

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: March 2021/2020 Report – Self-Catering

## 1.0 Introduction March 2021/2020

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering March 2021 and benchmarking against March 2020. 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 March 2021

Self-Catering Unit Occupancy rates for the month of March 2021 witnessed a decrease of -26.60 percentage points(pp) when comparing occupancy rates with March 2020. Typically a month where we see an increase in occupancy, March 2021 numbers remain low due to restrictions related to COVID-19. The visitor attraction sector saw a decrease of **-55.5%** in visits numbers when comparing March 2021 with March 2020.

## 3.0 Self-Catering

### 3.1 Performance by Self-Catering Category – March 2021/2020

In the **Self-Catering sector**, the unit occupancy rate for the period March 2021 was **2.05%** when compared to data from the previous year of **19.29%** occupancy rate; this shows a pp decrease of **-17.24**.

**Unit occupancy** rates in Angus & City of Dundee were the highest in March 2021. Cottages, those located in Remote Small Towns, Coastal properties and those charging a weekly tariff of £300 - £499 experienced the highest percentage unit occupancy rates during March 2021.

#### Unit Occupancy – March 2021/2020

Unit Occupancy	Mar 21	Mar 20	21/20 Diff <sup>1</sup>	YTD 21	YTD 20	21/20 Diff
Self-Catering	2.05%	19.29%	-17.24pp	2.12%	23.64%	-21.52pp

#### Unit Occupancy by Former VisitScotland Area – March 2021/2020

Area	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
Aberdeen & Grampian	12.34%	25.93%	-13.59pp	9.63%	25.64%	-16.01pp
ALLFV	0.76%	11.58%	-10.82pp	1.42%	19.94%	-18.52pp
Angus & City of Dundee	23.24%	43.66%	-20.42pp	12.26%	28.99%	-16.73pp
Ayrshire & Arran	0.00%	36.78%	-36.78pp	0.00%	46.45%	-46.45pp
Dumfries & Galloway	0.00%	8.74%	-8.74pp	0.55%	8.82%	-8.27pp
Edinburgh & Lothian	0.80%	14.63%	-13.83pp	0.67%	19.69%	-19.02pp
Greater Glasgow	0.00%	3.81%	-3.81pp	3.82%	24.56%	-20.74pp
Highlands of Scotland	0.71%	22.52%	-21.81pp	0.62%	28.30%	-27.68pp
Kingdom of Fife	0.00%	36.50%	-36.50pp	0.00%	32.10%	-32.10pp
Orkney	*	64.52%	-64.52pp	12.68%	32.78%	-20.10pp
Perthshire	2.91%	21.66%	-18.75pp	2.02%	24.61%	-22.59pp
Scottish Borders	*	24.60%	-24.60pp	0.00%	24.11%	-24.11pp
Shetland Islands	11.29%	0.00%	11.29pp	3.89%	1.65%	2.24pp
Outer Hebrides	*	12.10%	-12.10pp	0.00%	10.47%	-10.47pp

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

<sup>1</sup> 21/20 Diff throughout this report is expressed by percentage point Change (pp)

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

Location accessibility/density	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
Large Urban Areas	1.23%	3.36%	-2.13pp	7.46%	20.59%	-13.13pp
Other Urban Areas	3.33%	16.88%	-13.55pp	1.93%	24.94%	-23.01pp
Accessible Small Towns	0.41%	20.64%	-20.23pp	0.80%	15.74%	-14.94pp
Remote Small Towns	7.02%	18.92%	-11.90pp	5.20%	19.44%	-14.24pp
Accessible Rural	2.86%	25.53%	-22.67pp	2.23%	28.72%	-26.49pp
Remote Rural	0.90%	19.94%	-19.04pp	1.31%	25.14%	-23.83pp

### Unit Occupancy by Location (Geographic) – March 2021/2020

Location (Geographic)	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
Coastal	2.21%	14.94%	-12.73pp	1.92%	15.85%	-13.93pp
Inland	2.05%	18.22%	-16.17pp	2.23%	24.48%	-22.25pp
Island	1.14%	37.85%	-36.71pp	1.95%	37.44%	-35.49pp

### Unit Occupancy by Property Type – March 2021/2020

Property Type	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
Glamping inc Yurts etc	0.00%	3.18%	-3.18pp	0.00%	4.30%	-4.30pp
Lodge/Chalet	0.47%	31.42%	-30.95pp	0.73%	44.09%	-43.36pp
Cottage	4.46%	20.62%	-16.16pp	3.08%	21.60%	-18.52pp
Bungalow	0.00%	21.53%	-21.53pp	0.01%	28.65%	-28.64pp
House	0.52%	9.52%	-9.00pp	2.69%	10.75%	-8.06pp
Flat	0.54%	11.63%	-11.09pp	3.39%	20.49%	-17.10pp
Static Caravan	0.00%	10.52%	-10.52pp	0.15%	8.55%	-8.40pp
Other Property	0.00%	13.41%	-13.41pp	0.00%	12.99%	-12.99pp

### Unit Occupancy by Tariff – March 2021/2020

Weekly Tariff	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
Unknown	0.00%	4.32%	-4.32pp	2.12%	4.02%	-1.90pp
Under £299	0.00%	23.31%	-23.31pp	0.65%	27.28%	-26.63pp
£300 - £499	5.13%	18.90%	-13.77pp	3.65%	19.27%	-15.62pp
£500 - £799	2.80%	17.77%	-14.97pp	2.65%	21.38%	-18.73pp
£800 or more	0.43%	23.89%	-23.46pp	1.20%	33.04%	-31.84pp

### Unit Occupancy by Location Type – March 2021/2020

Location Type	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
Seaside - Coastal	2.19%	21.97%	-19.78pp	1.70%	27.57%	-25.87pp
City – Large Town	1.66%	8.98%	-7.32pp	6.74%	24.57%	-17.83pp
Small Town	1.15%	20.92%	-19.77pp	0.65%	16.60%	-15.95pp
Countryside - Village	2.22%	19.13%	-16.91pp	2.23%	22.53%	-20.30pp

### Unit Occupancy by Grading – March 2021/2020

Grading	Mar 21	Mar 20	21/20 Diff	YTD 21	YTD 20	21/20 Diff
1 Stars	0.00%	22.50%	-22.50pp	0.00%	10.94%	-10.94pp
2 Stars	0.00%	6.02%	-6.02pp	7.77%	5.14%	2.63pp
3 Stars	1.68%	20.08%	-18.40pp	1.72%	22.18%	-20.46pp
4 Stars	1.35%	26.17%	-24.82pp	1.19%	27.33%	-26.14pp
5 Stars	0.84%	40.45%	-39.61pp	0.61%	46.01%	-45.40pp
Unclassified	3.58%	8.07%	-4.49pp	3.05%	16.21%	-13.16pp