

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

## 1.0 Introduction July 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering July 2020 and benchmarking against July 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](mailto:gfe2@gcu.ac.uk)).

## 2.0 Executive Summary July 2020

Self-Catering Unit Occupancy rates for the month of July 2020 witnessed a significant decrease of -44.89% when comparing occupancy rates with July 2019. With July 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 July 2019 figures. The visitor attraction sector saw a decrease of 81.7% in visits numbers when comparing July 2020 with July 2019.

## 3.0 Self-Catering

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

In the **Self-Catering sector**, the unit occupancy rate for the period July 2020 was **19.47%** when compared to data from the previous year of **64.36%** occupancy rate; this shows a % Point decrease of **-44.89%**.

**Unit occupancy** rates in Ayrshire & Arran were the highest in July 2020. Bungalow Properties, those located in Remote Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during July 2020.

#### Unit Occupancy – July 2020/2019

Unit Occupancy	July 20	July 19	20/19 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 20	YTD 19	20/19 Diff	Change
Self-Catering	19.47%	64.36%	-44.89%	55	14.03%	47.97%	-33.94%	66

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

Area	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	23.20%	55.64%	-32.44%	68	20.38%	46.05%	-25.67%	74
ALLFV	19.11%	67.21%	-48.10%	52	12.54%	56.48%	-43.94%	56
Angus & City of Dundee	16.81%	69.21%	-52.40%	48	18.49%	60.20%	-41.71%	58
Ayrshire & Arran	51.22%	59.96%	-8.74%	91	26.97%	45.60%	-18.63%	81
Dumfries & Galloway	6.85%	37.07%	-30.22%	70	5.04%	27.13%	-22.09%	78
Edinburgh & Lothian	10.08%	53.02%	-42.94%	57	10.49%	35.99%	-25.50%	75
Greater Glasgow	2.80%	40.46%	-37.66%	62	10.83%	36.59%	-25.76%	74
Highlands of Scotland	22.64%	77.75%	-55.11%	45	15.16%	56.16%	-41.00%	59
Kingdom of Fife	0.00%	82.44%	-82.44%	18	15.30%	48.83%	-33.53%	66
Orkney	20.00%	83.07%	-63.07%	37	20.20%	45.82%	-25.62%	74
Perthshire	31.43%	69.78%	-38.35%	62	15.87%	38.65%	-22.78%	77
Scottish Borders	30.28%	65.92%	-35.64%	64	14.66%	50.10%	-35.44%	65
Shetland Islands	0.00%	61.31%	-61.31%	39	0.70%	32.74%	-32.04%	68

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

<sup>2</sup> 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.

Outer Hebrides	44.10%	86.16%	-42.06%	58	12.75%	51.16%	-38.41%	62
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### Unit Occupancy by Location (Accessibility & Density) – July 2020/2019

Location accessibility/density	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	2.43%	45.27%	-42.84%	57	10.20%	33.88%	-23.68%	76
Other Urban Areas	21.43%	66.93%	-45.50%	55	13.81%	53.64%	-39.83%	60
Accessible Small Towns	13.50%	65.88%	-52.38%	48	8.50%	41.69%	-33.19%	67
Remote Small Towns	22.33%	58.57%	-36.24%	64	13.21%	45.11%	-31.90%	68
Accessible Rural	11.04%	65.11%	-54.07%	46	16.12%	56.59%	-40.47%	60
Remote Rural	26.99%	68.46%	-41.47%	59	16.31%	48.07%	-31.76%	68

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

Location (Geographic)	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	11.87%	57.81%	-45.94%	54	9.49%	36.74%	-27.25%	73
Inland	19.05%	64.45%	-45.40%	55	14.24%	50.93%	-36.69%	63
Island	42.61%	80.44%	-37.83%	62	26.26%	55.81%	-29.55%	70

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

Property Type	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Glamping inc Yurts etc	2.33%	70.37%	-68.04%	32	2.47%	38.00%	-35.53%	64
Lodge/Chalet	31.40%	82.56%	-51.16%	49	26.22%	71.88%	-45.66%	54
Cottage	19.83%	58.58%	-38.75%	61	13.61%	42.08%	-28.47%	72
Bungalow	34.68%	71.47%	-36.79%	63	20.43%	53.61%	-33.18%	67
House	12.91%	45.60%	-32.69%	67	6.62%	32.07%	-25.45%	75
Flat	4.82%	41.35%	-36.53%	63	9.82%	29.36%	-19.54%	80
Static Caravan	17.45%	62.20%	-44.75%	55	6.23%	43.76%	-37.53%	62
Other Property	0.00%	89.69%	-89.69%	10	5.94%	49.39%	-43.45%	57

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

Weekly Tariff	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Unknown	0.00%	20.93%	-20.93%	79	1.43%	11.51%	-10.08%	90
Under £299	15.79%	53.98%	-38.19%	62	15.76%	33.00%	-17.24%	83
£300 - £499	7.08%	52.44%	-45.36%	55	11.31%	40.82%	-29.51%	70
£500 - £799	21.47%	66.61%	-45.14%	55	13.57%	47.70%	-34.13%	66
£800 or more	27.11%	72.60%	-45.49%	55	20.08%	57.38%	-37.30%	63

### Unit Occupancy by Location Type – July 2020/2019

Location Type	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	20.08%	70.21%	-50.13%	50	15.61%	54.74%	-39.13%	61
City – Large Town	2.93%	43.08%	-40.15%	60	13.85%	35.98%	-22.13%	78
Small Town	17.08%	63.78%	-46.70%	53	8.73%	45.91%	-37.18%	63
Countryside - Village	21.98%	64.68%	-42.70%	57	14.37%	46.15%	-31.78%	68

### Unit Occupancy by Grading – July 2020/2019

Grading	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
2 Stars	0.00%	32.56%	-32.56%	67	4.80%	37.46%	-32.66%	67
3 Stars	9.50%	31.94%	-22.44%	78	4.00%	20.75%	-16.75%	83
4 Stars	23.21%	64.20%	-40.99%	59	14.54%	45.22%	-30.68%	69
5 Stars	20.81%	68.88%	-48.07%	52	14.97%	50.57%	-35.60%	64
Unclassified	45.76%	85.23%	-39.47%	61	35.77%	51.42%	-15.65%	84