

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: April 2020/2019 Report – Self-Catering

### 1.0 Introduction April 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering April 2020 and benchmarking against April 2019. The survey reviews Accommodation performance throughout Scotland, highlighting trends across various sectors and categories of the industry. This report offers a snapshot of accommodation performance based on participating providers. Comments and feedback should be directed to Marina Martinolli (Tel: 0141 331 8400 or via E-mail: [mma4@gcu.ac.uk](mailto:mma4@gcu.ac.uk)).

### 2.0 Executive Summary April 2020

Self-Catering Unit Occupancy rates for the month of April 2020 witnessed a significant decrease of -46.67% when comparing occupancy rates with April 2019. Traditionally occupancy rates in April increase significantly with the UK Easter school break, however in 2020 COVID-19 and the national lockdown has impacted the travel and tourism sector across the globe, halting all but the most essential travel. The visitor attraction sector saw a decrease of 98% in visits numbers when comparing April 2020 with April 2019.

### 3.0 Self-Catering

#### 3.1 Performance by Self-Catering Category – April 2020/2019

In the **Self-Catering sector**, the unit occupancy rate for the period April 2020 was **4.92%** when compared to data from the previous year of **51.59%** occupancy rate; this shows a decrease of **-20.11%**.

**Unit occupancy** rates in the Aberdeen & Grampian area were the highest in April 2020. Chalet and Lodges, those located in Remote Rural Areas, Inland properties and those charging a weekly tariff or between £500 - £799 experienced the highest percentage unit occupancy rates during April 2020.

#### Unit Occupancy – April 2020/2019

Unit Occupancy	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Self-Catering	4.92%	51.59%	-46.67%	18.18%	39.00%	-20.82%

#### Unit Occupancy by Former VisitScotland Area – April 2020/2019

Area	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Aberdeen & Grampian	17.90%	55.89%	-37.99%	24.11%	39.16%	-15.05%
ALLFV	2.87%	54.85%	-51.98%	15.33%	50.35%	-35.02%
Angus & City of Dundee	9.00%	72.41%	-63.41%	24.30%	57.44%	-33.14%
Ayrshire & Arran	0.32%	44.36%	-44.04%	26.56%	39.94%	-13.38%
Dumfries & Galloway	2.55%	26.61%	-24.06%	7.15%	22.34%	-15.19%
Edinburgh & Lothian	0.00%	41.15%	-41.15%	13.99%	24.94%	-10.95%
Greater Glasgow	0.06%	39.62%	-39.56%	18.02%	32.11%	-14.09%
Highlands of Scotland	6.40%	60.99%	-54.59%	21.36%	42.40%	-21.04%
Kingdom of Fife	6.77%	52.80%	-46.03%	26.16%	37.07%	-10.91%
Orkney	0.00%	36.66%	-36.66%	10.93%	25.02%	-14.09%
Perthshire	7.42%	56.75%	-49.33%	22.11%	32.95%	-10.84%
Scottish Borders	0.00%	55.99%	-55.99%	21.80%	37.95%	-16.15%
Shetland Islands	0.00%	36.67%	-36.67%	1.24%	10.53%	-9.29%
Outer Hebrides	0.00%	65.53%	-65.53%	11.01%	25.36%	-14.35%

### Unit Occupancy by Location (Accessibility & Density) – April 2020/2019

Location accessibility/density	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Large Urban Areas	3.65%	35.65%	-32.00%	16.00%	25.57%	-9.57%
Other Urban Areas	3.46%	61.38%	-57.92%	17.46%	44.21%	-26.75%
Accessible Small Towns	2.52%	48.44%	-45.92%	11.94%	31.65%	-19.71%
Remote Small Towns	4.39%	52.04%	-47.65%	16.39%	36.12%	-19.73%
Accessible Rural	5.09%	53.12%	-48.03%	21.61%	52.66%	-31.05%
Remote Rural	6.78%	52.18%	-45.40%	20.17%	36.23%	-16.06%

### Unit Occupancy by Location (Geographic) – April 2020/2019

Location (Geographic)	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Coastal	3.28%	42.70%	-39.42%	12.04%	27.45%	-15.41%
Inland	6.01%	53.72%	-47.71%	19.61%	43.17%	-23.56%
Islands	0.57%	58.92%	-58.35%	25.86%	40.57%	-14.71%

### Unit Occupancy by Property Type – April 2020/2019

Property Type	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Glamping inc Yurts etc	2.37%	30.35%	-27.98%	4.17%	22.08%	-17.91%
Lodge/Chalet	7.03%	74.60%	-67.57%	35.94%	66.04%	-30.10%
Cottage	6.97%	49.09%	-42.12%	17.37%	31.98%	-14.61%
Bungalow	0.00%	49.09%	-49.09%	19.26%	43.66%	-24.40%
House	1.56%	30.34%	-28.78%	7.36%	21.51%	-14.15%
Flat	2.42%	30.15%	-27.73%	15.31%	21.54%	-6.23%
Static Caravan	1.90%	51.28%	-49.38%	6.41%	31.49%	-25.08%
Other Property	0.00%	65.97%	-65.97%	9.89%	30.62%	-20.73%

### Unit Occupancy by Tariff – April 2020/2019

Weekly Tariff	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Unknown	0.14%	9.15%	-9.01%	3.49%	5.48%	-1.99%
Under £299	1.64%	26.73%	-25.09%	18.36%	27.23%	-8.87%
£300 - £499	4.41%	44.91%	-40.50%	16.32%	32.80%	-16.48%
£500 - £799	7.18%	53.80%	-46.62%	16.87%	36.21%	-19.34%
£800 or more	4.71%	63.06%	-58.35%	25.59%	50.33%	-24.74%

### Uni Occupancy by Location Type – April 2020/2019

Location Type	April 20	April 19	% Change	Jan-April 20	Jan-April 19	% Change
Seaside - Coastal	2.19%	54.42%	-52.23%	19.01%	46.58%	-27.57%
City – Large Town	4.37%	38.41%	-34.04%	20.25%	29.50%	-9.25%
Small Town	2.89%	56.12%	-53.23%	12.02%	34.88%	-22.86%
Countryside - Village	7.04%	51.35%	-44.31%	18.61%	36.18%	-17.57%