

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

1.0 Introduction August 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering August 2020 and benchmarking against August 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 Giancarlo Fedeli (E-mail: gfe2@gcu.ac.uk).

2.0 Executive Summary August 2020

Self-Catering Unit Occupancy rates for the month of August 2020 witnessed a decrease of -17.80% when comparing occupancy rates with August 2019. With August being a peak month for tourism, we would normally see a heightened occupancy rate amongst all sectors, however, with the continued effects and restrictions of COVID-19, there remains to be low occupancy in comparison to August 2019 figures. The visitor attraction sector saw a decrease of 72.2% in visits numbers when comparing August 2020 with August 2019.

3.0 Self-Catering

3.1 Performance by Self-Catering Category – August 2020/2019

In the **Self-Catering sector**, the unit occupancy rate for the period August 2020 was **49.02%** when compared to data from the previous year of **66.82%** occupancy rate; this shows a % Point decrease of **-17.80%**.

Unit occupancy rates in the Outer Hebrides were the highest in August 2020. Static Caravans, those located in Accessible Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during August 2020.

Unit Occupancy – August 2020/2019

Unit Occupancy	August 20	August 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Self-Catering	49.02%	66.82%	-17.80%	82	18.56%	50.35%	-31.79%	68

Unit Occupancy by Former VisitScotland Area – August 2020/2019

Area	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	53.18%	66.43%	-13.25%	87	24.51%	48.49%	-23.98%	76
ALLFV	57.92%	71.11%	-13.19%	87	19.13%	58.40%	-39.27%	61
Angus & City of Dundee	78.37%	77.39%	0.98%	101	25.42%	62.36%	-36.94%	63
Ayrshire & Arran	23.20%	64.04%	-40.84%	59	26.50%	47.68%	-21.18%	79
Dumfries & Galloway	52.30%	45.21%	7.09%	107	11.24%	29.29%	-18.05%	82
Edinburgh & Lothian	33.33%	61.04%	-27.71%	72	13.17%	39.07%	-25.90%	74
Greater Glasgow	47.78%	46.14%	1.64%	102	15.75%	37.79%	-22.04%	78
Highlands of Scotland	45.74%	78.35%	-32.61%	67	19.68%	59.20%	-39.52%	60
Kingdom of Fife	13.44%	59.93%	-46.49%	54	15.07%	50.36%	-35.29%	65
Orkney	75.01%	73.38%	1.63%	102	27.16%	49.53%	-22.37%	78
Perthshire	51.78%	58.46%	-6.68%	93	16.97%	40.60%	-23.63%	76
Scottish Borders	65.08%	82.50%	-17.42%	83	21.49%	54.12%	-32.63%	67
Shetland Islands	15.07%	26.91%	-11.84%	88	2.52%	31.94%	-29.42%	71
Outer Hebrides	82.26%	72.82%	9.44%	109	21.93%	53.76%	-31.83%	68

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

² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

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

Location accessibility/density	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	29.17%	47.83%	-18.66%	81	11.10%	35.58%	-24.48%	76
Other Urban Areas	43.73%	79.85%	-36.12%	64	18.20%	57.47%	-39.27%	61
Accessible Small Towns	49.45%	60.48%	-11.03%	89	13.52%	44.76%	-31.24%	69
Remote Small Towns	54.88%	65.04%	-10.16%	90	20.34%	47.52%	-27.18%	73
Accessible Rural	65.65%	72.10%	-6.45%	94	22.82%	58.54%	-35.72%	64
Remote Rural	43.14%	67.65%	-24.51%	75	19.81%	50.21%	-30.40%	70

Unit Occupancy by Location (Geographic) – August 2020/2019

Location (Geographic)	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	41.50%	55.49%	-13.99%	86	14.24%	39.27%	-25.03%	75
Inland	49.49%	69.76%	-20.27%	80	18.59%	53.25%	-34.66%	65
Island	74.71%	77.43%	-2.72%	97	32.10%	58.61%	-26.51%	73

Unit Occupancy by Property Type – August 2020/2019

Property Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Glamping inc Yurts etc	10.58%	77.76%	-67.18%	33	3.36%	42.15%	-38.79%	61
Lodge/Chalet	81.45%	85.35%	-3.90%	96	34.53%	73.62%	-39.09%	61
Cottage	44.96%	65.02%	-20.06%	80	17.84%	44.96%	-27.12%	73
Bungalow	9.01%	73.66%	-64.65%	35	19.14%	55.99%	-36.85%	63
House	31.53%	48.28%	-16.75%	83	10.45%	34.08%	-23.63%	76
Flat	39.63%	39.72%	-0.09%	100	13.73%	30.67%	-16.94%	83
Static Caravan	100.00%	70.39%	29.61%	130	8.27%	47.84%	-39.57%	60
Other Property	21.03%	77.96%	-56.93%	43	7.27%	52.30%	-45.03%	55

Unit Occupancy by Tariff – August 2020/2019

Weekly Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Unknown	19.76%	20.60%	-0.84%	99	2.66%	12.69%	-10.03%	90
Under £299	14.27%	34.51%	-20.24%	80	15.60%	33.06%	-17.46%	83
£300 - £499	28.44%	54.02%	-25.58%	74	13.11%	42.24%	-29.13%	71
£500 - £799	45.98%	71.66%	-25.68%	74	17.99%	50.87%	-32.88%	67
£800 or more	67.17%	72.36%	-5.19%	95	27.50%	59.47%	-31.97%	68

Unit Occupancy by Location Type – August 2020/2019

Location Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	58.11%	71.72%	-13.61%	86	22.66%	57.02%	-34.36%	66
City – Large Town	27.25%	51.38%	-24.13%	76	14.55%	37.88%	-23.33%	77
Small Town	16.86%	71.82%	-54.96%	45	9.40%	49.92%	-40.52%	59
Countryside - Village	48.12%	65.14%	-17.02%	83	18.79%	48.35%	-29.56%	70

Unit Occupancy by Grading – August 2020/2019

Grading	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 Stars	58.25%	96.27%	-38.02%	62	9.51%	45.10%	-35.59%	64
2 Stars	45.45%	38.01%	7.44%	107	17.17%	23.33%	-6.16%	94
3 Stars	54.66%	67.96%	-13.30%	87	19.86%	48.38%	-28.52%	71
4 Stars	61.25%	77.06%	-15.81%	84	18.89%	54.09%	-35.20%	65
5 Stars	64.98%	63.91%	1.07%	101	38.16%	52.98%	-14.82%	85
Unclassified	39.89%	61.11%	-21.22%	79	14.68%	48.94%	-34.26%	66