

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

### 1.0 Introduction November 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering November 2020 and benchmarking against November 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](mailto:gfe2@gcu.ac.uk)).

### 2.0 Executive Summary November 2020

Self-Catering Unit Occupancy rates for the month of November 2020 witnessed a decrease of -21.89% when comparing occupancy rates with November 2019. November, a typically a low occupancy month within the sector, demonstrated an even lower occupancy on last years figures with the increased restrictions related to COVID-19. The visitor attraction sector saw a decrease of -55.8% in visits numbers when comparing November 2020 with November 2019.

### 3.0 Self-Catering

#### 3.1 Performance by Self-Catering Category – November 2020/2019

In the **Self-Catering sector**, the unit occupancy rate for the period November 2020 was **10.80%** when compared to data from the previous year of **32.69%** occupancy rate; this shows a % Point decrease of **-21.89%**.

**Unit occupancy** rates in Orkney was the highest in November 2020. Lodge/Chalets, those located in Accesible Rural Areas, Inland properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during November 2020.

#### Unit Occupancy – November 2020/2019

| Unit Occupancy | Nov 20 | Nov 19 | 20/19 Diff <sup>1</sup> | Change <sup>2</sup> | YTD 20 | YTD 19 | 20/19 Diff | Change |
|----------------|--------|--------|-------------------------|---------------------|--------|--------|------------|--------|
| Self-Catering  | 10.80% | 32.69% | -21.89%                 | 78                  | 21.78% | 48.95% | -27.17%    | 73     |

#### Unit Occupancy by Former VisitScotland Area – November 2020/2019

| Area                   | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|------------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Aberdeen & Grampian    | 29.99% | 27.36% | 2.63%      | 103    | 30.69% | 46.06% | -15.37%    | 85     |
| ALLFV                  | 9.97%  | 34.55% | -24.58%    | 75     | 24.21% | 55.68% | -31.47%    | 69     |
| Angus & City of Dundee | 2.82%  | 22.39% | -19.57%    | 80     | 32.08% | 59.14% | -27.06%    | 73     |
| Ayrshire & Arran       | 0.00%  | 57.74% | -57.74%    | 42     | 20.47% | 51.13% | -30.66%    | 69     |
| Dumfries & Galloway    | 2.57%  | 11.92% | -9.35%     | 91     | 12.04% | 27.47% | -15.43%    | 85     |
| Edinburgh & Lothian    | 10.55% | 30.42% | -19.87%    | 80     | 10.70% | 37.59% | -26.89%    | 73     |
| Greater Glasgow        | 6.00%  | 51.92% | -45.92%    | 54     | 16.22% | 40.51% | -24.29%    | 76     |
| Highlands of Scotland  | 7.11%  | 32.60% | -25.49%    | 75     | 25.14% | 56.70% | -31.56%    | 68     |
| Kingdom of Fife        | 19.63% | 48.34% | -28.71%    | 71     | 19.17% | 53.05% | -33.88%    | 66     |
| Orkney                 | 33.33% | 6.67%  | 26.66%     | 127    | 31.03% | 44.60% | -13.57%    | 86     |
| Perthshire             | 17.32% | 26.88% | -9.56%     | 90     | 18.98% | 39.98% | -21.00%    | 79     |
| Scottish Borders       | 6.01%  | 39.45% | -33.44%    | 67     | 28.07% | 54.16% | -26.09%    | 74     |
| Shetland Islands       | *      | 3.33%  | -3.33%     | 97     | 4.36%  | 27.00% | -22.64%    | 77     |
| Outer Hebrides         | 21.66% | 31.44% | -9.78%     | 90     | 22.94% | 55.50% | -32.56%    | 67     |

<sup>1</sup> 20/19 Diff throughout this report is expressed by % Point Change

<sup>2</sup> 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.

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

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

| Location accessibility/density | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|--------------------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Large Urban Areas              | 10.26% | 19.00% | -8.74%     | 91     | 10.84% | 34.93% | -24.09%    | 76     |
| Other Urban Areas              | 9.66%  | 31.29% | -21.63%    | 78     | 21.47% | 52.99% | -31.52%    | 68     |
| Accessible Small Towns         | 1.92%  | 23.95% | -22.03%    | 78     | 17.19% | 43.66% | -26.47%    | 74     |
| Remote Small Towns             | 12.22% | 32.11% | -19.89%    | 80     | 22.05% | 45.92% | -23.87%    | 76     |
| Accessible Rural               | 14.73% | 48.23% | -33.50%    | 67     | 17.19% | 57.08% | -39.89%    | 60     |
| Remote Rural                   | 11.87% | 30.55% | -18.68%    | 81     | 22.38% | 49.32% | -26.94%    | 73     |

### Unit Occupancy by Location (Geographic) – November 2020/2019

| Location (Geographic) | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|-----------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Coastal               | 9.48%  | 23.62% | -14.14%    | 86     | 16.87% | 39.31% | -22.44%    | 78     |
| Inland                | 11.55% | 34.36% | -22.81%    | 77     | 22.72% | 51.04% | -28.32%    | 72     |
| Island                | 8.99%  | 43.91% | -34.92%    | 65     | 30.38% | 59.11% | -28.73%    | 71     |

### Unit Occupancy by Property Type – November 2020/2019

| Property Type          | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|------------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Glamping inc Yurts etc | 3.71%  | 19.72% | -16.01%    | 84     | 5.73%  | 39.26% | -33.53%    | 66     |
| Lodge/Chalet           | 19.11% | 56.22% | -37.11%    | 63     | 41.11% | 71.81% | -30.70%    | 69     |
| Cottage                | 9.56%  | 27.77% | -18.21%    | 82     | 20.64% | 43.64% | -23.00%    | 77     |
| Bungalow               | 16.26% | 47.37% | -31.11%    | 69     | 18.00% | 56.08% | -38.08%    | 62     |
| House                  | 17.67% | 11.14% | 6.53%      | 107    | 13.47% | 31.20% | -17.73%    | 82     |
| Flat                   | 11.35% | 18.66% | -7.31%     | 93     | 13.40% | 30.62% | -17.22%    | 83     |
| Static Caravan         | 0.11%  | 3.42%  | -3.31%     | 97     | 13.43% | 41.96% | -28.53%    | 71     |
| Other Property         | 6.83%  | 40.98% | -34.15%    | 66     | 11.12% | 55.09% | -43.97%    | 56     |

### Unit Occupancy by Tariff – November 2020/2019

| Weekly Tariff | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|---------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Unknown       | 9.83%  | 1.26%  | 8.57%      | 109    | 4.98%  | 11.92% | -6.94%     | 93     |
| Under £299    | 14.14% | 17.12% | -2.98%     | 97     | 15.46% | 32.95% | -17.49%    | 83     |
| £300 - £499   | 10.59% | 21.11% | -10.52%    | 89     | 18.11% | 40.44% | -22.33%    | 78     |
| £500 - £799   | 8.25%  | 31.31% | -23.06%    | 77     | 21.43% | 49.00% | -27.57%    | 72     |
| £800 or more  | 15.23% | 48.81% | -33.58%    | 66     | 29.95% | 58.93% | -28.98%    | 71     |

### Unit Occupancy by Location Type – November 2020/2019

| Location Type         | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|-----------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Seaside - Coastal     | 7.96%  | 41.86% | -33.90%    | 66     | 25.29% | 56.51% | -31.22%    | 69     |
| City – Large Town     | 8.15%  | 17.80% | -9.65%     | 90     | 12.97% | 36.22% | -23.25%    | 77     |
| Small Town            | 4.80%  | 15.09% | -10.29%    | 90     | 16.68% | 44.41% | -27.73%    | 72     |
| Countryside - Village | 13.96% | 30.95% | -16.99%    | 83     | 22.27% | 46.92% | -24.65%    | 75     |

### Unit Occupancy by Grading – November 2020/2019

| Grading      | Nov 20 | Nov 19 | 20/19 Diff | Change | YTD 20 | YTD 19 | 20/19 Diff | Change |
|--------------|--------|--------|------------|--------|--------|--------|------------|--------|
| 1 Stars      | 0.00%  | 0.00%  | 0.00%      | 100    | 9.13%  | 41.05% | -31.92%    | 68     |
| 2 Stars      | 2.85%  | 32.87% | -30.02%    | 70     | 14.68% | 28.24% | -13.56%    | 86     |
| 3 Stars      | 9.46%  | 30.44% | -20.98%    | 79     | 22.06% | 47.54% | -25.48%    | 75     |
| 4 Stars      | 11.28% | 33.20% | -21.92%    | 78     | 22.65% | 51.75% | -29.10%    | 71     |
| 5 Stars      | 17.00% | 53.54% | -36.54%    | 63     | 34.83% | 55.22% | -20.39%    | 80     |
| Unclassified | 11.05% | 31.04% | -19.99%    | 80     | 19.30% | 47.63% | -28.33%    | 72     |