

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

1.0 Introduction October 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering October 2020 and benchmarking against October 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).

2.0 Executive Summary October 2020

Self-Catering Unit Occupancy rates for the month of October 2020 witnessed a decrease of -12.66% when comparing occupancy rates with October 2019. With the continuing effects and restrictions of COVID-19, there remains to be low occupancy in comparison to October 2019 figures. The visitor attraction sector saw a decrease of **-60.0%** in visits numbers when comparing October 2020 with October 2019.

3.0 Self-Catering

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

In the **Self-Catering** sector, the unit occupancy rate for the period October 2020 was **36.54%** when compared to data from the previous year of **49.20%** occupancy rate; this shows a % Point decrease of **-12.66%**.

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

Unit Occupancy – October 2020/2019

Unit Occupancy	Oct 20	Oct 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Self-Catering	36.54%	49.20%	-12.66%	87	22.99%	50.56%	-27.57%	72

Unit Occupancy by Former VisitScotland Area – October 2020/2019

Area	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	48.14%	40.58%	7.56%	108	30.76%	47.83%	-17.07%	83
ALLFV	46.69%	53.17%	-6.48%	94	25.87%	57.92%	-32.05%	68
Angus & City of Dundee	51.62%	55.21%	-3.59%	96	34.46%	62.65%	-28.19%	72
Ayrshire & Arran	0.61%	65.14%	-64.53%	35	22.42%	50.54%	-28.12%	72
Dumfries & Galloway	16.96%	22.72%	-5.76%	94	12.99%	28.94%	-15.95%	84
Edinburgh & Lothian	8.24%	35.42%	-27.18%	73	10.71%	38.31%	-27.60%	72
Greater Glasgow	15.15%	47.08%	-31.93%	68	17.81%	39.47%	-21.66%	78
Highlands of Scotland	50.69%	52.78%	-2.09%	98	27.12%	58.67%	-31.55%	68
Kingdom of Fife	33.02%	71.40%	-38.38%	62	19.13%	53.56%	-34.43%	66
Orkney	32.25%	38.20%	-5.95%	94	29.93%	48.64%	-18.71%	81
Perthshire	33.50%	54.27%	-20.77%	79	19.20%	42.15%	-22.95%	77
Scottish Borders	58.06%	59.71%	-1.65%	98	30.41%	55.59%	-25.18%	75
Shetland Islands	*	31.20%	-31.20%	69	4.81%	29.46%	-24.65%	75
Outer Hebrides	53.23%	67.73%	-14.50%	86	23.05%	57.76%	-34.71%	65

¹ 20/19 Diff throughout this report is expressed by % 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.

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

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

Location accessibility/density	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	13.50%	36.76%	-23.26%	77	10.87%	35.77%	-24.90%	75
Other Urban Areas	39.64%	43.43%	-3.79%	96	23.26%	55.26%	-32.00%	68
Accessible Small Towns	26.08%	48.54%	-22.46%	78	18.47%	45.65%	-27.18%	73
Remote Small Towns	34.22%	45.01%	-10.79%	89	22.97%	47.27%	-24.30%	76
Accessible Rural	47.69%	54.04%	-6.35%	94	30.29%	57.91%	-27.62%	72
Remote Rural	38.05%	51.53%	-13.48%	87	23.68%	51.39%	-27.71%	72

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

Location (Geographic)	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	24.90%	43.86%	-18.96%	81	17.65%	40.82%	-23.17%	77
Inland	41.08%	48.53%	-7.45%	93	23.96%	52.71%	-28.75%	71
Island	39.80%	67.76%	-27.96%	72	33.11%	60.58%	-27.47%	73

Unit Occupancy by Property Type – October 2020/2019

Property Type	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Glamping inc Yurts etc	11.99%	42.04%	-30.05%	70	5.98%	42.31%	-36.33%	64
Lodge/Chalet	73.37%	68.03%	5.34%	105	43.44%	73.29%	-29.85%	70
Cottage	34.03%	46.00%	-11.97%	88	22.04%	45.45%	-23.41%	77
Bungalow	28.74%	58.31%	-29.57%	70	19.46%	56.87%	-37.41%	63
House	22.61%	27.81%	-5.20%	95	12.95%	33.30%	-20.35%	80
Flat	14.76%	33.88%	-19.12%	81	13.54%	31.33%	-17.79%	82
Static Caravan	30.41%	24.13%	6.28%	106	15.24%	44.66%	-29.42%	71
Other Property	29.74%	74.70%	-44.96%	55	11.59%	56.88%	-45.29%	55

Unit Occupancy by Tariff – October 2020/2019

Weekly Tariff	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Unknown	18.30%	13.01%	5.29%	105	4.24%	12.98%	-8.74%	91
Under £299	11.80%	52.41%	-40.61%	59	15.64%	35.30%	-19.66%	80
£300 - £499	34.92%	41.14%	-6.22%	94	19.17%	42.68%	-23.51%	76
£500 - £799	36.70%	46.09%	-9.39%	91	22.98%	50.81%	-27.83%	72
£800 or more	43.03%	63.52%	-20.49%	80	31.12%	59.76%	-28.64%	71

Unit Occupancy by Location Type – October 2020/2019

Location Type	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	39.87%	58.39%	-18.52%	81	27.19%	57.96%	-30.77%	69
City – Large Town	11.92%	24.54%	-12.62%	87	13.30%	37.25%	-23.95%	76
Small Town	33.43%	28.53%	4.90%	105	18.16%	47.01%	-28.85%	71
Countryside - Village	39.42%	49.36%	-9.94%	90	23.20%	48.70%	-25.50%	75

Unit Occupancy by Grading – October 2020/2019

Grading	Oct 20	Oct 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 Stars	0.00%	12.88%	-12.88%	87	9.91%	45.10%	-35.19%	65
2 Stars	11.44%	38.63%	-27.19%	73	16.87%	27.46%	-10.59%	89
3 Stars	32.84%	50.88%	-18.04%	82	23.56%	49.42%	-25.86%	74
4 Stars	42.42%	49.08%	-6.66%	93	24.05%	53.77%	-29.72%	70
5 Stars	33.16%	77.69%	-44.53%	55	37.20%	55.37%	-18.17%	82
Unclassified	37.62%	45.06%	-7.44%	93	20.06%	49.08%	-29.02%	71