

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

1.0 Introduction March 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering March 2020 and benchmarking against March 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 Marina Martinolli (Tel: 0141 331 8400 or via E-mail: mma4@gcu.ac.uk).

2.0 Executive Summary March 2020

Self-Catering Unit Occupancy rates for the month of March 2020 witnessed a significant decrease of -20.11% when comparing occupancy rates with March 2019. Although March can see occupancy rates begin to increase, COVID-19 has impacted the travel and tourism sector significantly. The unprecedented shock of lockdown on the 23rd of March throughout the UK, and similar lockdown measures across the globe, halting travel, has impacted greatly across all accommodation sectors. The visitor attraction sector saw a decrease of 47% in visits numbers when comparing March 2020 with March 2019.

3.0 Self-Catering

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

In the **Self-Catering sector**, the unit occupancy rate for the period March 2020 was **17.24%** when compared to data from the previous year of **37.35%** occupancy rate; this shows a decrease of **-20.11%**.

Unit occupancy rates in the Angus & City of Dundee the highest in March 2020. Chalet and Lodges, those located in Accessible Rural Areas, Island properties and those charging a £800 or more weekly tariff experienced the highest percentage unit occupancy rates during March 2020.

Unit Occupancy – March 2020/2019

Unit Occupancy	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Self-Catering	17.24%	37.35%	-20.11%	22.98%	34.83%	-11.85%

Unit Occupancy by Former VisitScotland Area – March 2020/2019

Area	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Aberdeen & Grampian	26.72%	43.86%	-17.14%	26.31%	33.91%	-7.60%
ALLFV	11.49%	54.07%	-42.58%	19.85%	48.85%	-29.00%
Angus & City of Dundee	44.06%	60.70%	-16.64%	29.40%	52.47%	-23.07%
Ayrshire & Arran	5.39%	41.34%	-35.95%	35.41%	38.86%	-3.45%
Dumfries & Galloway	8.76%	12.13%	-3.37%	8.82%	21.14%	-12.32%
Edinburgh & Lothian	13.87%	21.25%	-7.38%	18.13%	19.47%	-1.34%
Greater Glasgow	1.47%	29.95%	-28.48%	23.74%	29.65%	-5.91%
Highlands of Scotland	22.74%	33.26%	-10.52%	28.54%	34.25%	-5.71%
Kingdom of Fife	36.50%	33.20%	3.30%	32.10%	29.67%	2.43%
Orkney	0.00%	47.30%	-47.30%	16.39%	21.63%	-5.24%
Perthshire	26.18%	31.43%	-5.25%	26.31%	29.15%	-2.84%
Scottish Borders	24.60%	40.25%	-15.65%	28.21%	32.66%	-4.45%
Shetland Islands	0.00%	0.00%	0.00%	1.65%	0.00%	1.65%
Outer Hebrides	24.19%	17.51%	6.68%	15.06%	13.18%	1.88%

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

Location accessibility/density	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Large Urban Areas	3.27%	23.52%	-20.25%	20.06%	22.62%	-2.56%
Other Urban Areas	15.24%	37.36%	-22.12%	23.48%	36.09%	-12.61%
Accessible Small Towns	20.26%	29.38%	-9.12%	15.30%	25.88%	-10.58%
Remote Small Towns	18.39%	33.34%	-14.95%	20.64%	31.13%	-10.49%
Accessible Rural	20.77%	56.45%	-35.68%	27.24%	52.52%	-25.28%
Remote Rural	18.19%	32.72%	-14.53%	25.04%	30.86%	-5.82%

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

Location (Geographic)	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Coastal	13.87%	21.72%	-7.85%	15.62%	22.72%	-7.10%
Inland	18.20%	42.12%	-23.92%	24.45%	39.58%	-15.13%
Islands	20.99%	38.96%	-17.97%	33.21%	34.74%	-1.53%

Unit Occupancy by Property Type – March 2020/2019

Property Type	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Glamping inc Yurts etc	3.39%	24.43%	-21.04%	4.76%	17.34%	-12.58%
Lodge/Chalet	31.34%	66.73%	-35.39%	44.18%	63.44%	-19.26%
Cottage	19.05%	28.75%	-9.70%	21.15%	26.14%	-4.99%
Bungalow	3.05%	33.81%	-30.76%	25.54%	41.79%	-16.25%
House	9.85%	16.82%	-6.97%	9.74%	18.79%	-9.05%
Flat	10.16%	19.27%	-9.11%	19.91%	19.20%	0.71%
Static Caravan	10.52%	18.52%	-8.00%	8.96%	22.40%	-13.44%
Other Property	13.07%	34.90%	-21.83%	12.89%	18.08%	-5.19%

Unit Occupancy by Tariff – March 2020/2019

Weekly Tariff	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Unknown	8.63%	6.34%	2.29%	5.38%	4.10%	1.28%
Under £299	13.71%	31.95%	-18.24%	24.71%	27.34%	-2.63%
£300 - £499	18.38%	30.59%	-12.21%	19.59%	28.35%	-8.76%
£500 - £799	17.06%	32.59%	-15.53%	20.73%	29.05%	-8.32%
£800 or more	19.65%	47.20%	-27.55%	32.45%	46.95%	-14.50%

Uni Occupancy by Location Type – March 2020/2019

Location Type	March 20	March 19	% Change	Jan-March 20	Jan-March 19	% Change
Seaside - Coastal	13.58%	47.04%	-33.46%	25.49%	43.96%	-18.47%
City – Large Town	8.67%	27.53%	-18.86%	24.08%	26.95%	-2.87%
Small Town	20.79%	27.80%	-7.01%	16.81%	25.84%	-9.03%
Countryside - Village	19.37%	34.37%	-15.00%	22.63%	31.28%	-8.65%