

Scottish Accommodation Occupancy Survey 2021



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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.

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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

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

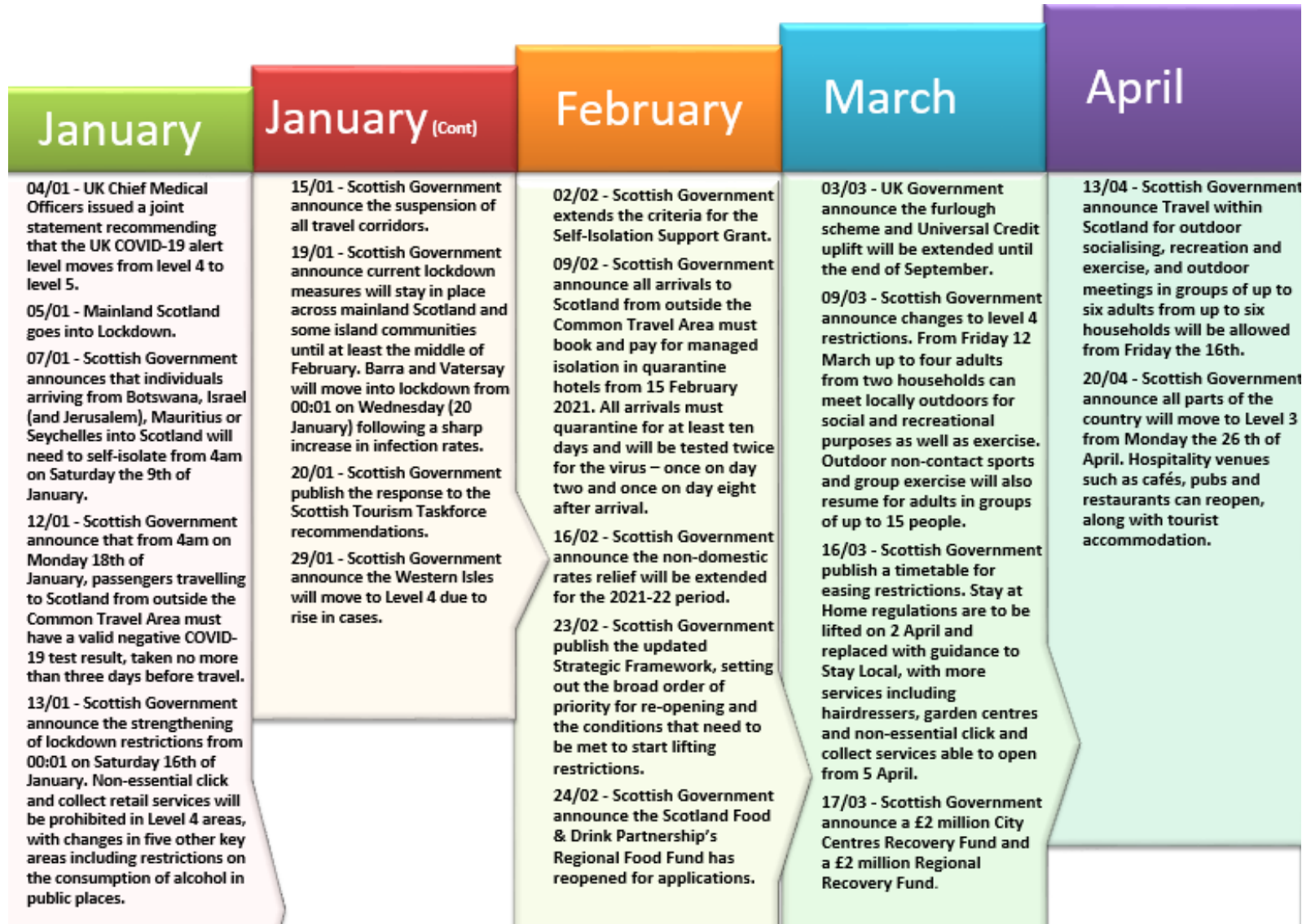


Figure 2 Covid-19 Key Dates in Scotland: May – August 2021

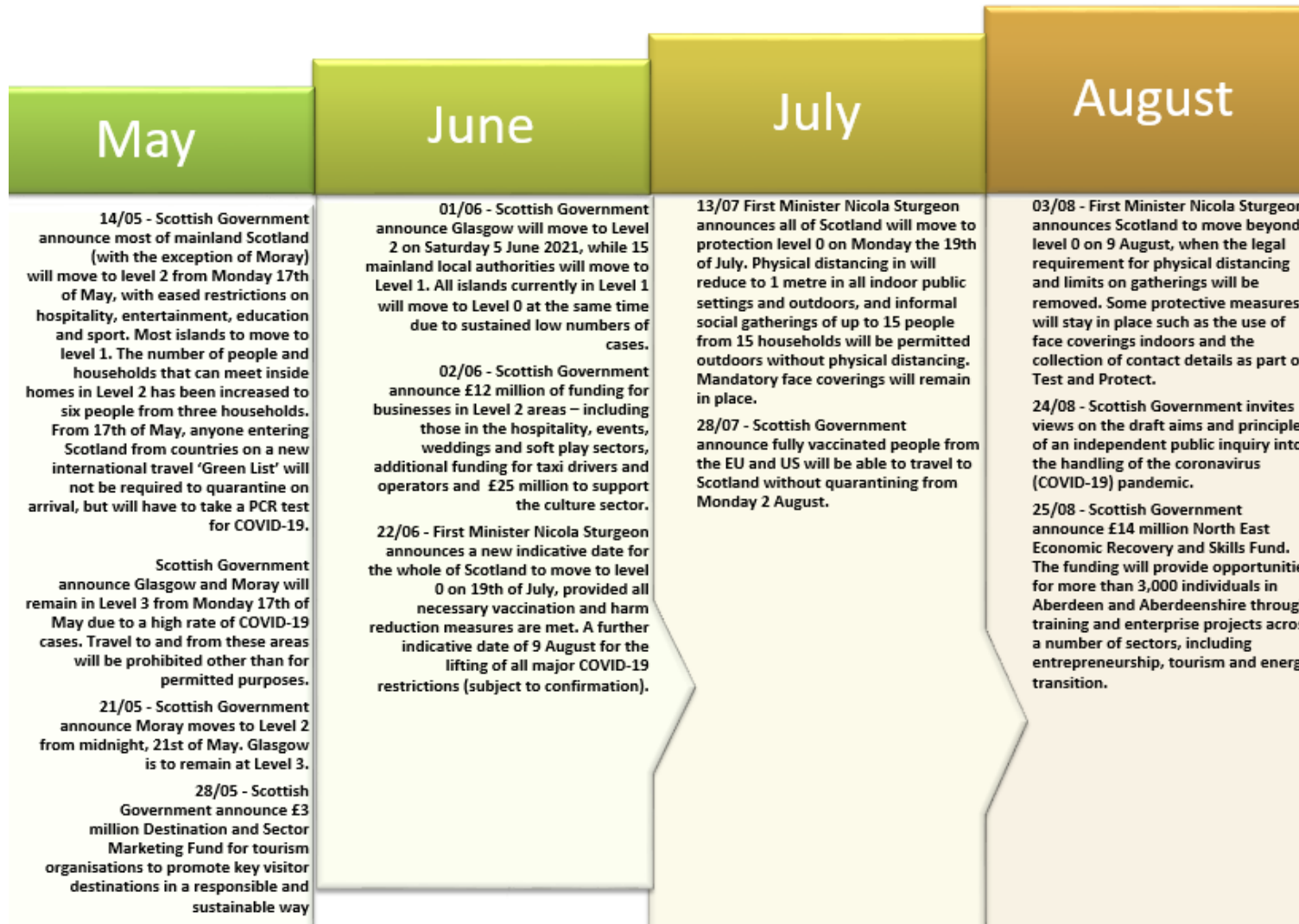


Figure 3 Covid-19 Key Dates in Scotland: September – December 2021

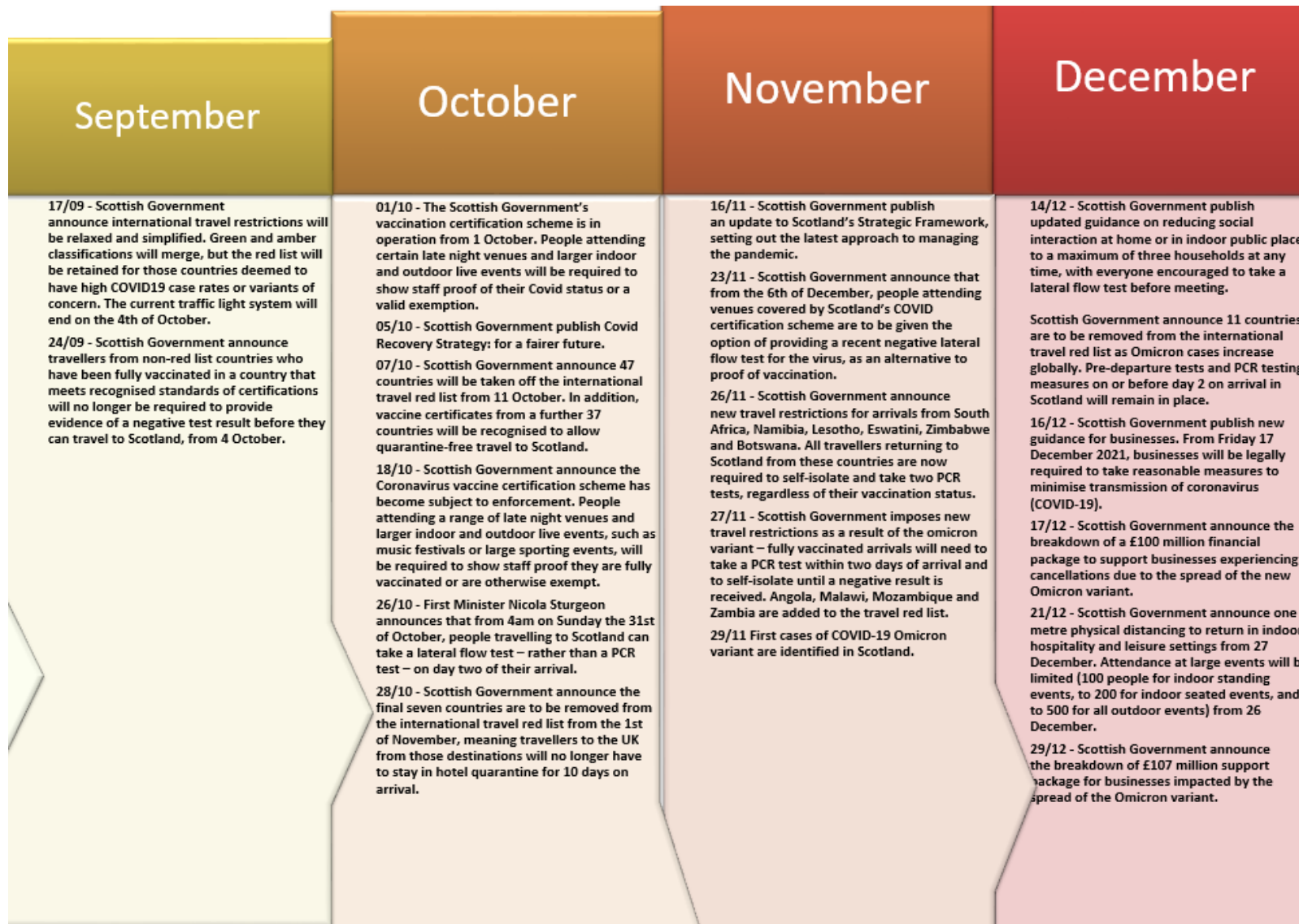


Figure 4 Covid-19 Key Dates in Scotland: March – July 2020

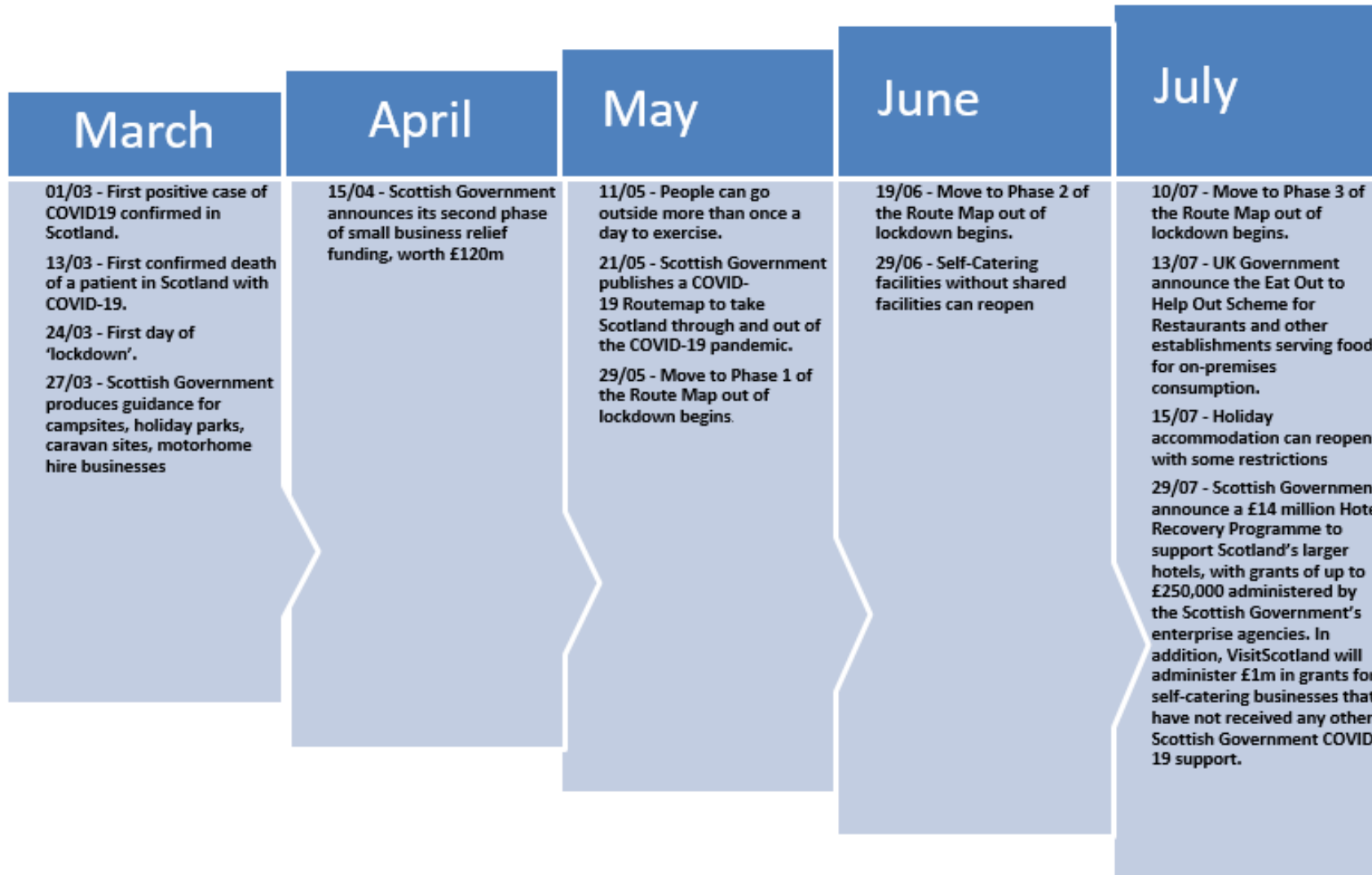
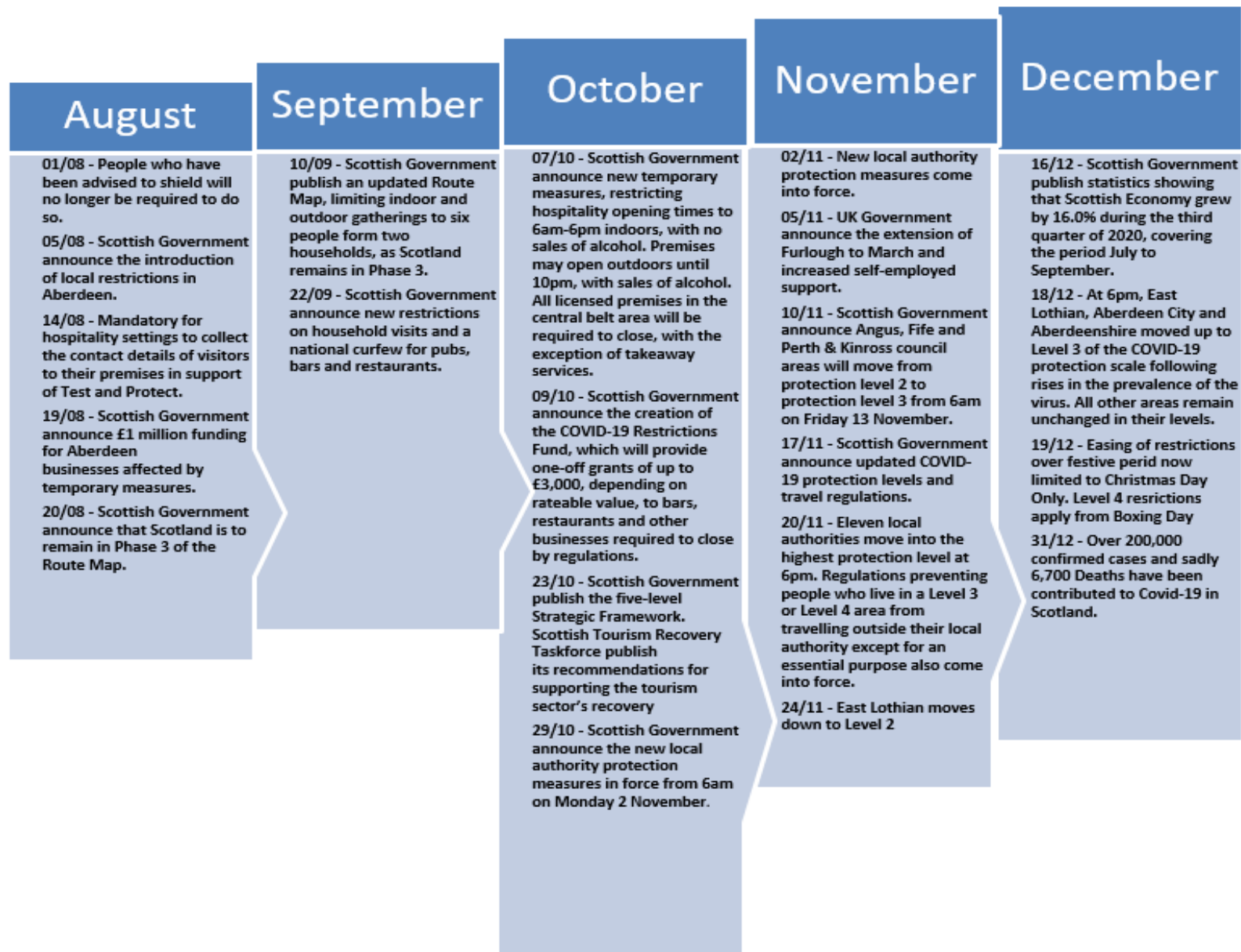


Figure 5 Covid-19 Key Dates in Scotland: August – December 2020



4 Serviced Accommodation



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

Room Occupancy	2021	2020	21/20 Diff ¹	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

¹ 21/20 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.

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

Serviced Accommodation



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
Island	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



Serviced Accommodation

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

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 6 Hotel Monthly Distribution by % Room Occupancy 2021/2020

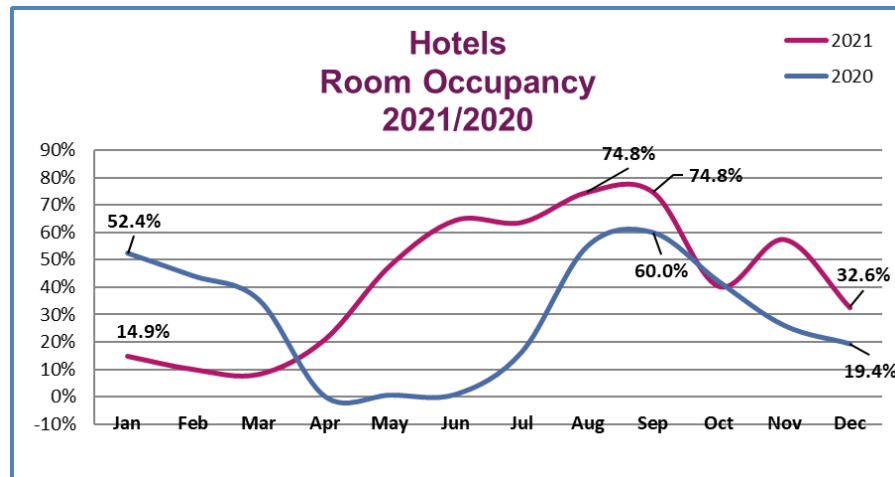
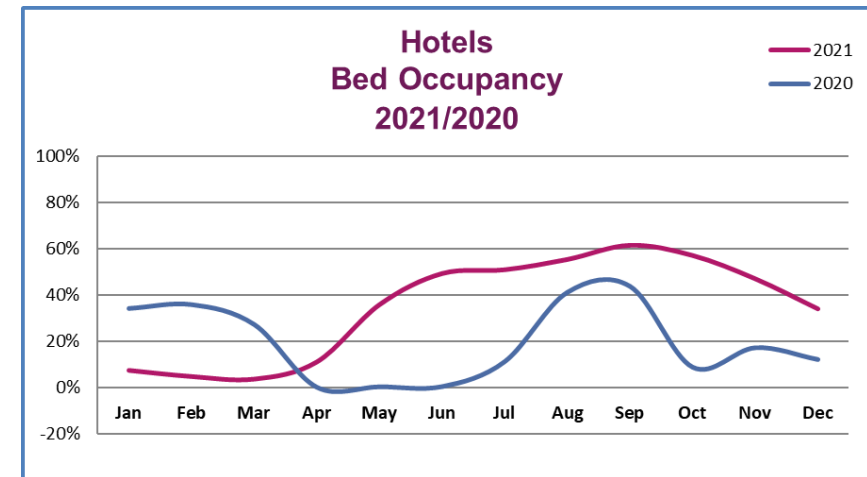


Figure 7 Hotel Monthly Distribution by % Bed Occupancy 2021/2020



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.

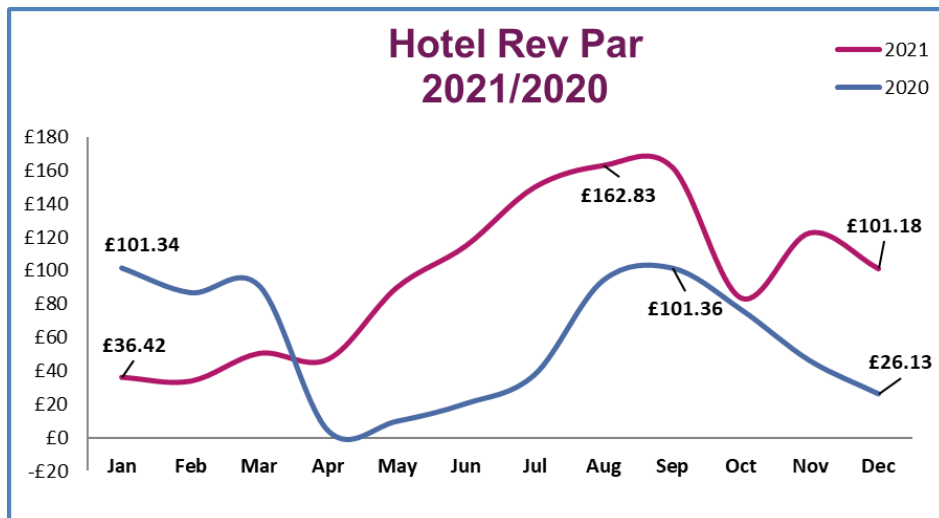
In 2020, Hotel room occupancy reached a peak in September at 60.0%, whilst maintaining a room occupancy rate of over 50% between in August and September.



Serviced Accommodation

4.1.4. Hotel Rev Par 2021/2020

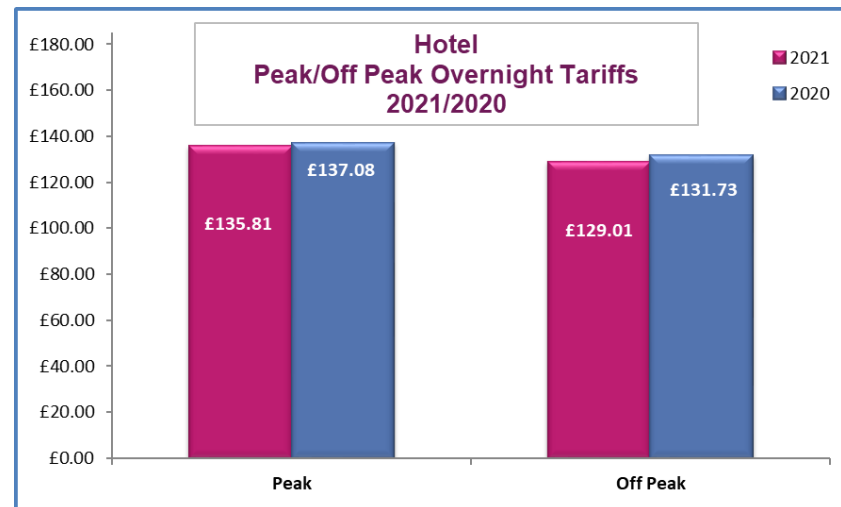
Figure 8 Hotel Rev Par 2021/2020



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.

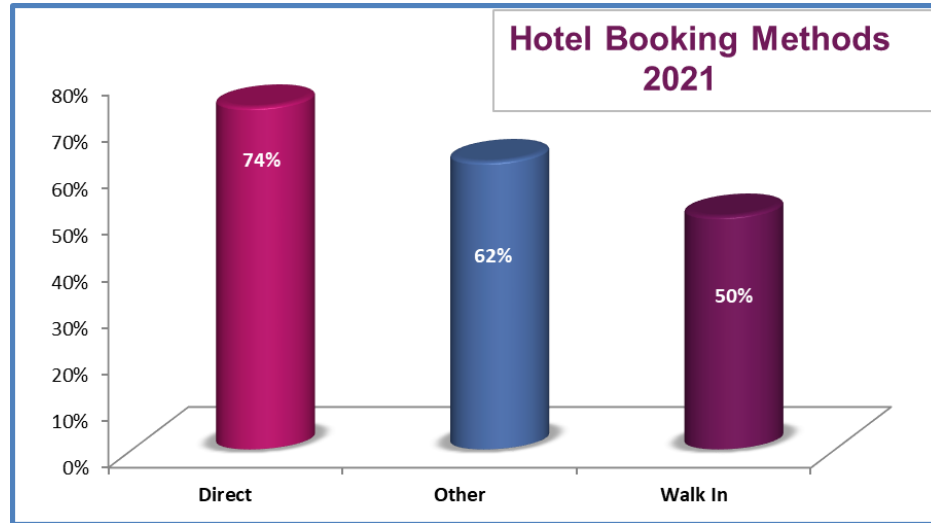
In 2020, the average peak tariff amongst participating hotels was £137.08, whilst the off-peak average tariff was £131.73

Serviced Accommodation



4.1.5. Hotel Booking Methods 2021

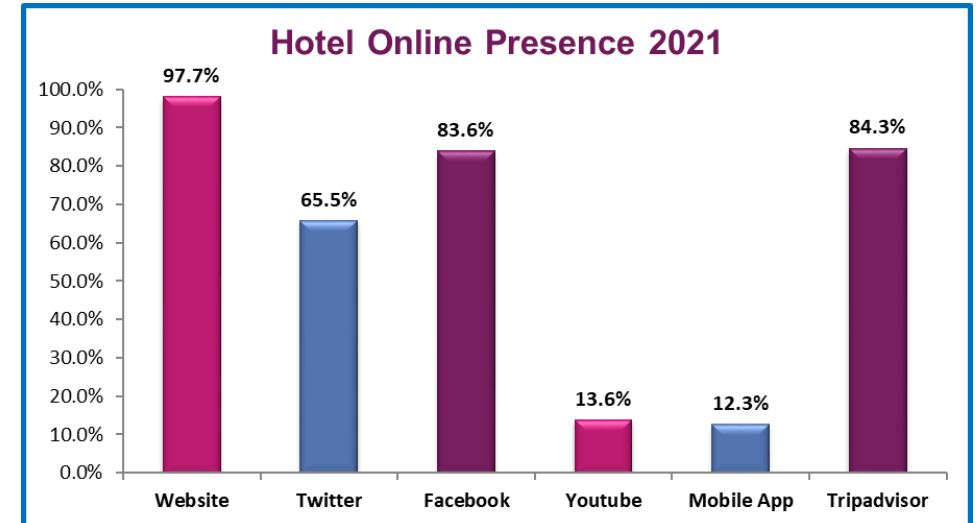
Figure 10 Booking Methods 2021



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.



Serviced Accommodation

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				
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

Serviced Accommodation

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**



Serviced Accommodation

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

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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

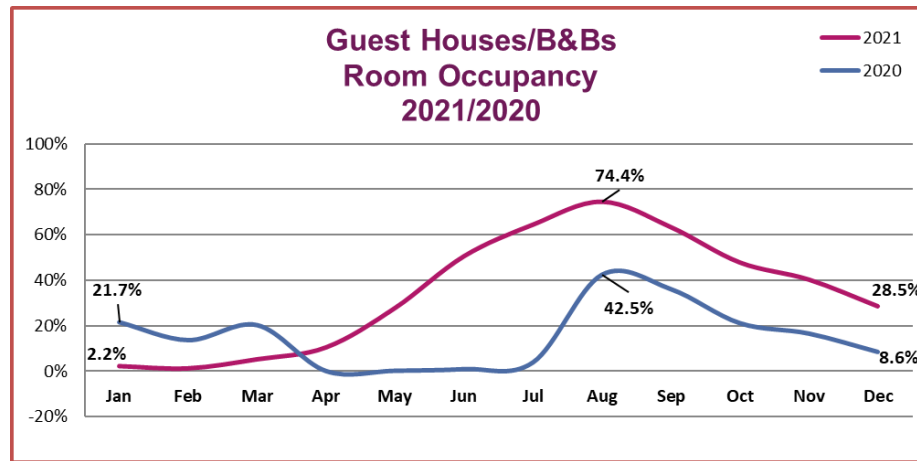
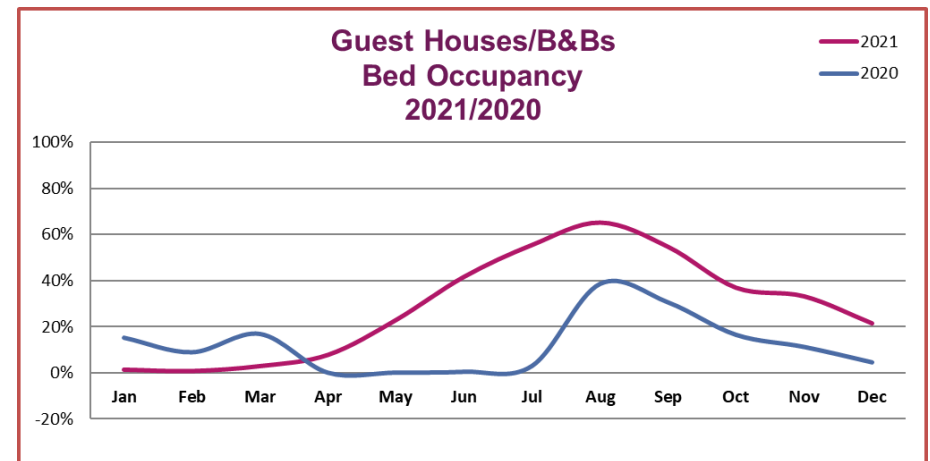


Table 12 Guest House, B&B Monthly Distribution by % Bed Occupancy 2021/2020

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	1.3	0.7	2.8	7.7	22.9	41.7	55.5	65.2	54.7	36.9	33.2	21.4
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%.

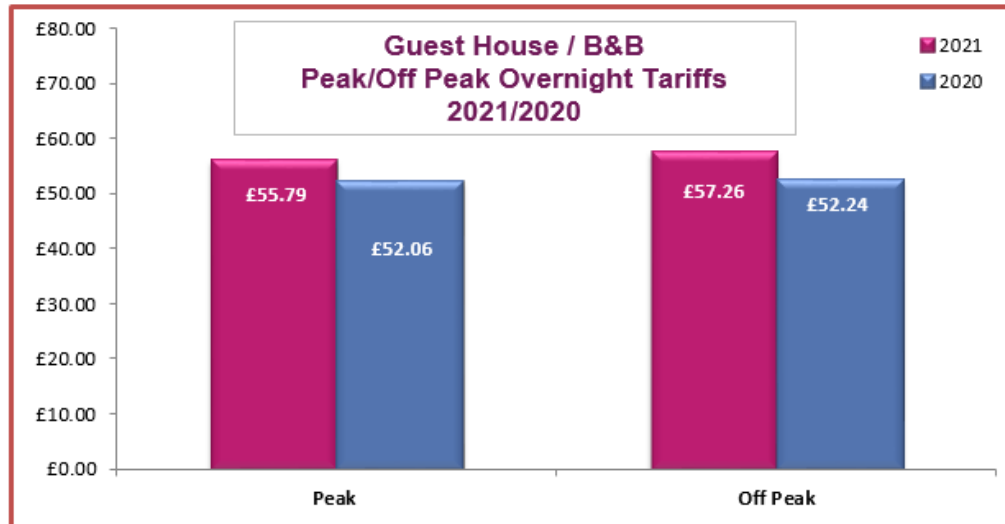
In April, May and June 2020 during the initial lockdown occupancy was less than 1.1%. Guest House room occupancy reached a peak in August at 42.5%.

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

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



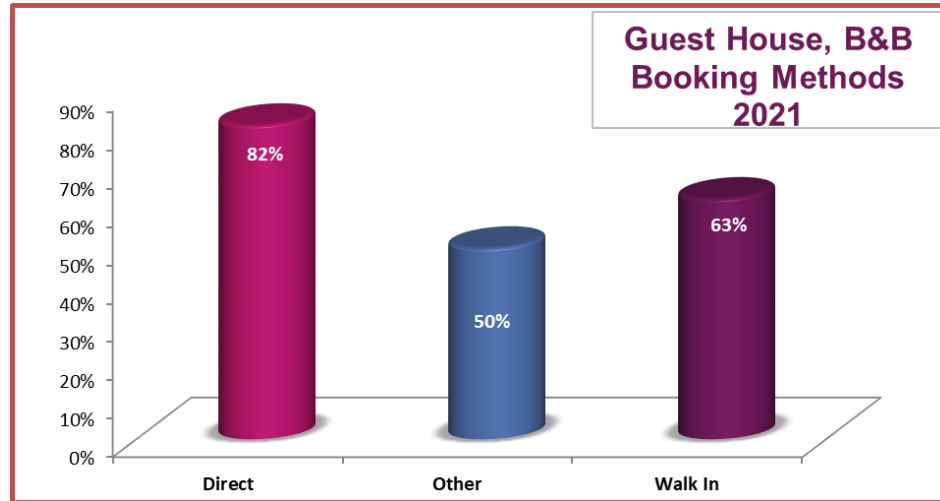
In 2021, the average peak tariff amongst participating Guest House, B&B accommodation was £55.79 per person per night, whilst the off-peak average tariff was £57.26.

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.

Serviced Accommodation

4.2.5. Guest House, B&B Booking Methods 2021

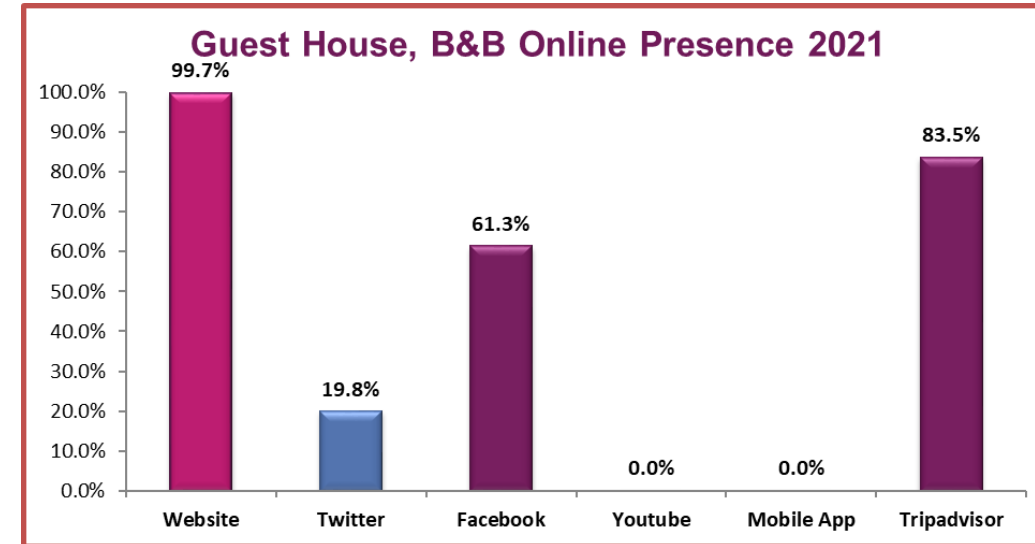
Figure 15 Booking Methods 2021



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 Self-Catering Accommodation



5.1. % Unit Occupancy

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

Unit Occupancy	2021	2020	21/20 Diff ⁴	Change ⁵
	28.10%	20.52%	7.58	108
Former VisitScotland Area				
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	Change ⁵
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.

Self-Catering Accommodation



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

Self-Catering Accommodation

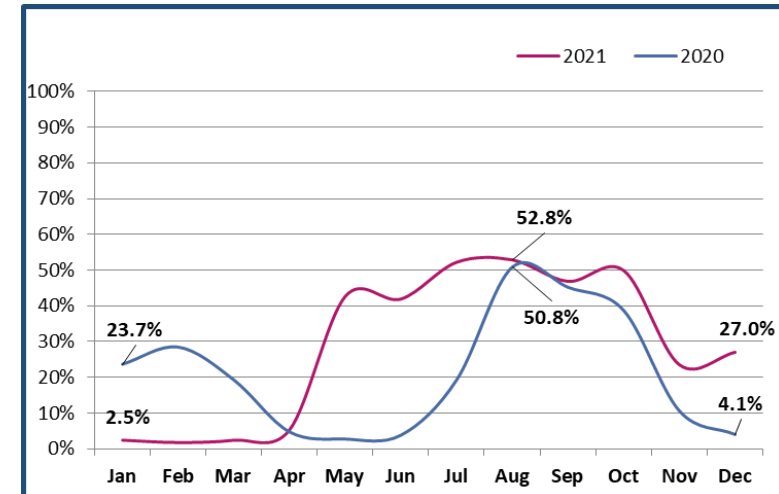


5.2. Self-Catering Monthly Distribution by % Unit Occupancy 2021/2020

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%.

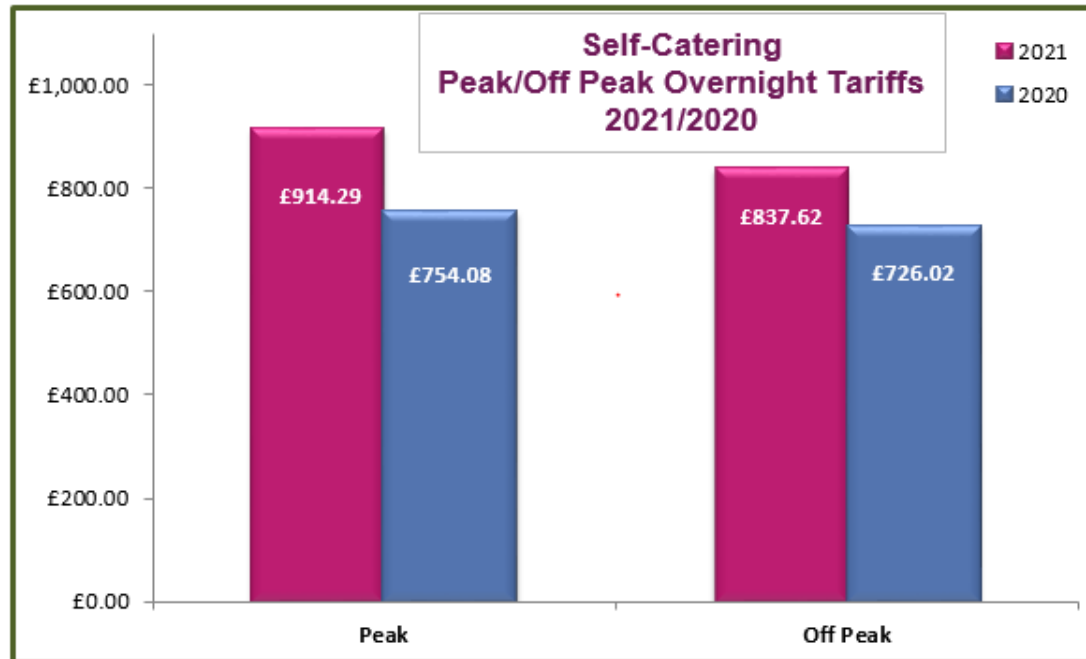
In 2020, Self-Catering Unit during the initial lockdown did not exceed 4.8%, however, occupancy reached a peak in August at 50.8%.

Self-Catering Accommodation

5.3. Self-Catering Peak/Off-Peak Tariffs



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



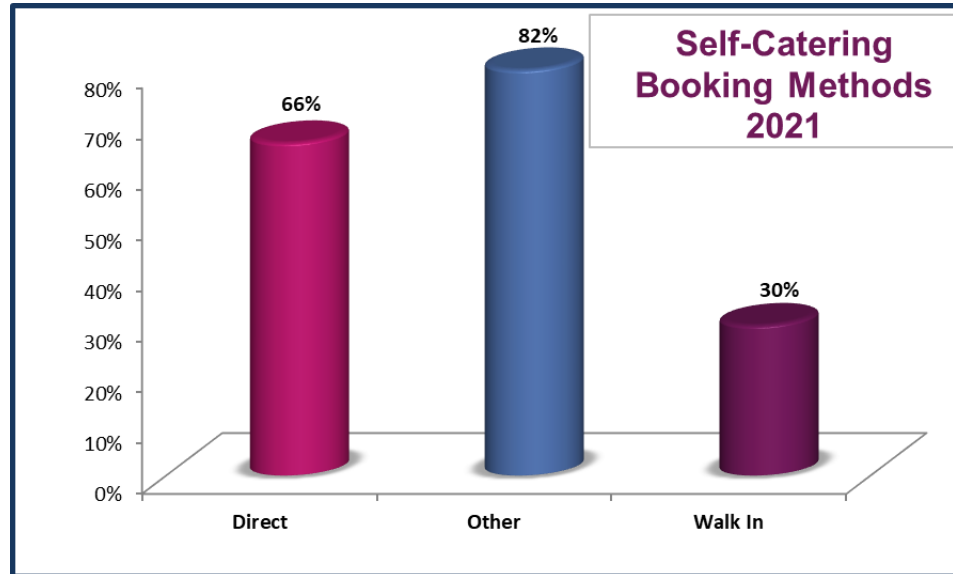
In 2021, the average peak tariff amongst participating Self-Catering accommodation was £914.29 per week, whilst the off-peak average tariff was £837.62 per week.

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.

Self-Catering Accommodation

5.4. Self-Catering Booking Methods 2021

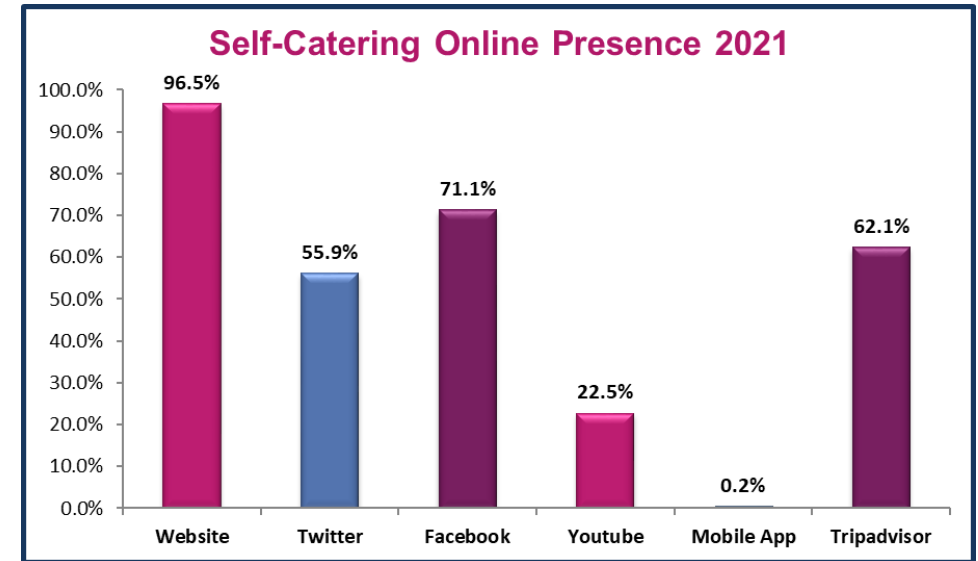
Figure 19 Self-Catering Booking Methods 2021



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 Touring Accommodation



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
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.

Touring Accommodation



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

Touring Accommodation

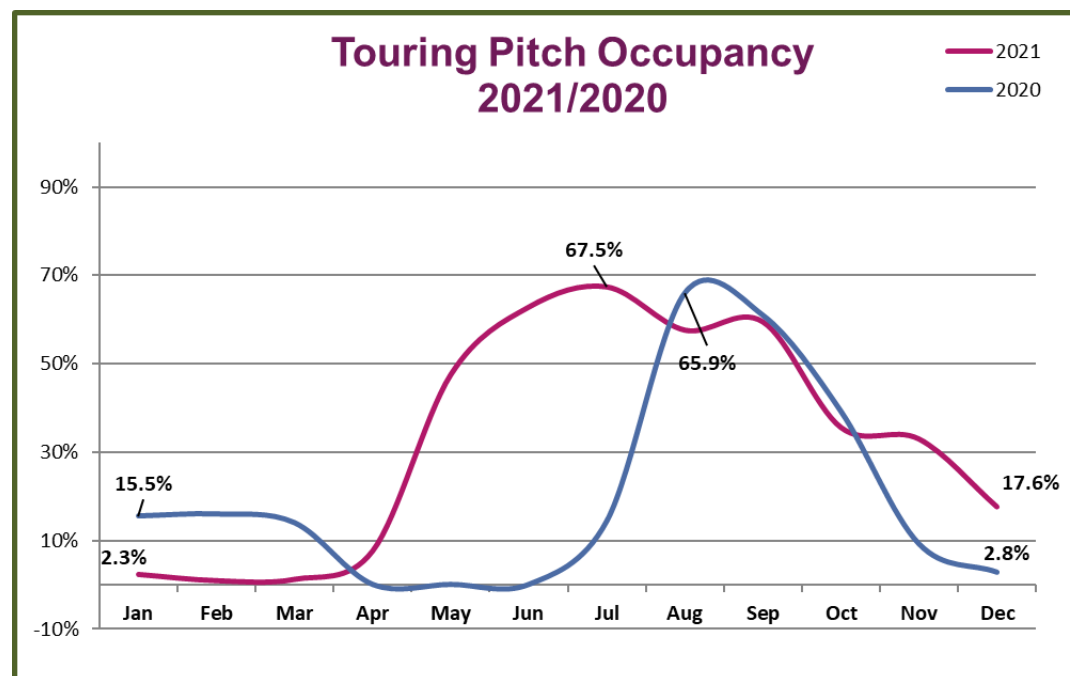


6.2. Touring Monthly Distribution by % Pitch Occupancy 2021/2020

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

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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



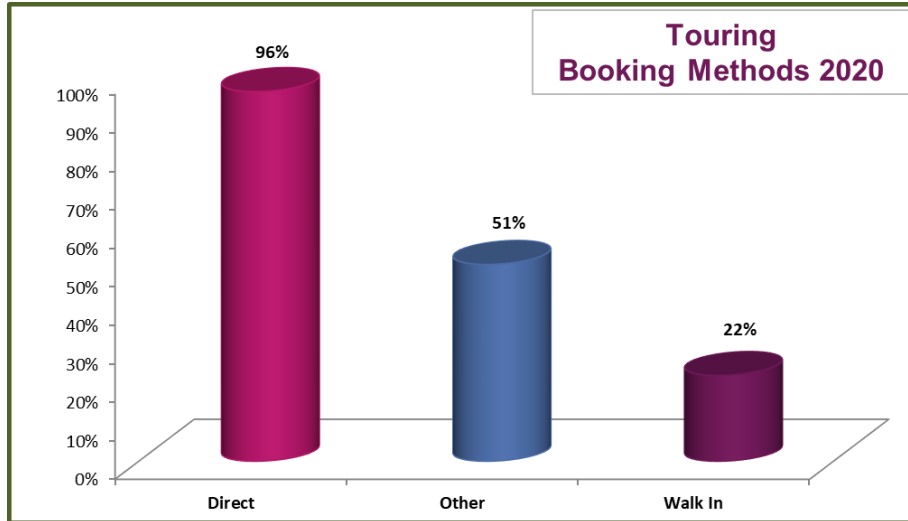
In 2021, Touring Pitch occupancy during the first quarter of 2021 was less than 2.5% due to the ongoing Level 4 lockdown, with the relaxation of restrictions May observed a significant increase, with occupancy reaching a peak in July at 67.5% which as seen in Table 12 was over a 50% increase compared 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 gradual relaxation of the lockdown, with occupancy reaching a peak in August at 65.9%

Touring Accommodation

6.3. Touring Booking Methods 2021

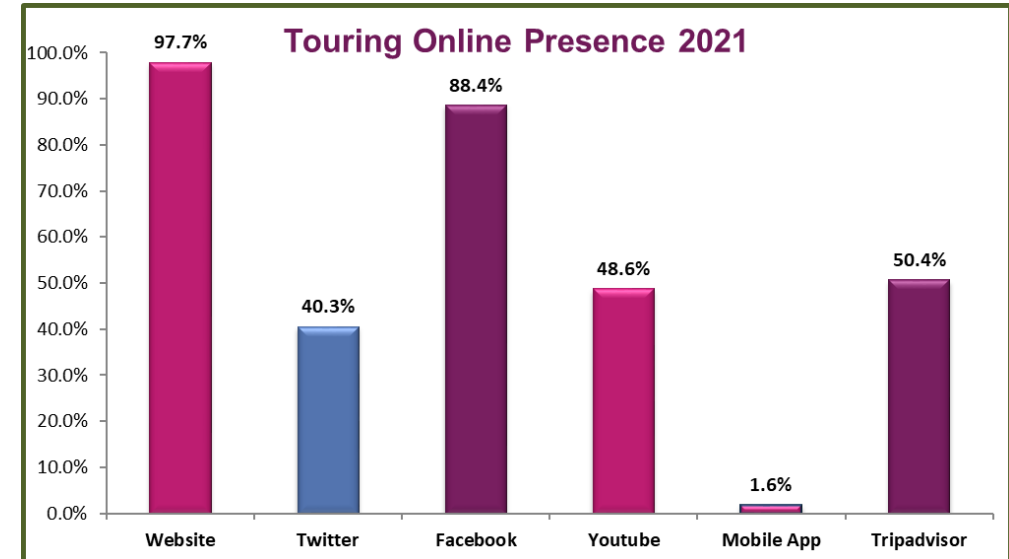
Figure 22 Touring Booking Methods 2021



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
Type				
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	2021	2020	21/20 Diff ¹⁰	Change ¹¹
Location				
Coastal	32.38%	17.04%	15.34	115
Inland	34.92%	19.76%	15.16	115
Island	46.45%	47.19%	-0.74	99
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	39.33%	30.83%	8.50	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.

Table 20 % Bed Occupancy Analysis 2021/2019

Bed Occupancy	2021	2019	21/19 Diff¹²	Change
	35.06%	60.15%	-25.09	75
Type				
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

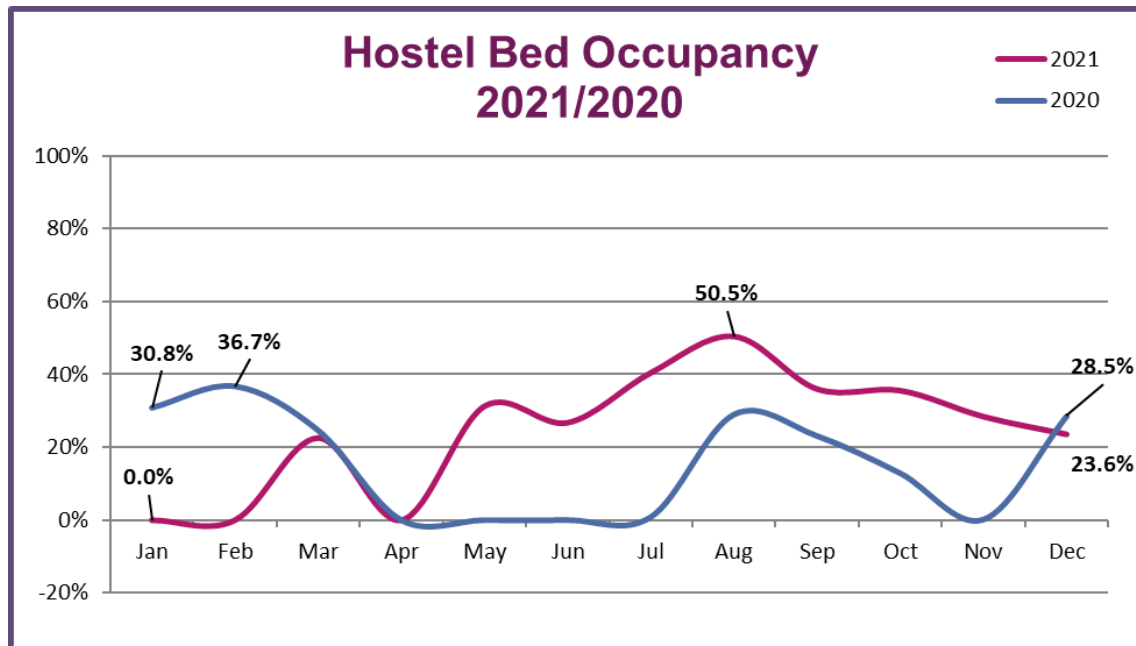


7.2. Hostel Monthly Distribution by % Bed Occupancy 2021/2020

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

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2021	0.0	0.0	22.6	0.0	31.3	26.8	40.5	50.5	36.0	35.6	28.5	23.6
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.

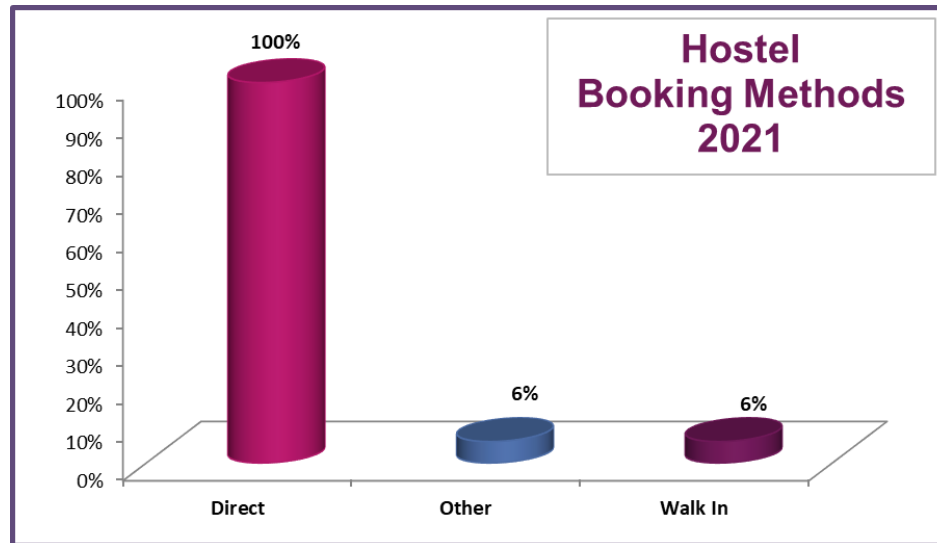
In 2020, Hostel Bed occupancy reached a peak in February at 36.7%.

Hostel Accommodation



7.3. Hostel Booking Methods 2021

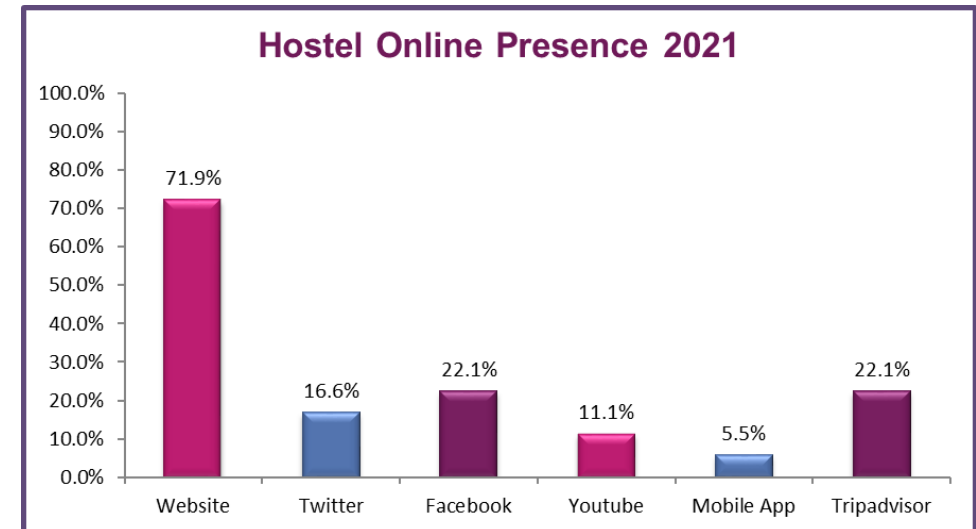
Figure 25 Hostel Booking Methods 2021



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

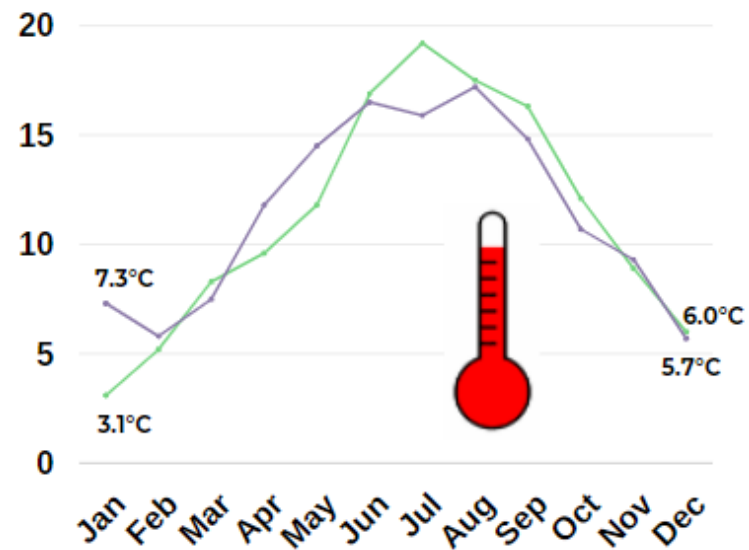


Figure 28 Average Rainfall

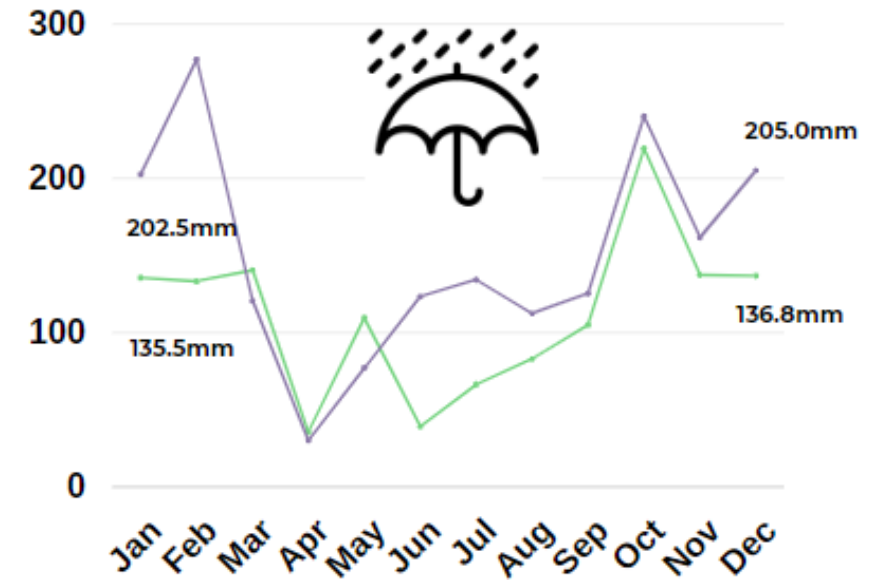
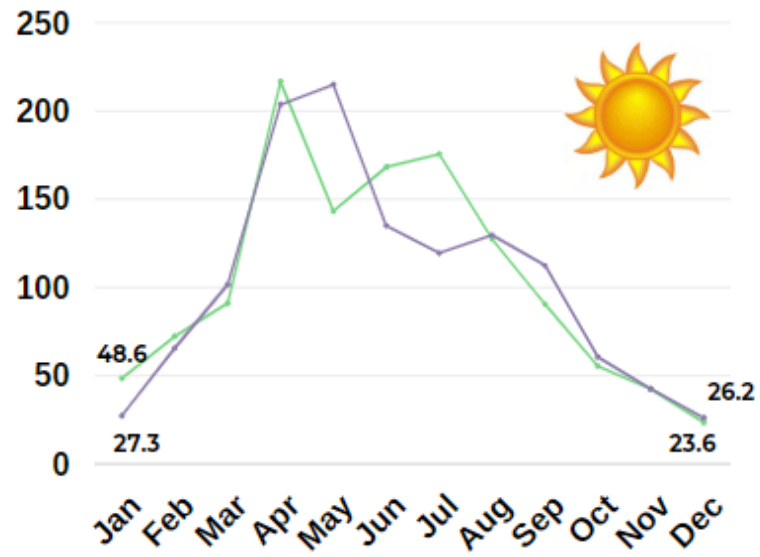


Figure 29 Average Hours of Sunshine



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

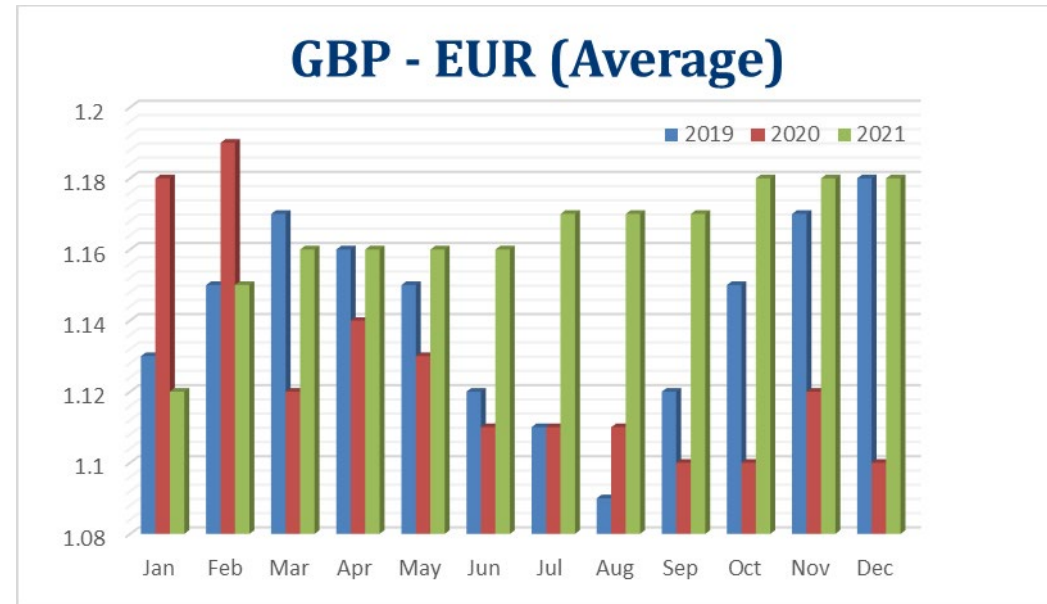
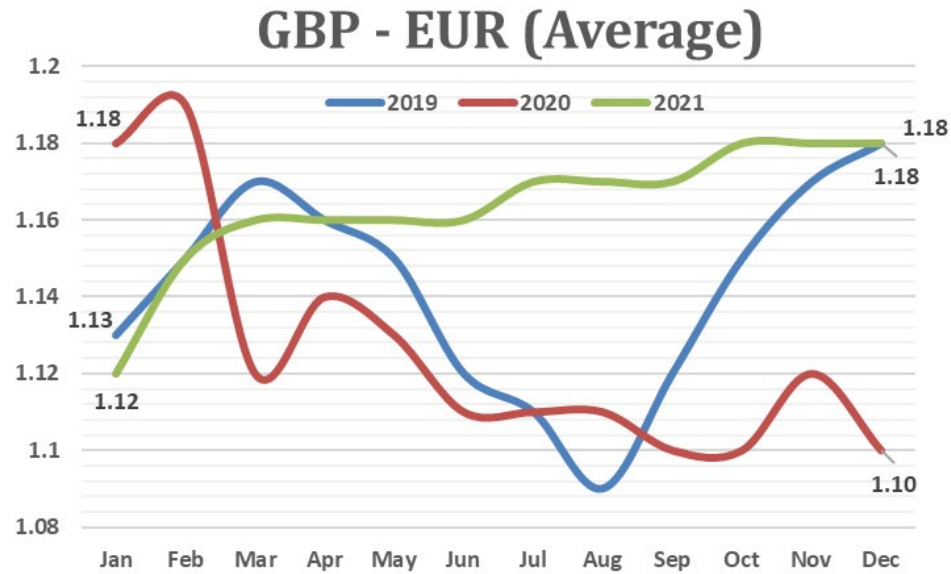
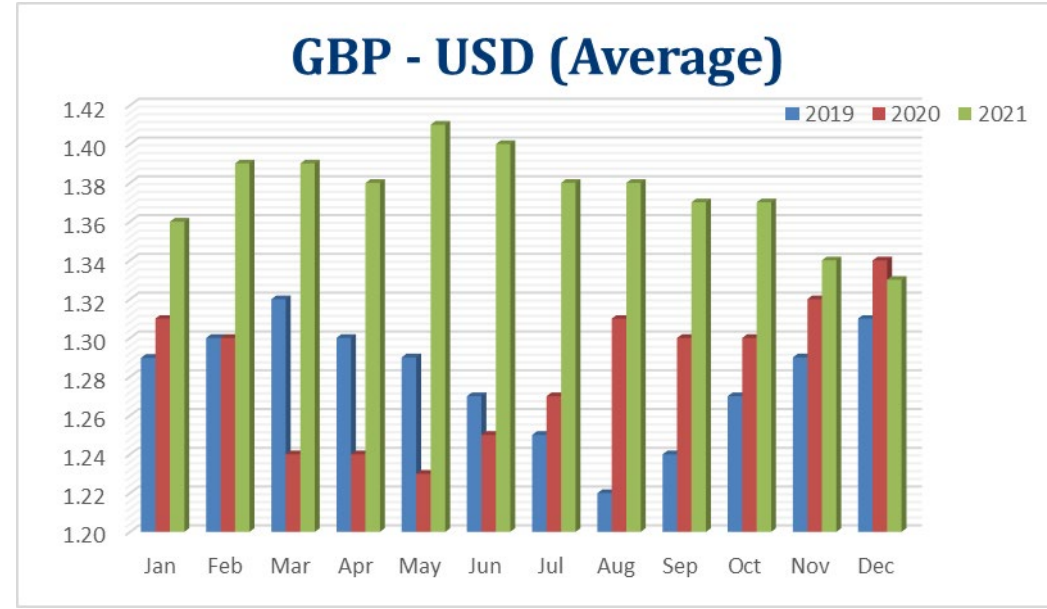
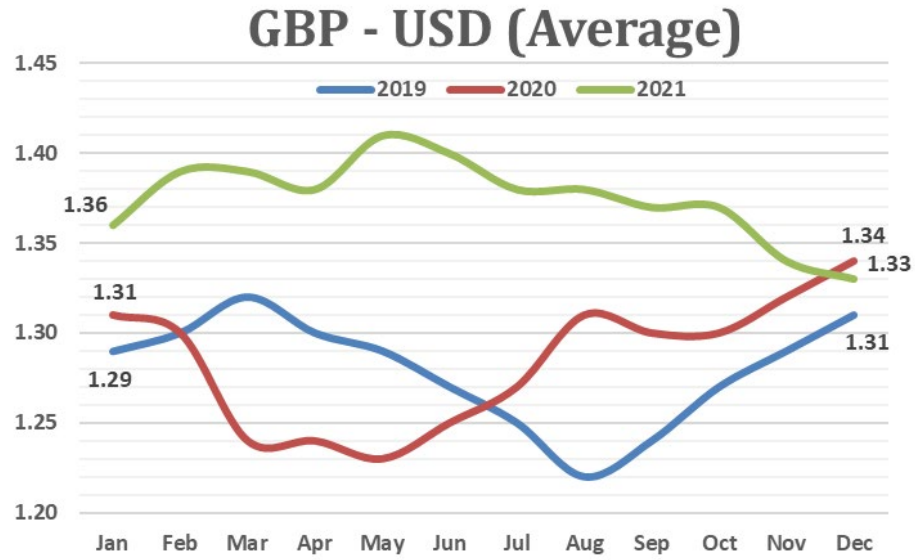


Figure 31 GBP – US Dollar Average Exchange rates



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:
 - o Island based accommodation
 - o 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 of 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