

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

1.0 Introduction June 2020/2019

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

Self-Catering Unit Occupancy rates for the month of June 2020 witnessed a significant decrease of -55.58% when comparing occupancy rates with June 2019. Traditionally, as we come into the summer months, June would show us significant increases in occupancy, however, the current lockdown situation is still heavily restricting travel and tourism at this time. The visitor attraction sector saw a decrease of 93.4% in visits numbers when comparing June 2020 with June 2019.

3.0 Self-Catering

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

In the **Self-Catering sector**, the unit occupancy rate for the period June 2020 was **3.31%** when compared to data from the previous year of **58.89%** occupancy rate; this shows a % Point decrease of **-55.58%**.

Unit occupancy rates in the Aberdeen & Grampian area were the highest in June 2020. Chalet and Lodges, those located in Other Urban Areas, Coastal properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during June 2020.

Unit Occupancy – June 2020/2019

Unit Occupancy	June 20	June 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Self-Catering	3.31%	58.89%	-55.58%	44	12.53%	45.15%	-32.62%	67

Unit Occupancy by Former VisitScotland Area – June 2020/2019

Area	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	10.44%	57.39%	-46.95%	53	19.73%	44.53%	-24.80%	75
ALLFV	6.68%	63.03%	-56.35%	44	11.15%	54.56%	-43.41%	57
Angus & City of Dundee	8.00%	66.67%	-58.67%	41	18.85%	58.65%	-39.80%	60
Ayrshire & Arran	0.00%	59.44%	-59.44%	41	17.56%	43.55%	-25.99%	74
Dumfries & Galloway	0.60%	34.64%	-34.04%	66	4.72%	25.58%	-20.86%	79
Edinburgh & Lothian	0.00%	53.58%	-53.58%	46	9.55%	32.95%	-23.40%	77
Greater Glasgow	0.00%	44.01%	-44.01%	56	11.82%	35.96%	-24.14%	76
Highlands of Scotland	2.12%	67.39%	-65.27%	35	13.40%	52.03%	-38.63%	61
Kingdom of Fife	0.00%	56.01%	-56.01%	44	17.84%	42.40%	-24.56%	75
Orkney	0.00%	75.99%	-75.99%	24	6.51%	38.96%	-32.45%	68
Perthshire	0.49%	45.31%	-44.82%	55	14.61%	35.35%	-20.74%	79
Scottish Borders	0.00%	72.47%	-72.47%	28	13.95%	47.60%	-33.65%	66
Shetland Islands	0.00%	57.77%	-57.77%	42	0.82%	27.39%	-26.57%	73
Outer Hebrides	0.00%	78.57%	-78.57%	21	7.13%	44.69%	-37.56%	62

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) – June 2020/2019

Location accessibility/density	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	0.00%	48.23%	-48.23%	52	11.28%	32.04%	-20.76%	79
Other Urban Areas	5.07%	61.12%	-56.05%	44	11.91%	50.80%	-38.89%	61
Accessible Small Towns	1.78%	47.51%	-45.73%	54	7.40%	36.63%	-29.23%	71
Remote Small Towns	3.96%	56.71%	-52.75%	47	11.85%	42.97%	-31.12%	69
Accessible Rural	3.88%	62.35%	-58.47%	42	15.38%	55.37%	-39.99%	60
Remote Rural	3.50%	64.92%	-61.42%	39	14.02%	44.64%	-30.62%	69

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

Location (Geographic)	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	3.59%	46.40%	-42.81%	57	8.97%	33.10%	-24.13%	76
Other Urban Areas	3.51%	60.20%	-56.69%	43	13.38%	48.62%	-35.24%	65
Accessible Small Towns	0.00%	78.35%	-78.35%	22	17.16%	51.64%	-34.48%	66

Unit Occupancy by Property Type – June 2020/2019

Property Type	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Glamping inc Yurts etc	0.00%	65.62%	-65.62%	34	2.74%	31.76%	-29.02%	71
Lodge/Chalet	7.86%	81.90%	-74.04%	26	25.78%	69.98%	-44.20%	56
Cottage	3.87%	52.72%	-48.85%	51	12.14%	39.27%	-27.13%	73
Bungalow	0.00%	69.48%	-69.48%	31	12.82%	50.82%	-38.00%	62
House	1.82%	48.93%	-47.11%	53	4.94%	29.96%	-25.02%	75
Flat	0.04%	42.99%	-42.95%	57	10.29%	27.67%	-17.38%	83
Static Caravan	0.65%	50.12%	-49.47%	51	4.04%	39.84%	-35.80%	64
Other Property	0.00%	74.28%	-74.28%	26	6.71%	39.98%	-33.27%	67

Unit Occupancy by Tariff – June 2020/2019

Weekly Tariff	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Unknown	0.00%	22.92%	-22.92%	77	2.01%	9.44%	-7.43%	93
Under £299	0.00%	53.52%	-53.52%	46	12.55%	31.46%	-18.91%	81
£300 - £499	2.79%	52.44%	-49.65%	50	11.77%	39.25%	-27.48%	73
£500 - £799	3.66%	57.58%	-53.92%	46	11.79%	44.16%	-32.37%	68
£800 or more	4.80%	66.36%	-61.56%	38	17.60%	54.65%	-37.05%	63

Unit Occupancy by Location Type – June 2020/2019

Location Type	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	2.82%	66.66%	-63.84%	36	13.13%	51.96%	-38.83%	61
City – Large Town	0.00%	48.79%	-48.79%	51	15.13%	34.90%	-19.77%	80
Small Town	0.00%	54.06%	-54.06%	46	7.09%	42.22%	-35.13%	65
Countryside - Village	4.75%	57.14%	-52.39%	48	12.98%	43.13%	-30.15%	70

Unit Occupancy by Grading – June 2020/2019

Grading	June 20	June 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
2 Stars	0.00%	86.25%	-86.25%	14	5.48%	38.28%	-32.80%	67
3 Stars	0.00%	40.30%	-40.30%	60	1.80%	18.62%	-16.82%	83
4 Stars	4.28%	57.84%	-53.56%	46	11.75%	41.62%	-29.87%	70
5 Stars	1.47%	64.96%	-63.49%	37	13.96%	46.97%	-33.01%	67
Unclassified	10.26%	61.00%	-50.74%	49	31.58%	47.56%	-15.98%	84