

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

1.0 Introduction May 2020/2019

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

Self-Catering Unit Occupancy rates for the month of May 2020 witnessed a significant decrease of -53.10% when comparing occupancy rates with May 2019. Generally, we would see occupancy rates in May increase, however in 2020 COVID-19 and the national lockdown has impacted the travel and tourism sector across the globe, halting all but the most essential travel. The visitor attraction sector saw a decrease of 97% in visits numbers when comparing May 2020 with May 2019.

3.0 Self-Catering

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

In the **Self-Catering sector**, the unit occupancy rate for the period May 2020 was **2.86%** when compared to data from the previous year of **55.96%** occupancy rate; this shows a decrease of **-53.10%**.

Unit occupancy rates in the Aberdeen & Grampian area were the highest in May 2020. Chalet and Lodges, those located in Large Urban Areas, Coastal properties and those charging a weekly tariff or between £500 - £799 experienced the highest percentage unit occupancy rates during May 2020.

Unit Occupancy – May 2020/2019

Unit Occupancy	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Self-Catering	2.86%	55.96%	-53.10%	14.66%	42.44%	-27.78%

Unit Occupancy by Former VisitScotland Area – May 2020/2019

Area	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Aberdeen & Grampian	13.20%	54.00%	-40.80%	21.68%	42.06%	-20.38%
ALLFV	3.26%	62.54%	-59.28%	12.36%	52.83%	-40.47%
Angus & City of Dundee	8.23%	55.04%	-46.81%	21.00%	56.97%	-35.97%
Ayrshire & Arran	0.00%	45.78%	-45.78%	21.07%	40.92%	-19.85%
Dumfries & Galloway	0.03%	30.74%	-30.71%	5.59%	23.96%	-18.37%
Edinburgh & Lothian	0.00%	44.57%	-44.57%	11.31%	28.76%	-17.45%
Greater Glasgow	0.00%	43.46%	-43.46%	14.22%	34.41%	-20.19%
Highlands of Scotland	2.51%	68.97%	-66.46%	16.37%	48.65%	-32.28%
Kingdom of Fife	1.29%	46.10%	-44.81%	21.25%	39.26%	-18.01%
Orkney	0.00%	61.93%	-61.93%	8.13%	30.93%	-22.80%
Perthshire	2.11%	40.70%	-38.59%	17.76%	34.02%	-16.26%
Scottish Borders	0.00%	65.02%	-65.02%	17.07%	43.10%	-26.03%
Shetland Islands	0.00%	54.86%	-54.86%	0.99%	20.67%	-19.68%
Outer Hebrides	0.00%	84.98%	-84.98%	8.62%	38.41%	-29.79%

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

Location accessibility/density	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Large Urban Areas	3.93%	40.68%	-36.75%	13.45%	28.51%	-15.06%
Other Urban Areas	3.04%	62.11%	-59.07%	13.84%	48.60%	-34.76%
Accessible Small Towns	0.12%	42.28%	-42.16%	8.91%	34.00%	-25.09%
Remote Small Towns	3.40%	59.24%	-55.84%	13.54%	40.52%	-26.98%
Accessible Rural	3.09%	60.16%	-57.07%	17.76%	54.07%	-36.31%
Remote Rural	3.50%	59.84%	-56.34%	16.36%	40.92%	-24.56%

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

Location (Geographic)	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Coastal	4.17%	44.54%	-40.37%	10.19%	30.71%	-20.52%
Inland	2.63%	57.97%	-55.34%	15.70%	46.26%	-30.56%
Islands	0.00%	69.60%	-69.60%	20.68%	46.28%	-25.60%

Unit Occupancy by Property Type – May 2020/2019

Property Type	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Glamping inc Yurts etc	0.00%	49.54%	-49.54%	3.32%	26.83%	-23.51%
Lodge/Chalet	4.70%	75.61%	-70.91%	29.76%	67.87%	-38.11%
Cottage	3.68%	54.42%	-50.74%	14.12%	36.61%	-22.49%
Bungalow	0.00%	63.33%	-63.33%	15.33%	47.59%	-32.26%
House	0.00%	40.74%	-40.74%	5.64%	25.56%	-19.92%
Flat	2.51%	34.90%	-32.39%	12.46%	24.32%	-11.86%
Static Caravan	1.13%	54.18%	-53.05%	4.95%	37.21%	-32.26%
Other Property	0.00%	58.68%	-58.68%	7.97%	34.83%	-26.86%

Unit Occupancy by Tariff – May 2020/2019

Weekly Tariff	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Unknown	0.00%	15.00%	-15.00%	2.51%	7.28%	-4.77%
Under £299	3.17%	47.43%	-44.26%	15.02%	29.15%	-14.13%
£300 - £499	2.61%	51.38%	-48.77%	13.58%	36.69%	-23.11%
£500 - £799	4.35%	59.36%	-55.01%	13.82%	41.39%	-27.57%
£800 or more	2.05%	59.67%	-57.62%	20.51%	52.18%	-31.67%

Uni Occupancy by Location Type – May 2020/2019

Location Type	May 20	May 19	% Change	Jan-May 20	Jan-May 19	% Change
Seaside - Coastal	3.58%	60.46%	-56.88%	15.48%	49.24%	-33.76%
City – Large Town	4.66%	41.58%	-36.92%	17.51%	31.84%	-14.33%
Small Town	0.70%	56.53%	-55.83%	9.00%	39.52%	-30.52%
Countryside - Village	2.79%	56.02%	-53.23%	14.95%	40.38%	-25.43%