stars	-	-	-
3 Stars	13.41%	47.96%	-34.55pp
4 Stars	13.61%	46.94%	-33.33pp
5 Stars	11.59%	31.63%	-20.04pp
Unclassified	11.86%	35.57%	-23.71pp

4.2.2. % Bed Occupancy

Table 7 **Guest House, B&B % Bed Occupancy Comparative Analysis 2020/2019**

Bed Occupancy	2020	2019	20/19 Diff
	10.24%	42.21%	-31.97pp
Former VisitScotland Area			
Aberdeen & Grampian	-	2.38%	-2.38pp
ALLFV	7.17%	42.19%	-35.02pp
Angus & City of Dundee	10.83%	24.53%	-13.70pp
Ayrshire & Arran	4.30%	25.94%	-21.64pp
Dumfries & Galloway	14.75%	40.85%	-26.10pp
Edinburgh & Lothians	16.59%	74.67%	-58.08pp
Greater Glasgow & Clyde	9.11%	16.63%	-7.52pp
Highlands of Scotland	13.98%	37.15%	-23.17pp
Kingdom of Fife	-	-	-
Orkney	9.99%	42.01%	-32.02pp
Outer Hebrides	6.35%	29.68%	-23.33pp
Perthshire	2.65%	27.86%	-25.21pp
Scottish Borders	-	3.23%	-3.23pp
Shetland Islands	-	31.25%	-31.25pp
Location			
Coastal	8.01%	30.15%	-22.14pp
Inland	11.63%	48.52%	-36.89pp
Island	7.67%	40.27%	-32.60pp
Tariff			
£20 - £29.99	-	23.60%	-23.60pp
£30 - £39.99	2.85%	36.68%	-33.83pp
£40 - £49.99	13.11%	39.75%	-26.64pp
£50 - £59.99	22.10%	39.28%	-17.18pp

Bed Occupancy	2020	2019	20/19 Diff
£60 - £69.99	8.81%	49.62%	-40.81pp
£70 +	8.49%	47.45%	-38.96pp
Size			
1 to 3	4.41%	26.65%	-22.24pp
4 to 10	14.73%	44.83%	-30.10pp
11 to 25	11.55%	80.83%	-69.28pp
26 to 50	-	-	-
51 to 100	-	-	-
Over 100	-	-	-
Urban/Rural			
Large Urban Areas	15.28%	65.28%	-50.00pp
Other Urban Areas	7.21%	51.71%	-44.50pp
Accessible Small Towns	7.67%	33.17%	-25.50pp
Remote Small Towns	16.70%	44.09%	-27.39pp
Accessible Rural	6.80%	21.22%	-14.42pp
Remote Rural	7.69%	30.10%	-22.41pp
Grading			
1 Star	-	-	-
2 Stars	-	-	-
3 Stars	10.03%	39.40%	-29.37pp
4 Stars	11.90%	39.80%	-27.90pp
5 Stars	9.14%	29.73%	-20.59pp
Unclassified	8.02%	27.74%	-19.72pp

4.2.3. Guest House, B&B Monthly Distribution by % Occupancy 2020/19

In April, May and June 2020 during the initial lockdown occupancy was no more than above 1.1%, a small increase can be seen in July when the lockdown was gradually relaxed with it reaching a peak in August at 43.0% before dropping dramatically again when the Covid-19 Level system was introduced.

In 2019, Guest House room occupancy also reached a peak in August at 79.8%.

Table 8 **Guest House, B&B Monthly Distribution by % Room Occupancy 2020/2019**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	21.0	13.4	19.7	0.2	0.4	1.1	4.3	43.0	36.2	21.0	16.3	8.4
2019	26.8	28.5	28.0	46.6	65.3	62.3	68.8	79.8	65.2	41.0	36.2	31.0

Table 9 **Guest House, B&B Monthly Distribution by % Bed Occupancy 2020/2019**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	15.0	8.8	16.4	0.1	0.2	0.5	3.2	38.7	30.6	16.4	11.0	4.5
2019	21.0	21.5	22.0	39.6	56.0	50.2	60.7	70.4	55.3	33.2	29.1	26.2

Figure 7 **Guest House, B&B Monthly Distribution by % Room Occupancy 2020/2019**

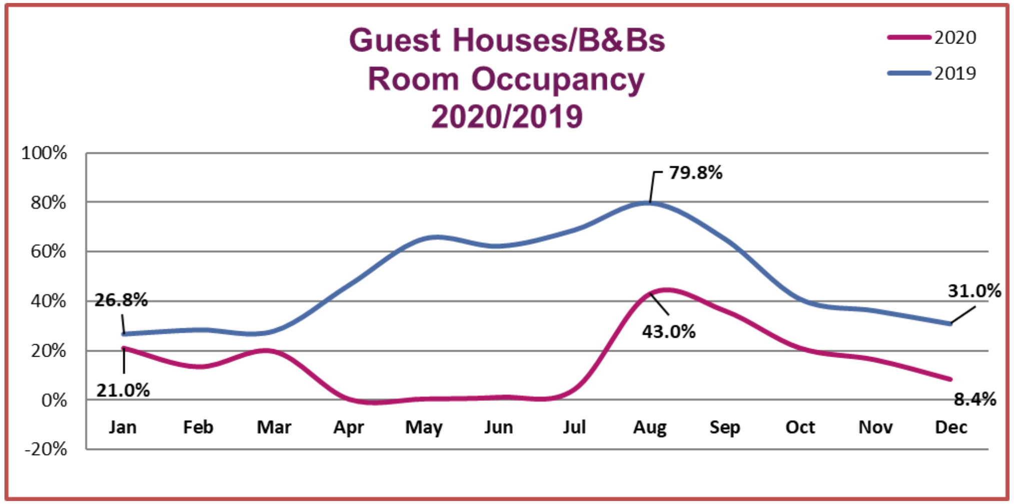
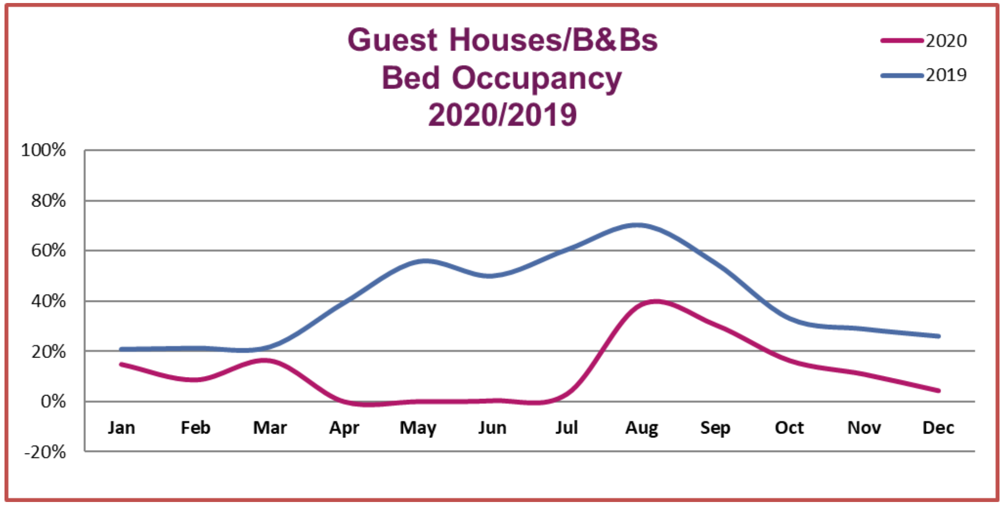


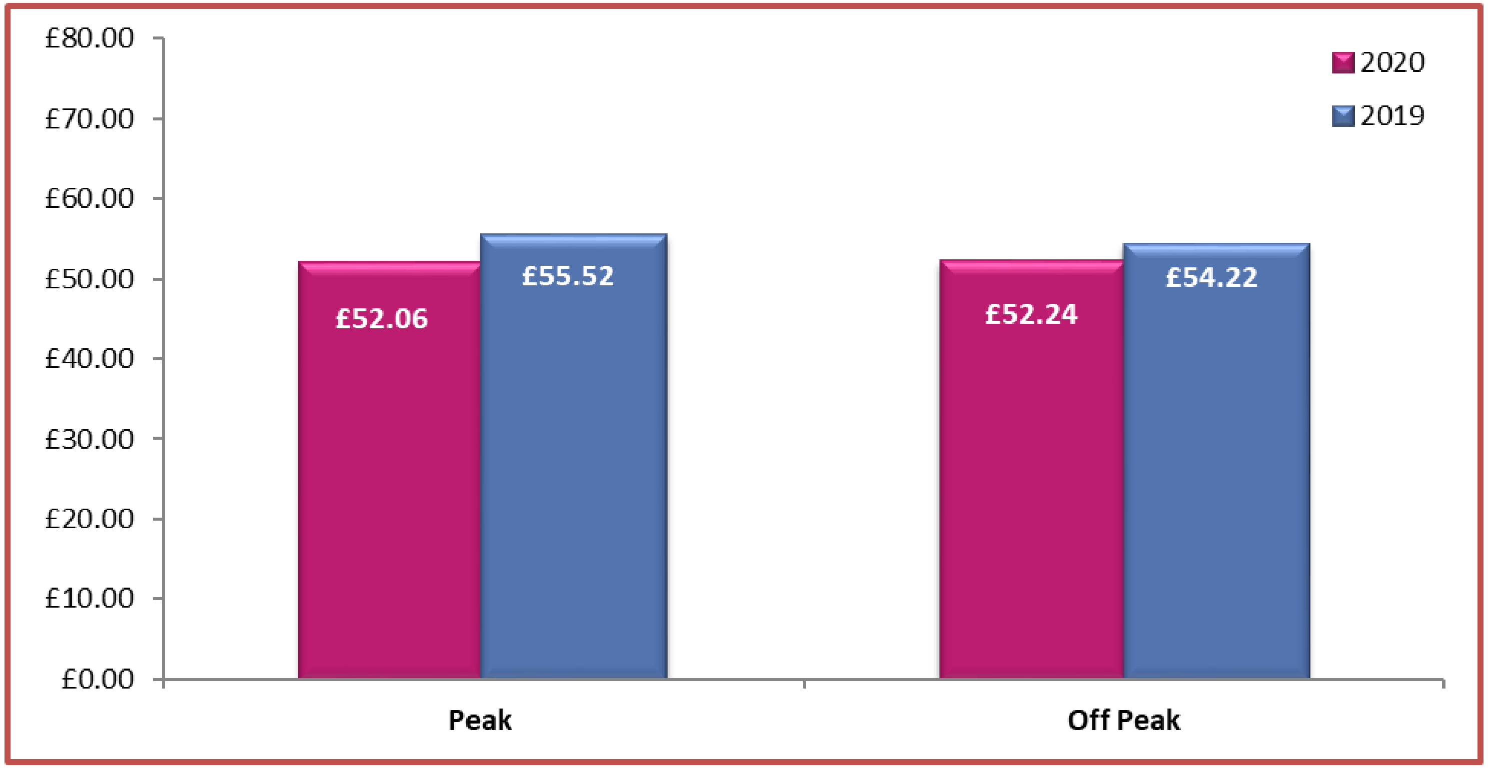
Figure 8 **Guest House, B&B Monthly Distribution by % Bed Occupancy 2020/2019**



4.2.4. Guest House, B&B Peak/Off-Peak Tariffs

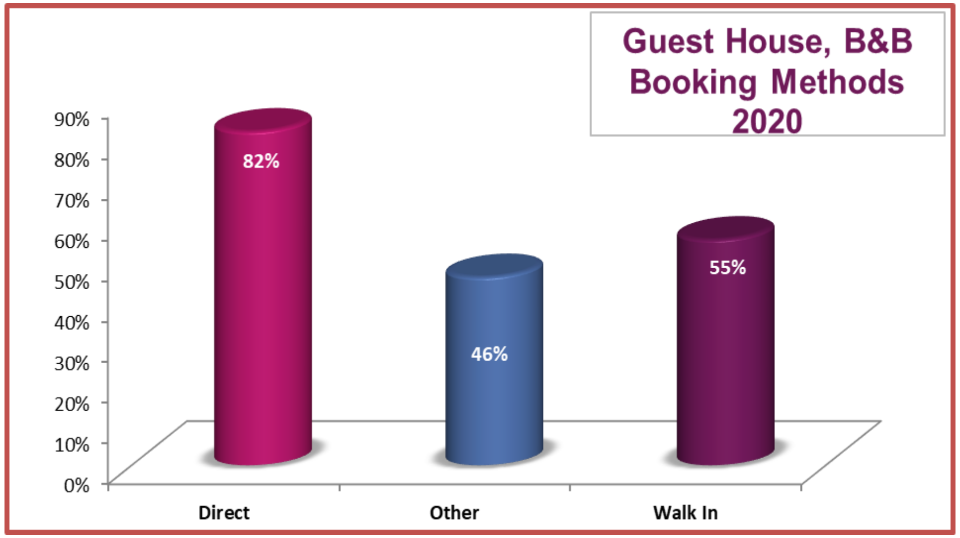
In 2020, the average peak tariff amongst participating Guest House, B&B accommodation was £52.06 per person per night, whilst the off-peak average tariff was £52.24.
In 2019, the average peak tariff amongst participating Guest House, B&B accommodation was £55.52 per person per night, whilst the off-peak average tariff was £54.22.

Figure 9 **Guest House, B&B Peak/Off-Peak Tariffs 2020/2019**



4.2.5. Guest House, B&B Booking Methods 2020

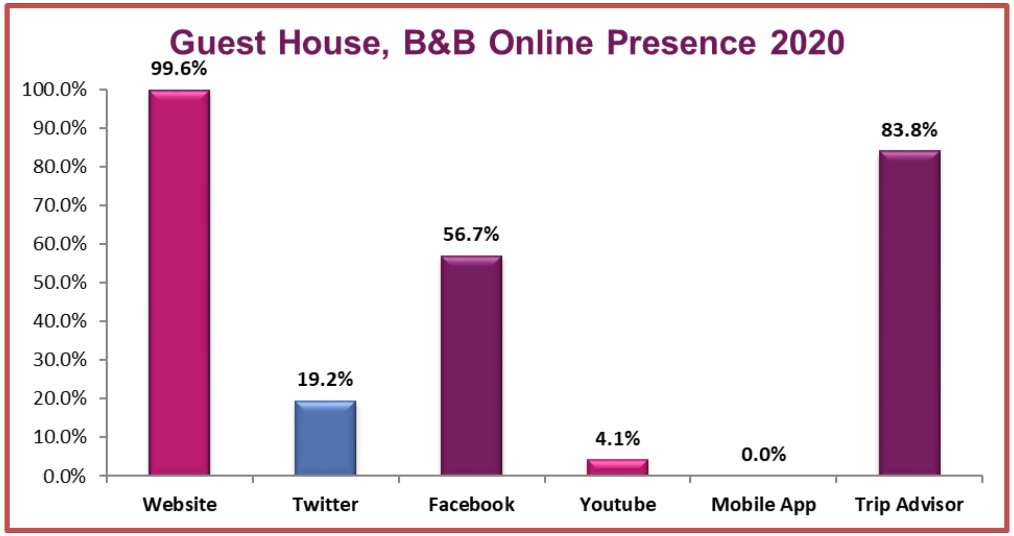
Figure 10 **Guest House and B&B Booking Methods 2020**



In 2020, Guest House, B&B accommodation providers noted the most popular booking method was direct booking, followed by 'walk-in'. 'Other' booking channels such as booking sites, proved less popular in 2020.

4.2.6. Guest House, B&B Online Presence 2020

Figure 11 **Guest House and B&B Online Presence 2020**



In 2020, all participating Guest House, B&B providers had their own website, with the majority also listing on TripAdvisor (84%). Facebook was also popular in 2020 with 57% having their own page to promote their accommodation. You tube was only used by 4% of Guest House, B&B providers in 2020.

5 Self-Catering Accommodation

5.1. % Unit Occupancy

Table 10 **Self-Catering % Unit Occupancy Analysis 2020/2019**

Unit Occupancy	2020	2019	20/19 Diff[2]
	20.52%	47.61%	-27.09pp
Former VisitScotland Area			
Aberdeen & Grampian	29.12%	44.62%	-15.50pp
ALLFV	22.25%	54.42%	-32.17pp
Angus & City of Dundee	29.34%	57.08%	-27.74pp
Ayrshire & Arran	18.73%	50.65%	-31.92pp
Dumfries & Galloway	11.07%	26.19%	-15.12pp
Edinburgh & Lothians	13.58%	36.87%	-23.29pp
Greater Glasgow & Clyde Valley	15.80%	40.65%	-24.85pp
Highlands of Scotland	24.21%	55.17%	-30.96pp
Kingdom of Fife	18.10%	51.27%	-33.17pp
Orkney	29.51%	43.49%	-13.98pp
Outer Hebrides	17.47%	38.39%	-20.92pp
Perthshire	19.03%	52.22%	-33.19pp
Scottish Borders	5.96%	24.60%	-18.64pp
Shetland Islands	22.45%	51.73%	-29.28pp
Property Type			
Bungalow	17.07%	54.57%	-37.50pp
Cottage	19.94%	42.10%	-22.16pp
Flat	12.36%	30.61%	-18.25pp
Glamping	4.81%	35.68%	-30.87pp
House	13.02%	29.89%	-16.87pp
Lodge/Chalet	38.44%	70.84%	-32.40pp
Other Property	6.68%	52.90%	-46.22pp
Static Caravan	10.75%	39.89%	-29.14pp

Unit Occupancy	2020	2019	20/19 Diff[2]
Tariff			
Unknown	5.93%	11.46%	-5.53pp
Up to £299	12.02%	30.91%	-18.89pp
£300 to £499	16.77%	38.52%	-21.75pp
£500 to £799	20.64%	47.36%	-26.72pp
£800 or more	37.82%	58.36%	-20.54pp
Location			
Coastal	15.47%	38.18%	-22.71pp
Inland	21.76%	49.61%	-27.85pp
Island	27.38%	57.56%	-30.18pp
Urban/Rural			
Large Urban Areas	10.61%	34.58%	-23.97pp
Other Urban Areas	21.14%	50.65%	-29.51pp
Accessible Small Towns	14.72%	42.19%	-27.47pp
Remote Small Towns	20.73%	44.28%	-23.55pp
Accessible Rural	27.29%	56.60%	-29.31pp
Remote Rural	21.09%	47.72%	-26.63pp
Grading			
1 Star	8.41%	38.71%	-30.30pp
2 Stars	12.34%	26.64%	-14.30pp
3 Stars	21.05%	46.19%	-25.14pp
4 Stars	21.22%	49.84%	-28.62pp
5 Stars	29.58%	54.75%	-25.17pp
Unclassified	19.00%	46.66%	-27.66pp

5.2. Self-Catering Monthly Distribution by % Unit Occupancy 2020/2019

In 2020, Self-Catering Unit occupancy during the initial lockdown did not exceed 4.8%, a slight increase can be seen in July when the lockdown was gradually relaxed with it reaching a peak in August at 50.8% before dropping dramatically again when the Covid-19 Level system as introduced.

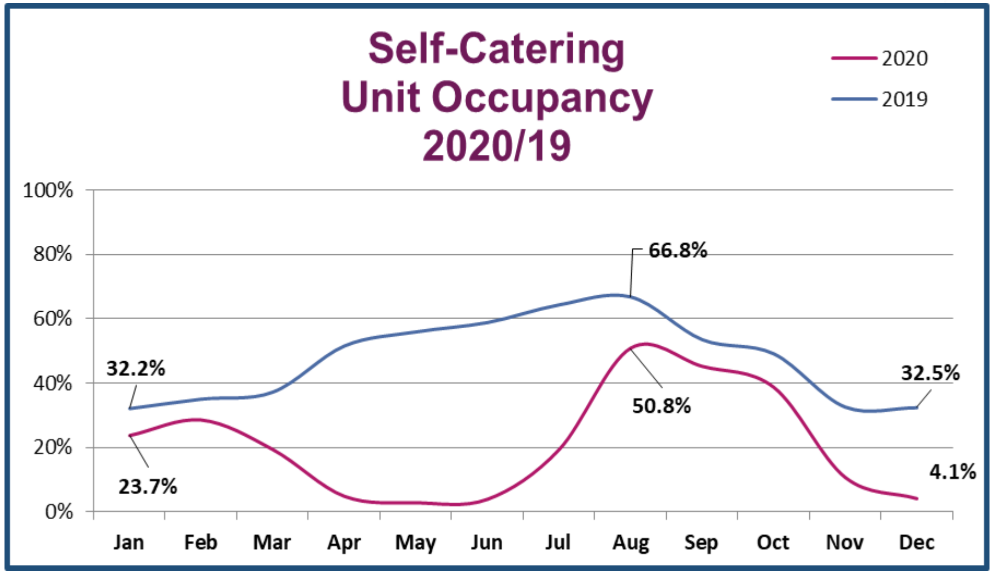
[2] 20/19 Diff throughout this report is expressed by % Point Change

In 2019, Self-Catering Unit occupancy reached a peak in August at 66.8%.

Table 11 **Self-Catering Monthly Distribution by % Unit Occupancy 2020/2019**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	23.7	28.5	19.3	4.8	2.8	3.9	19.3	50.8	45.1	38.6	10.7	4.1
2019	32.2	35.2	37.3	51.6	56.0	58.9	64.4	66.8	53.6	49.2	32.7	32.5

Figure 12 **Self-Catering Monthly Distribution by % Room Occupancy 2020/2019**

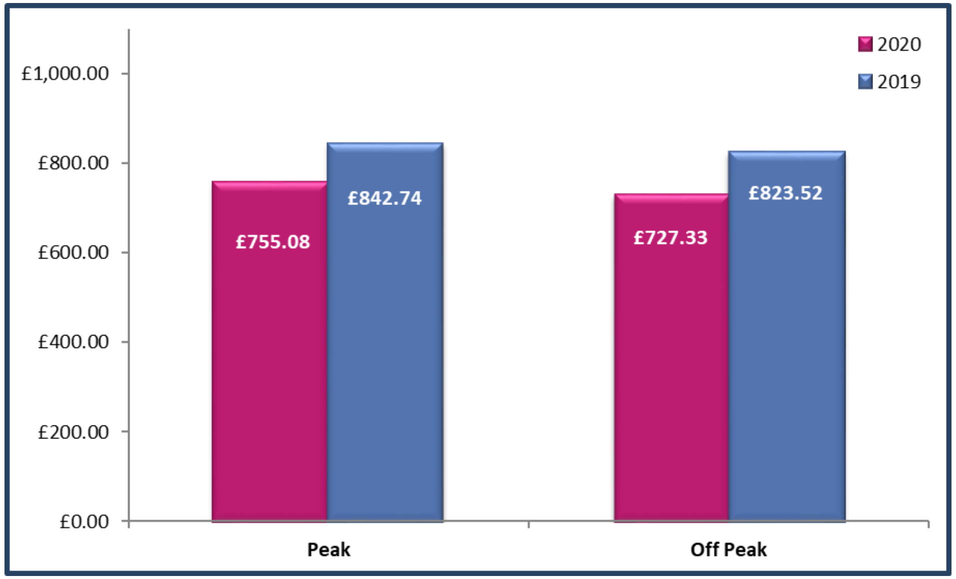


5.3. Self-Catering Peak/Off-Peak Tariffs

In 2020, the average peak tariff amongst participating Self-Catering accommodation was £755.08 per week, whilst the off -peak average tariff was £727.33 per week.

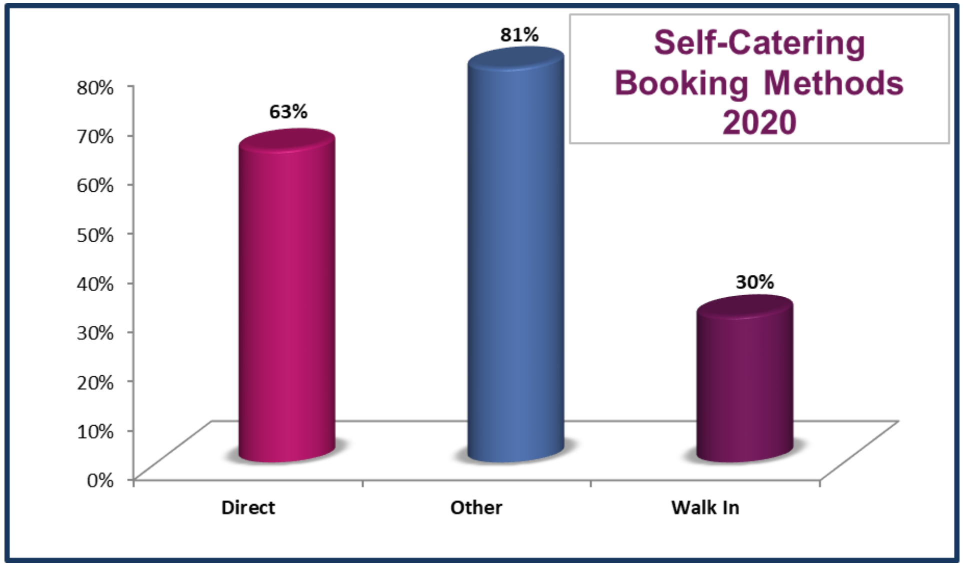
In 2019, the average peak tariff amongst participating Self-Catering accommodation was £842.74 per week, whilst the off- peak average tariff was £823.52 per week.

Figure 13 **Self-Catering Peak/Off-Peak Tariffs 2020/2019**



5.4. Self-Catering Booking Methods 2020

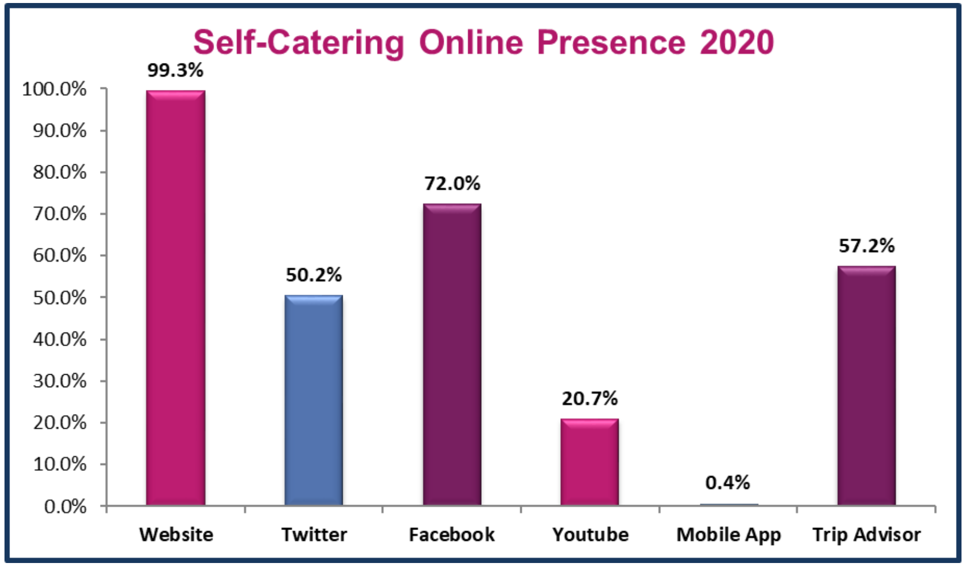
Figure 14 **Self-Catering Booking Methods 2020**



In 2020, Other booking methods were cited as most popular by 81% Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland.

5.5. Self-Catering Online Presence 2020

Figure 15 **Self-Catering Online Presence 2020**



In 2020, 100% of all participating Self-Catering accommodation providers had their own website. Just under three quarters had a Facebook page, with just under 60% of participants using Trip Advisor. Twitter was used by just over 50% of participants, however just over a fifth used YouTube (21%) in 2020.

6 Touring Accommodation

6.1. % Pitch Occupancy

Table 12 **% Pitch Occupancy Analysis 2020/2019**

Pitch Occupancy	2020	2019	20/19 Diff[3]
Net Pitch	30.47%	41.22%	-10.75pp
Whole Park	48.08%	43.23%	4.85pp
Caravan	20.01%	43.82%	-23.81pp
Tent	4.98%	19.72%	-14.74pp
Former VisitScotland Area			
Aberdeen & Grampian	20.57%	23.04%	-2.47pp
ALLFV	24.56%	43.12%	-18.56pp
Angus & City of Dundee	-	-	-
Ayrshire & Arran	68.54%	46.82%	21.72pp
Dumfries & Galloway	30.63%	52.04%	-21.41pp
Edinburgh & Lothians	13.47%	29.19%	-15.72pp
Greater Glasgow & Clyde Valley	-	39.86%	-39.86pp
Highlands of Scotland	44.64%	45.89%	-1.25pp
Kingdom of Fife	69.78%	40.51%	29.27pp
Orkney	-	-	-
Outer Hebrides	-	-	-
Perthshire	53.43%	45.30%	8.13pp
Scottish Borders	15.31%	43.11%	-27.80pp
Shetland Islands	-	-	-
Tariff			
Under £10	51.94%	30.76%	21.18pp
£10-£14.99	5.86%	19.59%	-13.73pp
£15- £19.00	19.75%	32.25%	-12.50pp
£20 +	2.11%	20.90%	-18.79pp
Location			
Coastal	34.34%	44.68%	-10.34pp
Inland	28.89%	39.07%	-10.18pp
Island	32.27%	48.59%	-16.32pp
Urban/Rural			
Large Urban Areas	12.66%	34.30%	-21.64pp
Other Urban Areas	45.06%	42.08%	2.98pp
Accessible Small Towns	11.81%	30.04%	-18.23pp
Remote Small Towns	31.16%	55.05%	-23.89pp
Accessible Rural	25.86%	33.99%	-8.13pp
Remote Rural	40.06%	47.10%	-7.04pp
Grading			
1	-	-	-
2	0.00%	53.56%	-53.56pp
3	2.96%	33.83%	-30.87pp
4	32.38%	41.10%	-8.72pp
5	40.89%	41.09%	-0.20pp
Unclassified	19.04%	45.43%	-26.39pp

[3] 20/19 Diff throughout this report is expressed by % Point Change

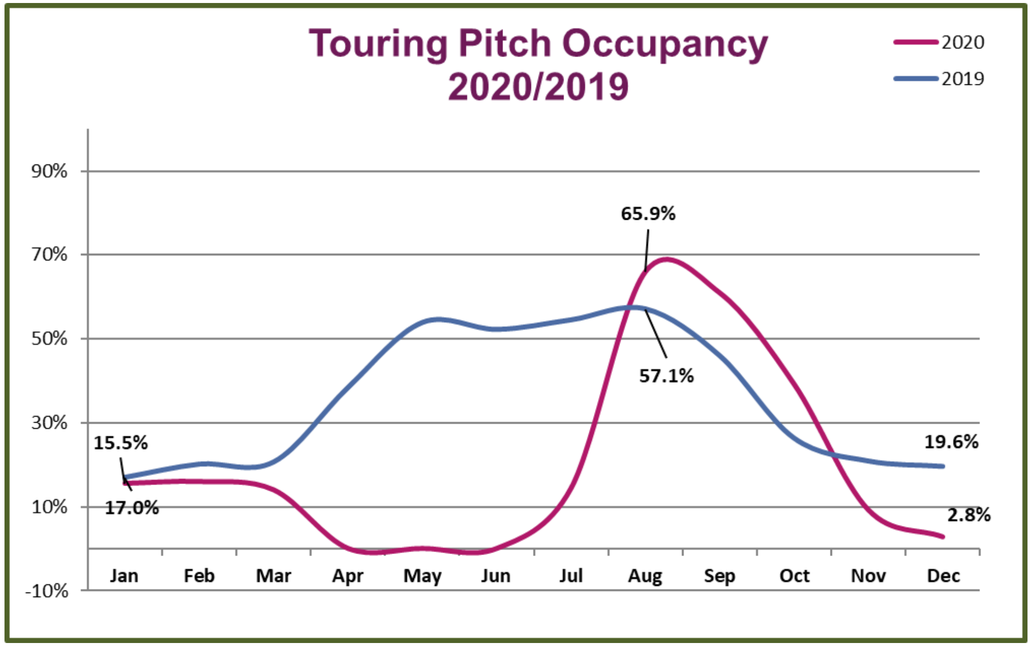
6.2. Touring Monthly Distribution by % Pitch Occupancy 2020/2019

Table 13 **Touring Monthly Distribution by % Pitch Occupancy 2020/2019**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	15.5	15.9	14.0	0.0	0.0	0.0	14.3	65.9	60.9	39.2	9.2	2.8
2019	17.0	20.1	20.7	38.4	53.9	52.2	54.5	57.1	46.0	26.3	20.9	19.6

In 2019, Touring Pitch occupancy reached a peak in August at 57.1%. In 2020, Touring Pitch occupancy during the initial lockdown collapsed to 0% during April, May and June, July witnessed the gradually relaxation of the lockdown, with occupancy reaching a peak in August at 65.9% which as seen in Table 13 was just over an 8pp increase compared to the same period in 2019. Once the Covid-19 Level system was introduced the occupancy % again dropped dramatically.

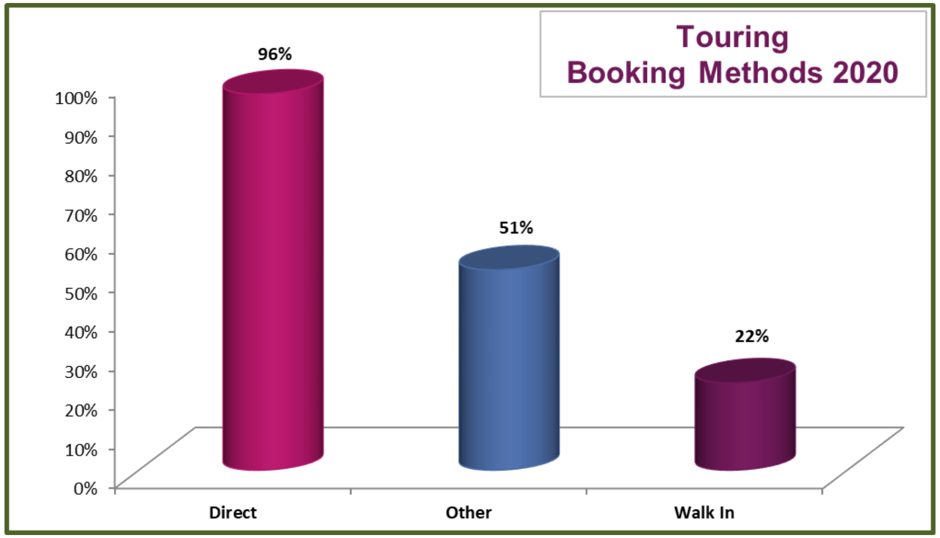
Figure 16 **Touring Monthly Distribution by % Pitch Occupancy 2020/2019**



Touring Booking Methods 2020

In 2020, Direct booking methods were cited as most popular by 96% Touring accommodation providers. Other booking methods (51%) and Walk in (22%) were less popular when booking touring pitches in 2020.

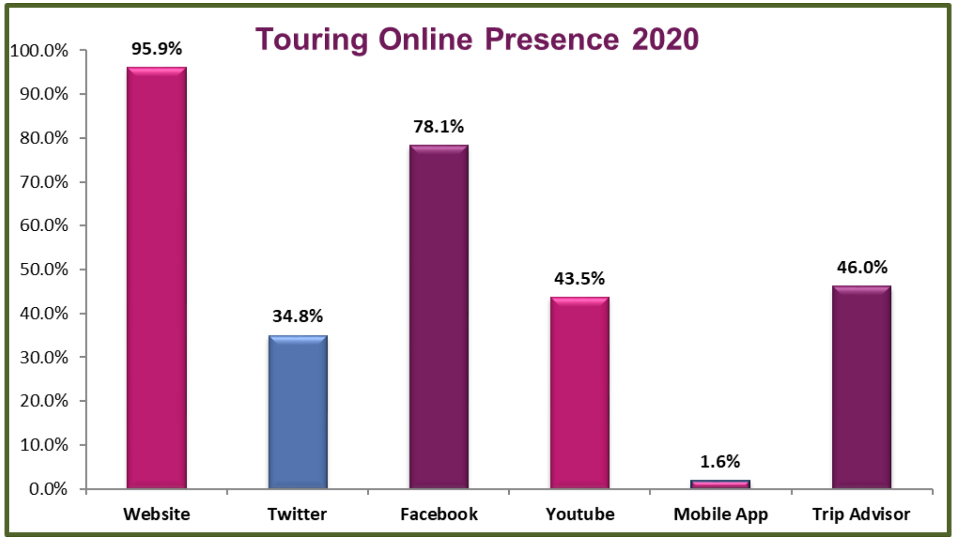
Figure 17 **Touring Booking Methods 2020**



6.3. Touring Online Presence 2020

In 2020, 96% of all participating Touring accommodation providers had their own website. Just over three quarters had a Facebook page. Under half were listed on Trip Advisor and YouTube at 46% and 44% respectively, just over a third (34.8%) had a presence on Twitter in 2020.

Figure 18 **Touring Online Presence 2020**



7 Hostel Accommodation

7.1. % Bed Occupancy

Table 14 **% Bed Occupancy Analysis 2020/2019**

Bed Occupancy	2020	2019	20/19 Diff[4]
	20.59%	60.19%	-39.60pp
Type			
SYHA	20.70%	57.57%	-36.87pp
Independent	18.14%	70.32%	-52.18pp
Former VisitScotland Area			
Aberdeen & Grampian	17.72%	35.22%	-17.50pp
ALLFV	17.12%	50.33%	-33.21pp
Angus & City of Dundee	-	-	-
Ayrshire & Arran	40.25%	47.43%	-7.18pp
Dumfries & Galloway	0.00%	44.10%	-44.10pp
Edinburgh & Lothians	10.64%	71.91%	-61.27pp
Greater Glasgow & Clyde Valley	29.06%	65.37%	-36.31pp
Highlands of Scotland	30.67%	59.99%	-29.32pp
Kingdom of Fife	0.00%	0.00%	0.00pp
Orkney	0.00%	59.89%	-59.89pp
Perthshire	37.14%	58.88%	-21.74pp
Scottish Borders	-	-	-
Shetland Islands	-	-	-
Outer Hebrides	-	-	-
Grading			
1	-	60.30%	-60.30pp
2	-	56.61%	-56.61pp
3	30.92%	63.49%	-32.57pp

Bed Occupancy	2020	2019	20/19 Diff[4]
4	24.11%	51.79%	-27.68pp
5	15.59%	54.73%	-39.14pp
Unclassified	4.28%	67.41%	-63.13pp
Location			
Coastal	17.45%	51.65%	-34.20pp
Inland	19.76%	61.90%	-42.14pp
Island	47.19%	67.67%	-20.48pp
Urban/Rural			
Large Urban Areas	13.36%	64.70%	-51.34pp
Other Urban Areas	14.65%	53.62%	-38.97pp
Accessible Small Towns	30.83%	51.15%	-20.32pp
Remote Small Towns	20.16%	44.34%	-24.18pp
Accessible Rural	29.13%	63.94%	-34.81pp
Remote Rural	36.10%	62.96%	-26.86pp

[4] 20/19 Diff throughout this report is expressed by % Point Change

7.2. Hostel Monthly Distribution by % Bed Occupancy 2020/2019

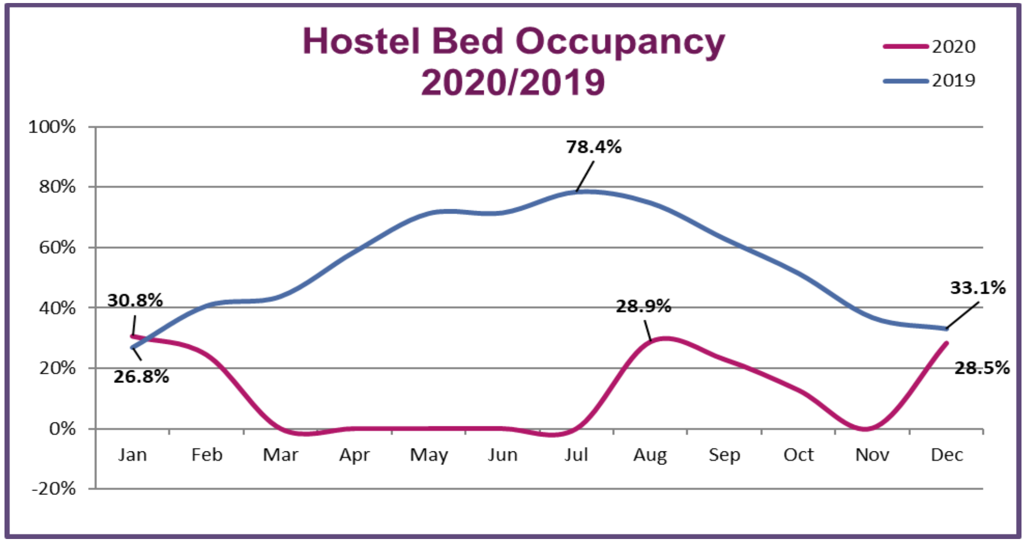
In 2020, Hostel Bed occupancy during the initial lockdown collapsed to 0%, due to the nature of the multi-guest accommodation and the 2 metre distance regulations. Consequently, many Hostel providers either remained closed or significantly reduced their occupancy levels. The peak was seen in August when the bed occupancy % reached 28.9. Once the Covid-19 Level system was introduced the occupancy % again dropped dramatically.

In 2019, Hostel Bed occupancy reached a peak in July at 78.4%.

Table 15 **Hostel Monthly Distribution by % Bed Occupancy 2020/2019**

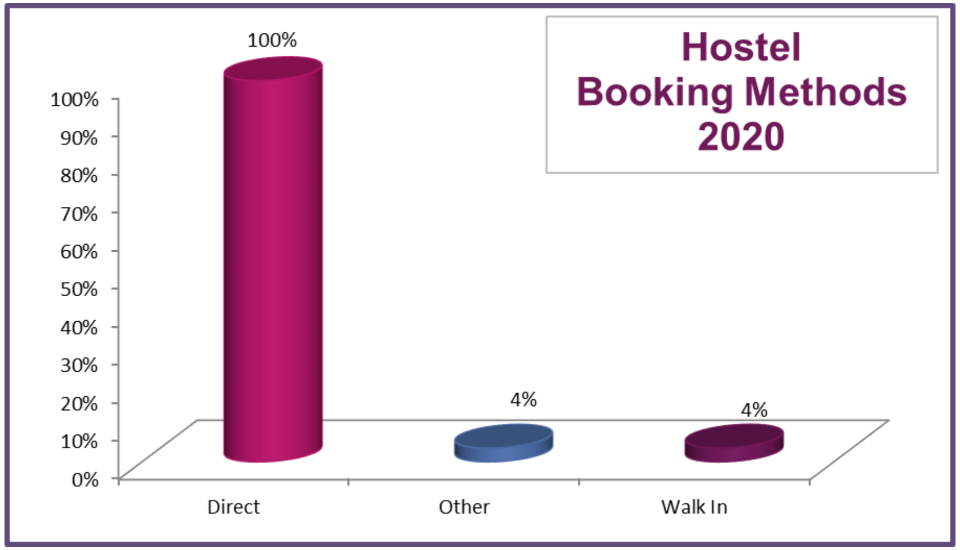
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	30.8	24.6	0.0	0.0	0.0	0.0	0.0	28.9	23.0	12.8	0.2	28.5
2019	26.8	40.6	43.8	58.6	71.2	71.4	78.4	74.7	62.9	51.4	36.7	33.1

Figure 19 **Hostel Monthly Distribution by % Bed Occupancy 2020/2019**



7.3. Hostel Booking Methods 2020

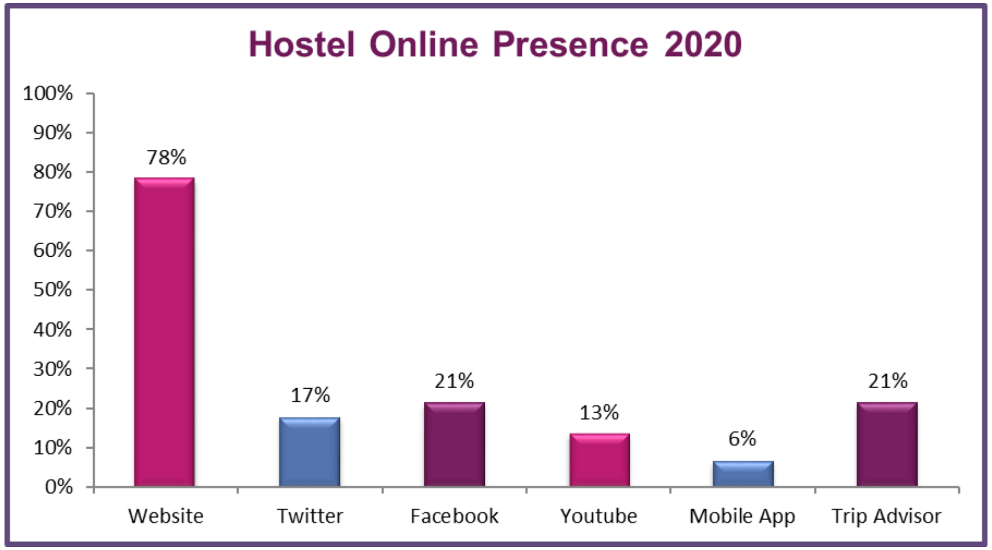
Figure 20 **Hostel Booking Methods 2020**



In 2020, Direct booking methods were cited as most popular by 100% of Hostel accommodation providers.

7.4. Hostel Online Presence 2020

Figure 21 **Hostel Online Presence 2020**



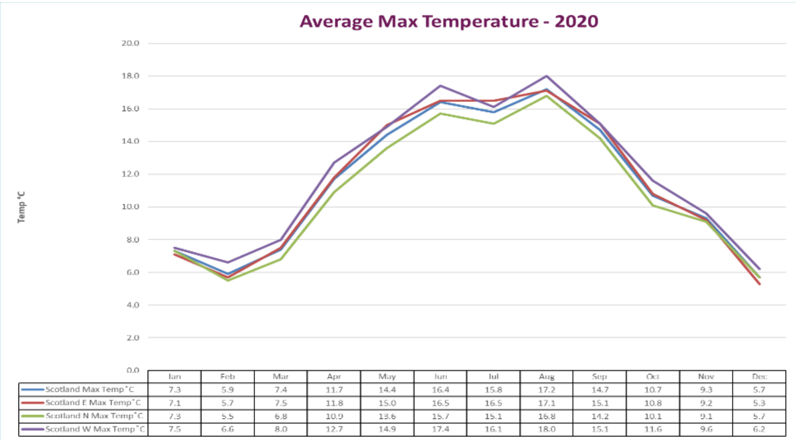
In 2020, over three quarters of participating Hostel accommodation providers had their own website (78%). Just over a fifth of Hostel accommodation providers also using Facebook and Trip Advisor (21%), with just over 15% using Twitter to promote their accommodation.

8 Weather & Currency Data

Weather

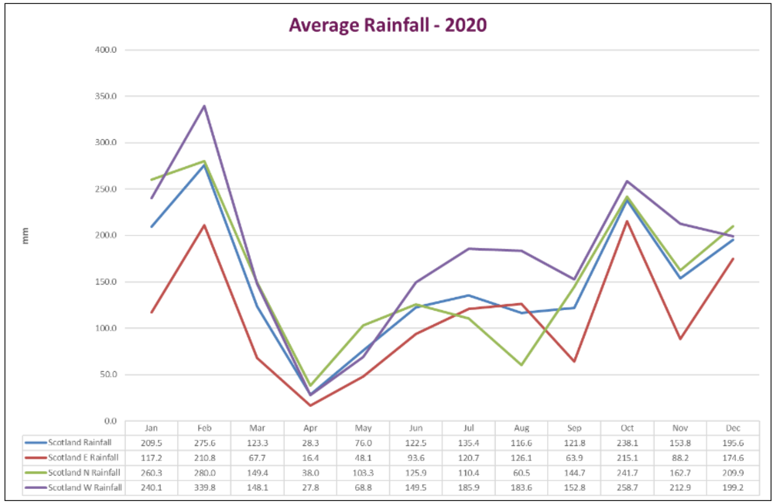
The weather information is based on the averages for the full year month from data sourced through the Met Office (www.metoffice.gov.uk).

Figure 22 **Average Maximum Temperature**



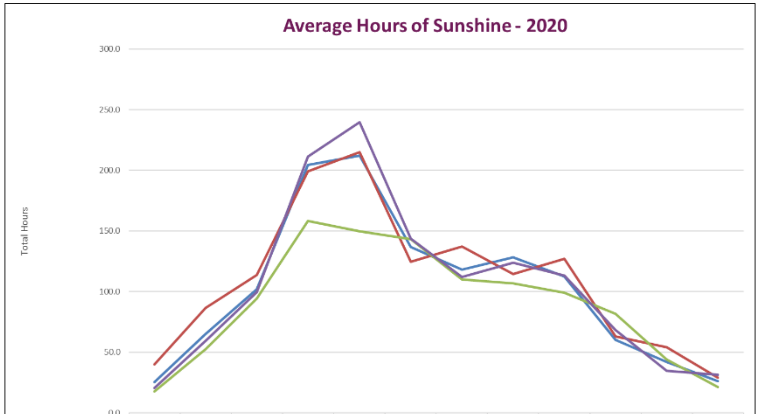
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Scotland Max Temp °C	7.3	5.9	7.4	11.7	14.4	16.4	15.8	17.2	14.7	10.7	9.3	5.7
Scotland E Max Temp °C	7.1	5.7	7.5	11.8	15.0	16.5	16.5	17.1	15.1	10.8	9.2	5.3
Scotland N Max Temp °C	7.3	5.5	6.8	10.9	13.6	15.7	15.1	16.8	14.2	10.1	9.1	5.7
Scotland W Max Temp °C	7.5	6.6	8.0	12.7	14.9	17.4	16.1	18.0	15.1	11.6	9.6	6.2

Figure 23 **Average Rainfall**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Scotland Rainfall	209.5	275.6	123.3	28.3	76.0	122.5	135.4	116.6	121.8	238.1	153.8	195.6
Scotland E Rainfall	117.2	210.8	67.7	16.4	48.1	93.6	120.7	126.1	63.9	215.1	88.2	174.6
Scotland N Rainfall	260.3	280.0	149.4	38.0	103.3	125.9	110.4	60.5	144.7	241.7	162.7	209.9
Scotland W Rainfall	240.1	339.8	148.1	27.8	68.8	149.5	185.9	183.6	152.8	258.7	212.9	199.2

Figure 24 **Average Hours of Sunshine**

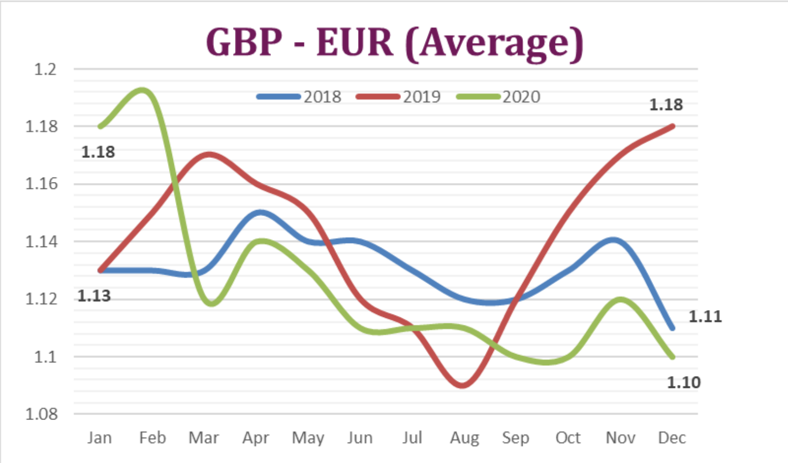


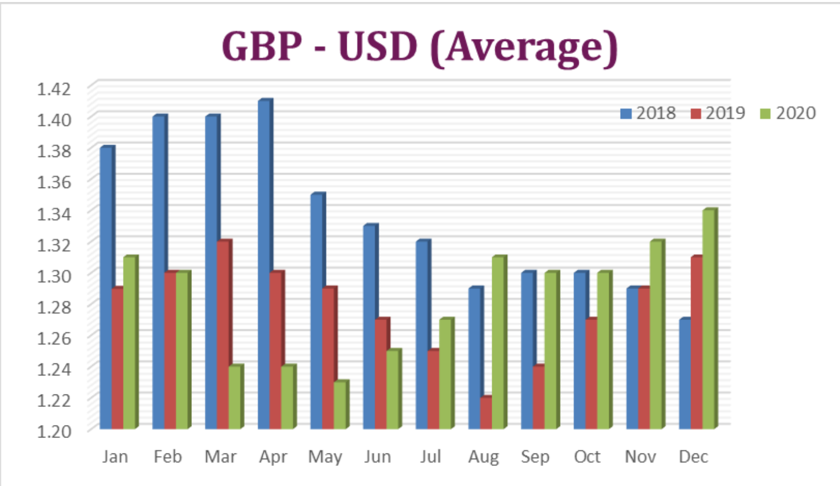
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Scotland Sunshine	25.5	65.1	101.8	204.6	212.0	136.7	118.0	128.4	112.5	60.2	42.1	26.1
Scotland E Sunshine	40.2	86.7	113.8	199.3	215.0	124.6	137.2	114.6	127.1	63.3	54.3	29.1
Scotland N Sunshine	17.6	52.4	94.1	158.3	149.9	143.3	109.9	106.8	99.2	81.9	44.1	21.2
Scotland W Sunshine	20.5	59.4	99.4	211.2	239.7	143.7	112.0	123.7	113.5	68.5	34.6	31.7

Currency

The currency information is based on the averages for the full month from data sourced through OFX (www.ofx.com). The currency data provided offers a month on month comparison of Sterling against the Euro and the US Dollar with a trend average (3 years).

Figure 25 **GBP – Euro Average Exchange rates**





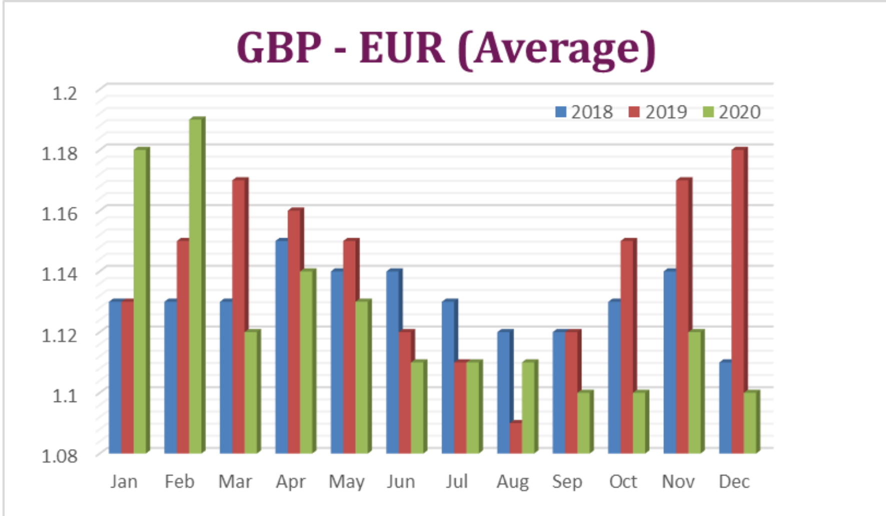
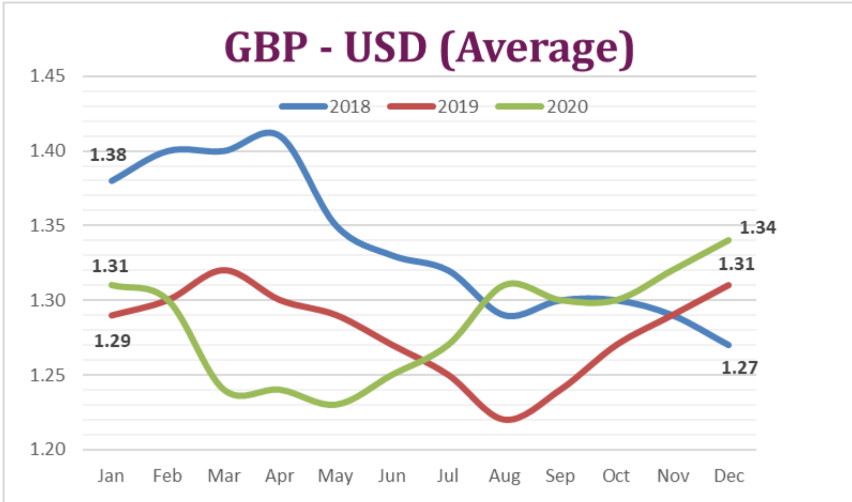


Figure 26 **GBP – US Dollar Average Exchange rates**



Changes in Geographic Location Analysis

Up to 2010, the accommodation sector was analysed according to whether they were Urban/Rural/Seaside.
This classification was problematic as some properties could be located in both a Seaside area and an Urban area for example (e.g. accommodation in Aberdeen)

Two new sets of variables were introduced in 2010 to improve analysis:

- ***Geographic Location***, dividing attractions into three categories:
    - Island based accommodation
    - Coastal accommodation (located within approximately one mile of the coast)
    - Inland accommodation (encompassing the remainder of attractions).

- Location according to the Scottish Government's 2013-2014 ***Urban Rural Classification,*** dividing attractions into the six categories shown in the following table.

Table 16 **Urban Rural Classification**

Category	Description
Large Urban Areas	Settlements of over 125,000 people.
Other Urban Areas	Settlements of 10,000 to 124,999 people.
Accessible Small Towns	Settlements of 3,000 and 9,999 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Small Towns	Settlements of 3,000 and 9,999 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.
Accessible Rural	Settlements of less than 3,000 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Rural	Settlements of less than 3,000 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.

For more information, consult the Scottish Government's website at: www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification