

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

June 2021/2020 & June 2021/2019 Report – Self-Catering

1.0 Introduction June 2021/2020

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering June 2021 and benchmarking against June 2020 and also between June 2021 against June 2019. The report 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 2021

Self-Catering Unit Occupancy rates for June 2021 witnessed an increase of **37.85 percentage points** when comparing occupancy rates with June 2020 which reflects the ending of lockdown restrictions in 2021 in contrast to last years initial lockdown period. When comparing June 2021 with June 2019, we can see a decrease of **-17.01 percentage points**. This illustrates the occupancy difference prior to COVID-19 and its effects on the sector.

The Visitor Attraction sector saw an increase of **430.2%** in visits numbers when comparing June 2021 with June 2020, however when comparing June 2021 with June 2019 saw a decrease of **-58.2%**.

3.0 Self-Catering

3.1 Performance by Self-Catering Category – June 2021/2020 & June 2021/2019

In the **Self-Catering sector**, the unit occupancy rate for the period June 2021 was **41.74%** when compared to data from the previous year of **3.89%** occupancy rate; this shows a percentage point increase of **37.85pp**, however when comparing to data from 2019 of **58.75%** occupancy rate this shows an overall percentage point decrease of **-17.01pp**.

Unit occupancy rates in Orkney was the highest in June 2021. Bungalows, those located in Remote Rural Areas, Island properties and those charging a weekly tariff of £500 - £799 experienced the highest percentage unit occupancy rates during June 2021.

Unit Occupancy – June 2021/2020

Unit Occupancy	June 21	June 20	21/20 Diff ¹	Change ²	YTD 21	YTD 20	21/20 Diff	Change
Self-Catering	41.74%	3.89%	37.85	138	14.39%	12.97%	1.42	101

Unit Occupancy – June 2021/2019

Unit Occupancy	June 21	June 19	21/19 Diff ³	Change ⁴	YTD 21	YTD 19	21/19 Diff	Change
Self-Catering	41.74%	58.75%	-17.01	83	14.39%	45.14%	-30.75	69

¹ 21/20 Diff throughout this report is expressed by Percentage 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.

³ 21/19 Diff throughout this report is expressed by Percentage Point Change

⁴ 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 Former VisitScotland Area – June 2021/2020

Area	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
Aberdeen & Grampian	44.16%	13.50%	30.66	131	22.25%	19.89%	2.36	102
ALLFV	38.66%	6.68%	31.98	132	12.41%	11.15%	1.26	101
Angus & City of Dundee	76.67%	8.00%	68.67	169	30.25%	18.76%	11.49	111
Ayrshire & Arran	66.13%	0.00%	66.13	166	15.68%	22.90%	-7.22	93
Dumfries & Galloway	23.17%	0.61%	22.56	123	7.95%	4.72%	3.23	103
Edinburgh & Lothian	17.89%	0.00%	17.89	118	6.64%	10.56%	-3.92	96
Greater Glasgow	40.34%	0.00%	40.34	140	11.04%	12.24%	-1.20	99
Highlands of Scotland	48.48%	2.10%	46.38	146	18.32%	13.59%	4.73	105
Kingdom of Fife	30.15%	0.00%	30.15	130	10.32%	17.84%	-7.52	92
Orkney	90.00%	20.00%	70.00	170	34.63%	20.24%	14.39	114
Perthshire	32.00%	0.38%	31.62	132	7.06%	12.93%	-5.87	94
Scottish Borders	53.75%	0.00%	53.75	154	19.02%	11.92%	7.10	107
Shetland Islands	*	*	63.33	163	15.19%	0.82%	14.37	114
Outer Hebrides	82.01%	2.67%	79.34	179	29.73%	6.42%	23.31	123

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

Unit Occupancy by Former VisitScotland Area – June 2021/2019

Area	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
Aberdeen & Grampian	44.16%	57.39%	-13.23	87	22.25%	44.53%	-22.28	78
ALLFV	38.66%	63.03%	-24.37	76	12.41%	54.56%	-42.15	58
Angus & City of Dundee	76.67%	66.67%	10.00	110	30.25%	58.00%	-27.75	72
Ayrshire & Arran	66.13%	59.44%	6.69	107	15.68%	43.55%	-27.87	72
Dumfries & Galloway	23.17%	34.64%	-11.47	89	7.95%	25.58%	-17.63	82
Edinburgh & Lothian	17.89%	53.58%	-35.69	64	6.64%	32.95%	-26.31	74
Greater Glasgow	40.34%	44.01%	-3.67	96	11.04%	35.96%	-24.92	75
Highlands of Scotland	48.00%	66.64%	-18.64	81	18.32%	51.93%	-33.61	66
Kingdom of Fife	30.15%	56.01%	-25.86	74	10.32%	42.40%	-32.08	68
Orkney	90.00%	75.99%	14.01	114	34.63%	38.96%	-4.33	96
Perthshire	32.00%	45.31%	-13.30	87	7.06%	35.35%	-28.29	72
Scottish Borders	53.75%	72.47%	-18.72	81	19.02%	47.60%	-28.58	71
Shetland Islands	*	*	5.56	106	15.19%	27.39%	-12.20	88
Outer Hebrides	82.01%	78.59%	3.42	103	29.73%	44.69%	-14.96	85

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

Unit Occupancy by Location (Accessibility & Density) – June 2021/2020

Location accessibility/density	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
Large Urban Areas	11.41%	1.24%	10.17	110	8.67%	11.61%	-2.94	97
Other Urban Areas	45.29%	5.16%	40.13	140	17.26%	12.27%	4.99	105
Accessible Small Towns	29.76%	1.79%	27.97	128	10.64%	7.52%	3.12	103
Remote Small Towns	45.02%	4.13%	40.89	141	19.45%	11.56%	7.89	108
Accessible Rural	39.90%	7.01%	32.89	133	11.59%	16.95%	-5.36	95
Remote Rural	51.53%	3.47%	48.06	148	16.54%	14.08%	2.46	102

Unit Occupancy by Location (Accessibility & Density) – June 2021/2019

Location accessibility/density	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
Large Urban Areas	11.41%	48.23%	-36.82	63	8.67%	32.04%	-23.37	77
Other Urban Areas	45.29%	61.03%	-15.74	84	17.26%	50.76%	-33.50	67
Accessible Small Towns	29.76%	47.44%	-17.68	82	10.64%	36.61%	-25.97	74
Remote Small Towns	45.02%	56.00%	-10.98	89	19.45%	42.95%	-23.50	77
Accessible Rural	39.90%	62.45%	-22.55	77	11.59%	55.39%	-43.80	56
Remote Rural	51.53%	64.44%	-12.91	87	16.54%	44.61%	-28.07	72

Unit Occupancy by Location (Geographic) – June 2021/2020

Location (Geographic)	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
Coastal	35.78%	3.54%	32.24	132	11.68%	9.08%	2.60	103
Inland	38.56%	3.88%	34.68	135	13.83%	13.34%	0.49	100
Island	79.23%	5.26%	73.97	174	26.58%	22.31%	4.27	104

Unit Occupancy by Location (Geographic) – June 2021/2019

Location (Geographic)	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
Coastal	35.78%	46.30%	-10.52	89	11.68%	33.08%	-21.40	79
Inland	38.56%	60.00%	-21.44	79	13.83%	48.59%	-34.76	65
Island	79.23%	78.34%	0.89	101	26.58%	51.62%	-25.04	75

Unit Occupancy by Property Type – June 2021/2020

Property Type	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
Glamping inc Yurts etc	6.48%	0.00%	6.48	106	3.63%	2.50%	1.13	101
Lodge/Chalet	55.36%	7.33%	48.03	148	17.99%	25.11%	-7.12	93
Cottage	41.83%	4.55%	37.28	137	15.31%	12.46%	2.85	103
Bungalow	61.75%	6.11%	55.64	156	20.14%	16.68%	3.46	103
House	43.53%	1.92%	41.61	142	13.59%	5.44%	8.15	108
Flat	21.90%	0.82%	21.08	121	8.99%	10.74%	-1.75	98
Static Caravan	39.06%	0.67%	38.39	138	12.19%	4.00%	8.19	108
Other Property	38.15%	0.00%	38.15	138	7.38%	6.80%	0.58	101

Unit Occupancy by Property Type – June 2021/2019

Property Type	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
Glamping inc Yurts etc	6.48%	65.61%	-59.13	41	3.63%	31.76%	-28.13	72
Lodge/Chalet	55.36%	81.93%	-26.57	73	17.99%	69.97%	-51.98	48
Cottage	41.83%	52.66%	-10.83	89	15.31%	39.26%	-23.95	76
Bungalow	61.75%	68.02%	-6.27	94	20.14%	50.79%	-30.65	69
House	43.53%	48.67%	-5.14	95	13.59%	30.05%	-16.46	84
Flat	21.90%	43.01%	-21.11	79	8.99%	27.67%	-18.68	81
Static Caravan	39.06%	49.86%	-10.80	89	12.19%	39.76%	-27.57	72
Other Property	38.15%	74.27%	-36.12	64	7.38%	39.98%	-32.60	67

Unit Occupancy by Tariff – June 2021/2020

Weekly Tariff	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
Unknown	12.59%	0.00%	12.59	113	3.62%	1.44%	2.18	102
Under £299	17.48%	6.77%	10.71	111	2.03%	15.73%	-13.70	86
£300 - £499	30.94%	4.06%	26.88	127	13.34%	11.79%	1.55	102
£500 - £799	45.49%	3.86%	41.63	142	17.32%	11.88%	5.44	105
£800 or more	44.64%	4.88%	39.76	140	14.73%	18.51%	-3.78	96

Unit Occupancy by Tariff – June 2021/2019

Weekly Tariff	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
Unknown	12.59%	22.92%	-10.33	90	3.62%	9.44%	-5.82	94
Under £299	17.48%	53.46%	-35.98	64	2.03%	31.45%	-29.42	71
£300 - £499	30.94%	52.31%	-21.37	79	13.34%	39.21%	-25.87	74
£500 - £799	45.49%	57.52%	-12.03	88	17.32%	44.16%	-26.84	73
£800 or more	44.64%	66.09%	-21.45	79	14.73%	54.61%	-39.88	60

Unit Occupancy by Location Type – June 2021/2020

Location Type	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
Seaside - Coastal	45.19%	3.93%	41.26	141	14.64%	14.79%	-0.15	100
City – Large Town	10.55%	1.49%	9.06	109	7.41%	15.52%	-8.11	92
Small Town	38.07%	0.00%	38.07	138	14.13%	6.92%	7.21	107
Countryside - Village	45.48%	5.07%	40.41	140	15.21%	12.88%	2.33	102

Unit Occupancy by Location Type – June 2021/2019

Location Type	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
Seaside - Coastal	45.19%	66.61%	-21.42	79	14.64%	51.94%	-37.30	63
City – Large Town	10.55%	48.77%	-38.22	62	7.41%	34.89%	-27.48	73
Small Town	38.07%	53.84%	-15.77	84	14.13%	42.14%	-28.01	72
Countryside - Village	45.48%	56.92%	-11.44	89	15.21%	43.12%	-27.91	72

Unit Occupancy by Grading – June 2021/2020

Grading	June 21	June 20	21/20 Diff	Change	YTD 21	YTD 20	21/20 Diff	Change
1 Stars	0.00%	0.00%	0.00	100	0.00%	5.51%	-5.51	94
2 Stars	32.64%	0.00%	32.64	133	20.72%	1.89%	18.83	119
3 Stars	50.52%	6.40%	44.12	144	19.54%	12.48%	7.06	107
4 Stars	47.27%	1.51%	45.76	146	15.94%	13.95%	1.99	102
5 Stars	49.28%	10.23%	39.05	139	15.37%	33.36%	-17.99	82
Unclassified	32.53%	4.49%	28.04	128	11.07%	9.37%	1.70	102

Unit Occupancy by Grading – June 2021/2019

Grading	June 21	June 19	21/19 Diff	Change	YTD 21	YTD 19	21/19 Diff	Change
1 Stars	0.00%	86.25%	-86.25	14	0.00%	38.28%	-38.28	62
2 Stars	32.64%	39.95%	-7.31	93	20.72%	18.58%	2.14	102
3 Stars	50.52%	57.00%	-6.48	94	19.54%	41.63%	-22.09	78
4 Stars	47.27%	64.92%	-17.65	82	15.94%	46.94%	-31.00	69
5 Stars	49.28%	60.99%	-11.71	88	15.37%	47.55%	-32.18	68
Unclassified	32.53%	56.26%	-23.73	76	11.07%	45.78%	-34.71	65