



Scottish Accommodation Occupancy Survey 2021





University for the Common Good

Acknowledgements

The authors would like to acknowledge the support and assistance of the representatives and operators in the accommodation sector who submitted data to the Scottish Accommodation Occupancy Survey, without whose contribution this publication would not have been possible.

No part of this publication may be reproduced for commercial purposes without the written consent of The Moffat Centre for Travel and Tourism Business Development, Glasgow Caledonian University. Extracts may be quoted only if the source is acknowledged.

Prof J John Lennon, Giancarlo Fedeli, Hugh Sheridan, Becca Murray Moffat Centre for Travel and Tourism Business Development

Produced by the Moffat Centre for Travel and Tourism Business Development Glasgow School *for* Business and Society Glasgow Caledonian University www.moffatcentre.com

Statistics in this report are given in good faith on the basis of information provided in the SAOS 2021 and 2021 by individual operators/managers of accommodation providers to the Moffat Centre for Travel and Tourism Business Development, Glasgow School *for* Business and Society, Glasgow Caledonian University. The Moffat Centre cannot accept responsibility for errors or misrepresentations. All liability for loss, disappointment, negligence, or other damage caused by the reliance on the information contained in this report is hereby excluded. Users are advised to exercise discretion when drawing any conclusions based on this data.





Contents

1	Executive Summary 2021		5
2	Methodology		6
3	Highlights		7
4	Serviced Accommodation		14
4.1.	Hotels		14
4.2.	Guest House, B&B		21
5	Self-Catering Accommodation		28
5.1.	% Unit Occupancy		28
5.2.	Self-Catering Monthly Distribution by % Unit	Occupancy 2021/2020	30
5.3.	Self-Catering Peak/Off Peak Tariffs		31
5.4.	Self-Catering Booking Methods 2021		32
5.5.	Self-Catering Online Presence 2021		32
6	Touring Accommodation		33
6.1.	% Pitch Occupancy		33
6.2.		upancy 2021/2020	
6.3.	Touring Booking Methods 2021		36
6.4.	Touring Online Presence 2021		36
7	Hostel Accommodation		37
7.1.	% Bed Occupancy		
7.2.	Hostel Monthly Distribution by % Bed Occup	ancy 2021/2020	40
7.3.	Hostel Booking Methods 2021		41
7.4.	Hostel Online Presence 2021		41
8	Weather & Currency Data		42





List of Figures

Figure 1	Covid-19 Key Dates in Scotland: January – April 2021	9
Figure 2	Covid-19 Key Dates in Scotland: May – August 2021	10
Figure 3	Covid-19 Key Dates in Scotland: September – December 2021	11
Figure 4	Covid-19 Key Dates in Scotland: March – July 2020	12
Figure 5	Covid-19 Key Dates in Scotland: August – December 2020	13
Figure 6	Hotel Monthly Distribution by % Room Occupancy 2021/2020	18
Figure 7	Hotel Monthly Distribution by % Bed Occupancy 2021/2020	18
Figure 8	Hotel Rev Par 2021/2020	19
Figure 9	Hotel Peak/Off-Peak Tariffs 2021/2020	19
Figure 10	Booking Methods 2021	20
Figure 11	Online Presence 2021	20
Figure 12	Guest House, B&B Monthly Distribution by % Room Occupancy 2021/2020	25
Figure 13	Guest House, B&B Monthly Distribution by % Bed Occupancy 2021/2020 Error! Bodefined.	okmark no
Figure 14	Guest House, B&B Peak/Off-Peak Tariffs 2021/2020	26
Figure 15	Booking Methods 2021	27
Figure 16	Online Presence 2021	27
Figure 17	Self-Catering Monthly Distribution by % Room Occupancy 2021/2020	30
Figure 18	Self-Catering Peak/Off-Peak Tariffs 2021/2020	31
Figure 19	Self-Catering Booking Methods 2021	32
Figure 20	Self-Catering Online Presence 2021	32
Figure 21	Touring Monthly Distribution by % Pitch Occupancy 2021/2020	35
Figure 22	Touring Booking Methods 2021	36
Figure 23	Touring Online Presence 2021	36
Figure 24	Hostel Monthly Distribution by % Bed Occupancy 2021/2020	40
Figure 25	Hostel Booking Methods 2021	41
Figure 26	Hostel Online Presence 2021	41
Figure 27	Average Maximum Temperature	42
Figure 28	Average Rainfall	42
Figure 29	Average Hours of Sunshine	43
Figure 30	GBP – Euro Average Exchange rates	44
Figure 31	GBP – US Dollar Average Exchange rates	45





1 Executive Summary 2021

The year 2021 saw the continued negative impact of the global pandemic and Coronavirus on both Scottish, UK and global tourism. The continued application of infection control measures impacted significantly on performance in the sector. Many operators and regions were effected differently given variations in precautionary measures. This created uncertainty and restrictions on travel and tourism that prior to March 2020 were simply unprecedented.

The 5th of January 2021, Mainland Scotland entered a Lockdown to further control infection rates the vast majority of Scottish and UK tourism businesses were negatively impacted. The gradual easing of restrictions following this period of lockdown saw Scotland move to Level 3 from the 26th of April, with hospitality venues such as cafés, pubs and restaurants reopening, along with tourist accommodation. Furthermore, on the 17th of May, all of mainland Scotland entered Level 2 (except for Moray which moved to level 2 on the 21st of May), and the vast majority of islands moved into Level 1, (except for Skye, which moved to Level 2). However, on the 14th of May, the Scottish Government announced that Glasgow would remain in Level 3 due to an increase in Covid-19 Cases (Glasgow remained at this level until moving to Level 2 on the 5th of June). Some respite was finally achieved with the whole of Scotland moving to Level 0 on the 19th of July and a reduction in physical distancing to one-meter. The situation improved further 9th of August when Scotland moved to 'Beyond Level 0' with relaxation of social distancing and limits on gatherings, however, the wearing of face coverings remained for 2021.

The partial reopening produce selective effects. The performance of Scottish Cities remained weak and the downturn in the Meetings, Incentives, Conference and Events (MICE) sector along with the significant downturn in office and business usage and occupancy saw demand continue to reduce in urban centres. However, the staging of the United Nations Climate Change Conference (COP 26) in Glasgow from the 31st of October to the 13th of November provided short term positive impacts for a city that suffered significantly as a consequence of the pandemic.

In leisure terms, Highland and coastal areas continued to experience the most significant levels of demand. Visitation to the majority of Scottish islands was impacted by requirements for social distancing on ferry crossings. This reduced transit capacity and negatively impacted demand. Other issues such as weather conditions and fleet reliability and maintenance also contributed to lower levels of island visitation.

The persistent uncertainty in respect of Covid-19 variants continued to overshadow recovery in the travel and tourism sector around the globe. Whilst 2021 appears positive in contrast to the year 2020, comparisons with 2019 have also been included to illustrate the real extent of reduced volumes and rates. It should also be noted that there were multiple closures within both Self-Catering and Serviced Accommodation provision in 2021, with some businesses, particularly serviced establishments, reporting a permanent cessation of trading.

Professor J John Lennon
Director of Moffat Centre for Travel and Tourism Business Development
https://www.moffatcentre.com/

T: +44 (0)141 331 8405 | M: +44 (0)79 7656 9368 | E: <u>J.J.Lennon@gcu.ac.uk</u>
Glasgow Caledonian University, Cowcaddens Road, Glasgow, G4 0BA, Scotland, United Kingdom





2 Methodology

The Moffat Centre began managing VisitScotland's Scottish Accommodation Occupancy Survey in December 2016.

In respect of the 2021 survey, initial emails were circulated to all accommodation providers from February 2021 requesting January data. Accompanying this email were detailed instructions on submitting data onto the RIBOS platform. At the same time, telephone enquiries were answered, and participants offered assistance with navigating RIBOS. A reminder email was circulated 2 weeks later, with telephone chase ups beginning at the same time.

This data capture process was repeated each month in the following accommodation sectors: Serviced, Self-Catering, Touring and Hostels.

Data was collated via RIBOS, the online web platform; by email via excel/word documents and by telephone. Several intermediaries were used to provide Self-Catering accommodation data.





3 Highlights

Serviced Accommodation

All Serviced accommodation experienced a Room Occupancy increase of 20.72% when comparing 2021 with 2020, however, when compared with 2019 Serviced accommodation experienced a significant Room Occupancy decrease of -21.51%. Hotel Room Occupancy saw an increase of 17.78% when comparing 2021 with 2020. However, when comparing the same period in 2019 Hotel Room Occupancy saw a decrease of -24.70%. In 2021, Hotel room occupancy reached a peak in August and September at 74.8%, compared with a peak of 60.0% at the same time in 2020. In 2021, the average peak tariff amongst Serviced accommodation was £110.97, whilst the off-peak average tariff was £107.47. In 2020, the average peak tariff was £106.11, whilst the off-peak average tariff was £103.08.

In 2021, the average peak tariff amongst participating hotels was £135.81, whilst the off-peak average tariff was £129.01. In 2020, the average peak tariff was £137.08, whilst the off-peak average tariff was £131.73. In 2021, some 97.7% of all participating Hotels had their own website, with the majority also listing on TripAdvisor (84.3%).

Guest House, B&B Room Occupancy increased by 27.92% when comparing 2021 with 2020, however, when compared to 2019 Guest House, B&B Room Occupancy decreased by -8.53%. In 2021, Guest House, B&B room occupancy peaked in August at 74.4%, compared with a peak of 42.5% at the same period in 2020.

In 2021, the average peak tariff amongst participating Guest House, B&B accommodation was £55.79 per person per night, whilst the off-peak average tariff was £57.26 per person per night. In 2020, the average peak tariff was £52.06 per person per night, with the off-peak average tariff was £52.24 per person per night.

Self-Catering Accommodation

Self-Catering unit occupancy experienced an increase of 7.58% when comparing 2021 with 2020, however, when comparing the same period in 2019 unit occupancy experienced a decrease of -19.46%. In 2021, Self-Catering unit occupancy peaked in August at 52.847%, whilst in 2020; unit occupancy peaked at 50.8% in August.

In 2021, some 97% of all participating Self-Catering accommodation providers had their own website. Just under three quarters had a Facebook page and just over 60% were listed on TripAdvisor





Touring Accommodation experienced a Net Pitch Occupancy increase of 16.97% when comparing 2021 with 2020, when compared with 2019 touring accommodation bucked the trend with a Net Pitch Occupancy increase of 6.22%.

In 2021, Direct booking methods were cited as the most popular by 93% of Touring accommodation providers. 'Other' booking methods (51%) and 'Walk in' (13%) were less popular when booking touring pitches in 2021.

In 2021, 98% of all participating Touring accommodation providers had their own website and more than three quarters had a Facebook page.

Hostel Accommodation

Hostel accommodation suffered a Bed Occupancy increase of 14.57% when comparing 2021 with 2020, however, when comparing the same period in 2019 Bed occupancy experienced a decrease of -25.09%. In 2021, Hostel occupancy peaked in August at 50.5%, whilst in 2020 Hostel occupancy peaked in February at 36.7%.

Some 72% of all participating Hostel accommodation providers had their own website. Just over a fifth of Hostel accommodation providers also utilised Facebook and TripAdvisor (22%) with just under 17% using Twitter to promote their accommodation.





Impact of Covid-19: Time Frame

The graphics below illustrate the key dates and events related to Covid-19 which s impacted Scotland's accommodation providers in 2020 and 2021.

Figure 1 Covid-19 Key Dates in Scotland: January - April 2021

January

04/01 - UK Chief Medical Officers issued a joint statement recommending that the UK COVID-19 alert level moves from level 4 to level 5.

05/01 - Mainland Scotland goes into Lockdown.

07/01 - Scottish Government announces that individuals arriving from Botswana, Israel (and Jerusalem), Mauritius or Seychelles into Scotland will need to self-isolate from 4am on Saturday the 9th of January.

12/01 - Scottish Government announce that from 4am on Monday 18th of January, passengers travelling to Scotland from outside the Common Travel Area must have a valid negative COVID-19 test result, taken no more than three days before travel.

13/01 - Scottish Government announce the strengthening of lockdown restrictions from 00:01 on Saturday 16th of January. Non-essential click and collect retail services will be prohibited in Level 4 areas, with changes in five other key areas including restrictions on the consumption of alcohol in public places.

January (cont)

15/01 - Scottish Government announce the suspension of all travel corridors.

19/01 - Scottish Government announce current lockdown measures will stay in place across mainland Scotland and some island communities until at least the middle of February. Barra and Vatersay will move into lockdown from 00:01 on Wednesday (20 January) following a sharp increase in infection rates.

20/01 - Scottish Government publish the response to the Scottish Tourism Taskforce recommendations.

29/01 - Scottish Government announce the Western Isles will move to Level 4 due to rise in cases.

February

02/02 - Scottish Government extends the criteria for the Self-Isolation Support Grant.

09/02 - Scottish Government announce all arrivals to Scotland from outside the Common Travel Area must book and pay for managed isolation in quarantine hotels from 15 February 2021. All arrivals must quarantine for at least ten days and will be tested twice for the virus – once on day two and once on day eight after arrival.

16/02 - Scottish Government announce the non-domestic rates relief will be extended for the 2021-22 period.

23/02 - Scottish Government publish the updated Strategic Framework, setting out the broad order of priority for re-opening and the conditions that need to be met to start lifting restrictions.

24/02 - Scottish Government announce the Scotland Food & Drink Partnership's Regional Food Fund has reopened for applications.

March

03/03 - UK Government announce the furlough scheme and Universal Credit uplift will be extended until the end of September.

09/03 - Scottish Government announce changes to level 4 restrictions. From Friday 12 March up to four adults from two households can meet locally outdoors for social and recreational purposes as well as exercise. Outdoor non-contact sports and group exercise will also resume for adults in groups of up to 15 people.

16/03 - Scottish Government publish a timetable for easing restrictions. Stay at Home regulations are to be lifted on 2 April and replaced with guidance to Stay Local, with more services including hairdressers, garden centres and non-essential click and collect services able to open from 5 April.

17/03 - Scottish Government announce a £2 million City Centres Recovery Fund and a £2 million Regional Recovery Fund.

April

13/04 - Scottish Government announce Travel within Scotland for outdoor socialising, recreation and exercise, and outdoor meetings in groups of up to six adults from up to six households will be allowed from Friday the 16th.

20/04 - Scottish Government announce all parts of the country will move to Level 3 from Monday the 26 th of April. Hospitality venues such as cafés, pubs and restaurants can reopen, along with tourist accommodation.





May

14/05 - Scottish Government announce most of mainland Scotland (with the exception of Moray) will move to level 2 from Monday 17th of May, with eased restrictions on hospitality, entertainment, education and sport. Most islands to move to level 1. The number of people and households that can meet inside homes in Level 2 has been increased to six people from three households. From 17th of May, anyone entering Scotland from countries on a new international travel 'Green List' will not be required to quarantine on arrival, but will have to take a PCR test for COVID-19.

Scottish Government announce Glasgow and Moray will remain in Level 3 from Monday 17th of May due to a high rate of COVID-19 cases. Travel to and from these areas will be prohibited other than for permitted purposes.

21/05 - Scottish Government announce Moray moves to Level 2 from midnight, 21st of May. Glasgow is to remain at Level 3.

28/05 - Scottish
Government announce £3
million Destination and Sector
Marketing Fund for tourism
organisations to promote key visitor
destinations in a responsible and
sustainable way

June

01/06 - Scottish Government announce Glasgow will move to Level 2 on Saturday 5 June 2021, while 15 mainland local authorities will move to Level 1. All islands currently in Level 1 will move to Level 0 at the same time due to sustained low numbers of

02/06 - Scottish Government announce £12 million of funding for businesses in Level 2 areas – including those in the hospitality, events, weddings and soft play sectors, additional funding for taxi drivers and operators and £25 million to support the culture sector.

22/06 - First Minister Nicola Sturgeon announces a new indicative date for the whole of Scotland to move to level 0 on 19th of July, provided all necessary vaccination and harm reduction measures are met. A further indicative date of 9 August for the lifting of all major COVID-19 restrictions (subject to confirmation).

July

13/07 First Minister Nicola Sturgeon announces all of Scotland will move to protection level 0 on Monday the 19th of July. Physical distancing in will reduce to 1 metre in all indoor public settings and outdoors, and informal social gatherings of up to 15 people from 15 households will be permitted outdoors without physical distancing. Mandatory face coverings will remain in place.

28/07 - Scottish Government announce fully vaccinated people from the EU and US will be able to travel to Scotland without quarantining from Monday 2 August.

August

03/08 - First Minister Nicola Sturgeon announces Scotland to move beyond level 0 on 9 August, when the legal requirement for physical distancing and limits on gatherings will be removed. Some protective measures will stay in place such as the use of face coverings indoors and the collection of contact details as part of Test and Protect.

24/08 - Scottish Government invites views on the draft aims and principles of an independent public inquiry into the handling of the coronavirus (COVID-19) pandemic.

25/08 - Scottish Government announce £14 million North East Economic Recovery and Skills Fund. The funding will provide opportunities for more than 3,000 individuals in Aberdeen and Aberdeenshire through training and enterprise projects across a number of sectors, including entrepreneurship, tourism and energy transition.





September

17/09 - Scottish Government announce international travel restrictions will be relaxed and simplified. Green and amber classifications will merge, but the red list will be retained for those countries deemed to have high COVID19 case rates or variants of concern. The current traffic light system will end on the 4th of October.

24/09 - Scottish Government announce travellers from non-red list countries who have been fully vaccinated in a country that meets recognised standards of certifications will no longer be required to provide evidence of a negative test result before they can travel to Scotland, from 4 October.

October

01/10 - The Scottish Government's vaccination certification scheme is in operation from 1 October. People attending certain late night venues and larger indoor and outdoor live events will be required to show staff proof of their Covid status or a valid exemption.

05/10 - Scottish Government publish Covid Recovery Strategy: for a fairer future.

07/10 - Scottish Government announce 47 countries will be taken off the international travel red list from 11 October. In addition, vaccine certificates from a further 37 countries will be recognised to allow quarantine-free travel to Scotland.

18/10 - Scottish Government announce the Coronavirus vaccine certification scheme has become subject to enforcement. People attending a range of late night venues and larger indoor and outdoor live events, such as music festivals or large sporting events, will be required to show staff proof they are fully vaccinated or are otherwise exempt.

26/10 - First Minister Nicola Sturgeon announces that from 4am on Sunday the 31st of October, people travelling to Scotland can take a lateral flow test - rather than a PCR test - on day two of their arrival.

28/10 - Scottish Government announce the final seven countries are to be removed from the international travel red list from the 1st of November, meaning travellers to the UK from those destinations will no longer have to stay in hotel guarantine for 10 days on arrival.

November

16/11 - Scottish Government publish an update to Scotland's Strategic Framework, setting out the latest approach to managing the pandemic.

23/11 - Scottish Government announce that from the 6th of December, people attending venues covered by Scotland's COVID certification scheme are to be given the option of providing a recent negative lateral flow test for the virus, as an alternative to proof of vaccination.

26/11 - Scottish Government announce new travel restrictions for arrivals from South Africa, Namibia, Lesotho, Eswatini, Zimbabwe and Botswana. All travellers returning to Scotland from these countries are now required to self-isolate and take two PCR tests, regardless of their vaccination status.

27/11 - Scottish Government imposes new travel restrictions as a result of the omicron variant - fully vaccinated arrivals will need to take a PCR test within two days of arrival and to self-isolate until a negative result is received. Angola, Malawi, Mozambique and Zambia are added to the travel red list.

29/11 First cases of COVID-19 Omicron variant are identified in Scotland.

December

14/12 - Scottish Government publish updated guidance on reducing social interaction at home or in indoor public places to a maximum of three households at any time, with everyone encouraged to take a lateral flow test before meeting.

Scottish Government announce 11 countries are to be removed from the international travel red list as Omicron cases increase globally. Pre-departure tests and PCR testing measures on or before day 2 on arrival in Scotland will remain in place.

16/12 - Scottish Government publish new guidance for businesses. From Friday 17 December 2021, businesses will be legally required to take reasonable measures to minimise transmission of coronavirus (COVID-19).

17/12 - Scottish Government announce the breakdown of a £100 million financial package to support businesses experiencing cancellations due to the spread of the new Omicron variant.

21/12 - Scottish Government announce one metre physical distancing to return in indoor hospitality and leisure settings from 27 December. Attendance at large events will be limited (100 people for indoor standing events, to 200 for indoor seated events, and to 500 for all outdoor events) from 26 December.

29/12 - Scottish Government announce the breakdown of £107 million support ackage for businesses impacted by the spread of the Omicron variant.





March	April	May	June	July
01/03 - First positive case of COVID19 confirmed in Scotland. 13/03 - First confirmed death of a patient in Scotland with COVID-19. 24/03 - First day of 'lockdown'. 27/03 - Scottish Government produces guidance for campsites, holiday parks, caravan sites, motorhome hire businesses	15/04 - Scottish Government announces its second phase of small business relief funding, worth £120m	11/05 - People can go outside more than once a day to exercise. 21/05 - Scottish Government publishes a COVID- 19 Routemap to take Scotland through and out of the COVID-19 pandemic. 29/05 - Move to Phase 1 of the Route Map out of lockdown begins.	19/06 - Move to Phase 2 of the Route Map out of lockdown begins. 29/06 - Self-Catering facilities without shared facilities can reopen	10/07 - Move to Phase 3 of the Route Map out of lockdown begins. 13/07 - UK Government announce the Eat Out to Help Out Scheme for Restaurants and other establishments serving food for on-premises consumption. 15/07 - Holiday accommodation can reopen with some restrictions 29/07 - Scottish Government announce a £14 million Hotel Recovery Programme to support Scotland's larger hotels, with grants of up to £250,000 administered by the Scottish Government's enterprise agencies. In addition, VisitScotland will administer £1m in grants for self-catering businesses that have not received any other Scottish Government COVID-19 support.





August

01/08 - People who have been advised to shield will no longer be required to do so.

05/08 - Scottish Government announce the introduction of local restrictions in Aberdeen.

14/08 - Mandatory for hospitality settings to collect the contact details of visitors to their premises in support of Test and Protect.

19/08 - Scottish Government announce £1 million funding for Aberdeen businesses affected by temporary measures.

20/08 - Scottish Government announce that Scotland is to remain in Phase 3 of the Route Map.

September

10/09 - Scottish Government publish an updated Route Map, limiting indoor and outdoor gatherings to six people form two households, as Scotland remains in Phase 3.

22/09 - Scottish Government announce new restrictions on household visits and a national curfew for pubs, bars and restaurants.

October

07/10 - Scottish Government announce new temporary measures, restricting hospitality opening times to 6am-6pm indoors, with no sales of alcohol. Premises may open outdoors until 10pm, with sales of alcohol. All licensed premises in the central belt area will be required to close, with the exception of takeaway services.

09/10 - Scottish Government announce the creation of the COVID-19 Restrictions Fund, which will provide one-off grants of up to £3,000, depending on rateable value, to bars, restaurants and other businesses required to close by regulations.

23/10 - Scottish Government publish the five-level Strategic Framework. Scottish Tourism Recovery Taskforce publish its recommendations for supporting the tourism sector's recovery

29/10 - Scottish Government announce the new local authority protection measures in force from 6am on Monday 2 November.

November

02/11 - New local authority protection measures come into force.

05/11 - UK Government announce the extension of Furlough to March and increased self-employed support.

10/11 - Scottish Government announce Angus, Fife and Perth & Kinross council areas will move from protection level 2 to protection level 3 from 6am on Friday 13 November.

17/11 - Scottish Government announce updated COVID-19 protection levels and travel regulations.

20/11 - Eleven local authorities move into the highest protection level at 6pm. Regulations preventing people who live in a Level 3 or Level 4 area from travelling outside their local authority except for an essential purpose also come into force.

24/11 - East Lothian moves down to Level 2

December

16/12 - Scottish Government publish statistics showing that Scottish Economy grew by 16.0% during the third quarter of 2020, covering the period July to September.

18/12 - At 6pm, East Lothian, Aberdeen City and Aberdeenshire moved up to Level 3 of the COVID-19 protection scale following rises in the prevalence of the virus. All other areas remain unchanged in their levels.

19/12 - Easing of restrictions over festive perid now limited to Christmas Day Only. Level 4 restrictions apply from Boxing Day

31/12 - Over 200,000 confirmed cases and sadly 6,700 Deaths have been contributed to Covid-19 in Scotland.





4.1. Hotels

4.1.1. % Room Occupancy

Table 1 Hotel % Room Occupancy Analysis 2021/2020

Room Occupancy	2021	2020	21/20 Diff ¹	Change ²
	46.31%	28.53%	17.78	118
Former VisitScotland Area	-	-	•	- -
Aberdeen & Grampian	47.73%	27.30%	20.43	120
ALLFV	58.08%	30.73%	27.35	127
Angus & City of Dundee	50.91%	21.85%	29.06	129
Ayrshire & Arran	62.61%	3.41%	59.20	159
Dumfries & Galloway	58.85%	40.91%	17.94	118
Edinburgh & Lothian	70.20%	39.53%	30.67	131
Greater Glasgow	37.50%	21.30%	16.20	116
Highlands of Scotland	35.19%	32.84%	2.35	102
Kingdom of Fife	57.28%	25.05%	32.23	132
Orkney	*	*	0.00	100
Perthshire	51.13%	38.81%	12.32	112
Scottish Borders	54.87%	30.26%	24.61	125
Shetland Islands	*	*	0.00	100
Outer Hebrides	51.38%	33.39%	17.99	118
Location				
Coastal	43.78%	31.02%	12.76	113
Inland	45.99%	27.31%	18.68	119
Island	68.75%	32.92%	35.83	136
Tariff				
£20 - £29.99	0.00%	0.00%	0.00	100
£30 - £39.99	1.62%	32.47%	-30.85	69
£40 - £49.99	40.35%	34.44%	5.91	106
£50 - £59.99	20.62%	44.42%	-23.80	76
£60 - £69.99	52.52%	23.78%	28.74	129

¹ 21/20 Diff throughout this report is expressed by % Point Change



Room Occupancy	2021	2020	21/20 Diff¹	Change ²
£70+	49.98%	26.45%	23.53	124
Size				
1 to 3	*	*	0.00	100
4 to 10	58.85%	23.34%	35.51	136
11 to 25	49.93%	28.10%	21.83	122
26 to 50	61.03%	39.04%	21.99	122
51 to 100	51.90%	23.96%	27.94	128
Over 100	29.95%	25.47%	4.48	104
Urban/Rural				
Large Urban Areas	33.53%	18.54%	14.99	115
Other Urban Areas	56.01%	28.61%	27.40	127
Accessible Small Towns	59.60%	38.09%	21.51	122
Remote Small Towns	59.58%	40.41%	19.17	119
Accessible Rural	41.82%	35.33%	6.49	106
Remote Rural	39.13%	27.76%	11.37	111
Grading				
1 Star	-	-	-	100
2 Stars	51.60%	28.31%	23.29	123
3 Stars	47.34%	29.58%	17.76	118
4 Stars	41.94%	25.43%	16.51	117
5 Stars	47.60%	22.92%	24.68	125
Unclassified	54.98%	35.93%	19.05	119

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





 $^{^2}$ 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.

Table 2 Hotel % Room Occupancy Analysis 2021/2019

Room Occupancy	2021	2019	21/19 Diff ³	Change
	46.31%	71.01%	-24.70	75
Former VisitScotland Area				
Aberdeen & Grampian	47.73%	55.77%	-8.04	92
ALLFV	58.08%	75.24%	-17.16	83
Angus & City of Dundee	50.91%	63.65%	-12.74	87
Ayrshire & Arran	62.61%	72.65%	-10.04	90
Dumfries & Galloway	58.85%	55.80%	3.05	103
Edinburgh & Lothian	70.20%	72.91%	-2.71	97
Greater Glasgow	37.50%	79.78%	-42.28	58
Highlands of Scotland	35.19%	70.05%	-34.86	65
Kingdom of Fife	57.28%	65.81%	-8.53	91
Orkney	*	58.68%	-58.68	41
Perthshire	51.13%	66.83%	-15.70	84
Scottish Borders	54.87%	56.70%	-1.83	98
Shetland Islands	*	*	0.00	100
Outer Hebrides	51.38%	69.45%	-18.07	82
Location				
Coastal	43.78%	60.38%	-16.60	83
Inland	45.99%	74.51%	-28.52	71
Island	68.75%	68.05%	0.70	101
Tariff				
£20 - £29.99	0.00%	56.19%	-56.19%	44
£30 - £39.99	1.62%	65.47%	-63.85	36
£40 - £49.99	40.35%	49.86%	-9.51	90

Room Occupancy	2021	2019	21/19 Diff ³	Change
£50 - £59.99	20.62%	70.45%	-49.83	50
£60 - £69.99	52.52%	57.76%	-5.24	95
£70+	49.98%	73.07%	-23.09	77
Size				
1 to 3	*	*	-3.81	96
4 to 10	58.85%	52.93%	5.92	106
11 to 25	49.93%	58.99%	-9.06	91
26 to 50	61.03%	78.99%	-17.96	82
51 to 100	51.90%	74.55%	-22.65	77
Over 100	29.95%	77.63%	-47.68	52
Urban/Rural				
Large Urban Areas	33.53%	80.23%	-46.70	53
Other Urban Areas	56.01%	68.70%	-12.69	87
Accessible Small Towns	59.60%	81.92%	-22.32	78
Remote Small Towns	59.58%	59.23%	0.35	100
Accessible Rural	41.82%	66.43%	-24.61	75
Remote Rural	39.13%	60.15%	-21.02	79
Grading				
1 Star	-	-	-	100
2 Stars	51.60%	61.60%	-10.00	90
3 Stars	47.34%	65.28%	-17.94	82
4 Stars	41.94%	79.83%	-37.89	62
5 Stars	47.60%	64.71%	-17.11	83
Unclassified	54.98%	65.18%	-10.20	90

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

³ 21/19 Diff throughout this report is expressed by % Point Change





4.1.2. % Bed Occupancy

Table 3 Hotel % Bed Occupancy Analysis 2021/2020

Bed Occupancy	2021	2020	21/20 Diff	Change	
	37.84	16.70%	21.14	121	
Former VisitScotland Area	-				
Aberdeen & Grampian	32.03%	13.41%	18.62	119	
ALLFV	40.42%	23.60%	16.82	117	
Angus & City of Dundee	30.87%	24.98%	5.89	106	
Ayrshire & Arran	47.08%	2.84%	44.24	144	
Dumfries & Galloway	47.93%	12.96%	34.97	135	
Edinburgh & Lothian	77.82%	16.07%	61.75	162	
Greater Glasgow	31.69%	16.07%	15.62	116	
Highlands of Scotland	43.74%	27.55%	16.19	116	
Kingdom of Fife	50.09%	25.29%	24.80	125	
Orkney	*	*	0.00	100	
Perthshire	40.23%	8.21%	32.02	132	
Scottish Borders	46.25%	24.31%	21.94	122	
Shetland Islands	*	*	0.00	100	
Outer Hebrides	40.95%	25.22%	15.73	116	
Location					
Coastal	42.10%	24.13%	17.97	118	
Inland	35.19%	14.45%	20.74	121	
Island	53.34%	24.47%	28.87	129	
Tariff					
£20 - £29.99	0.00%	0.00%	0.00	100	
£30 - £39.99	0.00%	21.16%	-21.16	79	
£40 - £49.99	27.43%	23.52%	3.91	104	
£50 - £59.99	43.17%	10.10%	33.07	133	
£60 - £69.99	38.74%	16.18%	22.56	123	
£70 +	37.88%	19.28%	18.60	119	

Bed Occupancy	2021	2020	21/20 Diff	Change
1 to 3	*	*	0.00	100
4 to 10	34.32%	13.51%	20.81	121
11 to 25	38.08%	17.73%	20.35	120
26 to 50	49.93%	15.66%	34.27	134
51 to 100	43.11%	18.89%	24.22	124
Over 100	28.64%	17.27%	11.37	111
Urban/Rural	_			
Large Urban Areas	27.37%	12.81%	14.56	115
Other Urban Areas	42.37%	20.06%	22.31	122
Accessible Small Towns	47.55%	8.58%	38.97	139
Remote Small Towns	43.68%	30.35%	13.33	113
Accessible Rural	33.58%	28.35%	5.23	105
Remote Rural	42.31%	18.47%	23.84	124
Grading	-			
1 Star	-	-	-	100
2 Stars	37.96%	21.76%	16.20	116
3 Stars	45.02%	22.28%	22.74	123
4 Stars	32.36%	11.47%	20.89	121
5 Stars	43.34%	21.55%	21.79	122
Unclassified	34.92%	18.81%	16.11	116

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

Size





Table 4 Hotel % Bed Occupancy Analysis 2021/2019

Bed Occupancy	2021	2019	21/19 Diff	Change
	37.84%	53.44%	-15.60	84
Former VisitScotland Area	-			
Aberdeen & Grampian	32.03%	34.45%	-2.42	98
ALLFV	40.42%	50.06%	-9.64	90
Angus & City of Dundee	30.87%	50.32%	-19.45	81
Ayrshire & Arran	47.08%	54.23%	-7.15	93
Dumfries & Galloway	47.93%	43.10%	4.83	105
Edinburgh & Lothian	77.82%	75.06%	2.76	103
Greater Glasgow	31.69%	58.68%	-26.99	73
Highlands of Scotland	43.74%	58.17%	-14.43	86
Kingdom of Fife	50.09%	52.64%	-2.55	97
Orkney	*	41.46%	-41.46	59
Perthshire	40.23%	60.75%	-20.52	79
Scottish Borders	46.25%	43.78%	2.47	102
Shetland Islands	*	*	0.00	100
Outer Hebrides	40.95%	53.96%	-13.01	87
Location				
Coastal	42.10%	45.96%	-3.86	96
Inland	35.19%	56.15%	-20.96	79
<u>Island</u>	53.34%	59.08%	-5.74	94
Tariff				
£20 - £29.99	0.00%	38.14%	-38.14	62
£30 - £39.99	0.00%	47.98%	-47.98	52
£40 - £49.99	27.43%	34.82%	-7.39	93
£50 - £59.99	43.17%	61.72%	-18.55	81
£60 - £69.99	38.74%	36.88%	1.86	102
£70 +	37.88%	54.70%	-16.82	83
Size				
1 to 3	*	3.83%	-3.83	96
4 to 10	34.32%	33.55%	0.77	101
11 to 25	38.08%	47.91%	-9.83	90
26 to 50	49.93%	57.83%	-7.90	92
51 to 100	43.11%	61.72%	-18.61	81
Over 100	28.64%	55.43%	-26.79	73

Bed Occupancy	2021	2019	21/19 Diff	Change
Urban/Rural				
Large Urban Areas	27.37%	58.64%	-31.27	69
Other Urban Areas	42.37%	56.98%	-14.61	85
Accessible Small Towns	47.55%	56.76%	-9.21	91
Remote Small Towns	43.68%	45.33%	-1.65	98
Accessible Rural	33.58%	51.97%	-18.39	82
Remote Rural	42.31%	47.89%	-5.58	94
Grading				
1 Star	-	-	-	100
2 Stars	37.96%	50.82%	-12.86	87
3 Stars	45.02%	53.51%	-8.49	92
4 Stars	32.36%	59.66%	-27.30	73
5 Stars	43.34%	53.90%	-10.56	89
Unclassified	34.92%	36.21%	-1.29	99





4.1.3. Hotel Monthly Distribution by % Occupancy 2021/2020

Table 5 Monthly Distribution by % Room Occupancy 2021/2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	14.9	10.1	8.3	20.9	48.1	64.6	63.8	74.8	74.8	40.4	57.6	32.6
2020	52.4	44.1	35.4	0.3	0.7	1.0	16.3	55.0	60.0	42.1	26.0	19.4

Figure 6 Hotel Monthly Distribution by % Room Occupancy 2021/2020

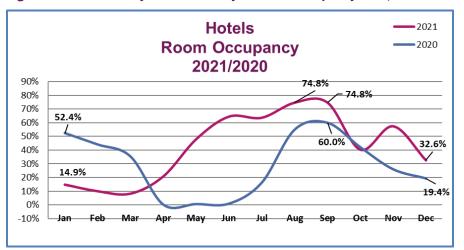


Table 6 Monthly Distribution by % Bed Occupancy 2021/2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	7.4	4.7	3.6	11.0	35.7	49.1	50.7	55.1	61.2	56.8	46.8	33.9
2020	34.0	35.7	27.1	0.1	0.3	0.4	11.2	41.0	43.5	8.7	17.1	12.1

Figure 7 Hotel Monthly Distribution by % Bed Occupancy 2021/2020



In January, February and March 2021 during the Level 4 lockdown occupancy was less than 15%, with a gradual increase in April as the lockdown was being relaxed with it reaching a peak in August & September at 74.8% before reducing in October.

In 2020, Hotel room occupancy reached a peak in September at 60.0%, whilst maintaing a room occupancy rate of over 50% between in August and September.





4.1.4. Hotel Rev Par 2021/2020

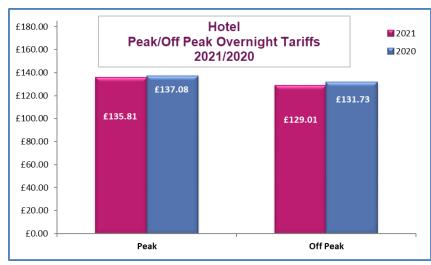
Figure 8 Hotel Rev Par 2021/2020



In 2021, average peak Rev Par was £162.83, achieved in August.

In 2020, average peak Rev Par was £101.36, achieved in September.

Figure 9 Hotel Peak/Off-Peak Tariffs 2021/2020



In 2021, the average peak tariff amongst participating hotels was £135.81, whilst the off-peak average tariff was £129.01.

In 2020, the average peak tariff amongst participating hotels was £137.08, whilst the off-peak average tariff was £131.73



4.1.5. Hotel Booking Methods 2021

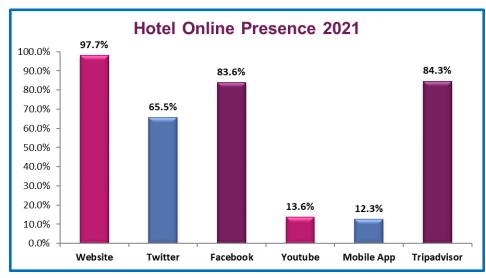
Figure 10 Booking Methods 2021



In 2021, the most popular booking method was directly with hotel accommodation, followed by 'Other', which includes booking sites, such as Booking.com; Expedia, laterooms.com and agents. Half of all participating hotels welcomed 'walk-in' guests.

4.1.6. Hotel Online Presence 2021

Figure 11 Online Presence 2021



In 2021, 98% of all participating Hotels had their own website, with the majority also listing on TripAdvisor (84%). Facebook was popular in 2021 with 84% having their own page to promote their accommodation. YouTube was only used by 14% of hotels respectively in 2021.





4.2. Guest House, B&B

4.2.1. % Room Occupancy

 Table 7
 Guest House, B&B % Room Occupancy Analysis 2021/2020

•				•
Room Occupancy	2021	2020	21/20 Diff	Change
Guest House / B&B	42.68%	14.76%	27.92	128
Former VisitScotland Area	<u> </u>	<u>-</u>		
Aberdeen & Grampian	*	*	0.00	100
ALLFV	42.02%	9.49%	32.53	133
Angus & City of Dundee	30.22%	16.58%	13.64	114
Ayrshire & Arran	45.74%	4.85%	40.89	141
Dumfries & Galloway	65.31%	30.28%	35.03	135
Edinburgh & Lothian	*	19.03%	-19.03	81
Greater Glasgow	23.48%	17.19%	6.29	106
Highlands of Scotland	52.42%	15.40%	37.02	137
Kingdom of Fife	0.00%	0.00%	0.00	100
Orkney	27.48%	9.99%	17.49	117
Perthshire	21.11%	9.42%	11.69	112
Scottish Borders	41.93%	2.65%	39.28	139
Shetland Islands	*	*	0.00	100
Outer Hebrides	9.58%	0.00%	9.58	110
Location				
Coastal	32.40%	11.80%	20.60	121
Inland	43.63%	17.39%	26.24	126
Island	48.55%	6.78%	41.77	142
Tariff				
£20 - £29.99	*	*	0.00	100
£30 - £39.99	26.88%	8.01%	18.87	119
£40 - £49.99	45.09%	17.35%	27.74	128
£50 - £59.99	60.92%	27.66%	33.26	133
Tariff (Cont.)				

Room Occupancy	2021	2020	21/20 Diff	Change
£60 - £69.99	24.67%	11.18%	13.49	113
£70+	45.72%	10.55%	35.17	135
Size				
1 to 3	40.83%	7.57%	33.26	133
4 to 10	44.04%	22.04%	22.00	122
11 to 25	45.74%	12.20%	33.54	134
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
Urban/Rural				
Large Urban Areas	33.41%	20.31%	13.10	113
Other Urban Areas	39.24%	10.31%	28.93	129
Accessible Small Towns	34.73%	10.70%	24.03	124
Remote Small Towns	52.89%	27.18%	25.71	126
Accessible Rural	21.48%	17.63%	3.85	104
Remote Rural	44.11%	9.98%	34.13	134
Grading				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	39.85%	11.96%	27.89	128
4 Stars	31.06%	12.66%	18.40	118
5 Stars	86.99%	9.14%	77.85	178
Unclassified	33.03%	10.74%	22.29	122

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





Table 8 Guest House, B&B % Room Occupancy Analysis 2021/2019

Room Occupancy	2021	2019	21/19 Diff	Change
Guest House / B&B	42.68%	51.21%	-8.53	91
Former VisitScotland Area	·			
Aberdeen & Grampian	*	*	0.00	100
ALLFV	42.02%	56.38%	-14.36	86
Angus & City of Dundee	30.22%	29.67%	0.55	101
Ayrshire & Arran	45.74%	33.79%	11.95	112
Dumfries & Galloway	65.31%	52.53%	12.78	113
Edinburgh & Lothian	*	86.05%	-86.05	14
Greater Glasgow	23.48%	26.52%	-3.04	97
Highlands of Scotland	52.42%	44.07%	8.35	108
Kingdom of Fife	0.00%	0.00%	0.00	100
Orkney	27.48%	50.18%	-22.70	77
Perthshire	21.11%	38.41%	-17.30	83
Scottish Borders	41.93%	39.29%	2.64	103
Shetland Islands	*	*	-4.84	95
Outer Hebrides	9.58%	49.09%	-39.51	60
Location				
Coastal	32.40%	39.53%	-7.13	93
Inland	43.63%	58.18%	-14.55	85
Island	48.55%	50.87%	-2.32	98
Tariff				
£20 - £29.99	*	23.60%	-23.60	76
£30 - £39.99	26.88%	48.81%	-21.93	78
£40 - £49.99	45.09%	49.96%	-4.87	95
£50 - £59.99	60.92%	44.02%	16.90	117
£60 - £69.99	24.67%	60.26%	-35.59	64
£70 +	45.72%	55.19%	-9.47	91

Room Occupancy	2021	2019	21/19 Diff	Change
Size				
1 to 3	40.83%	34.47%	6.36	106
4 to 10	44.04%	57.31%	-13.27	87
11 to 25	45.74%	87.93%	-42.19	58
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
Urban/Rural				_
Large Urban Areas	33.41%	72.65%	-39.24	61
Other Urban Areas	39.24%	63.22%	-23.98	76
Accessible Small Towns	34.73%	43.79%	-9.06	91
Remote Small Towns	52.89%	54.65%	-1.76	98
Accessible Rural	21.48%	22.99%	-1.51	98
Remote Rural	44.11%	37.11%	7.00	107
Grading	_			
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	48.05%	47.96%	0.09	100
4 Stars	34.20%	50.60%	-16.40	84
5 Stars	91.23%	14.02%	77.21	177
Unclassified	43.40%	35.22%	8.18	108

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





4.2.2. % Bed Occupancy

Table 9 Guest House, B&B % Bed Occupancy Analysis 2021/2020

Bed Occupancy	2021	2020	21/20 Diff	Change
	35.60%	11.51%	24.09%	124
Former VisitScotland Area	•	-	-	
Aberdeen & Grampian	*	*	0.00	100
ALLFV	33.17%	6.73%	26.44	126
Angus & City of Dundee	25.14%	10.83%	14.31	114
Ayrshire & Arran	28.43%	4.30%	24.13	124
Dumfries & Galloway	52.47%	22.90%	29.57	130
Edinburgh & Lothian	*	16.59%	-16.59	83
Greater Glasgow	15.52%	9.11%	6.41	106
Highlands of Scotland	49.85%	16.61%	33.24	133
Kingdom of Fife	0.00%	0.00%	0.00	100
Orkney	25.27%	9.99%	15.28	115
Perthshire	19.24%	9.42%	9.82	110
Scottish Borders	29.76%	2.65%	27.11	127
Shetland Islands	*	*	0.00	100
Outer Hebrides	6.71%	0.00%	6.71	107
Location				
Coastal	26.68%	9.24%	17.44	117
Inland	36.18%	13.32%	22.86	123
Island	41.61%	6.35%	35.26	135
Tariff				
£20 - £29.99	*	*	0.00	100
£30 - £39.99	23.78%	4.26%	19.52	120
£40 - £49.99	41.33%	12.97%	28.36	128
£50 - £59.99	52.48%	22.53%	29.95	130
£60 - £69.99	19.52%	8.81%	10.71	111
£70 +	34.43%	8.68%	25.75	126

Bed Occupancy	2021	2020	21/20 Diff	Change
Size				
1 to 3	33.87%	5.24%	28.63	129
4 to 10	38.41%	17.29%	21.12	121
11 to 25	28.43%	11.55%	16.88	117
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
Urban/Rural				
Large Urban Areas	26.88%	15.35%	11.53	112
Other Urban Areas	33.08%	7.61%	25.47	125
Accessible Small Towns	29.05%	8.47%	20.58	121
Remote Small Towns	41.65%	22.24%	19.41	119
Accessible Rural	18.68%	7.78%	10.90	111
Remote Rural	38.56%	8.85%	29.71	130
Grading				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	39.85%	11.96%	27.89	128
4 Stars	31.06%	12.66%	18.40	118
5 Stars	86.99%	9.14%	77.85	178
Unclassified	33.03%	10.74%	22.29	122

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





Table 10 Guest House, B&B % Bed Occupancy Analysis 2021/2019

Bed Occupancy	2021	2019	21/19 Diff	Change
	35.60%	42.99%	-7.39	93
Former VisitScotland Area	•	-	-	
Aberdeen & Grampian	0.00%	0.00%	0.00	100
ALLFV	33.17%	44.93%	-11.76	88
Angus & City of Dundee	25.14%	24.53%	0.61	101
Ayrshire & Arran	28.43%	25.94%	2.49	102
Dumfries & Galloway	52.47%	40.85%	11.62	112
Edinburgh & Lothian	0.00%	79.04%	-79.04	21
Greater Glasgow	15.52%	16.63%	-1.11	99
Highlands of Scotland	49.85%	37.15%	12.70	113
Kingdom of Fife	0.00%	0.00%	0.00	100
Orkney	25.27%	42.01%	-16.74	83
Perthshire	19.24%	29.31%	-10.07	90
Scottish Borders	29.76%	27.86%	1.90	102
Shetland Islands	0.00%	3.23%	-3.23	97
Outer Hebrides	6.71%	31.25%	-24.54	75
Location				
Coastal	26.68%	30.15%	-3.47	97
Inland	36.18%	50.65%	-14.47	86
Island	41.61%	40.27%	1.34	101
Tariff				
£20 - £29.99	0.00%	23.60%	-23.60	76
£30 - £39.99	23.78%	39.07%	-15.29	85
£40 - £49.99	41.33%	39.75%	1.58	102
£50 - £59.99	52.48%	36.81%	15.67	116
£60 - £69.99	19.52%	50.72%	-31.20	69
£70+	34.43%	48.56%	-14.13	86
Size				
1 to 3	33.87%	26.86%	7.01	107
4 to 10	38.41%	46.53%	-8.12	92
11 to 25	28.43%	80.83%	-52.40	48
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100

Bed Occupancy	2021	2019	21/19 Diff	Change
Urban/Rural				
Large Urban Areas	26.88%	67.70%	-40.82	59
Other Urban Areas	33.08%	51.71%	-18.63	81
Accessible Small Towns	29.05%	33.14%	-4.09	96
Remote Small Towns	41.65%	44.09%	-2.44	98
Accessible Rural	18.68%	15.93%	2.75	103
Remote Rural	38.56%	30.77%	7.79	108
Grading				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	39.85%	39.40%	0.45	100
4 Stars	31.06%	41.81%	-10.75	89
5 Stars	86.99%	25.36%	61.63	162
Unclassified	33.03%	27.57%	5.46	105

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





4.2.3. Guest House, B&B Monthly Distribution by % Occupancy 2021/20

Table 11 Guest House, B&B Monthly Distribution by % Room Occupancy 2021/2020

					May							
2021	2.2	1.2	5.2	10.4	27.8	50.5	64.3	74.4	63.3	47.7	40.2	28.5
2020	21.7	13.8	20.4	0.2	0.1	1.1	4.0	42.5	36.2	21.2	16.7	8.6

Figure 12 Guest House, B&B Monthly Distribution by % Room Occupancy 2021/2020

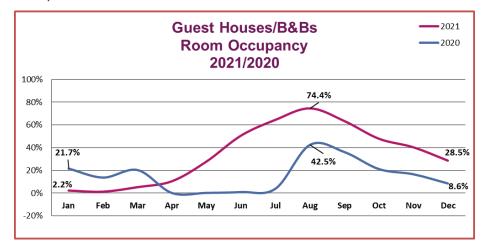
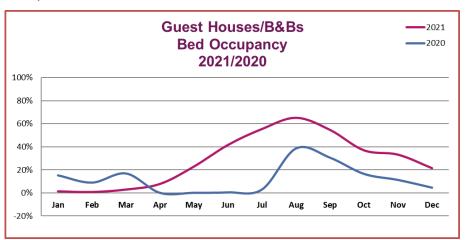


Table 12 Guest House, B&B Monthly Distribution by % Bed Occupancy 2021/2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	1.3											
2020	15.3	9.0	16.9	0.1	0.2	0.5	3.1	38.6	30.6	16.5	11.3	4.6

Figure 13 Guest House, B&B Monthly Distribution by % Bed Occupancy 2021/2020



Due to the Level 4 lockdown in early 2021, January, February and March Room Occupancy was below 5.2% a small increase can be seen in April when the lockdown was gradually relaxed with demand peaking in August at 74.4%.

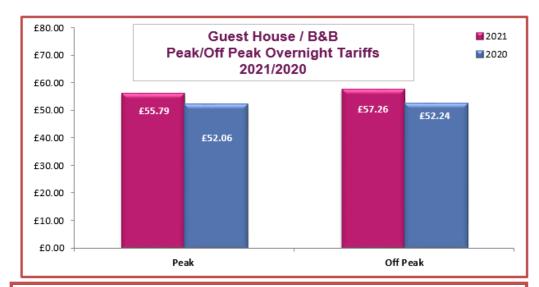
In April, May and June 2020 during the initial lockdown occupancy was less than 1.1%. Guest House room occupancy reached a peak in August at 42.5%.





4.2.4. Guest House, B&B Peak/Off-Peak Tariffs

Figure 14 Guest House, B&B Peak/Off-Peak Tariffs 2021/2020



In 2021, the average peak tariff amongst participating Guest House, B&B accommodation was £55.79 per person per night, whilst the off-peak average tariff was £57.26.

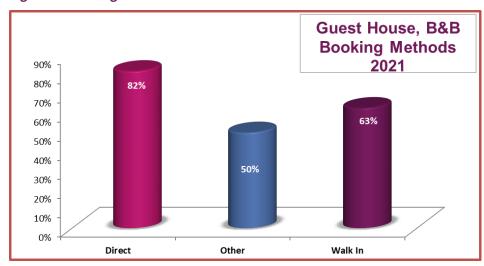
In 2020, the average peak tariff amongst participating Guest House, B&B accommodation was £52.06 per person per night, whilst the off-peak average tariff was £52.24.





4.2.5. Guest House, B&B Booking Methods 2021

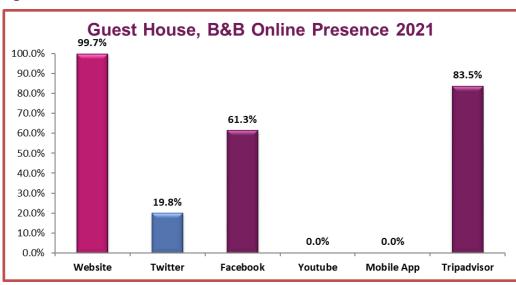
Figure 15 Booking Methods 2021



In 2021, Guest House, B&B accommodation providers noted the most popular booking method was direct booking, followed by 'walk-in'. 'Other' booking channels such as booking sites, proved less popular in 2021.

4.2.6. Guest House, B&B Online Presence 2021

Figure 16 Online Presence 2021



In 2021, all participating Guest House, B&B providers had their own website, with the majority also listing on TripAdvisor (84%). Facebook was also popular in 2021 with 61% having their own page to promote their accommodation. Twitter was only used by 20% of Guest House, B&B providers in 2021.





5.1. % Unit Occupancy

 Table 13
 Self-Catering % Unit Occupancy Analysis 2021/2020

Unit Occupancy	2021	2020	21/20 Diff ⁴	Change⁵
	28.10%	20.52%	7.58	108
Former VisitScotland Area	<u>_</u>			
Aberdeen & Grampian	32.56%	29.12%	3.44	103
ALLFV	29.70%	22.25%	7.45	107
Angus & City of Dundee	44.67%	29.34%	15.33	115
Ayrshire & Arran	35.83%	18.73%	17.10	117
Dumfries & Galloway	13.47%	11.07%	2.40	102
Edinburgh & Lothian	18.20%	13.58%	4.62	105
Greater Glasgow	17.48%	15.80%	1.68	102
Highlands of Scotland	33.48%	24.21%	9.27	109
Kingdom of Fife	24.73%	18.10%	6.63	107
Orkney	49.01%	29.51%	19.50	120
Perthshire	17.29%	17.47%	-0.18	100
Scottish Borders	32.49%	19.03%	13.46	113
Shetland Islands	29.18%	5.96%	23.22	123
Outer Hebrides	46.80%	22.45%	24.35	124
Property Type				
Bungalow	33.40%	17.07%	16.33	116
Cottage	27.04%	19.94%	7.10	107
Flat	14.72%	12.36%	2.36	102
Glamping	20.79%	6.28%	14.51	115
House	25.33%	13.02%	12.31	112
Lodge/Chalet	43.59%	38.44%	5.15	105
Other Property	19.04%	6.68%	12.36	112
Static Caravan	20.48%	10.75%	9.73	110

Unit Occupancy	2021	2020	21/20 Diff ⁴	Change⁵
Tariff				
Unknown	9.36%	5.93%	3.43	103
Up to £299	7.36%	12.02%	-4.66	95
£300 to £499	21.28%	16.77%	4.51	105
£500 to £799	28.79%	20.64%	8.15	108
£800 or more	34.90%	27.82%	7.08	107
Location				
Coastal	20.88%	15.47%	5.41	105
Inland	28.64%	21.76%	6.88	107
Island	46.28%	27.38%	18.90	119
Urban/Rural				
Large Urban Areas	13.75%	10.61%	3.14	103
Other Urban Areas	33.32%	21.14%	12.18	112
Accessible Small Towns	20.64%	14.72%	5.92	106
Remote Small Towns	29.91%	20.73%	9.18	109
Accessible Rural	28.03%	27.29%	0.74	101
Remote Rural	30.95%	21.09%	9.86	110
Grading	_			
1 Star	0.00%	8.41%	-8.41	92
2 Stars	22.62%	12.34%	10.28	110
3 Stars	33.01%	21.05%	11.96	112
4 Stars	29.13%	21.22%	7.91	108
5 Stars	31.22%	29.58%	1.64	102
Unclassified	25.40%	19.00%	6.40	106





 $^{^4}$ 21/20 Diff throughout this report is expressed by % Point Change

 $^{^5}$ 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.



 Table 14
 Self-Catering % Unit Occupancy Analysis 2021/2019

Unit Occupancy	2021	2019	21/19 Diff ⁶	Change
	28.10%	47.56%	-19.46	81
Former VisitScotland Area				
Aberdeen & Grampian	32.56%	44.70%	-12.14	88
ALLFV	29.70%	54.42%	-24.72	75
Angus & City of Dundee	44.67%	56.94%	-12.27	88
Ayrshire & Arran	35.83%	50.65%	-14.82	85
Dumfries & Galloway	13.47%	26.19%	-12.72	87
Edinburgh & Lothian	18.20%	36.87%	-18.67	81
Greater Glasgow	17.48%	40.58%	-23.10	77
Highlands of Scotland	33.48%	54.85%	-21.37	79
Kingdom of Fife	24.73%	51.27%	-26.54	73
Orkney	49.01%	43.49%	5.52	106
Perthshire	17.29%	38.39%	-21.10	79
Scottish Borders	32.49%	52.22%	-19.73	80
Shetland Islands	29.18%	24.60%	4.58	105
Outer Hebrides	46.80%	51.73%	-4.93	95
Property Type				
Bungalow	33.40%	54.43%	-21.03	79
Cottage	27.04%	42.11%	-15.07	85
Flat	14.72%	30.56%	-15.84	84
Glamping	20.79%	40.14%	-19.35	81
House	25.33%	30.32%	-4.99	95
Lodge/Chalet	43.59%	70.78%	-27.19	73
Other Property	19.04%	52.90%	-33.86	66
Static Caravan	20.48%	39.67%	-19.19	81
Tariff				
Unknown	9.36%	11.45%	-2.09	98
Up to £299	7.36%	30.90%	-23.54	76
£300 to £499	21.28%	38.47%	-17.19	83
£500 to £799	28.79%	47.35%	-18.56	81

Unit Occupancy	2021	2019	21/19 Diff ⁶	Change
£800 or more	34.90%	58.22%	-23.32	77
Location				
Coastal	20.88%	38.10%	-17.22	83
Inland	28.64%	49.55%	-20.91	79
Island	46.28%	57.54%	-11.26	89
Urban/Rural				
Large Urban Areas	13.75%	34.58%	-20.83	79
Other Urban Areas	33.32%	50.61%	-17.29	83
Accessible Small Towns	20.64%	42.07%	-21.43	79
Remote Small Towns	29.91%	44.27%	-14.36	86
Accessible Rural	28.03%	56.61%	-28.58	71
Remote Rural	30.95%	47.64%	-16.69	83
Grading	_			
1 Star	0.00%	38.71%	-38.71	61
2 Stars	22.62%	26.59%	-3.97	96
3 Stars	33.01%	46.16%	-13.15	87
4 Stars	29.13%	49.74%	-20.61	79
5 Stars	31.22%	54.72%	-23.50	77
Unclassified	25.40%	46.65%	-21.25	79

⁶ 21/19 Diff throughout this report is expressed by % Point Change





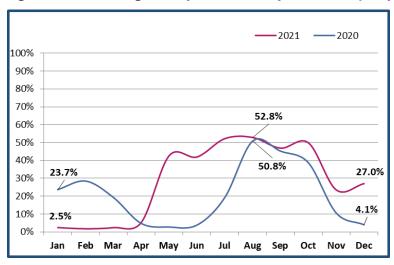


5.2. Self-Catering Monthly Distribution by % Unit Occupancy 2021/2020

Table 15 Self-Catering Monthly Distribution by % Unit Occupancy 2021/2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	2.5	1.8	2.5	5.4	42.6	41.9	52.2	52.8	46.8	49.8	23.5	27.0
2020	23.7	28.5	19.3	4.8	2.8	3.9	19.3	50.8	45.1	38.6	10.7	4.1

Figure 17 Self-Catering Monthly Distribution by % Unit Occupancy 2021/2020



In 2021, Self-Catering Unit occupancy in the first quarter did not exceed 2.5%, this was due the ongoing Level 4 Lockdown, a significant increase can be seen in May when the lockdown was relaxed with it reaching a peak in August at 50.8%.

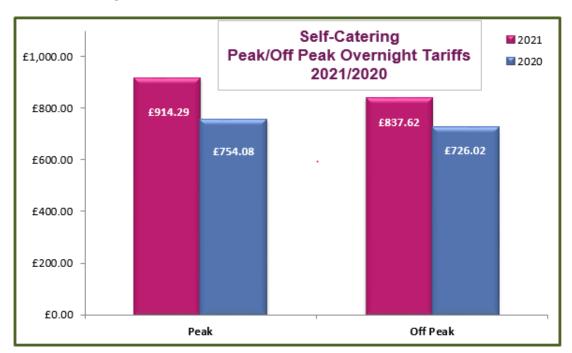
In 2020, Self-Catering Unit during the initial lockdown did not exceed 4.8%, however, occupancy reached a peak in August at 50.8%.





5.3. Self-Catering Peak/Off-Peak Tariffs

Figure 18 Self-Catering Peak/Off-Peak Tariffs 2021/2020



In 2021, the average peak tariff amongst participating Self-Catering accommodation was £914.29 per week, whilst the off -peak average tariff was £837.62 per week.

In 2020, the average peak tariff amongst participating Self-Catering accommodation was £754.08 per week, whilst the off- peak average tariff was £726.02 per week.

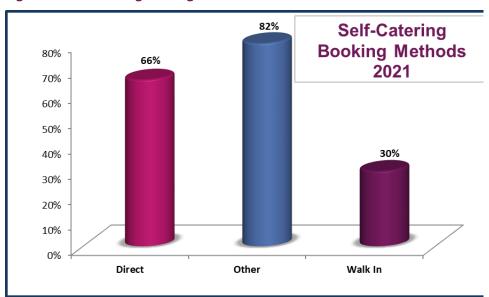






5.4. Self-Catering Booking Methods 2021

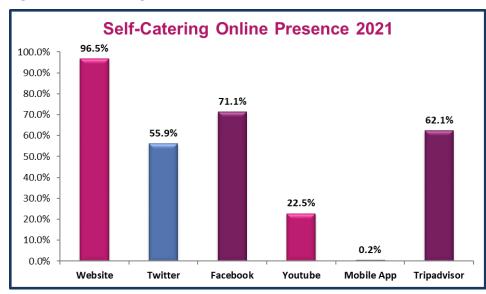
Figure 19 Self-Catering Booking Methods 2021



In 2021, Other booking methods were cited as most popular by 82% Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland.

5.5. Self-Catering Online Presence 2021

Figure 20 Self-Catering Online Presence 2021



In 2021, 97% of all participating Self-Catering accommodation providers had their own website. Just under three quarters had a Facebook page, with just over 60% of participants using TripAdvisor. Twitter was used by just over 55% of participants, however just under a quarter used YouTube (23%) in 2021.





6.1. % Pitch Occupancy

Table 16 % Pitch Occupancy Analysis 2021/2020

Pitch Occupancy	2021	2020	21/20 Diff ⁷	Change ⁸
Net Pitch	47.44%	30.47%	16.97	117
Whole Park	54.49%	48.08%	6.41	106
Caravan	36.47%	20.01%	16.46	116
Tent	22.46%	4.98%	17.48	117
Former VisitScotland Area				
Aberdeen & Grampian	34.00%	20.57%	13.43	113
ALLFV	46.48%	24.56%	21.92	122
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	58.15%	68.54%	-10.39	90
Dumfries & Galloway	49.72%	30.63%	19.09	119
Edinburgh & Lothian	29.96%	13.47%	16.49	116
Greater Glasgow	0.00%	0.00%	0.00	100
Highlands of Scotland	67.04%	44.64%	22.40	122
Kingdom of Fife	60.61%	69.78%	-9.17	91
Orkney	*	*	0.00	100
Perthshire	54.85%	53.43%	1.42	101
Scottish Borders	28.96%	15.31%	13.65	114
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Tariff				
Under £10	0.00%	51.94%	-51.94	48
£10-£14.99	20.92%	5.86%	15.06	115
£15-£19.00	54.98%	19.75%	35.23	135
£20 +	21.10%	2.11%	18.99	119

Pitch Occupancy	2021	2020	21/20 Diff ⁷	Change ⁸
Landin				
Location				
Coastal	50.37%	34.34%	16.03	116
Inland	45.09%	28.89%	16.20	116
Island	56.04%	32.27%	23.77	124
Urban/Rural				
Large Urban Areas	62.48%	12.66%	49.82	150
Other Urban Areas	47.78%	45.06%	2.72	103
Accessible Small Towns	25.25%	11.81%	13.44	113
Remote Small Towns	52.95%	31.16%	21.79	122
Accessible Rural	39.62%	25.86%	13.76	114
Remote Rural	59.43%	40.06%	19.37	119
Grading				
1	-	-	-	100
2	27.69%	0.00%	27.69	128
3	40.58%	2.96%	37.62	138
4	47.36%	32.38%	14.98	115
5	65.37%	40.89%	24.48	124
Unclassified	38.47%	19.04%	19.43	119





 $^{^{7}}$ 21/20 Diff throughout this report is expressed by % Point Change

 $^{^8}$ 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.

Table 17 % Pitch Occupancy Analysis 2021/2019

· · · · · · · · · · · · · · · · · · ·				
Pitch Occupancy	2021	2019	21/19 Diff ⁹	Change
Net Pitch	47.44%	41.22%	6.22	106
Whole Park	54.49%	43.23%	11.26	111
Caravan	36.47%	43.82%	-7.35	93
Tent	22.46%	19.72%	2.74	103
Former VisitScotland Area				
Aberdeen & Grampian	34.00%	23.04%	10.96	111
ALLFV	46.48%	43.12%	3.36	103
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	58.15%	46.82%	11.33	111
Dumfries & Galloway	49.72%	52.04%	-2.32	98
Edinburgh & Lothian	29.96%	29.19%	0.77	101
Greater Glasgow	0.00%	39.86%	-39.86	60
Highlands of Scotland	67.04%	45.89%	21.15	121
Kingdom of Fife	60.61%	40.51%	20.10	120
Orkney	*	*	0.00	100
Perthshire	54.85%	45.30%	9.55	110
Scottish Borders	28.96%	43.11%	-14.15	86
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Tariff				
Under £10	0.00%	30.76%	-30.76	69
£10-£14.99	20.92%	19.59%	1.33	101
£15-£19.00	54.98%	32.25%	22.73	123
£20+	21.10%	20.90%	0.20	100

Pitch Occupancy	2021	2019	21/19 Diff ⁹	Change
Location				
Coastal	50.37%	44.68%	5.69	106
Inland	45.09%	39.07%	6.02	106
Island	56.04%	48.59%	7.45	107
Urban/Rural				
Large Urban Areas	62.48%	34.30%	28.18	128
Other Urban Areas	47.78%	42.08%	5.70	106
Accessible Small Towns	25.25%	30.04%	-4.79	95
Remote Small Towns	52.95%	55.05%	-2.10	98
Accessible Rural	39.62%	33.99%	5.63	106
Remote Rural	59.43%	47.10%	12.33	112
Grading				
1	-	-	-	100
2	27.69%	53.56%	-25.87	74
3	40.58%	33.83%	6.75	107
4	47.36%	41.10%	6.26	106
5	65.37%	41.09%	24.28	124
Unclassified	38.47%	45.43%	-6.96	93

⁹ 21/19 Diff throughout this report is expressed by % Point Change



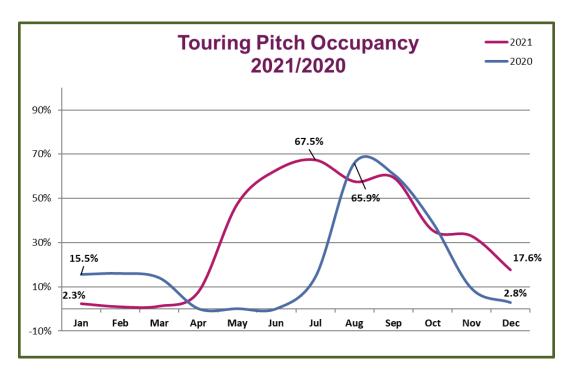


6.2. **Touring Monthly Distribution by % Pitch Occupancy 2021/2020**

Table 18 Touring Monthly Distribution by % Pitch Occupancy 2021/2020

					May							
2021	2.3	0.9	1.2	7.7	47.6	62.9	67.5	57.7	59.6	35.6	33.0	17.6
2020	15.5	15.9	14.0	0.0	0.0	0.0	14.3	65.9	60.9	39.2	9.2	2.8

Figure 21 Touring Monthly Distribution by % Pitch Occupancy 2021/2020



In 2021, Touring Pitch occupancy during the first guarter of 2021 was less than 2.5% due to the ongoing Level 4 lockdown, with the relaxation of restrictions May observed a significant increase, with occupancy reaching a peak in July at 67.5% which as seen in Table 12 was over a 50% increase compared to the same period in 2020.

In 2020, Touring Pitch occupancy during the initial lockdown collapsed to 0% during April, May and June, July witnessed the gradually relaxation of the lockdown, with occupancy reaching a peak in August at 65.9%

Touring Accommodation





6.3. Touring Booking Methods 2021

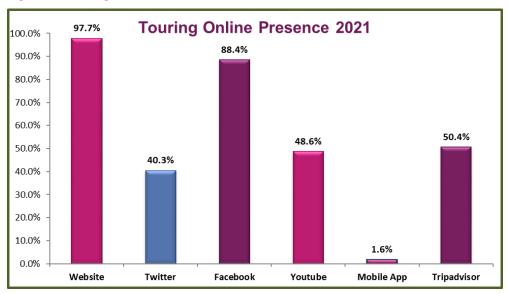
Figure 22 Touring Booking Methods 2021



In 2021, Direct booking methods were cited as most popular by 96% Touring accommodation providers. Other booking methods (51%) and walk in (22%) were less popular when booking touring pitches in 2021.

6.4. Touring Online Presence 2021

Figure 23 Touring Online Presence 2021



In 2021, 96% of all participating Touring accommodation providers had their own website. Just over three quarters had a Facebook page. Under half were listed on TripAdvisor and YouTube at 46% and 44% respectively, just over a third (34) had a presence on Twitter in 2021.



7 Hostel Accommodation

7.1. % Bed Occupancy

Table 19 % Bed Occupancy Analysis 2021/2020

Bed Occupancy	2021	2020	21/20 Diff ¹⁰	Change ¹¹
	35.06%	20.49%	14.57	115
Туре				
SYHA	36.88%	20.70%	16.18	116
Independent	12.51%	16.30%	-3.79	96
Former VisitScotland Area				
Aberdeen & Grampian	20.58%	17.72%	2.86	103
ALLFV	29.72%	16.58%	13.14	113
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	12.35%	40.25%	-27.90	72
Dumfries & Galloway	0.00%	0.00%	0.00	100
Edinburgh & Lothian	28.58%	10.64%	17.94	118
Greater Glasgow	36.20%	29.06%	7.14	107
Highlands of Scotland	40.82%	30.67%	10.15	110
Kingdom of Fife	*	*	0.00	100
Orkney	0.00%	0.00%	0.00	100
Perthshire	47.24%	37.14%	10.10	110
Scottish Borders	*	*	0.00	100
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Grading				
1	0.00%	0.00%	0.00	100
2	0.00%	0.00%	0.00	100
3	44.87%	30.92%	13.95	114
4	31.60%	23.80%	7.80	108
5	31.40%	15.59%	15.81	116
Unclassified	0.00%	4.28%	-4.28	96

Bed Occupancy 21/20 Diff¹⁰ 2021 2020 Change¹¹ Location Coastal 32.38% 17.04% 15.34 115 Inland 34.92% 19.76% 15.16 115 Island 47.19% 99 46.45% -0.74 Urban/Rural Large Urban Areas 29.59% 13.36% 16.23 116 Other Urban Areas 25.88% 14.65% 11.23 111 Accessible Small Towns 30.83% 8.50 39.33% 109 **Remote Small Towns** 25.39% 18.81% 6.58 107 Accessible Rural 40.78% 29.13% 11.65 112 Remote Rural 45.53% 36.10% 9.43 109





 $^{^{10}}$ 21/20 Diff throughout this report is expressed by % Point Change

 $^{^{11}}$ 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.

Bed Occupancy	2021	2019	21/19 Diff ¹²	Change
	35.06%	60.15%	-25.09	75
Туре				
SYHA	36.88%	57.57%	-20.69	79
Independent	12.51%	70.07%	-57.56	42
Former VisitScotland Area				
Aberdeen & Grampian	20.58%	35.22%	-14.64	85
ALLFV	29.72%	50.17%	-20.45	80
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	12.35%	47.43%	-35.08	65
Dumfries & Galloway	0.00%	44.10%	-44.10	56
Edinburgh & Lothian	28.58%	71.91%	-43.33	57
Greater Glasgow	36.20%	65.37%	-29.17	71
Highlands of Scotland	40.82%	59.99%	-19.17	81
Kingdom of Fife	*	*	0.00	100
Orkney	0.00%	59.89%	-59.89	40
Perthshire	47.24%	58.88%	-11.64	88
Scottish Borders	*	*	0.00	100
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Grading		·		
1	0.00%	60.30%	-60.30	40
2	0.00%	56.61%	-56.61	43
3	44.87%	63.49%	-18.62	81
4	31.60%	51.72%	-20.12	80
5	31.40%	54.73%	-23.33	77
Unclassified	0.00%	67.41%	-67.41	33
Location				
Coastal	32.38%	51.52%	-19.14	81
Inland	34.92%	61.90%	-26.98	73
Island	46.45%	67.67%	-21.22	79

 $^{^{12}}$ 21/19 Diff throughout this report is expressed by % Point Change





Bed Occupancy	2021	2019	21/19 Diff ¹²	Change
Urban/Rural				
Large Urban Areas	29.59%	64.70%	-35.11	65
Other Urban Areas	25.88%	63.62%	-37.74	62
Accessible Small Towns	39.33%	51.15%	-11.82	88
Remote Small Towns	25.39%	44.12%	-18.73	81
Accessible Rural	40.78%	63.94%	-23.16	77
Remote Rural	45.53%	62.96%	-17.43	83





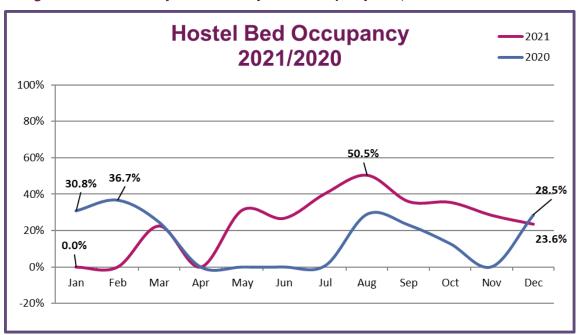
Hostel Accommodation

7.2. Hostel Monthly Distribution by % Bed Occupancy 2021/2020

Table 21 Hostel Monthly Distribution by % Bed Occupancy 2021/2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
					31.3							
2020	30.8	36.7	24.6	0.0	0.0	0.0	0.8	28.9	23.0	12.8	0.2	28.5

Figure 24 Hostel Monthly Distribution by % Bed Occupancy 2021/2020



In 2021, Hostel Bed occupancy during the Level 4 lockdown collapsed to 0%. The peak was seen in August with 50.5% bed occupancy. Once the Covid-19 Level system for infection control was reintroduced the occupancy % again dropped dramatically., due to the nature of the multi-guest accommodation and the 2 metre distance regulations. Consequently, many Hostel providers either remained closed or significantly reduced their occupancy levels.

In 2020, Hostel Bed occupancy reached a peak in February at 36.7%.

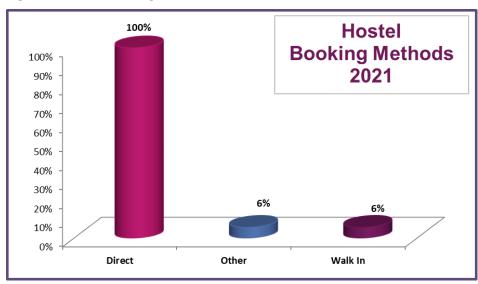




Hostel Accommodation

7.3. Hostel Booking Methods 2021

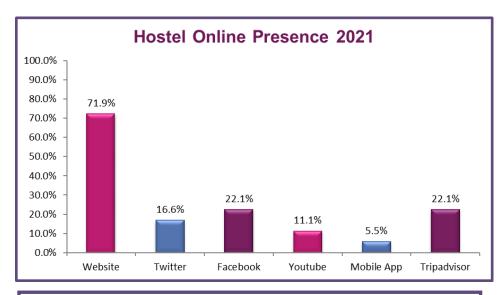
Figure 25 Hostel Booking Methods 2021



In 2021, Direct booking methods were cited as most popular by 100% of Hostel accommodation providers.

7.4. Hostel Online Presence 2021

Figure 26 Hostel Online Presence 2021



In 2021, just under three quarters of participating Hostel accommodation providers had their own website (71.9%). Just over a fifth of Hostel accommodation providers also using Facebook and TripAdvisor (22.1%), with just over 16% using Twitter to promote their accommodation.



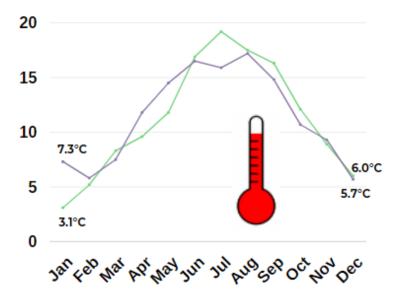


8 Weather & Currency Data

Weather

The weather information is based on the averages for the full year month from data sourced through the Met Office (www.metoffice.gov.uk).

Figure 27 Average Maximum Temperature



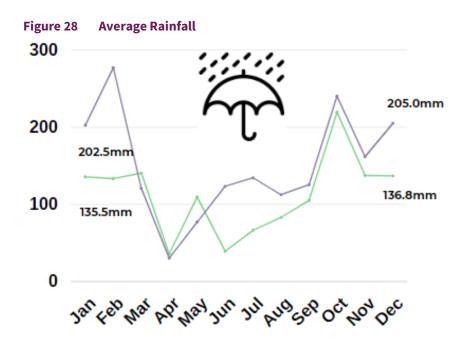
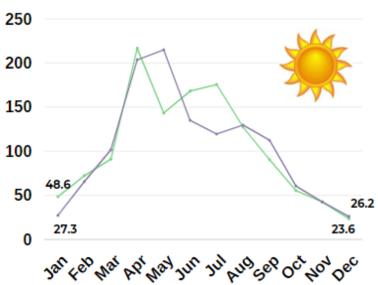






Figure 29 Average Hours of Sunshine

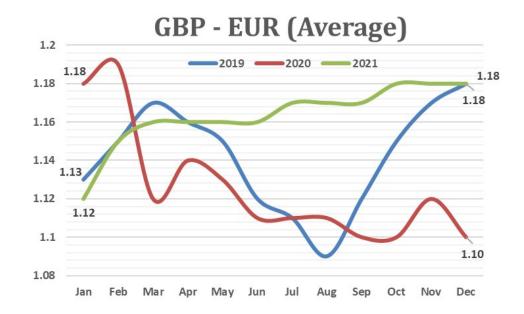




Currency

The currency information is based on the averages for the full month from data sourced through OFX (www.ofx.com). The currency data provided offers a month-on-month comparison of Sterling against the Euro and the US Dollar with a trend average (3 years).

Figure 30 GBP – Euro Average Exchange rates



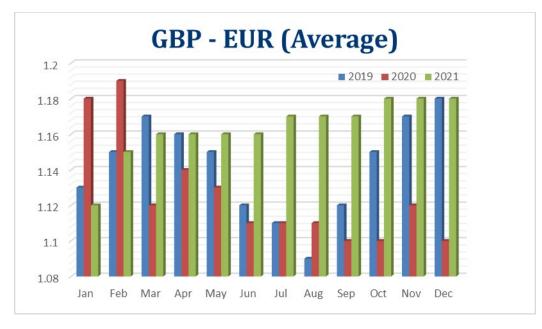
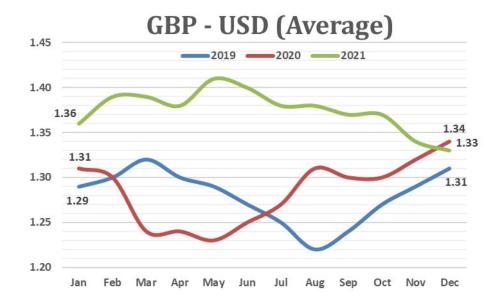
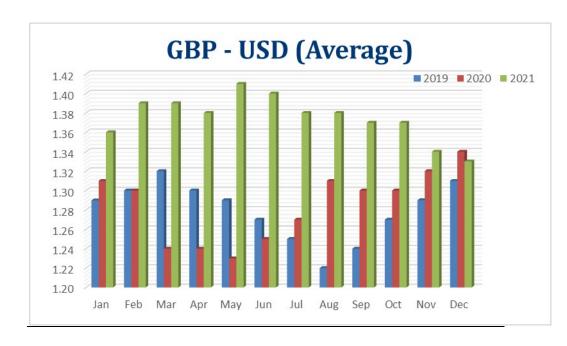






Figure 31 GBP - US Dollar Average Exchange rates









Changes in Geographic Location Analysis

Up to 2010, the accommodation sector was analysed according to whether they were Urban/Rural/Seaside.

This classification was problematic as some properties could be located in both a Seaside area and an urban area for example (e.g., accommodation in Aberdeen)

Two new sets of variables were introduced in 2010 to improve analysis:

- **Geographic Location**, dividing attractions into three categories:
 - Island based accommodation
 - Coastal accommodation (located within approximately one mile of the coast)
 - o Inland accommodation (encompassing the remainder of attractions).
- Location according to the Scottish Government's 2013-2014 *Urban Rural Classification*, dividing attractions into the six categories shown in the following table.

Table 22 Urban Rural Classification

Category	Description					
Large Urban Areas	Settlements of over 125,000 people.					
Other Urban Areas	Settlements of 10,000 to 124,999 people.					
Accessible Small Towns	Settlements of 3,000 and 9,999 people and within 30 minutes' drive of a settlement of 10,000 or more.					
Remote Small Towns	Settlements of 3,000 and 9,999 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.					
Accessible Rural	Settlements of less than 3,000 people and within 30 minutes' drive a settlement of 10,000 or more.					
Remote Rural	Settlements of less than 3,000 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.					

For more information, consult the Scottish Government's website at: www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification



