

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

1.0 Introduction September 2020/2019

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

Self-Catering Unit Occupancy rates for the month of September 2020 witnessed a decrease of -13.65% when comparing occupancy rates with September 2019. With the continuing effects and restrictions of COVID-19, there remains to be low occupancy in comparison to September 2019 figures. The visitor attraction sector saw a decrease of -57.5% in visits numbers when comparing September 2020 with September 2019.

3.0 Self-Catering

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

In the **Self-Catering sector**, the unit occupancy rate for the period September 2020 was **39.91%** when compared to data from the previous year of **53.56%** occupancy rate; this shows a % Point decrease of **-13.65%**.

Unit occupancy rates in Angus & City of Dundee were the highest in September 2020. Lodge/Chalets, those located in Other Urban Areas, Island properties and those charging a weekly tariff of £500 to £799 experienced the highest percentage unit occupancy rates during September 2020.

Unit Occupancy – September 2020/2019

Unit Occupancy	September 20	September 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Self-Catering	39.91%	53.56%	-13.65%	86	21.02%	53.56%	-32.54%	67

Unit Occupancy by Former VisitScotland Area – September 2020/2019

Area	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	56.71%	49.62%	7.09%	107	28.28%	49.62%	-21.34%	79
ALLFV	35.86%	59.00%	-23.14%	77	21.29%	59.00%	-37.71%	62
Angus & City of Dundee	86.79%	72.80%	13.99%	114	32.25%	72.80%	-40.55%	59
Ayrshire & Arran	12.77%	61.51%	-48.74%	51	24.98%	61.51%	-36.53%	63
Dumfries & Galloway	22.61%	32.28%	-9.67%	90	12.53%	32.28%	-19.75%	80
Edinburgh & Lothian	7.02%	35.07%	-28.05%	72	12.53%	35.07%	-22.54%	77
Greater Glasgow	36.34%	44.95%	-8.61%	91	18.16%	44.95%	-26.79%	73
Highlands of Scotland	53.37%	60.60%	-7.23%	93	23.85%	60.60%	-36.75%	63
Kingdom of Fife	38.44%	58.90%	-20.46%	80	17.58%	58.90%	-41.32%	59
Orkney	50.00%	49.59%	0.41%	100	29.66%	49.59%	-19.93%	80
Perthshire	39.10%	46.31%	-7.21%	93	18.08%	46.31%	-28.23%	72
Scottish Borders	69.21%	64.52%	4.69%	105	27.01%	64.52%	-37.51%	62
Shetland Islands	26.67%	8.90%	17.77%	118	5.17%	8.90%	-3.73%	96
Outer Hebrides	56.67%	81.95%	-25.28%	75	25.86%	81.95%	-56.09%	44

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.

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

Location accessibility/density	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	11.43%	36.78%	-25.35%	75	11.13%	36.78%	-25.65%	74
Other Urban Areas	50.79%	49.94%	0.85%	101	21.79%	49.94%	-28.15%	72
Accessible Small Towns	36.00%	48.78%	-12.78%	87	16.94%	48.78%	-31.84%	68
Remote Small Towns	48.61%	47.34%	1.27%	101	23.29%	47.34%	-24.05%	76
Accessible Rural	40.74%	56.56%	-15.82%	84	24.74%	56.56%	-31.82%	68
Remote Rural	40.57%	60.76%	-20.19%	80	22.17%	60.76%	-38.59%	61

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

Location (Geographic)	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	30.81%	50.09%	-19.28%	81	16.47%	50.09%	-33.62%	66
Inland	42.97%	52.54%	-9.57%	90	21.25%	52.54%	-31.29%	69
Island	52.80%	69.77%	-16.97%	83	34.19%	69.77%	-35.58%	64

Unit Occupancy by Property Type – September 2020/2019

Property Type	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Glamping inc Yurts etc	18.12%	43.91%	-25.79%	74	5.00%	43.91%	-38.91%	61
Lodge/Chalet	64.05%	75.68%	-11.63%	88	37.34%	75.68%	-38.34%	62
Cottage	43.37%	48.79%	-5.42%	95	20.85%	48.79%	-27.94%	72
Bungalow	18.31%	63.08%	-44.77%	55	19.09%	63.08%	-43.99%	56
House	29.10%	32.81%	-3.71%	96	12.53%	32.81%	-20.28%	80
Flat	17.92%	34.88%	-16.96%	83	14.30%	34.88%	-20.58%	79
Static Caravan	44.12%	37.09%	7.03%	107	13.34%	47.09%	-33.75%	66
Other Property	37.54%	76.70%	-39.16%	61	9.93%	76.70%	-66.77%	33

Unit Occupancy by Tariff – September 2020/2019

Weekly Tariff	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Unknown	17.39%	15.70%	1.69%	102	3.54%	15.70%	-12.16%	88
Under £299	12.98%	49.15%	-36.17%	64	15.34%	49.15%	-33.81%	66
£300 - £499	41.64%	47.27%	-5.63%	94	16.73%	47.27%	-30.54%	69
£500 - £799	45.69%	55.71%	-10.02%	90	21.42%	55.71%	-34.29%	66
£800 or more	37.84%	58.94%	-21.10%	79	28.70%	58.94%	-30.24%	70

Unit Occupancy by Location Type – September 2020/2019

Location Type	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	34.10%	65.37%	-31.27%	69	23.97%	65.37%	-41.40%	59
City – Large Town	11.48%	38.80%	-27.32%	73	14.24%	38.80%	-24.56%	75
Small Town	50.35%	36.33%	14.02%	114	15.53%	36.33%	-20.80%	79
Countryside - Village	44.05%	50.60%	-6.55%	93	21.58%	50.60%	-29.02%	71

Unit Occupancy by Grading – September 2020/2019

Grading	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 Stars	23.33%	76.12%	-52.79%	47	11.09%	76.12%	-65.03%	35
2 Stars	25.13%	46.84%	-21.71%	78	18.61%	46.84%	-28.23%	72
3 Stars	46.28%	55.22%	-8.94%	91	22.54%	55.22%	-32.68%	67
4 Stars	53.66%	57.47%	-3.81%	96	22.68%	57.47%	-34.79%	65
5 Stars	37.64%	59.12%	-21.48%	79	38.05%	59.12%	-21.07%	79
Unclassified	27.96%	53.73%	-25.77%	74	16.00%	53.73%	-37.73%	62