

Scottish Accommodation Occupancy Survey 2019



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1 Executive Summary 2019

The year 2019 saw continued strong performance in Scottish tourism with accommodation performing well across the majority of sectors. The occupancy achieved largely equalled or exceeded performance in 2018. However, it was in rates achieved that clear growth, particularly in cities, was most encouraging. The performance of Edinburgh and Glasgow are particularly noteworthy given the substantial increase in accommodation supply through new hotel developments and the growth in provision of private accommodation stock through on-line consolidators such as Airbnb. Accommodation performance across most regions and sectors was encouraging with the Highlands and Islands continuing the healthy occupancy and rate growth of previous years and Angus and Dundee, maintaining strong occupancy and encouraging rates. The latter reflecting the improved attraction offer and destination awareness of the city of Dundee.

Seasonality, perhaps the major challenge to Scottish tourism, continues to decline and the cities evidence less pronounced seasonal reductions in demand for accommodation. The rate differential between high and low seasons is also being diluted and the differences in prices achieved are less pronounced across many sectors.

The range of sectors examined does show some variation in performance. The self-catering sector has been challenged by on-line consolidators offering shorter stays and benefitting from global reservations platforms. For some, multiple listing is the response but this will impact on profitability margins. Indeed, electronic marketing presence is now the norm for the sector with accommodation supply mix across rural, urban, highland and island regions evidencing increased presence on web, social and digital channels. The transparency of offers and the visibility of guest feedback continues to drive positive impacts on quality.

The sourcing and retention of staff for operation of many parts of the tourist accommodation industry became increasingly acute in 2019. The ongoing net migration of EU nationals led to increased labour shortages in many areas such as; food production and accommodation servicing. Pressure on labour costs and labour supply continued as operators seek to maintain staffing levels at a time of continued strong demand for accommodation.

Clearly, 2019 has shown many positives across much of Scotland as the UK faced the prolonged and on-going uncertainty of Brexit. Such uncertainty will continue into 2020 a year that will be defined by the dire impacts of the Covid-19 pandemic presenting operators with an even more challenging macro-economic environment following closure of operations and major restrictions on travel. The sector will be impacted significantly and we will endeavor to reflect on this in coming reportage

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2 Methodology

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

In respect of the 2019 survey, initial emails were circulated to all accommodation providers from February 2019 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 to the following accommodation sectors: Serviced, Self-Catering, Touring and Hostels.

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

3 Highlights

Serviced Accommodation

Hotel % room occupancy increased slightly by 0.70% when comparing 2019 with 2018. In 2019, Hotel room occupancy reached a peak in August at 86%, compared with a peak of 88% at the same time in 2018.

In 2019, the average peak tariff amongst participating hotels was £143.18, whilst the off-peak average tariff was £133.92. In 2018, the average peak tariff amongst participating hotels was £137.37, whilst the off peak average tariff was £132.10.

In 2019, 99.8% of all participating Hotels had their own website, with the majority also listing on TripAdvisor (88.1%).

Guest House, B&B % room occupancy decreased slightly by -0.26% when comparing 2019 with 2018. In 2019, Guest House, B&B room occupancy peaked in August at 70%, compared with a peak of 73% at the same time in 2018.

In 2019, the average peak tariff amongst participating Guest House, B&B accommodation was £55.52 per person per night. In 2018, the average peak tariff amongst participating Guest House, B&B accommodation was £58.41 per person per night.

Self-Catering Accommodation

Self-Catering % unit occupancy decreased by -7.32% when comparing 2019 with 2018. In 2019, Self-Catering unit occupancy peaked in August at 67%, whilst in 2018; unit occupancy peaked at 78%.

In 2019, 99% of all participating Self-Catering accommodation providers had their own website. Just under three quarters had a Facebook page and just under 60% were listed on Trip Advisor

Touring Accommodation

Touring Accommodation % net pitch occupancy increased by 7.63% when comparing 2019 with 2018.

In 2019, Direct booking methods were cited as most popular by 98% Touring accommodation providers. 'Other' booking methods (53%) and 'Walk in' (29%) were less popular when booking touring pitches in 2019.

In 2019, 96% of all participating Touring accommodation providers had their own website. Just under two thirds had a Facebook page.

Hostel Accommodation

Hostel % bed occupancy increased by 4.88% when comparing 2019 with 2018. In 2019, Hostel occupancy peaked in July at 78%, whilst In 2018 Hostel occupancy peaked in August at 80%.

66% of all participating Hostel accommodation providers had their own website. The majority of Hostel accommodation providers also used Facebook (66%), Trip Advisor (62%) and Twitter (24%) to promote their accommodation.

4 Serviced Accommodation



4.1. Hotels

4.1.1. % Room Occupancy

Table 1 Hotel % Room Occupancy Analysis 2019/2018

Room Occupancy	2019	2018	19/18
	70.61%	69.91%	0.70%
Former VisitScotland Area			
Aberdeen & Grampian	56.46%	57.58%	-1.12%
ALLFV	74.45%	70.26%	4.19%
Angus & City of Dundee	70.47%	69.89%	0.58%
Ayrshire & Arran	72.65%	68.61%	4.04%
Dumfries & Galloway	56.03%	53.66%	2.37%
Edinburgh & Lothians	74.34%	71.08%	3.26%
Greater Glasgow & Clyde Valley	78.92%	80.27%	-1.35%
Highlands of Scotland	69.71%	71.43%	-1.72%
Kingdom of Fife	65.81%	64.21%	1.60%
Orkney	67.08%	65.34%	1.74%
Outer Hebrides	69.45%	63.18%	6.27%
Perthshire	66.02%	75.10%	-9.08%
Scottish Borders	56.70%	59.24%	-2.54%
Shetland Islands	-	-	-
Location			
Coastal	60.72%	62.66%	-1.94%
Inland	73.21%	72.29%	0.92%
Island	68.52%	66.00%	2.52%

Room Occupancy	2019	2018	19/18
Tariff			
£20 - £29.99	56.19%	60.25%	-4.06%
£30 - £39.99	65.47%	55.30%	10.17%
£40 - £49.99	49.47%	51.61%	-2.14%
£50 - £59.99	70.28%	72.51%	-2.23%
£60 - £69.99	55.10%	56.67%	-1.57%
£70 +	72.31%	71.28%	1.03%
Size			
1 to 3	3.81%	0.00%	3.81%
4 to 10	52.68%	53.13%	-0.45%
11 to 25	57.36%	59.64%	-2.28%
26 to 50	78.38%	75.68%	2.70%
51 to 100	74.35%	76.36%	-2.01%
Over 100	74.36%	74.32%	0.04%
Urban/Rural			
Large Urban Areas	75.57%	74.88%	0.69%
Other Urban Areas	68.74%	69.75%	-1.01%
Accessible Small Towns	81.98%	77.98%	4.00%
Remote Small Towns	58.53%	60.77%	-2.24%
Accessible Rural	65.67%	67.65%	-1.98%
Remote Rural	58.66%	60.77%	-2.11%

Serviced Accommodation



4.1.2. % Bed Occupancy

Table 2 Hotel % Bed Occupancy Analysis 2019/2018

Bed Occupancy	2019	2018	19/18
	52.94%	54.60%	-1.66%
Former VisitScotland Area			
Aberdeen & Grampian	33.01%	35.54%	-2.53%
ALLFV	49.43%	52.55%	-3.12%
Angus & City of Dundee	50.32%	48.47%	1.85%
Ayrshire & Arran	54.23%	51.99%	2.24%
Dumfries & Galloway	42.76%	43.27%	-0.51%
Edinburgh & Lothians	58.13%	46.53%	11.60%
Greater Glasgow & Clyde Valley	57.83%	61.76%	-3.93%
Highlands of Scotland	57.90%	59.93%	-2.03%
Kingdom of Fife	52.64%	53.54%	-0.90%
Orkney	48.21%	49.65%	-1.44%
Outer Hebrides	53.96%	48.56%	5.40%
Perthshire	59.26%	66.06%	-6.80%
Scottish Borders	43.78%	45.47%	-1.69%
Shetland Islands	-	-	-
Location			
Coastal	45.67%	48.40%	-2.73%
Inland	55.20%	56.78%	-1.58%
Island	59.80%	57.10%	2.70%

Bed Occupancy	2019	2018	19/18
Tariff			
£20 - £29.99	38.14%	40.21%	-2.07%
£30 - £39.99	47.98%	40.15%	7.83%
£40 - £49.99	34.55%	35.37%	-0.82%
£50 - £59.99	61.53%	65.21%	-3.68%
£60 - £69.99	38.06%	43.52%	-5.46%
£70 +	54.08%	55.37%	-1.29%
Size			
1 to 3	3.83%	0.00%	3.83%
4 to 10	33.58%	35.28%	-1.70%
11 to 25	47.25%	47.95%	-0.70%
26 to 50	57.60%	60.71%	-3.11%
51 to 100	60.24%	60.50%	-0.26%
Over 100	55.50%	59.26%	-3.76%
Urban/Rural			
Large Urban Areas	57.15%	59.02%	-1.87%
Other Urban Areas	56.81%	56.76%	0.05%
Accessible Small Towns	56.75%	62.00%	-5.25%
Remote Small Towns	45.18%	46.37%	-1.19%
Accessible Rural	51.61%	54.06%	-2.45%
Remote Rural	45.83%	47.18%	-1.35%

Serviced Accommodation



4.1.3. Hotel Monthly Distribution by % Occupancy 20019/2018

Table 3 Monthly Distribution by % Room Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	48%	58%	63%	71%	81%	84%	83%	86%	82%	72%	61%	54%
2018	50%	59%	61%	65%	82%	86%	84%	88%	82%	71%	58%	50%

Table 4 Monthly Distribution by % Bed Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	32%	38%	42%	54%	61%	64%	66%	70%	64%	55%	45%	45%
2018	37%	45%	48%	52%	63%	68%	68%	73%	64%	53%	42%	39%

Figure 1 Hotel Monthly Distribution by % Room Occupancy 2019/2018

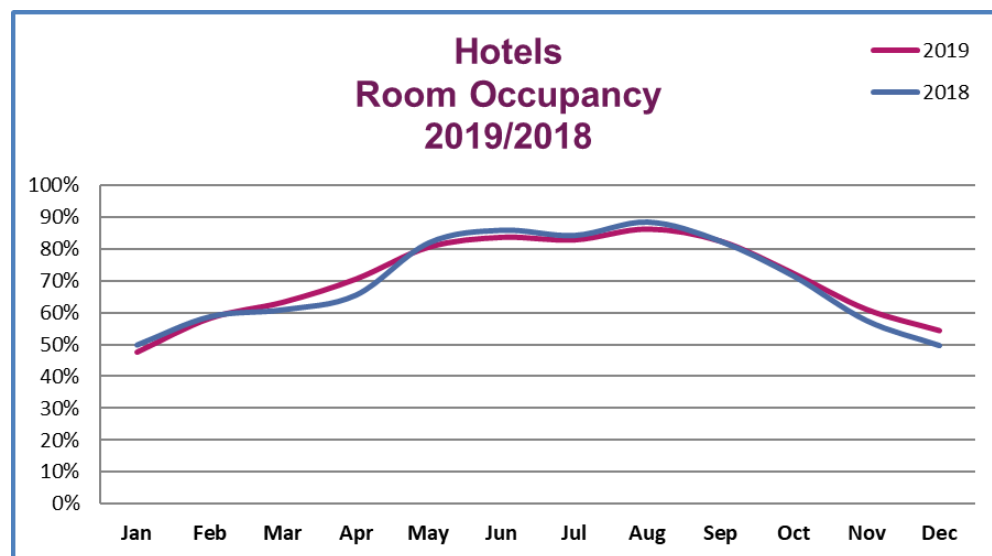
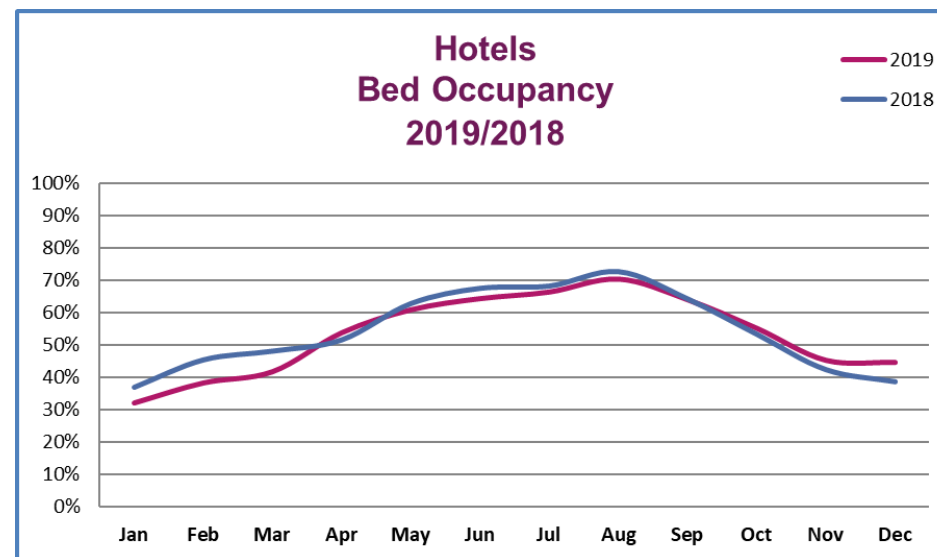


Figure 2 Hotel Monthly Distribution by % Bed Occupancy 2019/2018



In 2019, Hotel room occupancy reached a peak in August at 86%.

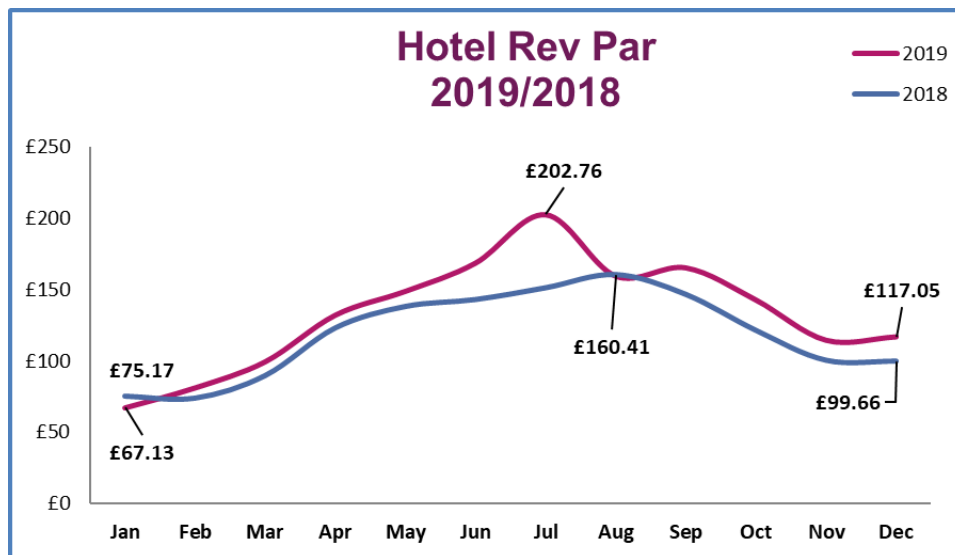
In 2018, Hotel room occupancy also reached a peak in August at 88%.

Serviced Accommodation



4.1.4. Hotel Rev Par 2019/2018

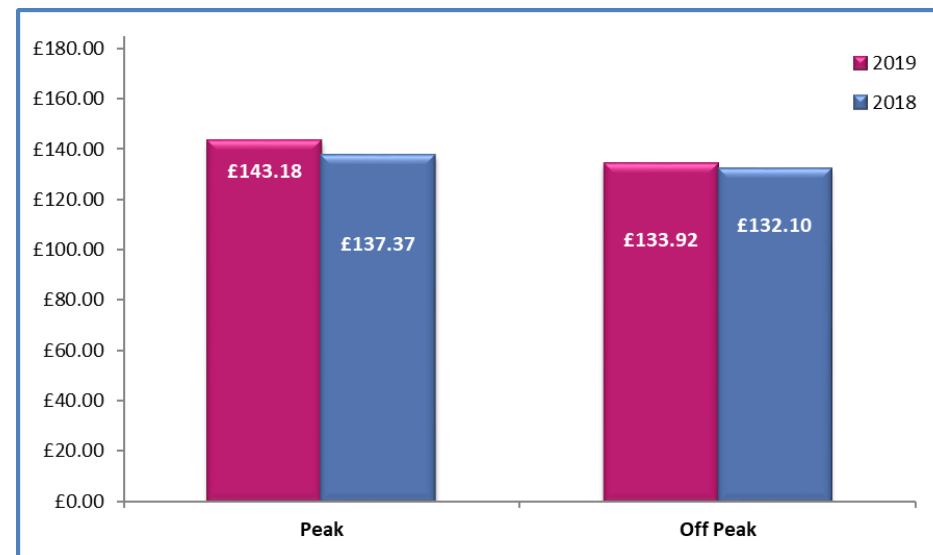
Figure 3 Hotel Rev Par 2019/2018



In 2019, average peak Rev Par was £202.76, achieved in July 2019.

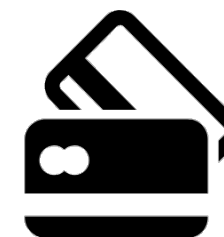
In 2018, average peak Rev Par was £160.41, achieved in August 2018.

Figure 4 Hotel Peak/Off Peak Tariffs 2019/2018



In 2019, the average peak tariff amongst participating hotels was £143.18, whilst the off peak average tariff was £133.92.

In 2018, the average peak tariff amongst participating hotels was £137.37, whilst the off peak average tariff was £132.10.

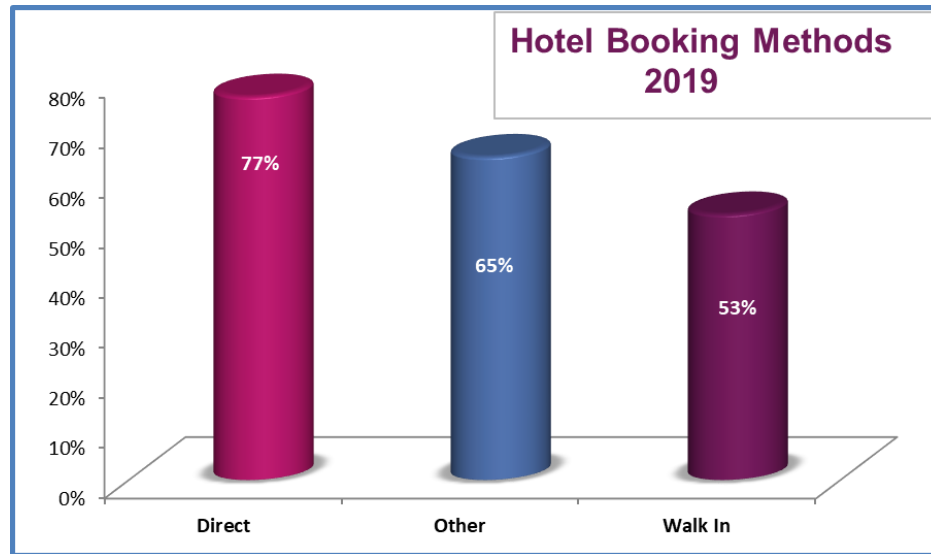


Serviced Accommodation



4.1.5. Hotel Booking Methods 2019

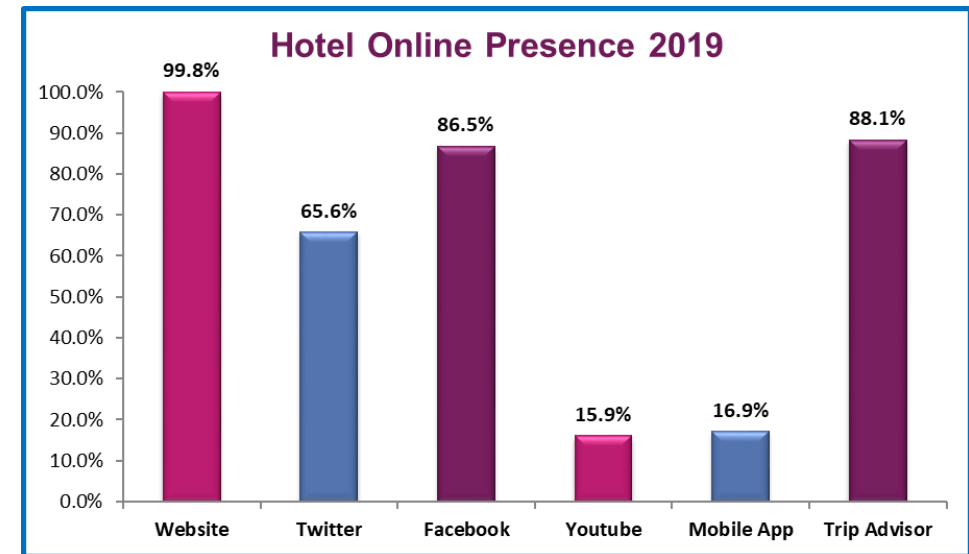
Figure 5 Booking Methods 2019



In 2019, 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. Just over half of all of participating hotels welcomed 'walk-in' guests.

4.1.6. Hotel Online Presence 2019

Figure 6 Online Presence 2019



In 2019, 100% of all participating Hotels had their own website, with the majority also listing on Trip Advisor (88%). Facebook was popular in 2019 with 87% having their own page to promote their accommodation. Youtube was only used by 16% of Hotels respectively in 2019.

Serviced Accommodation



4.2. Guest House, B&B

4.2.1. % Room Occupancy

Table 5 Guest House, B&B % Room Occupancy Analysis 2019/2018

Room Occupancy	2019	2018	19/18
	50.04%	50.30%	-0.26%
Former VisitScotland Area			
Aberdeen & Grampian	2.38%	45.03%	-42.65%
ALLFV	51.55%	57.74%	-6.19%
Angus & City of Dundee	29.67%	38.28%	-8.61%
Ayrshire & Arran	33.79%	26.58%	7.21%
Dumfries & Galloway	51.44%	39.48%	11.96%
Edinburgh & Lothians	82.07%	68.13%	13.94%
Greater Glasgow & Clyde Valley	26.52%	23.74%	2.78%
Highlands of Scotland	44.07%	54.45%	-10.38%
Kingdom of Fife	0.00%	56.03%	-56.03%
Orkney	50.18%	43.32%	6.86%
Outer Hebrides	49.09%	46.33%	2.76%
Perthshire	39.24%	34.57%	4.67%
Scottish Borders	39.29%	34.16%	5.13%
Shetland Islands	4.84%	50.41%	-45.57%
Location			
Coastal	39.41%	45.56%	-6.15%
Inland	55.45%	52.72%	2.73%
Island	50.87%	51.82%	-0.95%

Room Occupancy	2019	2018	19/18
Tariff			
£20 - £29.99	23.60%	45.86%	-22.26%
£30 - £39.99	43.98%	38.33%	5.65%
£40 - £49.99	49.96%	48.70%	1.26%
£50 - £59.99	46.46%	55.88%	-9.42%
£60 - £69.99	59.60%	53.65%	5.95%
£70 +	54.07%	58.56%	-4.49%
Size			
1 to 3	34.21%	42.26%	-8.05%
4 to 10	54.37%	51.09%	3.28%
11 to 25	87.93%	80.22%	7.71%
26 to 50	0.00%	0.00%	0.00%
51 to 100	0.00%	0.00%	0.00%
Over 100	0.00%	0.00%	0.00%
Urban/Rural			
Large Urban Areas	70.86%	63.57%	7.29%
Other Urban Areas	63.22%	58.67%	4.55%
Accessible Small Towns	43.93%	49.62%	-5.69%
Remote Small Towns	54.65%	40.34%	14.31%
Accessible Rural	26.24%	40.45%	-14.21%
Remote Rural	36.07%	46.67%	-10.60%

Serviced Accommodation



4.2.2. % Bed Occupancy

Table 6 Guest House, B&B % Bed Occupancy Comparative Analysis 2019/2018

Bed Occupancy	2019	2018	19/18
	42.21%	43.25%	-1.04%
Former VisitScotland Area			
Aberdeen & Grampian	2.38%	41.25%	-38.87%
ALLFV	42.19%	50.47%	-8.28%
Angus & City of Dundee	24.53%	31.11%	-6.58%
Ayrshire & Arran	25.94%	5.32%	20.62%
Dumfries & Galloway	40.85%	30.25%	10.60%
Edinburgh & Lothians	74.67%	59.70%	14.97%
Greater Glasgow & Clyde	16.63%	15.80%	0.83%
Highlands of Scotland	37.15%	50.70%	-13.55%
Kingdom of Fife	0.00%	42.48%	-42.48%
Orkney	42.01%	40.13%	1.88%
Outer Hebrides	31.25%	35.05%	-3.80%
Perthshire	29.68%	27.49%	2.19%
Scottish Borders	27.86%	23.71%	4.15%
Shetland Islands	3.23%	33.75%	-30.52%
Location			
Coastal	30.15%	36.70%	-6.55%
Inland	48.52%	45.89%	2.63%
Island	40.27%	47.32%	-7.05%

Bed Occupancy	2019	2018	19/18
Tariff			
£20 - £29.99	23.60%	41.22%	-17.62%
£30 - £39.99	36.68%	31.54%	5.14%
£40 - £49.99	39.75%	41.85%	-2.10%
£50 - £59.99	39.28%	51.70%	-12.42%
£60 - £69.99	49.62%	43.91%	5.71%
£70 +	47.45%	52.61%	-5.16%
Size			
1 to 3	26.65%	35.28%	-8.63%
4 to 10	44.83%	44.47%	0.36%
11 to 25	80.83%	80.48%	0.35%
26 to 50	0.00%	0.00%	0.00%
51 to 100	0.00%	0.00%	0.00%
Over 100	0.00%	0.00%	0.00%
Urban/Rural			
Large Urban Areas	65.28%	55.10%	10.18%
Other Urban Areas	51.71%	48.34%	3.37%
Accessible Small Towns	33.17%	40.73%	-7.56%
Remote Small Towns	44.09%	34.64%	9.45%
Accessible Rural	21.22%	27.63%	-6.41%
Remote Rural	30.10%	43.97%	-13.87%

Serviced Accommodation



4.2.3. Guest House, B&B Monthly Distribution by % Occupancy 2009/18

Table 7 Guest House, B&B Monthly Distribution by % Room Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	27%	29%	28%	47%	65%	62%	69%	80%	65%	41%	36%	31%
2018	15%	24%	25%	37%	68%	66%	74%	80%	69%	48%	34%	30%

Table 8 Guest House, B&B Monthly Distribution by % Bed Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	21%	22%	22%	40%	56%	50%	61%	70%	55%	33%	29%	26%
2018	9%	17%	19%	31%	58%	55%	68%	73%	58%	40%	27%	27%

Figure 7 Guest House, B&B Monthly Distribution by % Room Occupancy 2019/2018

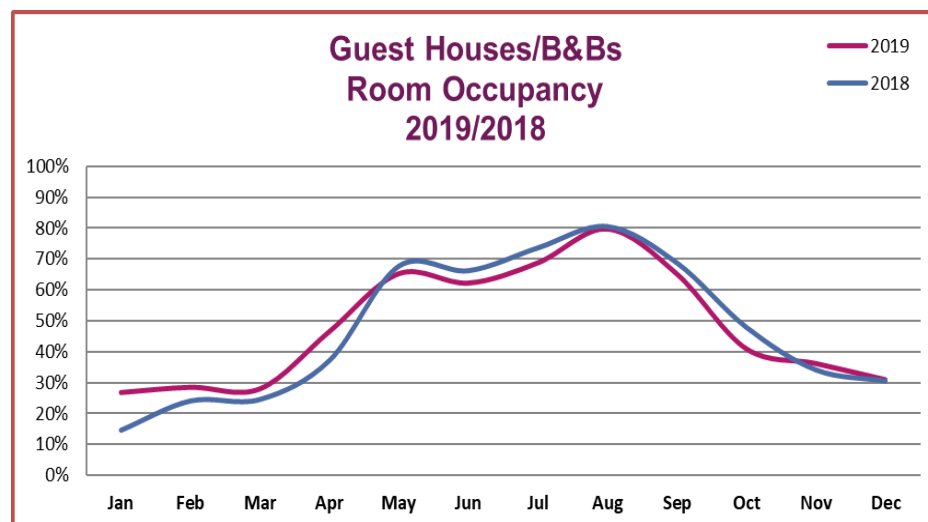
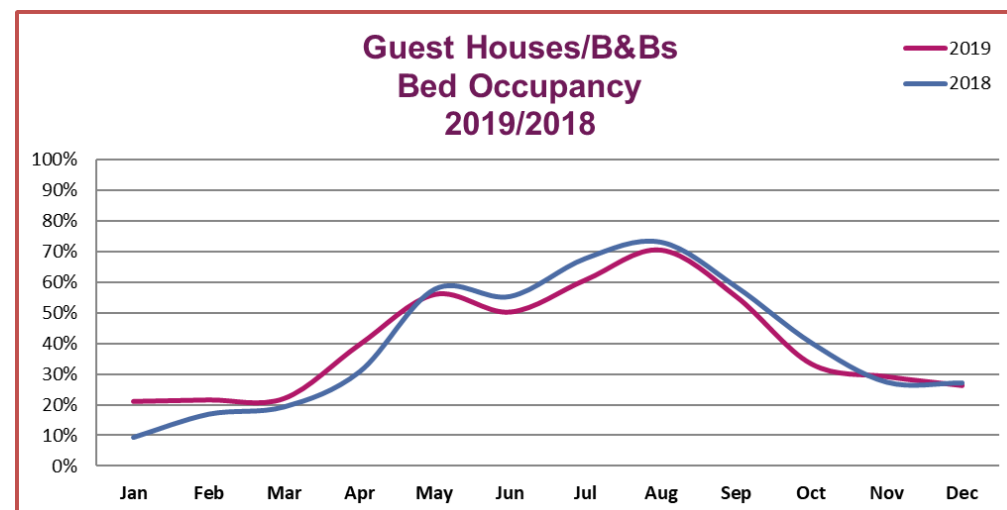


Figure 8 Guest House, B&B Monthly Distribution by % Bed Occupancy 2019/2018



In 2019, Guest House, B&B room occupancy peaked in August at 80%.

In 2018, Guest House, B&B room occupancy also peaked in August at 80%.

Serviced Accommodation



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

Figure 9 Guest House, B&B Peak/Off Peak Tariffs 2019/2018



In 2019, the average peak tariff amongst participating Guest House, B&B accommodation was £55.52 per person per night, whilst the off peak average tariff was £54.42.

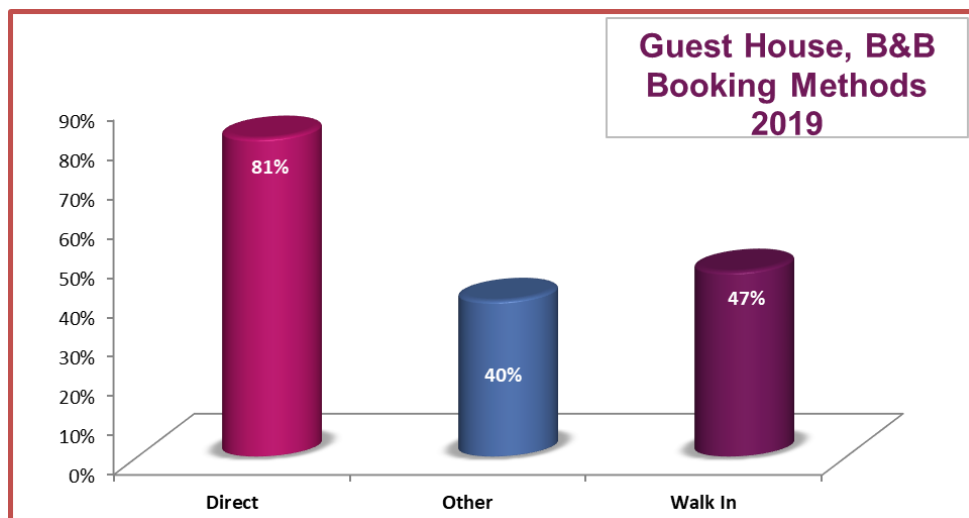
In 2018, the average peak tariff amongst participating Guest House, B&B accommodation was £58.41 per person per night, whilst the off peak average tariff was £54.87.



Serviced Accommodation

4.2.5. Guest House, B&B Booking Methods 2019

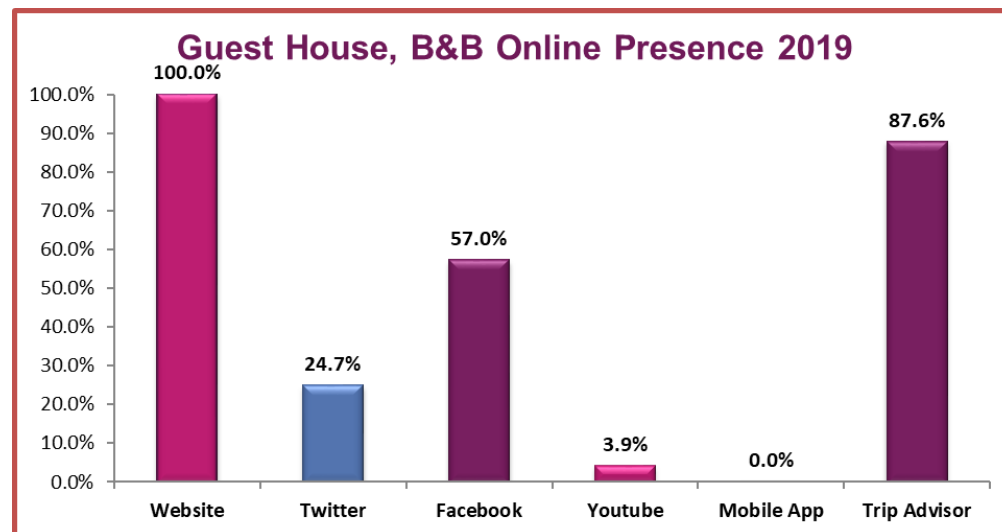
Figure 10 Booking Methods 2019



In 2019, 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 2019.

4.2.6. Guest House, B&B Online Presence 2019

Figure 11 Online Presence 2019



In 2019, all participating Guest House, B&B providers had their own website, with the majority also listing on tripadvisor (88%). Facebook was also popular in 2018 with 57% having their own page to promote their accommodation. You tube was only used by 4% of Guest House, B&B providers in 2019.

5 Self-Catering Accommodation



5.1. % Unit Occupancy

Table 9 Self-Catering % Unit Occupancy Analysis 2019/2018

Unit Occupancy	2019	2018	19/18
	47.61%	54.93%	-7.32%
Former VisitScotland Area			
Aberdeen & Grampian	44.62%	53.61%	-8.99%
ALLFV	54.42%	64.10%	-9.68%
Angus & City of Dundee	57.08%	59.35%	-2.27%
Ayrshire & Arran	50.65%	57.80%	-7.15%
Dumfries & Galloway	26.19%	45.77%	-19.58%
Edinburgh & Lothians	36.87%	46.35%	-9.48%
Greater Glasgow & Clyde Valley	40.65%	45.50%	-4.85%
Highlands of Scotland	55.17%	56.47%	-1.30%
Kingdom of Fife	51.27%	53.82%	-2.55%
Orkney	43.49%	50.87%	-7.38%
Outer Hebrides	51.73%	51.13%	0.60%
Perthshire	38.39%	45.97%	-7.58%
Scottish Borders	52.22%	42.60%	9.62%
Shetland Islands	24.60%	31.37%	-6.77%
Property Type			
Bungalow	54.57%	60.76%	-6.19%
Cottage	42.10%	51.95%	-9.85%
Flat	30.61%	42.93%	-12.32%
Glamping	35.68%	36.98%	-1.30%
House	29.89%	41.82%	-11.93%
Lodge/Chalet	70.84%	71.45%	-0.61%
Other Property	52.90%	45.59%	7.31%
Static Caravan	39.89%	54.12%	-14.23%

Unit Occupancy	2019	2018	19/18
Tariff			
Unknown	11.46%	13.36%	-1.90%
Up to £299	30.91%	42.72%	-11.81%
£300 to £499	38.52%	49.12%	-10.60%
£500 to £799	47.36%	56.43%	-9.07%
£800 or more	58.36%	64.04%	-5.68%
Location			
Coastal	38.18%	51.75%	-13.57%
Inland	49.61%	56.37%	-6.76%
Island	57.56%	56.90%	0.66%
Urban/Rural			
Large Urban Areas	34.58%	43.06%	-8.48%
Other Urban Areas	50.65%	58.62%	-7.97%
Accessible Small Towns	42.18%	50.61%	-8.43%
Remote Small Towns	44.28%	47.67%	-3.39%
Accessible Rural	26.60%	64.79%	-38.19%
Remote Rural	47.72%	54.93%	-7.21%
Grading			
1 Star	38.71%	44.68%	-5.97%
2 Stars	26.64%	37.60%	-10.96%
3 Stars	46.19%	51.38%	-5.19%
4 Stars	49.84%	51.59%	-1.75%
5 Stars	54.75%	61.17%	-6.42%
Unclassified	46.66%	58.45%	-11.79%

Self-Catering Accommodation

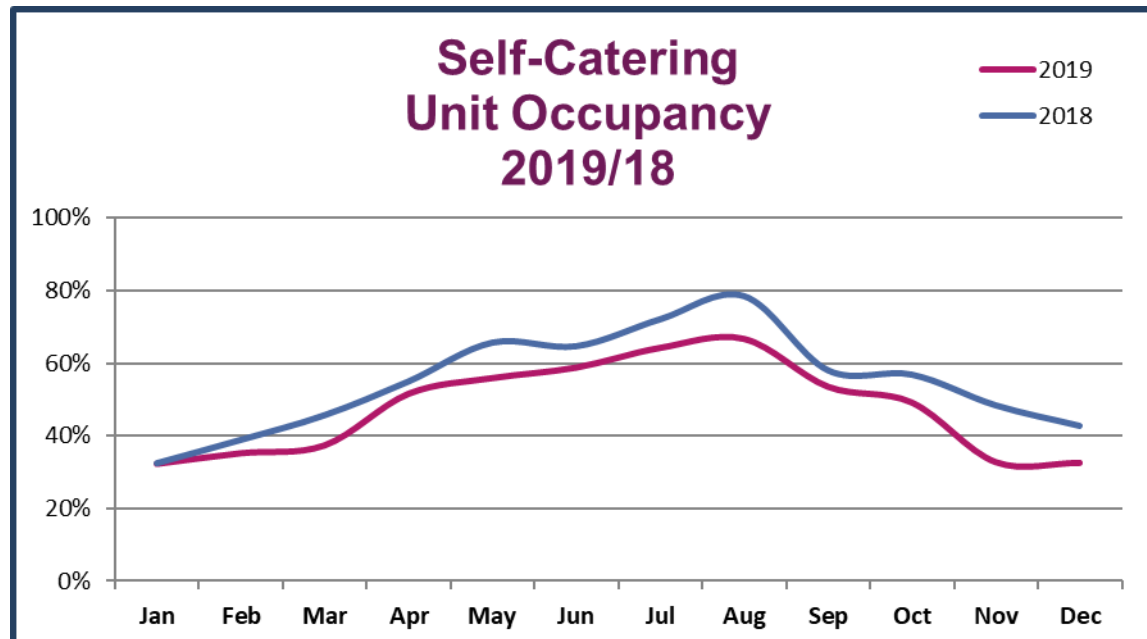


5.2. Self-Catering Monthly Distribution by % Unit Occupancy 2019/2018

Table 10 Self-Catering Monthly Distribution by % Unit Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	32%	35%	37%	52%	56%	59%	64%	67%	54%	49%	33%	32%
2018	33%	39%	46%	55%	66%	65%	72%	78%	58%	57%	48%	43%

Figure 12 Self-Catering Monthly Distribution by % Room Occupancy 2019/2018



In 2019, Self-Catering unit occupancy peaked in August at 67%.

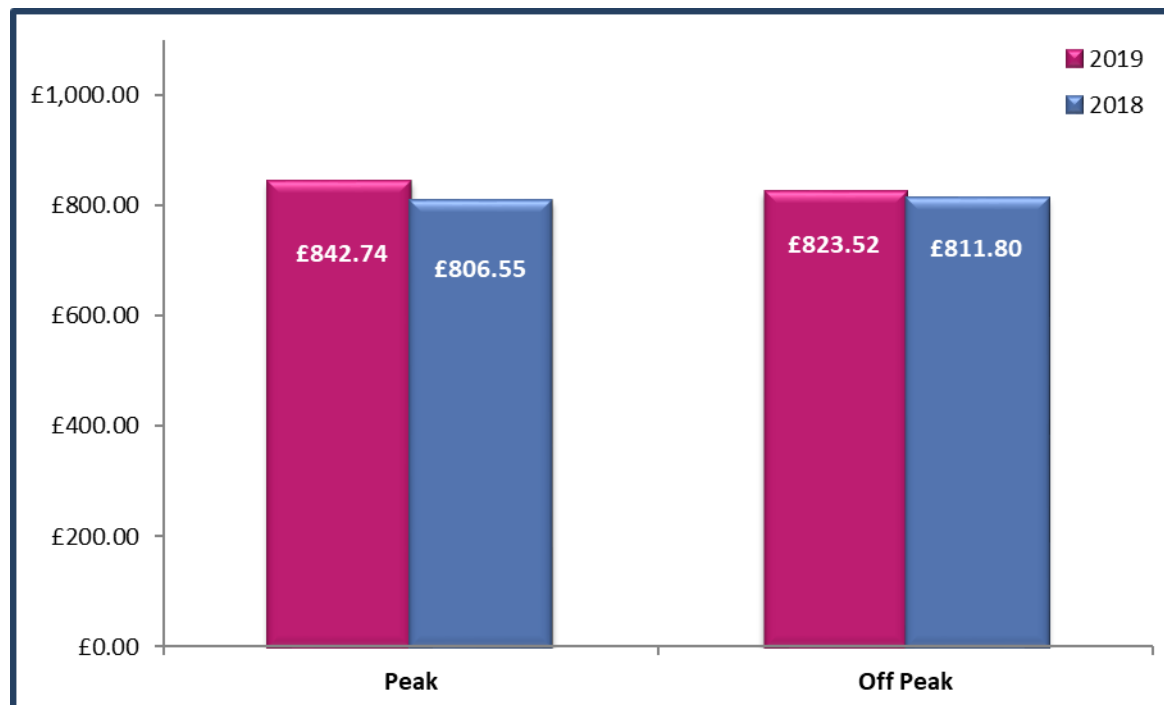
In 2018 Self-Catering unit occupancy also peaked in August at 78%.

Self-Catering Accommodation



5.3. Self-Catering Peak/Off Peak Tariffs

Figure 13 Self-Catering Peak/Off Peak Tariffs 2019/2018



In 2019, the average peak tariff amongst participating Self-Catering accommodation was £842.74 per week, whilst the off peak average tariff was £823.52 per week.

In 2018, the average peak tariff amongst participating Self-Catering accommodation was £806.55 per week, whilst the off peak average tariff was £811.80 per week.

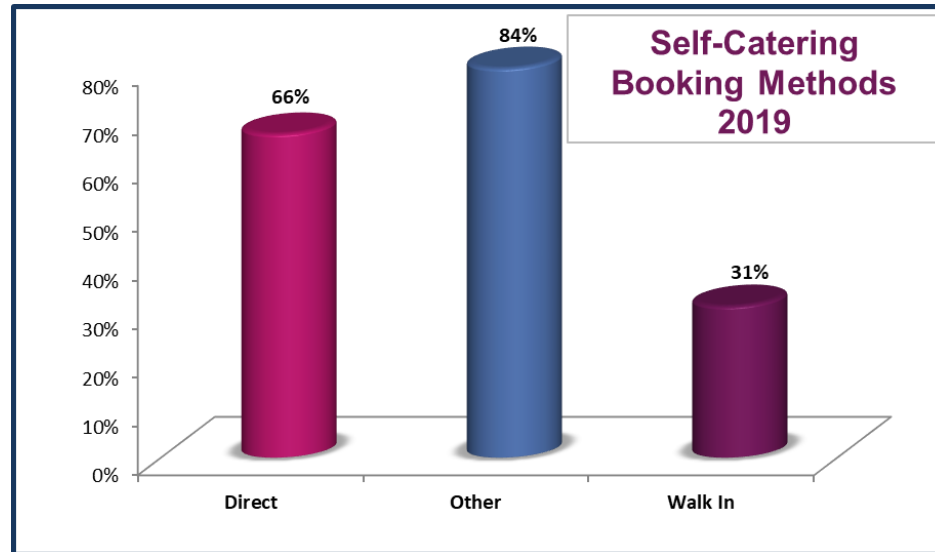


Self-Catering Accommodation



5.4. Self-Catering Booking Methods 2019

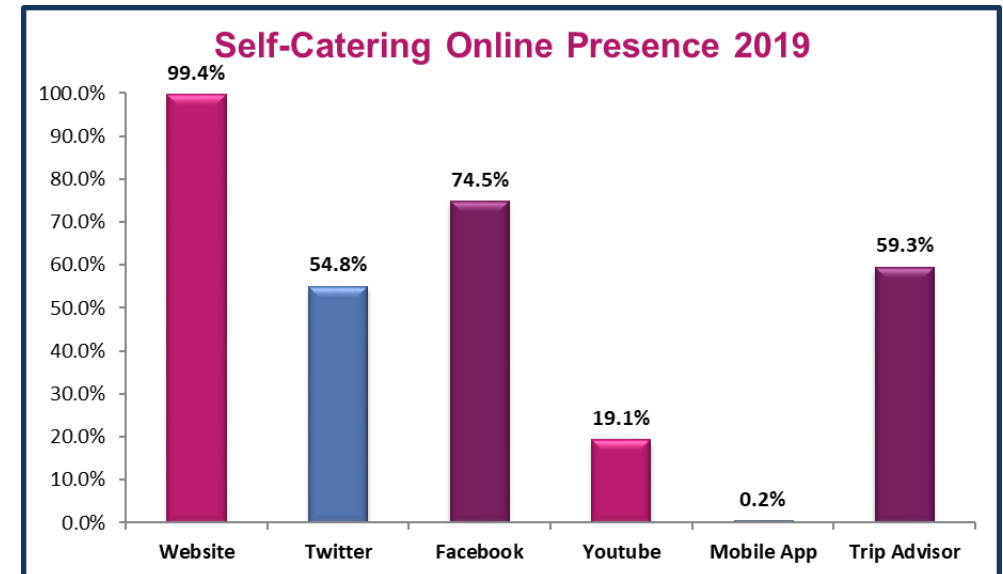
Figure 14 Self-Catering Booking Methods 2019



In 2019, Other booking methods were cited as most popular by 84% Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland.

5.5. Self-Catering Online Presence 2019

Figure 15 Self-Catering Online Presence 2019



In 2019, 100% of all participating Self-Catering accommodation providers had their own website. Just under three quarters had a facebook page, with just under 60% of participants using Trip Advisor. Twitter was used by over 50% of participants, however less than a fifth used Youtube (19%) in 2019.

6 Touring Accommodation



6.1. % Pitch Occupancy

Table 11 % Pitch Occupancy Analysis 2019/2018

Pitch Occupancy	2019	2018	19/18
Net Pitch	41.22%	33.59%	7.63%
Whole Park	43.23%	34.16%	9.07%
Caravan	43.82%	36.82%	7.00%
Tent	19.72%	18.20%	1.52%
Former VisitScotland Area			
Aberdeen & Grampian	23.04%	20.77%	2.27%
ALLFV	43.12%	44.96%	-1.84%
Angus & City of Dundee	-	-	-
Ayrshire & Arran	46.82%	45.55%	1.27%
Dumfries & Galloway	52.04%	45.67%	6.37%
Edinburgh & Lothians	29.19%	32.22%	-3.03%
Greater Glasgow & Clyde Valley	39.86%	42.08%	-2.22%
Highlands of Scotland	45.89%	27.37%	18.52%
Kingdom of Fife	40.51%	39.92%	0.59%
Orkney	-	-	-
Outer Hebrides	45.30%	46.06%	-0.76%
Perthshire	43.11%	32.84%	10.27%
Scottish Borders	-	5.37%	-5.37%
Shetland Islands	-	-	-

Pitch Occupancy	2019	2018	19/18
Tariff			
Under £10	30.76%	30.48%	0.28%
£10-£14.99	19.59%	10.53%	9.06%
£15- £19.00	32.25%	33.22%	-0.97%
£20 +	20.90%	26.06%	-5.16%
Location			
Coastal	44.68%	36.37%	8.31%
Inland	39.07%	32.85%	6.22%
Island	48.59%	21.45%	27.14%
Urban/Rural			
Large Urban Areas	34.30%	38.40%	-4.10%
Other Urban Areas	42.08%	44.42%	-2.34%
Accessible Small Towns	30.04%	32.57%	-2.53%
Remote Small Towns	55.05%	32.76%	22.29%
Accessible Rural	33.99%	27.90%	6.09%
Remote Rural	47.10%	37.66%	9.44%

Touring Accommodation

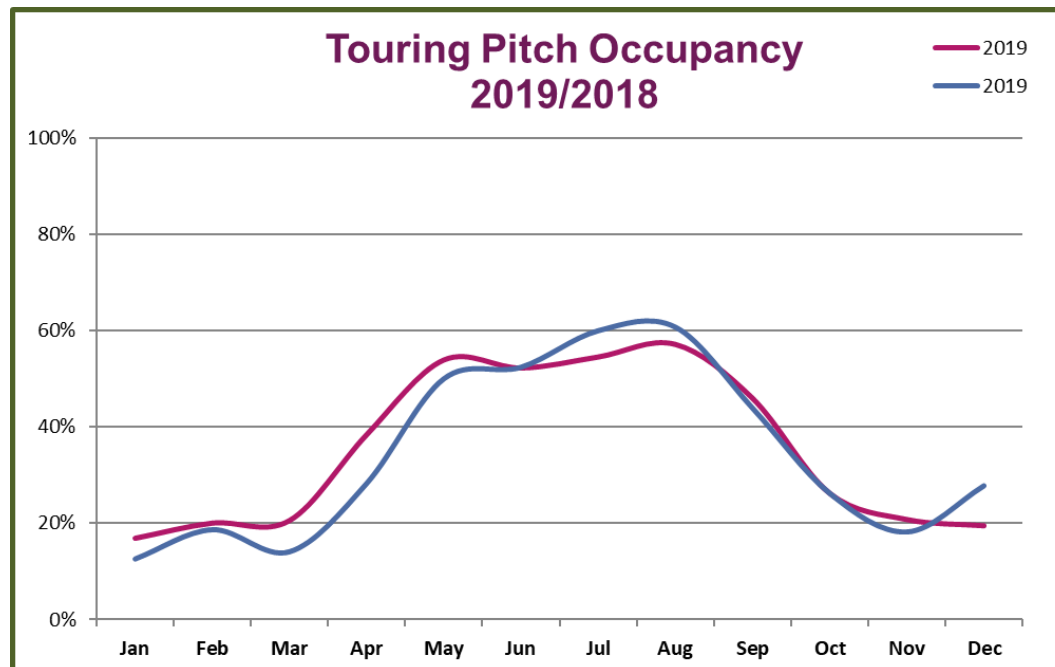


6.2. Touring Monthly Distribution by % Pitch Occupancy 2019/2018

Table 12 Touring Monthly Distribution by % Pitch Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	17%	20%	21%	38%	54%	52%	55%	57%	46%	26%	21%	20%
2018	13%	19%	14%	28%	50%	52%	60%	61%	44%	26%	18%	28%

Figure 16 Touring Monthly Distribution by % Pitch Occupancy 2019/2018



In 2019, Touring pitch occupancy peaked in August at 57%.

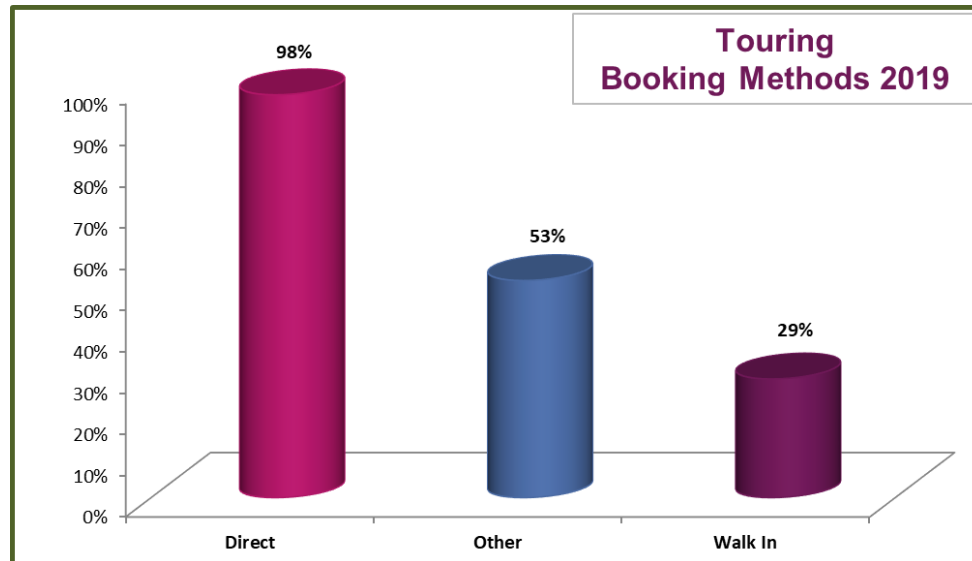
In 2018 Touring occupancy also peaked in August at 61%.

Touring Accommodation



6.3. Touring Booking Methods 2019

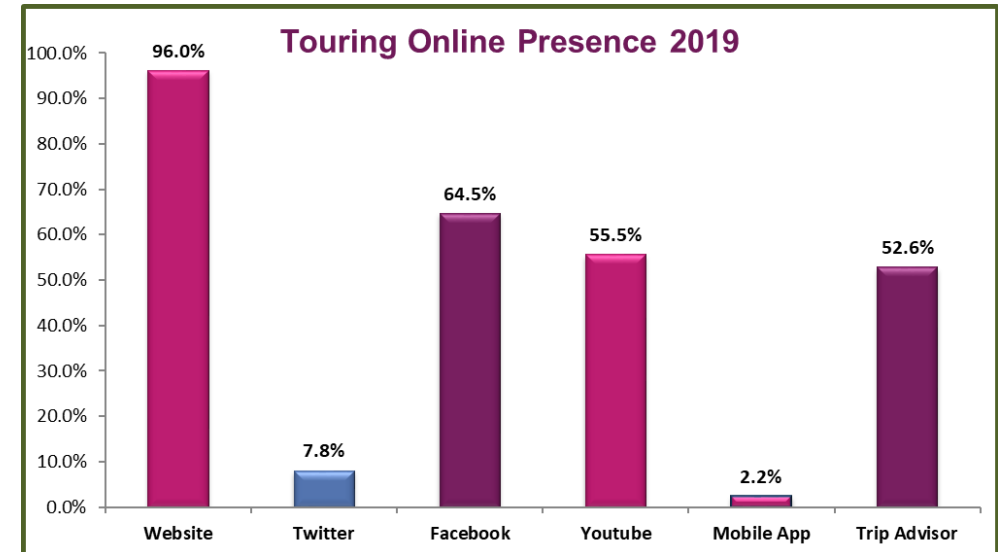
Figure 17 Touring Booking Methods 2019



In 2019, Direct booking methods were cited as most popular by 98% Touring accommodation providers. Other booking methods (53%) and Walk in (29%) were less popular when booking touring pitches in 2019.

6.4. Touring Online Presence 2019

Figure 18 Touring Online Presence 2019



In 2019, 96% of all participating Touring accommodation providers had their own website. Just under two thirds had a Facebook page. Over half were listed on Trip Advisor and Youtube at 53% and 56% respectively, less than 8% had a presence on Twitter in 2019.

7 Hostel Accommodation



7.1. % Bed Occupancy

Table 13 % Bed Occupancy Analysis 2019/2018

Bed Occupancy	2019	2018	19/18
	60.19%	55.31%	4.88%
Type			
SYHA	57.57%	57.38%	0.19%
Independent	70.32%	50.49%	19.83%
Former VisitScotland Area			
Aberdeen & Grampian	35.22%	34.43%	0.79%
ALLFV	50.33%	54.63%	-4.30%
Angus & City of Dundee	-	-	-
Ayrshire & Arran	47.43%	53.76%	-6.33%
Dumfries & Galloway	44.10%	16.49%	27.61%
Edinburgh & Lothians	71.91%	56.80%	15.11%
Greater Glasgow & Clyde Valley	65.37%	63.41%	1.96%
Highlands of Scotland	59.99%	58.06%	1.93%
Kingdom of Fife	0.00%	0.00%	0.00%
Orkney	59.89%	55.77%	4.12%
Perthshire	58.88%	53.85%	5.03%
Scottish Borders	-	-	-
Shetland Islands	-	-	-
Outer Hebrides	-	-	-

Bed Occupancy	2019	2018	19/18
Grading			
1	60.30%	48.83%	11.47%
2	56.61%	46.40%	10.21%
3	63.49%	57.87%	5.62%
4	51.79%	54.86%	-3.07%
5	54.73%	58.87%	-4.14%
Unclassified	67.41%	47.15%	20.26%
Location			
Coastal	51.65%	54.90%	-3.25%
Inland	61.90%	54.16%	7.74%
Island	67.67%	66.00%	1.67%
Urban/Rural			
Large Urban Areas	64.70%	54.93%	9.77%
Other Urban Areas	53.62%	55.46%	-1.84%
Accessible Small Towns	51.15%	53.78%	-2.63%
Remote Small Towns	44.34%	48.69%	-4.35%
Accessible Rural	63.94%	55.76%	8.18%
Remote Rural	62.96%	59.31%	3.65%

Hostel Accommodation

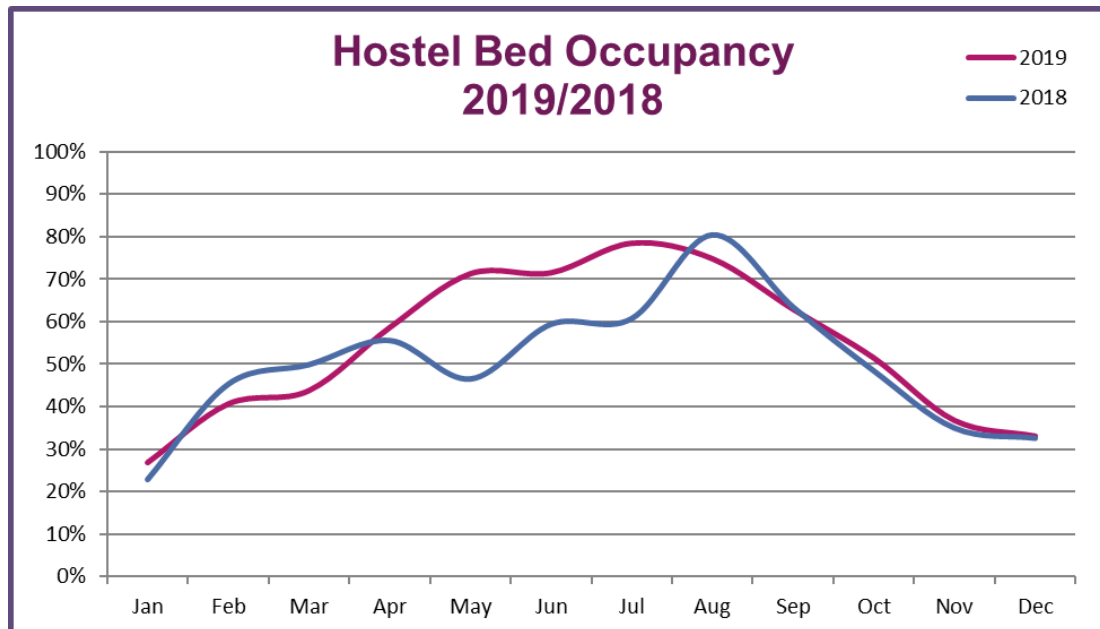


7.2. Hostel Monthly Distribution by % Bed Occupancy 2018/2018

Table 14 Hostel Monthly Distribution by % Bed Occupancy 2019/2018

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2019	27%	41%	44%	59%	71%	71%	78%	75%	63%	51%	37%	33%
2018	23%	45%	50%	56%	47%	59%	61%	80%	63%	48%	35%	33%

Figure 19 Hostel Monthly Distribution by % Bed Occupancy 2019/2018



In 2019, Hostel occupancy peaked in July at 78%.

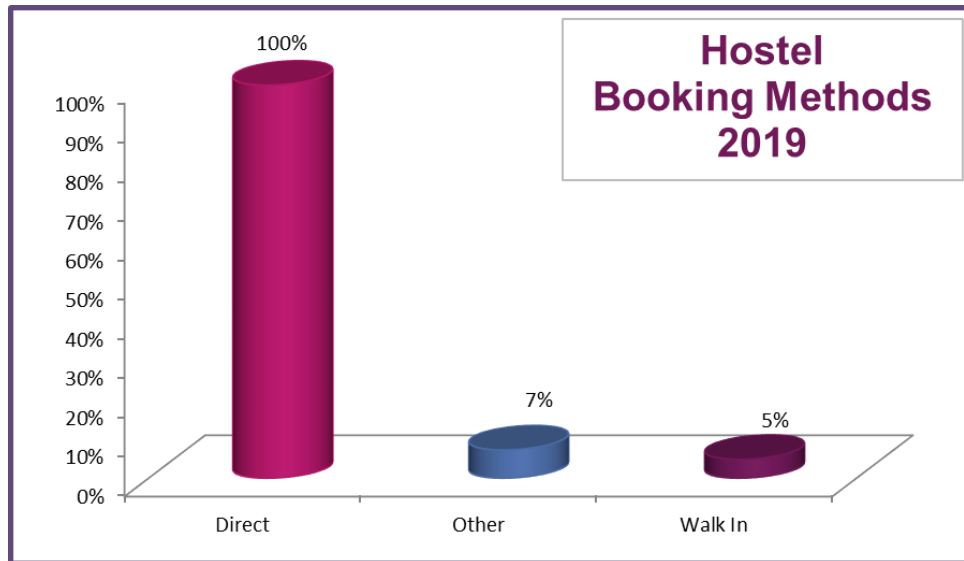
In 2018 Hostel occupancy peaked in August at 80%.

Hostel Accommodation



7.3. Hostel Booking Methods 2019

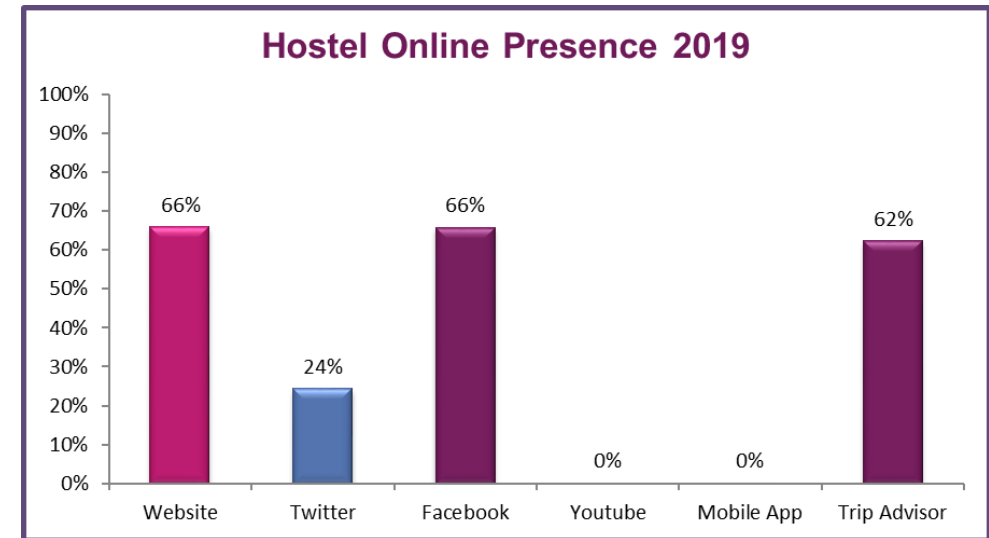
Figure 20 Hostel Booking Methods 2019



In 2019, Direct booking methods were cited as most popular by 100% of Hostel accommodation providers.

7.4. Hostel Online Presence 2019

Figure 21 Hostel Online Presence 2019



In 2019, two thirds of participating Hostel accommodation providers had their own website. The majority of Hostel accommodation providers also used used Facebook (66%), Trip Advisor (62%) and Twitter (24%) 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 MetOffice (www.metoffice.gov.uk).



Figure 22 Average Maximum Temperature

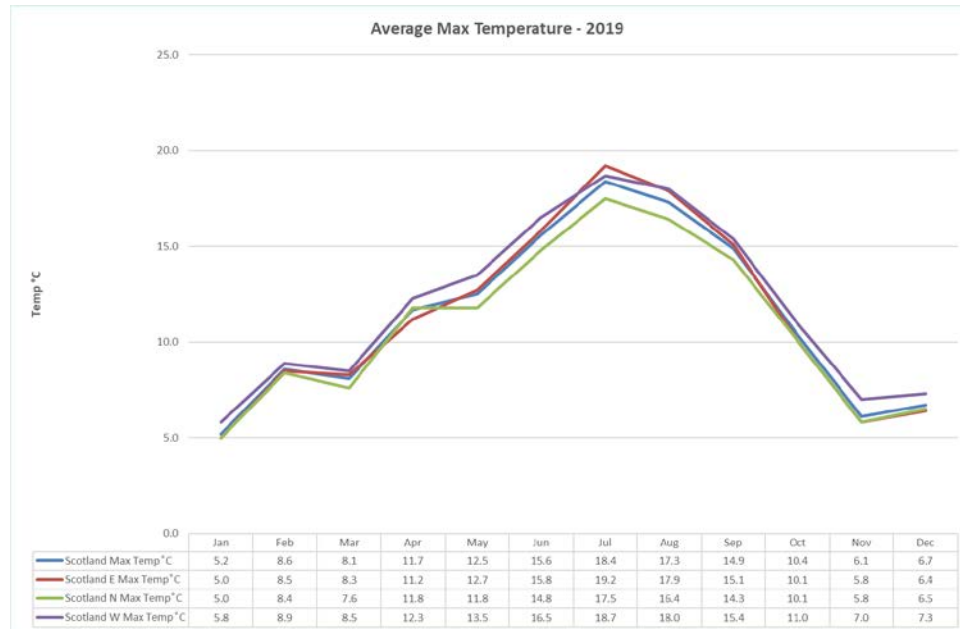


Figure 23 Average Rainfall

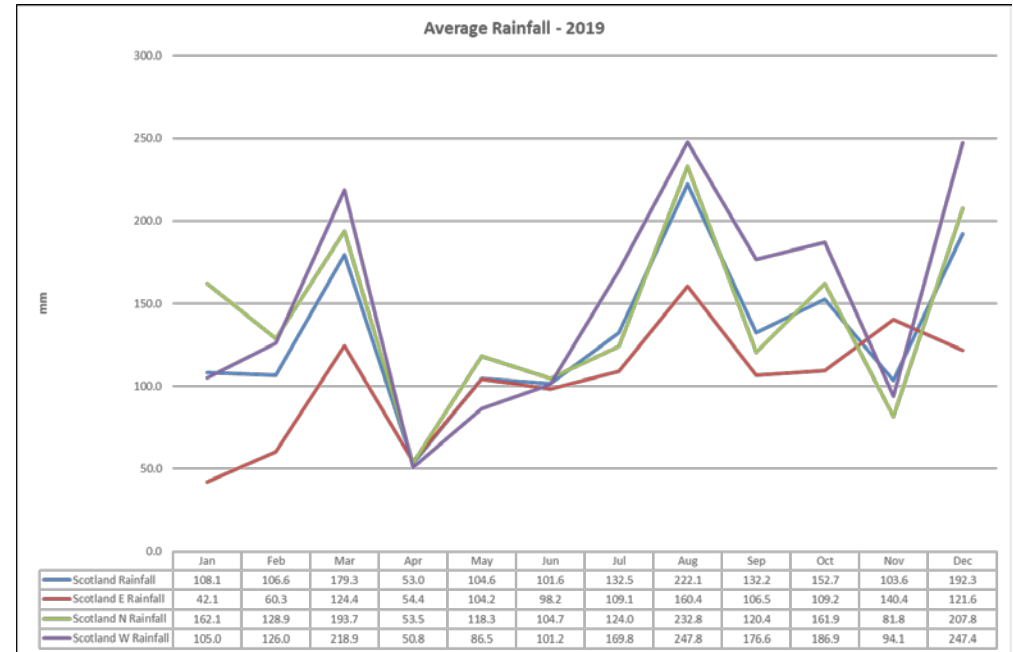
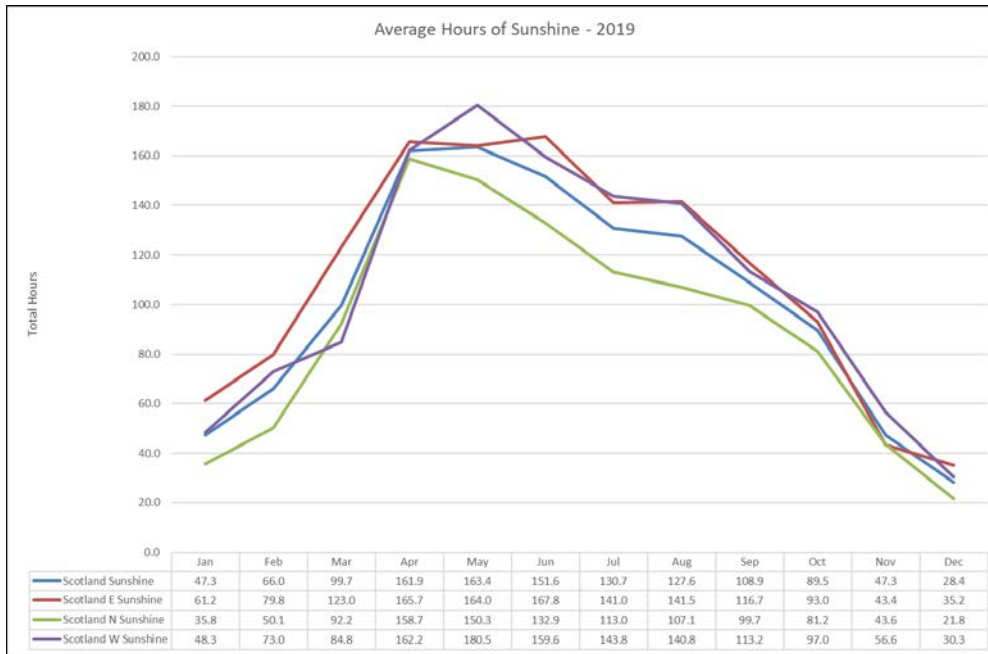


Figure 24 Average Hours of Sunshine



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 25 GBP – Euro Average Exchange rates

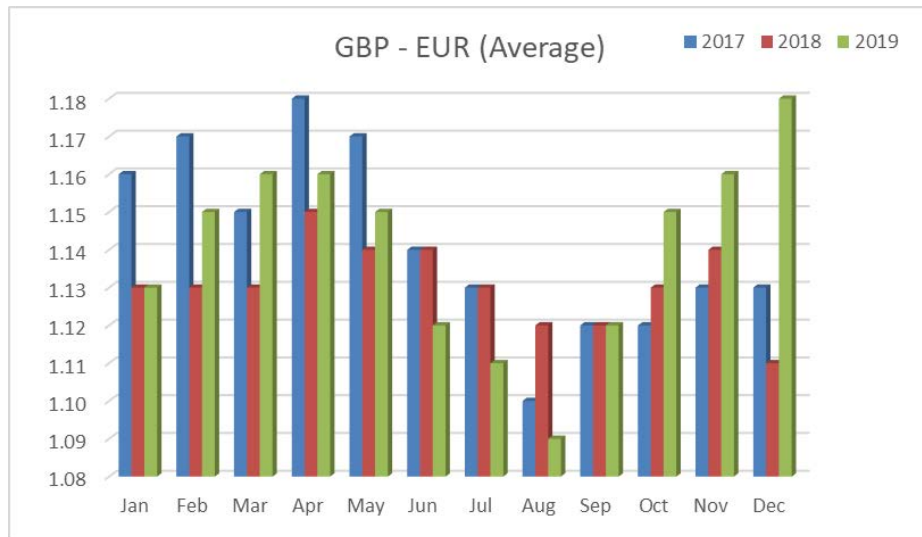
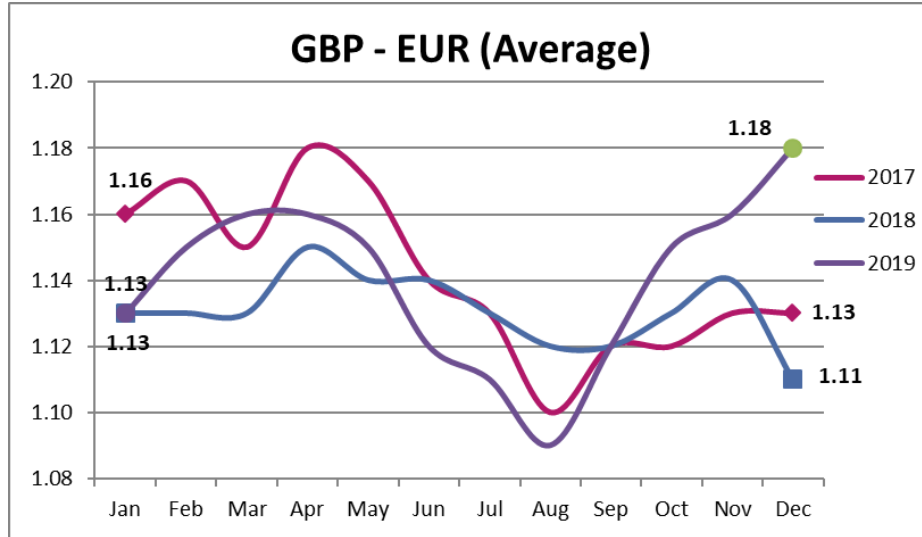
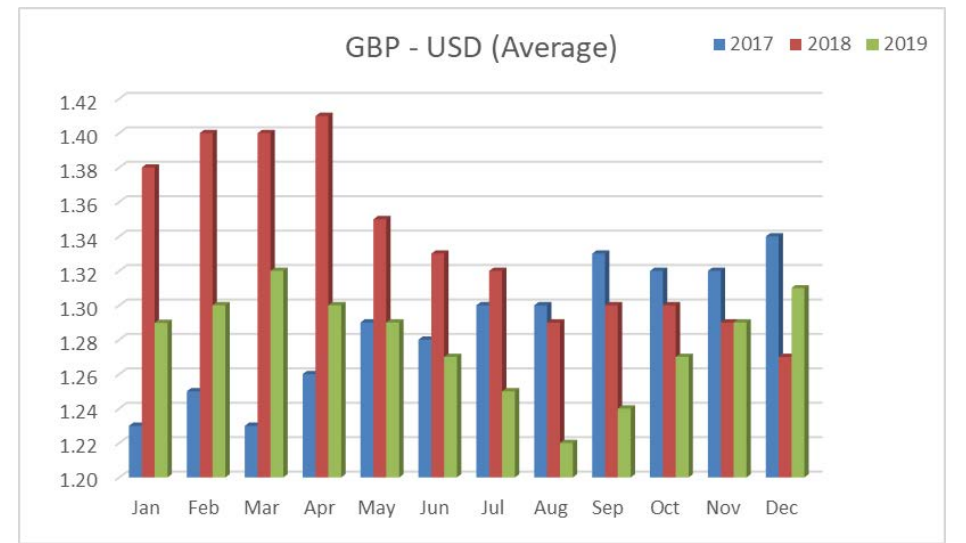
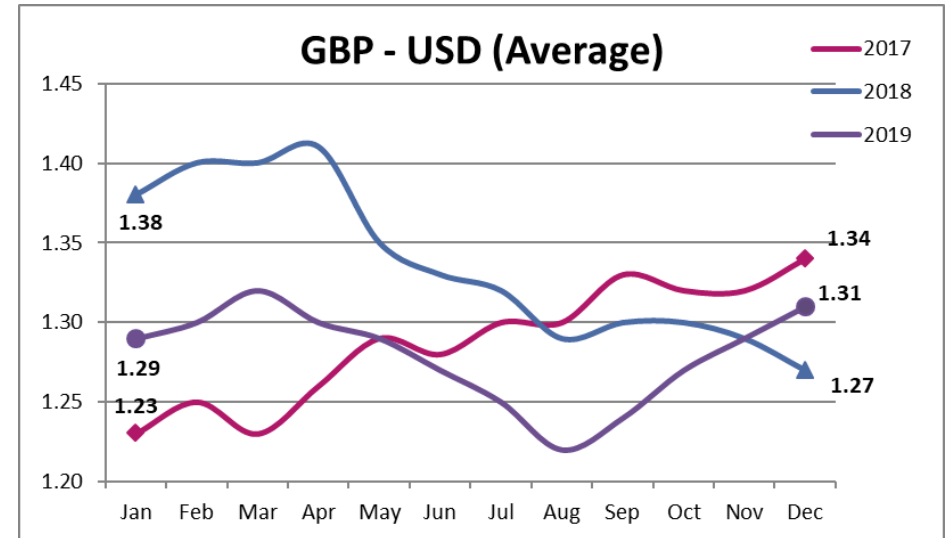


Figure 26 GBP – US Dollar Average Exchange rates



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 15 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 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