

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

1.0 Introduction January 2020/2019

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

Self-Catering Unit Occupancy rates for the month of January 2020 demonstrated a decrease of 8.67% when comparing occupancy rates with January 2019. During the month of January, a traditionally quiet time across all accommodation sectors, Ayrshire & Arran and The Scottish Borders experienced strong occupancy rates compared with occupancy rates of 2019.

3.0 Self-Catering

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

In the **Self-Catering** sector, the unit occupancy rate for the period January 2020 was **23.56%** when compared to data from the previous year of **32.23%** occupancy rate; this shows a decrease of **8.67%**. January's occupancy maintains similar levels to the previous month, December 2019. The visitor attraction sector witnessed an increase in visits of 1% when comparing January 2020 with January 2019.

Unit occupancy rates in Ayrshire & Arran were highest in January 2020. Chalet and Lodges, those located in Accessible Rural Areas, Inland properties and those charging £800 or more weekly tariff experienced the highest percentage unit occupancy rates during January 2020.

Unit Occupancy – January 2020/2019

Unit Occupancy	Jan 20	Jan 19	% Change
Self-Catering	23.56%	32.23%	-8.67%

Unit Occupancy by Former VisitScotland Area – January 2020/2019

Area	Jan 20	Jan 19	% Change
Aberdeen & Grampian	22.81%	25.80%	-2.99%
ALLFV	28.08%	42.82%	-14.74%
Angus & City of Dundee	4.84%	39.54%	-34.70%
Ayrshire & Arran	51.42%	38.90%	12.52%
Dumfries & Galloway	7.82%	31.71%	-23.89%
Edinburgh & Lothian	19.81%	15.89%	3.92%
Greater Glasgow	31.57%	28.80%	2.77%
Highlands of Scotland	32.52%	33.20%	-0.68%
Kingdom of Fife	18.40%	28.64%	-10.24%
Orkney	4.83%	9.68%	-4.85%
Perthshire	18.69%	23.31%	-4.62%
Scottish Borders	27.30%	21.75%	5.55%
Shetland Islands	4.84%	0.00%	4.84%
Outer Hebrides	11.84%	11.61%	0.23%

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

Location accessibility/density	Jan 20	Jan 19	% Change
Large Urban Areas	23.77%	18.79%	4.98%
Other Urban Areas	15.41%	38.62%	-23.21%
Accessible Small Towns	9.58%	23.21%	-13.63%
Remote Small Towns	20.90%	32.63%	-11.73%
Accessible Rural	29.64%	47.14%	-17.50%
Remote Rural	27.18%	29.89%	-2.71%

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

Location (Geographic)	Jan 20	Jan 19	% Change
Coastal	12.14%	25.50%	-13.36%
Inland	26.43%	35.37%	-8.94%
Islands	35.34%	34.87%	0.47%

Unit Occupancy by Property Type – January 2020/2019

Property Type	Jan 20	Jan 19	% Change
Glamping inc Yurts etc	7.18%	13.80%	-6.62%
Lodge/Chalet	45.67%	56.64%	-10.97%
Cottage	18.97%	26.71%	-7.74%
Bungalow	31.26%	48.85%	-17.59%
House	9.42%	21.25%	-11.83%
Flat	19.63%	18.01%	1.62%
Static Caravan	5.86%	23.62%	-17.76%
Other Property	12.28%	8.54%	3.74%

Unit Occupancy by Tariff – January 2020/2019

Weekly Tariff	Jan 20	Jan 19	% Change
Unknown	3.39%	2.67%	0.72%
Under £299	19.77%	22.28%	-2.51%
£300 - £499	15.76%	27.46%	-11.70%
£500 - £799	21.55%	27.40%	-5.85%
£800 or more	36.23%	45.12%	-8.89%

Uni Occupancy by Location Type – January 2020/2019

Location Type	Jan 20	Jan 19	% Change
Seaside - Coastal	31.32%	41.19%	-9.87%
City – Large Town	26.60%	21.06%	5.54%
Small Town	5.69%	27.79%	-22.10%
Countryside - Village	20.95%	28.42%	-7.47%