

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

1.0 Introduction December 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering December 2020 and benchmarking against December 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 December 2020

Self-Catering Unit Occupancy rates for the month of December 2020 witnessed a decrease of -28.47% when comparing occupancy rates with December 2019. December, a typically a low occupancy month within the sector, demonstrated an even lower occupancy on last years figures with the increased restrictions related to COVID-19. The visitor attraction sector saw a decrease of -65.1% in visits numbers when comparing December 2020 with December 2019.

3.0 Self-Catering

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

In the **Self-Catering** sector, the unit occupancy rate for the period December 2020 was **4.09%** when compared to data from the previous year of **32.56%** occupancy rate; this shows a % Point decrease of **-28.47%**.

Unit occupancy rates in Orkney was the highest in December 2020. Lodge/Chalets, those located in Remote Small Towns, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during December 2020.

Unit Occupancy – December 2020/2019

Unit Occupancy	Dec 20	Dec 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Self-Catering	4.09%	32.56%	-28.47%	72	20.00%	47.61%	-27.61%	72

Unit Occupancy by Former VisitScotland Area – December 2020/2019

Area	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	12.81%	28.74%	-15.93%	84	29.12%	44.62%	-15.50%	85
ALLFV	4.54%	40.06%	-35.52%	64	22.28%	54.42%	-32.14%	68
Angus & City of Dundee	1.61%	34.86%	-33.25%	67	29.34%	57.08%	-27.74%	72
Ayrshire & Arran	0.00%	46.27%	-46.27%	54	18.73%	50.65%	-31.92%	68
Dumfries & Galloway	0.96%	11.53%	-10.57%	89	11.07%	26.19%	-15.12%	85
Edinburgh & Lothian	2.08%	29.49%	-27.41%	73	9.86%	36.87%	-27.01%	73
Greater Glasgow	1.08%	42.16%	-41.08%	59	14.69%	40.65%	-25.96%	74
Highlands of Scotland	4.63%	33.71%	-29.08%	71	23.26%	55.17%	-31.91%	68
Kingdom of Fife	6.24%	33.22%	-26.98%	73	18.09%	51.27%	-33.18%	67
Orkney	25.81%	32.26%	-6.45%	94	30.59%	43.49%	-12.90%	87
Perthshire	3.18%	27.53%	-24.35%	76	17.38%	38.39%	-21.01%	79
Scottish Borders	0.37%	29.66%	-29.29%	71	19.03%	52.22%	-33.19%	67
Shetland Islands	*	0.00%	0.00%	100	3.98%	24.60%	-20.62%	79
Outer Hebrides	5.38%	9.21%	-3.83%	96	21.69%	51.73%	-30.04%	70

*Sample Size (4 or under) too small to be included

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) – December 2020/2019

Location accessibility/density	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	5.14%	30.95%	-25.81%	74	10.45%	34.58%	-24.13%	76
Other Urban Areas	2.54%	27.77%	-25.23%	75	19.63%	50.65%	-31.02%	69
Accessible Small Towns	1.92%	24.88%	-22.96%	77	14.80%	42.18%	-27.38%	73
Remote Small Towns	6.44%	24.50%	-18.06%	82	20.74%	44.28%	-23.54%	76
Accessible Rural	5.22%	50.73%	-45.51%	54	26.81%	56.60%	-29.79%	70
Remote Rural	5.06%	29.86%	-24.80%	75	20.71%	47.72%	-27.01%	73

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

Location (Geographic)	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	2.54%	23.17%	-20.63%	79	15.02%	38.18%	-23.16%	77
Inland	4.86%	34.26%	-29.40%	71	21.14%	49.61%	-28.47%	72
Island	5.28%	40.46%	-35.18%	65	27.77%	57.56%	-29.79%	70

Unit Occupancy by Property Type – December 2020/2019

Property Type	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Glamping inc Yurts etc	0.10%	11.34%	-11.24%	89	4.82%	35.68%	-30.86%	69
Lodge/Chalet	7.45%	58.70%	-51.25%	49	37.99%	70.84%	-32.85%	67
Cottage	3.74%	25.89%	-22.15%	78	19.01%	42.10%	-23.09%	77
Bungalow	1.51%	37.88%	-36.37%	64	16.55%	54.57%	-38.02%	62
House	7.17%	15.78%	-8.61%	91	12.97%	29.89%	-16.92%	83
Flat	5.08%	30.44%	-25.36%	75	12.64%	30.61%	-17.97%	82
Static Caravan	0.33%	4.63%	-4.30%	96	11.09%	39.89%	-28.80%	71
Other Property	0.33%	33.23%	-32.90%	67	6.68%	52.90%	-46.22%	54

Unit Occupancy by Tariff – December 2020/2019

Weekly Tariff	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Unknown	9.28%	7.55%	1.73%	102	5.19%	11.46%	-6.27%	94
Under £299	0.00%	14.79%	-14.79%	85	12.16%	30.91%	-18.75%	81
£300 - £499	3.06%	15.97%	-12.91%	87	16.61%	38.52%	-21.91%	78
£500 - £799	4.54%	28.88%	-24.34%	76	19.86%	47.36%	-27.50%	73
£800 or more	5.04%	51.57%	-46.53%	53	27.36%	58.36%	-31.00%	69

Unit Occupancy by Location Type – December 2020/2019

Location Type	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	2.77%	43.90%	-41.13%	59	22.53%	55.56%	-33.03%	67
City – Large Town	5.07%	35.11%	-30.04%	70	12.37%	36.13%	-23.76%	76
Small Town	0.59%	12.69%	-12.10%	88	15.14%	42.05%	-26.91%	73
Countryside - Village	5.76%	27.82%	-22.06%	78	20.74%	45.26%	-24.52%	75

Unit Occupancy by Grading – December 2020/2019

Grading	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 Stars	0.00%	12.98%	-12.98%	87	8.44%	38.71%	-30.27%	70
2 Stars	0.84%	7.19%	-6.35%	94	12.89%	26.64%	-13.75%	86
3 Stars	2.08%	29.58%	-27.50%	73	20.81%	46.19%	-25.38%	75
4 Stars	3.25%	30.30%	-27.05%	73	20.46%	49.84%	-29.38%	71
5 Stars	5.29%	48.42%	-43.13%	57	29.68%	54.75%	-25.07%	75
Unclassified	4.53%	35.38%	-30.85%	69	18.08%	46.66%	-28.58%	71