

# Scottish Accommodation Occupancy Survey 2023



## Acknowledgements

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# 1 Methodology

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

In respect of the 2023 survey, initial emails were circulated to all accommodation providers from February 2023 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 follow-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.

## **Participating in the Scottish Accommodation Occupancy Survey**

If you are a Scottish-based accommodation business, and you would like to contribute your occupancy figures to the Scottish Accommodation Occupancy Survey, please contact the Moffat Centre

Email: [info@moffatcentre.com](mailto:info@moffatcentre.com)

Further details of how to take part may be found at: **How to take part in the Scottish Accommodation Occupancy Survey**, <https://www.visitscotland.org/research-insights/about-our-industry/accommodation>

## 2 Highlights

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### **Serviced Accommodation**

The Serviced sector in Scotland experienced a 6.50 percentage point increase when comparing percentage room occupancy when comparing 2023 with 2022. Occupancy rates within the Hotel sector experienced a 4.50 percentage point increase when comparing 2023 with 2022, however, when comparing the same period in 2019 room occupancy experienced a 0.35 percentage point increase. In 2023, the average peak tariff amongst Serviced accommodation was £122.16 whilst the off-peak average tariff was £113.68. In 2022, the average peak tariff was £112.18, whilst the off-peak average tariff was £109.36.

In 2023, the average peak tariff amongst Hotel accommodation was £155.08, whilst the off-peak average tariff was £148.35. In 2022, the average peak tariff was £144.41, whilst the off-peak average tariff was £136.29. In 2023, some 99.3% of all participating Hotels had their own website, with the majority also listing on Tripadvisor (84.3%).

Room Occupancy rates within the Guest House/B&B experienced 16.04 percentage point increase when comparing 2023 with 2022. In 2023, Guest House/B&B room occupancy peaked in August at 89.4%, whilst in 2022 room occupancy peaked in July at 68.3%.

In 2023, the average peak tariff amongst participating Guest House/B&B accommodation was £100.70 per person per night, whilst the off-peak average tariff was £79.89 per person per night. In 2022, the average peak tariff was £56.64 per person per night, with the off-peak average tariff was £58.27 per person per night.

### **Self-Catering Accommodation**

Self-Catering unit occupancy experienced a 2.58 percentage point increase when comparing 2023 with 2022, however, when comparing the same period in 2019 unit occupancy experienced a 4.50 percentage point decrease. In 2023, Self-Catering unit occupancy peaked in August at 58.4%, whilst in 2022; unit occupancy peaked at 60.3% in July.

In 2023, some 99.5% of all participating Self-Catering accommodation providers had their own website. Over two-thirds of businesses had a Facebook page and 65.7% were listed on Tripadvisor.

### **Touring Accommodation**

Touring Accommodation experienced a Net Pitch Occupancy of 6.48 percentage point increase when comparing 2023 with 2022.

In 2023, Direct booking methods were cited as the most popular by 98.0% of Touring accommodation providers. 'Other' booking methods (56.1%) and 'Walk in' (14.4%) were less popular when booking touring pitches in 2023.

In 2023, 97.5% of all participating Touring accommodation providers had their own website and 84.3% of businesses had a Facebook page.

### **Hostel Accommodation**

Bed Occupancy within the Hostel accommodation experienced a 4.83 percentage point increase when comparing 2023 with 2022, however, when comparing the same period in 2019 Bed occupancy experienced a 1.65 percentage point decrease. In 2023, Hostel occupancy peaked in July at 74.7%, 2022 Hostel occupancy peaked in August at 68.2%.

Some 94.4% of all participating Hostel accommodation providers had their own website. Just over a fifth of Hostel accommodation providers also utilised Facebook and Tripadvisor (22.5% and 21.9% respectively) with just 7.5% using Twitter to promote their accommodation.



## 3 Serviced Accommodation

### 3.1. Hotels

#### 3.1.1. % Room Occupancy

Table 1 Hotel % Room Occupancy Analysis 2023/2022

Room Occupancy	2023	2022	23/22 Diff <sup>1</sup>	Change <sup>2</sup>
	65.44%	60.94%	4.50	105
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	68.41%	61.03%	7.38	107
ALLFV	70.19%	68.90%	1.29	101
Angus & City of Dundee	65.90%	58.34%	7.56	108
Ayrshire & Arran	81.40%	83.02%	-1.62	98
Dumfries & Galloway	54.39%	62.70%	-8.31	92
Edinburgh & Lothian	74.45%	62.44%	12.01	112
Greater Glasgow	57.52%	48.59%	8.93	109
Highlands of Scotland	72.13%	72.52%	-0.39	100
Kingdom of Fife	65.35%	55.83%	9.52	110
Orkney	82.87%	-	82.87	183
Perthshire	64.53%	62.06%	2.47	102
Scottish Borders	51.23%	45.80%	5.43	105
Shetland Islands	-	-	-	100
Outer Hebrides	67.51%	69.23%	-1.72	98
<b>Location</b>				
Coastal	66.54%	61.50%	5.04	105
Inland	64.78%	59.66%	5.12	105
Island	70.94%	71.68%	-0.74	99
<b>Tariff</b>				
£20 - £29.99	-	-	-	100
£30 - £39.99	-	-	-	100
£40 - £49.99	36.65%	27.66%	8.99	109
£50 - £59.99	56.54%	67.33%	-10.79	89

Room Occupancy	2023	2022	23/22 Diff <sup>1</sup>	Change <sup>2</sup>
£60 - £69.99	65.20%	64.80%	0.40	100
£70 +	65.86%	60.68%	5.18	105
<b>Size</b>				
1 to 3	-	-	-	100
4 to 10	55.87%	59.51%	-3.64	96
11 to 25	61.64%	56.91%	4.73	105
26 to 50	77.64%	69.42%	8.22	108
51 to 100	78.58%	77.37%	1.21	101
Over 100	57.88%	44.21%	13.67	114
<b>Urban/Rural</b>				
Large Urban Areas	59.83%	50.64%	9.19	109
Other Urban Areas	78.27%	70.47%	7.80	108
Accessible Small Towns	67.83%	63.68%	4.15	104
Remote Small Towns	55.01%	55.51%	-0.50	100
Accessible Rural	41.18%	40.54%	0.64	101
Remote Rural	67.42%	67.01%	0.41	100
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	72.51%	72.14%	0.37	100
3 Stars	68.24%	64.39%	3.85	104
4 Stars	59.97%	54.50%	5.47	105
5 Stars	75.66%	53.43%	22.23	122
Unclassified	72.98%	65.23%	7.75	108

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>1</sup> 23/22 Diff throughout this report is expressed by % Point Change

<sup>2</sup> 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 2023/2019**

Room Occupancy	2023	2019	22/19 Diff <sup>3</sup>	Change
	65.44%	69.21%	-3.77	96
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	68.41%	55.77%	12.64	113
ALLFV	70.19%	66.80%	3.39	103
Angus & City of Dundee	65.90%	63.65%	2.25	102
Ayrshire & Arran	81.40%	74.31%	7.09	107
Dumfries & Galloway	54.39%	55.80%	-1.41	99
Edinburgh & Lothian	74.45%	72.91%	1.54	102
Greater Glasgow	57.52%	79.78%	-22.26	78
Highlands of Scotland	72.13%	70.87%	1.26	101
Kingdom of Fife	65.35%	65.81%	-0.46	100
Orkney	82.87%	58.68%	24.19	124
Perthshire	64.53%	66.83%	-2.30	98
Scottish Borders	51.23%	57.75%	-6.52	93
Shetland Islands	-	-	-	100
Outer Hebrides	67.51%	69.45%	-1.94	98
<b>Location</b>				
Coastal	66.54%	60.55%	5.99	106
Inland	64.78%	72.21%	-7.43	93
Island	70.94%	68.05%	2.89	103
<b>Tariff</b>				
£20 - £29.99	-	*	-56.19	44
£30 - £39.99	-	65.47%	-65.47	35
£40 - £49.99	36.65%	49.86%	-13.21	87
£50 - £59.99	56.54%	70.45%	-13.91	86
£60 - £69.99	65.20%	57.76%	7.44	107
£70 +	65.86%	71.03%	-5.17	95
<b>Size</b>				
1 to 3	-	*	-3.81	96
4 to 10	55.87%	53.13%	2.74	103
11 to 25	61.64%	59.09%	2.55	103
26 to 50	77.64%	74.19%	3.45	103
51 to 100	78.58%	74.55%	4.03	104
Over 100	57.88%	77.63%	-19.75	80

Room Occupancy	2023	2019	22/19 Diff <sup>3</sup>	Change
<b>Urban/Rural</b>				
Large Urban Areas	59.83%	80.23%	-20.40	80
Other Urban Areas	78.27%	68.82%	9.45	109
Accessible Small Towns	67.83%	75.39%	-7.56	92
Remote Small Towns	55.01%	59.23%	-4.22	96
Accessible Rural	41.18%	67.93%	-26.75	73
Remote Rural	67.42%	60.15%	7.27	107
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	72.51%	61.60%	10.91	111
3 Stars	68.24%	65.32%	2.92	103
4 Stars	59.97%	76.63%	-16.66	83
5 Stars	75.66%	65.94%	9.72	110
Unclassified	72.98%	65.82%	7.16	107

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>3</sup> 23/19 Diff throughout this report is expressed by % Point Change



## Serviced Accommodation



### 3.1.2. % Bed Occupancy

Table 3 Hotel % Bed Occupancy Analysis 2023/2022

Bed Occupancy	2023	2022	23/22 Diff	Change
	54.69%	52.32%	2.37	102
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	60.76%	46.47%	14.29	114
ALLFV	66.32%	59.37%	6.95	107
Angus & City of Dundee	35.08%	34.97%	0.11	100
Ayrshire & Arran	52.63%	53.37%	-0.74	99
Dumfries & Galloway	38.27%	32.49%	5.78	106
Edinburgh & Lothian	57.73%	39.90%	17.83	118
Greater Glasgow	49.16%	52.84%	-3.68	96
Highlands of Scotland	61.18%	61.03%	0.15	100
Kingdom of Fife	50.81%	45.11%	5.70	106
Orkney	87.79%	-	87.79	188
Perthshire	46.33%	45.59%	0.74	101
Scottish Borders	43.52%	43.42%	0.10	100
Shetland Islands	-	-	-	100
Outer Hebrides	54.45%	55.85%	-1.40	99
<b>Location</b>				
Coastal	53.73%	46.95%	6.78	107
Inland	54.21%	53.18%	1.03	101
Island	68.86%	68.92%	-0.06	100
<b>Tariff</b>				
£20 - £29.99	-	-	-	100
£30 - £39.99	-	-	-	100
£40 - £49.99	8.44%	24.54%	-16.10	84
£50 - £59.99	48.20%	38.58%	9.62	110
£60 - £69.99	56.38%	53.71%	2.67	103
£70 +	54.79%	52.87%	1.92	102

Bed Occupancy	2023	2022	23/22 Diff	Change
<b>Size</b>				
1 to 3	-	-	-	100
4 to 10	36.98%	39.22%	-2.24	98
11 to 25	58.59%	52.28%	6.31	106
26 to 50	68.55%	56.11%	12.44	112
51 to 100	68.69%	66.72%	1.97	102
Over 100	39.57%	37.93%	1.64	102
<b>Urban/Rural</b>				
Large Urban Areas	50.68%	52.27%	-1.59	98
Other Urban Areas	64.90%	55.87%	9.03	109
Accessible Small Towns	56.33%	49.31%	7.02	107
Remote Small Towns	54.78%	54.38%	0.40	100
Accessible Rural	24.94%	28.51%	-3.57	96
Remote Rural	59.35%	51.49%	7.86	108
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	61.65%	57.53%	4.12	104
3 Stars	59.21%	55.65%	3.56	104
4 Stars	48.59%	50.99%	-2.40	98
5 Stars	68.71%	42.85%	25.86	126
Unclassified	51.29%	39.59%	11.70	112

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

**Table 4 Hotel % Bed Occupancy Analysis 2023/2019**

Bed Occupancy	2023	2019	22/19 Diff	Change
	54.69%	53.53%	1.16	101
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	60.76%	34.45%	26.31	126
ALLFV	66.32%	50.06%	16.26	116
Angus & City of Dundee	35.08%	50.32%	-15.24	85
Ayrshire & Arran	52.63%	55.05%	-2.42	98
Dumfries & Galloway	38.27%	43.10%	-4.83	95
Edinburgh & Lothian	57.73%	75.06%	-17.33	83
Greater Glasgow	49.16%	58.68%	-9.52	90
Highlands of Scotland	61.18%	58.64%	2.54	103
Kingdom of Fife	50.81%	52.64%	-1.83	98
Orkney	87.79%	41.46%	46.33	146
Perthshire	46.33%	60.75%	-14.42	86
Scottish Borders	43.52%	44.14%	-0.62	99
Shetland Islands	-	-	-	100
Outer Hebrides	54.45%	53.96%	0.49	100
<b>Location</b>				
Coastal	53.73%	45.69%	8.04	108
Inland	54.21%	56.21%	-2.00	98
Island	68.86%	59.08%	9.78	110
<b>Tariff</b>				
£20 - £29.99	-	*	-38.14	62
£30 - £39.99	-	47.98%	-47.98	52
£40 - £49.99	8.44%	34.82%	-26.38	74
£50 - £59.99	48.20%	61.72%	-13.52	86
£60 - £69.99	56.38%	36.88%	19.50	120
£70 +	54.79%	54.85%	-0.06	100
<b>Size</b>				
1 to 3	-	*	-3.83	96
4 to 10	36.98%	33.44%	3.54	104
11 to 25	58.59%	49.56%	9.03	109
26 to 50	68.55%	57.99%	10.56	111
51 to 100	68.69%	61.72%	6.97	107
Over 100	39.57%	55.43%	-15.86	84

Bed Occupancy	2023	2019	22/19 Diff	Change
<b>Urban/Rural</b>				
Large Urban Areas	50.68%	58.64%	-7.96	92
Other Urban Areas	64.90%	57.13%	7.77	108
Accessible Small Towns	56.33%	57.15%	-0.82	99
Remote Small Towns	54.78%	45.33%	9.45	109
Accessible Rural	24.94%	52.03%	-27.09	73
Remote Rural	59.35%	47.89%	11.46	111
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	61.65%	50.82%	10.83	111
3 Stars	59.21%	53.57%	5.64	106
4 Stars	48.59%	59.66%	-11.07	89
5 Stars	68.71%	54.53%	14.18	114
Unclassified	51.29%	34.18%	17.11	117
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>		



## Serviced Accommodation

### 3.1.3. Hotel Monthly Distribution by % Occupancy 2023/2022

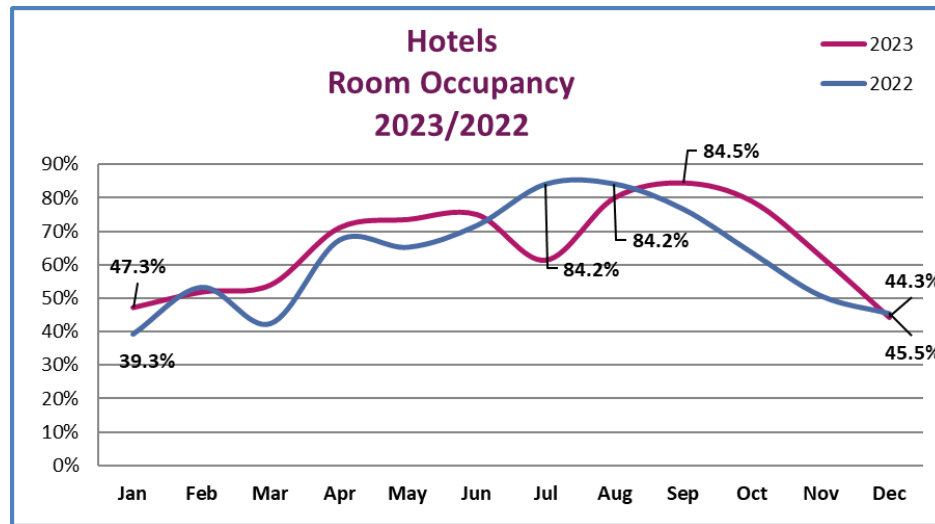
**Table 5 Monthly Distribution by % Room Occupancy 2023/2022**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	47.3	51.9	54.1	71.1	73.6	75.1	61.4	80.1	84.5	79.1	62.7	44.3
2022	39.3	53.3	42.5	67.4	65.3	71.8	84.2	84.2	76.7	63.7	50.8	45.5

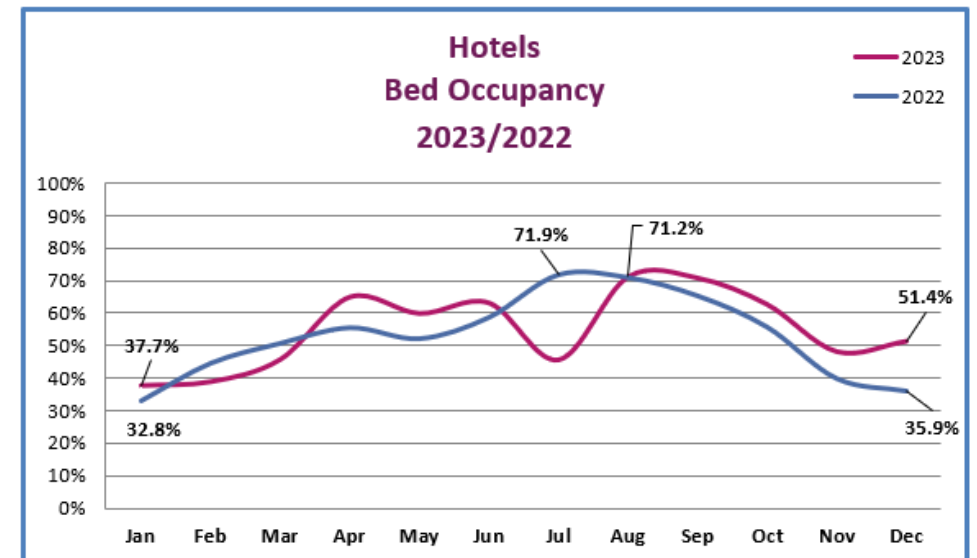
**Table 6 Monthly Distribution by % Bed Occupancy 2023/2022**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	37.7	38.9	45.8	65.0	59.9	63.2	45.6	71.2	70.9	62.7	48.2	51.4
2022	32.8	44.5	50.6	55.5	52.1	58.7	71.9	71.0	65.4	55.7	39.7	35.9

**Figure 1 Hotel Monthly Distribution by % Room Occupancy 2023/2022**



**Figure 2 Hotel Monthly Distribution by % Bed Occupancy 2023/2022**



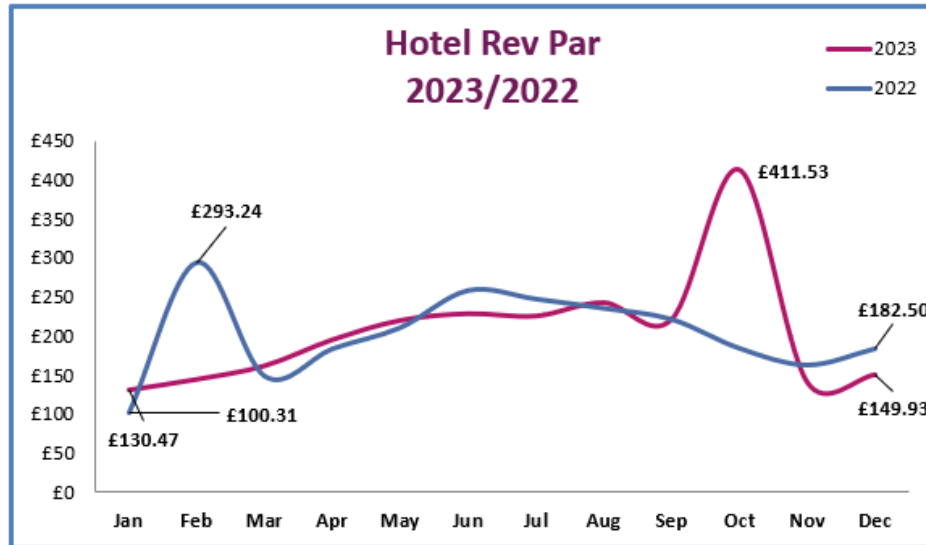
In 2023, Hotel room occupancy reached a peak in September at 84.5%.

In 2022, Hotel room occupancy reached a peak in July & August at 84.2% before reducing sharply in September.

## Serviced Accommodation

### 3.1.4. Hotel Rev Par 2023/2022

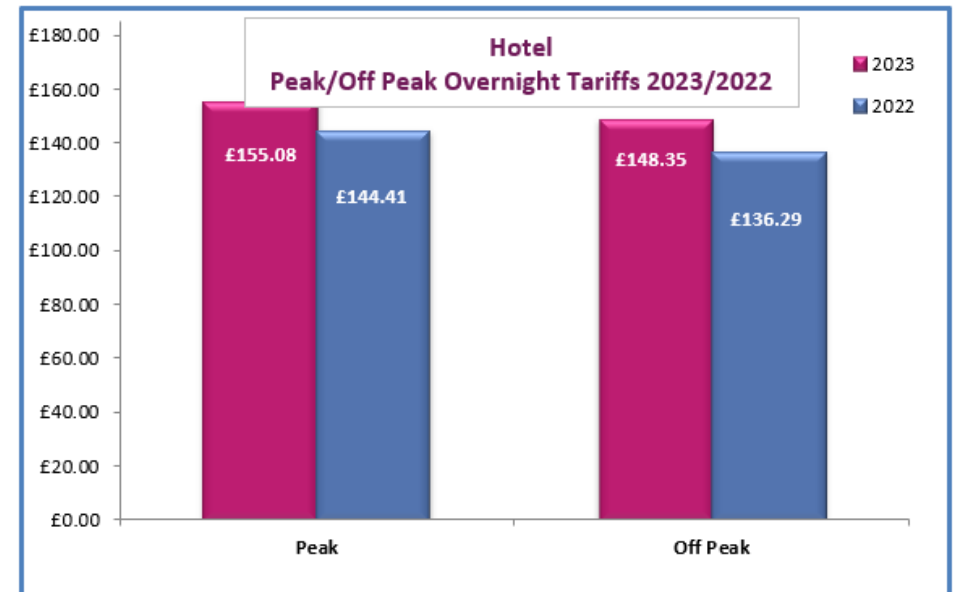
Figure 3 Hotel Rev Par 2023/2022



In 2023, the average peak Rev Par was £411.53, which was achieved in October.

In 2022, the average peak Rev Par was £293.24, which was achieved in February.

Figure 4 Hotel Peak/Off-Peak Tariffs 2023/2022



In 2023, the average peak tariff amongst participating hotels was £155.08, whilst the off-peak average tariff was £148.35.

In 2022, the average peak tariff amongst participating hotels was £144.41, whilst the off-peak average tariff was £136.29.

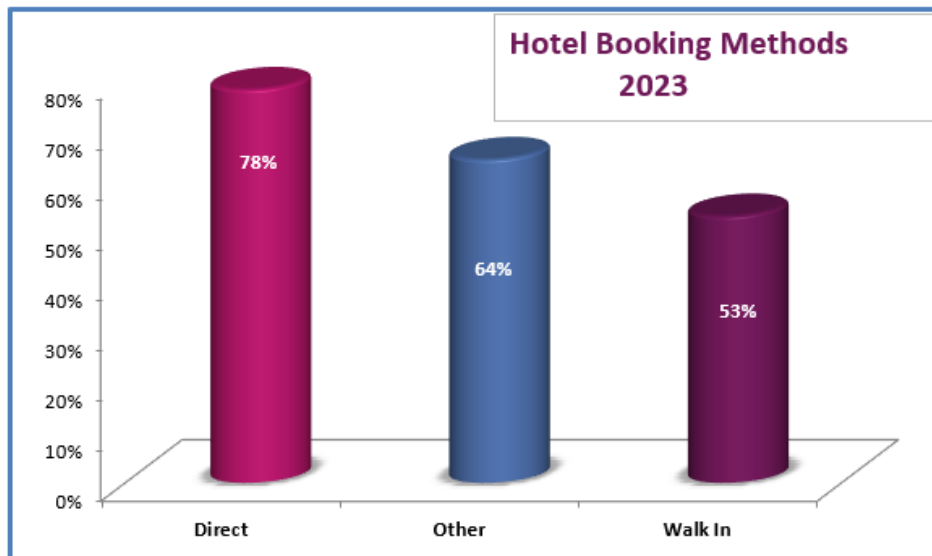


## Serviced Accommodation



### 3.1.5. Hotel Booking Methods 2023

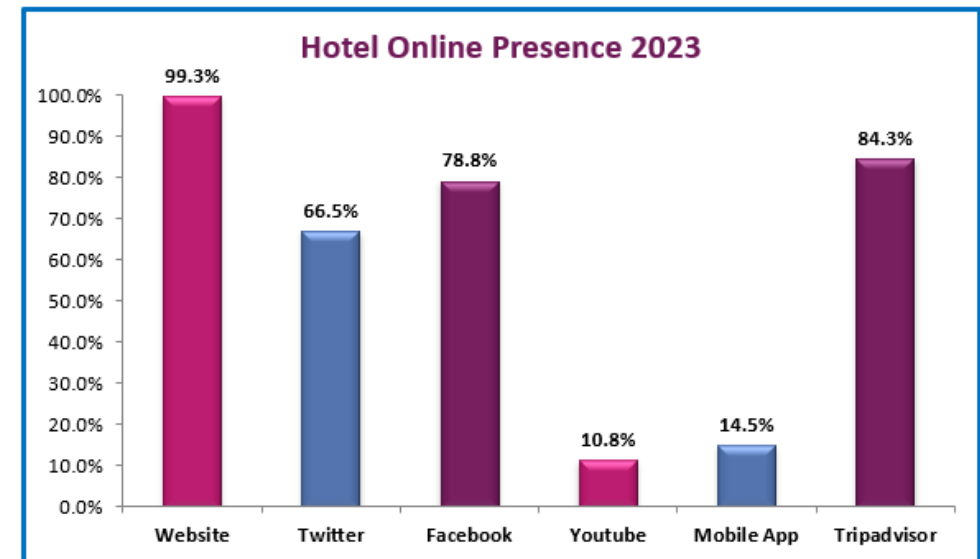
Figure 5 Booking Methods 2023



In 2023, the most popular booking method was 'directly' with the Hotel accommodation, followed by 'Other', which includes booking sites, such as Booking.com; Expedia, laterooms.com and agents. 53% of all participating hotels welcomed 'walk-in' guests.

### 3.1.6. Hotel Online Presence 2023

Figure 6 Online Presence 2023



In 2023, 99.3% of all participating Hotels had their own website, with the majority also listed on Tripadvisor (84.3%). Facebook continued to be popular in 2022 with 78.8% having their page to promote their accommodation. YouTube was only used by 10.8% of Hotels in 2023.

## Serviced Accommodation



### 3.2. Guest House, B&B

#### 3.2.1. % Room Occupancy

Table 7 Guest House, B&B % Room Occupancy Analysis 2023/2022

Room Occupancy	2023	2022	23/22 Diff	Change
<b>Guest House / B&amp;B</b>	76.97%	60.93%	16.04	116
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	66.76%	-	66.76	167
ALLFV	86.36%	53.12%	33.24	133
Angus & City of Dundee	13.21%	25.68%	-12.47	88
Ayrshire & Arran	-	32.96%	-32.96	67
Dumfries & Galloway	74.98%	88.92%	-13.94	86
Edinburgh & Lothian	97.33%	-	97.33	197
Greater Glasgow	-	65.12%	-65.12	35
Highlands of Scotland	87.84%	89.79%	-1.95	98
Kingdom of Fife	-	-	-	100
Orkney	38.81%	38.03%	0.78	101
Perthshire	-	33.01%	-33.01	67
Scottish Borders	42.21%	7.14%	35.07	135
Shetland Islands	-	0.00%	0.00	100
Outer Hebrides	76.58%	0.00%	76.58	177
<b>Location</b>				
Coastal	66.76%	-	66.76	167
Inland	79.27%	62.75%	16.52	117
Island	72.64%	58.03%	14.61	115
<b>Tariff</b>				
£20 - £29.99	-	*	0.00	100
£30 - £39.99	-	19.08%	-19.08	81
£40 - £49.99	13.24%	62.09%	-48.85	51
£50 - £59.99	-	76.74%	-76.74	23

Room Occupancy	2023	2022	23/22 Diff	Change
<b>Tariff (Cont)</b>				
£60 - £69.99	88.40%	91.64%	-3.24	97
£70 +	78.20%	44.08%	34.12	134
<b>Size</b>				
1 to 3	65.64%	62.52%	3.12	103
4 to 10	82.81%	70.77%	12.04	112
11 to 25	-	39.98%	-39.98	60
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
<b>Urban/Rural</b>				
Large Urban Areas	95.66%	65.12%	30.54	131
Other Urban Areas	77.75%	72.72%	5.03	105
Accessible Small Towns	58.05%	21.35%	36.70	137
Remote Small Towns	75.23%	76.58%	-1.35	99
Accessible Rural	82.16%	33.01%	49.15	149
Remote Rural	72.64%	58.03%	14.61	115
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	77.61%	56.32%	21.29	121
4 Stars	36.54%	66.99%	-30.45	70
5 Stars	-	*	0.00	100
Unclassified	71.14%	49.01%	22.13	122

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included



## Serviced Accommodation

**Table 8 Guest House, B&B % Room Occupancy Analysis 2023/2019**

Room Occupancy	2023	2019	22/19 Diff	Change
<b>Guest House / B&amp;B</b>	76.97%	51.80%	25.17	125
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	66.76%	*	66.76	167
ALLFV	86.36%	56.38%	29.98	130
Angus & City of Dundee	13.21%	29.67%	-16.46	84
Ayrshire & Arran	-	33.79%	-33.79	66
Dumfries & Galloway	74.98%	52.53%	22.45	122
Edinburgh & Lothian	97.33%	86.05%	11.28	111
Greater Glasgow	-	-	0.00	100
Highlands of Scotland	87.84%	44.07%	43.77	144
Kingdom of Fife	-	-	0.00	100
Orkney	38.81%	50.18%	-11.37	89
Perthshire	-	38.41%	-38.41	62
Scottish Borders	42.21%	39.29%	2.92	103
Shetland Islands	-	4.84%	-4.84	95
Outer Hebrides	76.58%	49.09%	27.49	127
<b>Location</b>				
Coastal	66.76%	40.52%	26.24	126
Inland	79.27%	58.18%	21.09	121
Island	72.64%	50.87%	21.77	122
<b>Tariff</b>				
£20 - £29.99	-	23.60%	-23.60	76
£30 - £39.99	-	48.81%	-48.81	51
£40 - £49.99	13.24%	52.70%	-39.46	61
£50 - £59.99	-	44.02%	-44.02	56
£60 - £69.99	88.40%	60.26%	28.14	128
£70 +	78.20%	55.19%	23.01	123

Room Occupancy	2023	2019	22/19 Diff	Change
<b>Size</b>				
1 to 3	65.64%	34.89%	30.75	131
4 to 10	82.81%	57.31%	25.50	126
11 to 25	-	87.93%	-87.93	12
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
<b>Urban/Rural</b>				
Large Urban Areas	95.66%	72.65%	23.01	123
Other Urban Areas	77.75%	71.23%	6.52	107
Accessible Small Towns	58.05%	43.79%	14.26	114
Remote Small Towns	75.23%	54.65%	20.58	121
Accessible Rural	82.16%	22.99%	59.17	159
Remote Rural	72.64%	37.11%	35.53	136
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	77.61%	47.96%	29.65	130
4 Stars	36.54%	53.53%	-16.99	83
5 Stars	-	14.02%	-14.02	86
Unclassified	71.14%	35.22%	35.92	136

- Sample Size = Nil \*Sample Size (between 1 and 4) too small to be included

### 3.2.2. % Bed Occupancy

**Table 9 Guest House, B&B % Bed Occupancy Analysis 2023/2022**

Bed Occupancy	2023	2022	23/22 Diff	Change
<b>Guest House / B&amp;B</b>	77.06%	53.33%	23.73	124
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	75.11%	-	75.11	175
ALLFV	87.78%	41.52%	46.26	146
Angus & City of Dundee	10.65%	9.44%	1.21	101
Ayrshire & Arran	-	21.14%	-21.14	79
Dumfries & Galloway	67.81%	69.22%	-1.41	99
Edinburgh & Lothian	91.65%	-	91.65	192
Greater Glasgow	-	65.42%	-65.42	35
Highlands of Scotland	87.84%	88.60%	-0.76	99
Kingdom of Fife	-	-	-	100
Orkney	31.45%	33.63%	-2.18	98
Perthshire	-	32.34%	-32.34	68
Scottish Borders	40.54%	5.71%	34.83	135
Shetland Islands	-	0.00%	0.00	100
Outer Hebrides	52.38%	0.00%	52.38	152
<b>Location</b>				
Coastal	75.11%	-	75.11	175
Inland	78.46%	55.77%	22.69	123
Island	68.01%	49.61%	18.40	118
<b>Tariff</b>				
£20 - £29.99	-	*	0.00	100
£30 - £39.99	-	17.67%	-17.67	82
£40 - £49.99	10.65%	68.33%	-57.68	42
£50 - £59.99	-	73.64%	-73.64	26
£60 - £69.99	80.55%	76.02%	4.53	105
£70 +	77.49%	34.56%	42.93	143

Bed Occupancy	2023	2022	23/22 Diff	Change
<b>Size</b>				
1 to 3	68.14%	63.07%	5.07	105
4 to 10	81.80%	60.06%	21.74	122
11 to 25	-	30.37%	-30.37	70
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
<b>Urban/Rural</b>				
Large Urban Areas	90.02%	65.42%	24.60	125
Other Urban Areas	78.05%	65.12%	12.93	113
Accessible Small Towns	66.26%	6.95%	59.31	159
Remote Small Towns	66.97%	59.93%	7.04	107
Accessible Rural	90.47%	32.34%	58.13	158
Remote Rural	68.01%	49.61%	18.40	118
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	69.90%	44.00%	25.90	126
4 Stars	38.24%	76.76%	-38.52	61
5 Stars	-	*	0.00	100
Unclassified	75.15%	37.86%	37.29	137

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included



**Table 10 Guest House, B&B % Bed Occupancy Analysis 2023/2019**

Bed Occupancy	2023	2019	22/19 Diff	Change
<b>Guest House / B&amp;B</b>	77.06%	43.71%	33.35	133
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	75.11%	*	75.11%	175
ALLFV	87.78%	44.93%	42.85%	143
Angus & City of Dundee	10.65%	24.53%	-13.88%	86
Ayrshire & Arran	-	25.94%	-25.94%	74
Dumfries & Galloway	67.81%	40.85%	26.96%	127
Edinburgh & Lothian	91.65%	79.04%	12.61%	113
Greater Glasgow	-	-	-	100
Highlands of Scotland	87.84%	37.15%	50.69%	151
Kingdom of Fife	-	-	-	100
Orkney	31.45%	42.01%	-10.56%	89
Perthshire	-	29.31%	-29.31%	71
Scottish Borders	40.54%	27.86%	12.68%	113
Shetland Islands	-	3.23%	-3.23%	97
Outer Hebrides	52.38%	31.25%	21.13%	121
<b>Location</b>				
Coastal	75.11%	31.41%	43.70%	144
Inland	78.46%	50.65%	27.81%	128
Island	68.01%	40.27%	27.74%	128
<b>Tariff</b>				
£20 - £29.99	-	23.60%	-23.60%	76
£30 - £39.99	-	39.07%	-39.07%	61
£40 - £49.99	10.65%	42.71%	-32.06%	68
£50 - £59.99	-	36.81%	-36.81%	63
£60 - £69.99	80.55%	50.72%	29.83%	130
£70 +	77.49%	48.56%	28.93%	129
<b>Size</b>				
1 to 3	68.14%	27.49%	40.65%	141
4 to 10	81.80%	46.53%	35.27%	135
11 to 25	-	80.83%	-80.83%	19
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100

Bed Occupancy	2023	2019	22/19 Diff	Change
<b>Urban/Rural</b>				
Large Urban Areas	90.02%	67.70%	22.32%	122
Other Urban Areas	78.05%	60.75%	17.30%	117
Accessible Small Towns	66.26%	33.14%	33.12%	133
Remote Small Towns	66.97%	44.09%	22.88%	123
Accessible Rural	90.47%	15.93%	74.54%	175
Remote Rural	68.01%	30.77%	37.24%	137
<b>Grading</b>				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	69.90%	39.40%	30.50%	131
4 Stars	38.24%	45.56%	-7.32%	93
5 Stars	-	25.36%	-25.36%	75
Unclassified	75.15%	27.57%	47.58%	148
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>		

# Serviced Accommodation



## 3.2.3. Guest House, B&B Monthly Distribution by % Occupancy 2023/22

Table 11 Guest House, B&B Monthly Distribution by % Room Occupancy 2023/2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	40.8	23.1	76.1	70.4	79.5	73.8	83.9	89.1	78.5	65.8	58.2	60.9
2022	18.6	35.0	36.9	62.0	67.6	75.0	75.9	71.9	61.7	38.0	33.3	46.5

Table 12 Guest House, B&B Monthly Distribution by % Bed Occupancy 2023/2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	39.4	21.6	72.4	58.6	66.4	73.3	82.6	89.4	78.7	72.1	60.9	77.0
2022	12.8	27.9	30.3	55.3	61.0	66.5	68.3	66.6	57.6	32.2	27.8	46.3

Figure 7 Guest House, B&B Monthly Distribution by % Room Occupancy 2023/2022

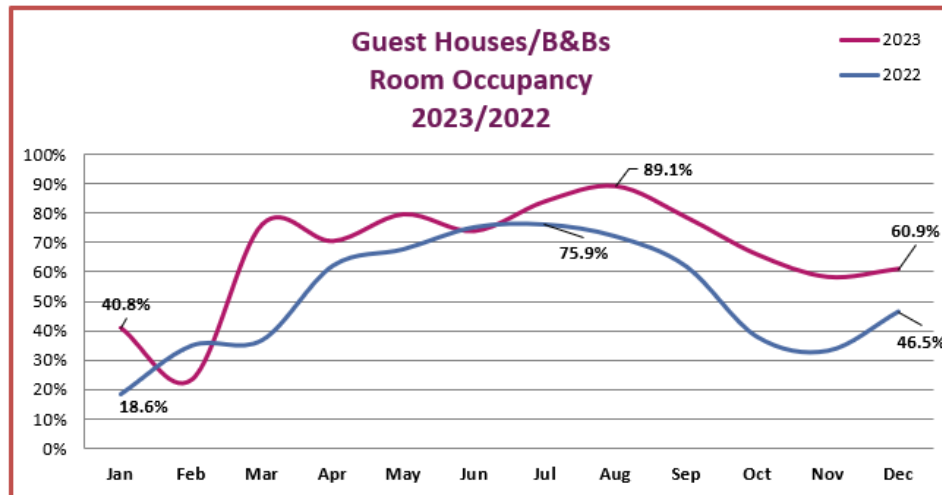
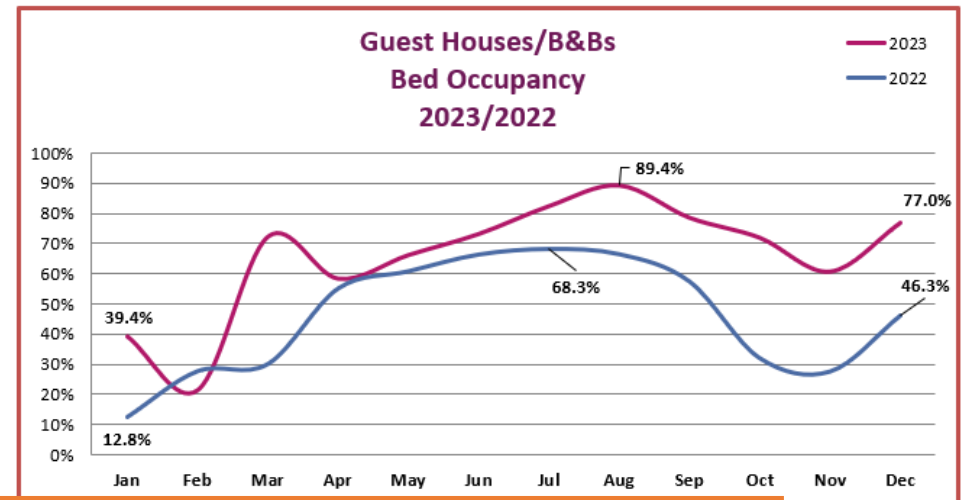


Figure 8 Guest House, B&B Monthly Distribution by % Bed Occupancy 2023/2022



In 2023, Guest Houses/B&Bs room occupancy reached a peak in August at 89.1% whilst maintaining a room occupancy rate of over 70% between March and September before reducing sharply in October.

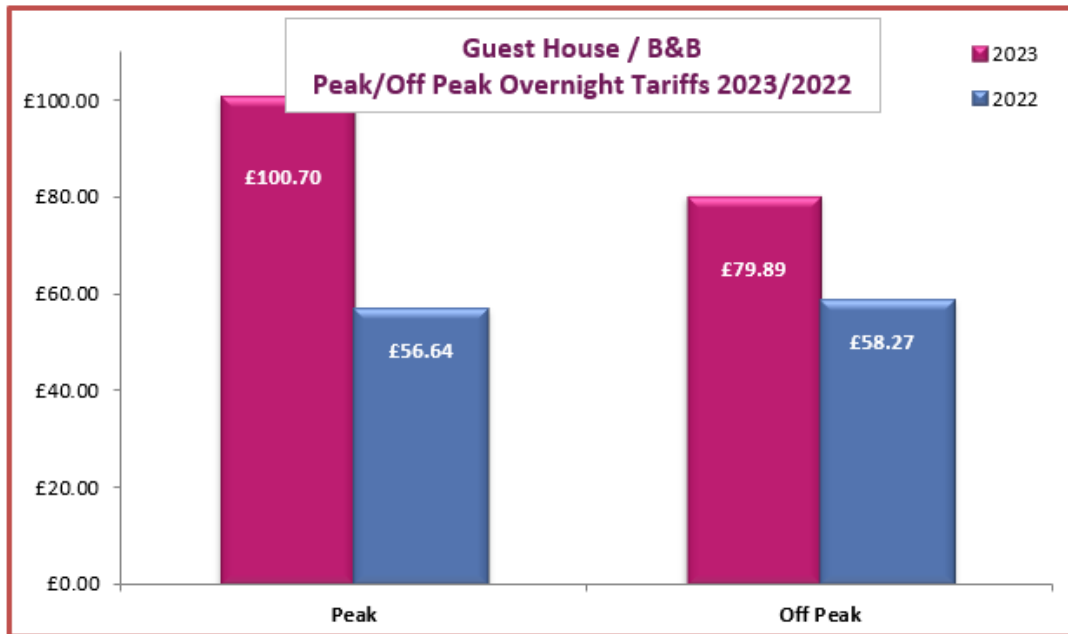
In 2022, Hotel room occupancy reached a peak in July at 75.9%, whilst maintaining a room occupancy rate of over 60% between in April and September.

## Serviced Accommodation



### 3.2.4. Guest House, B&B Peak/Off-Peak Tariffs

Figure 9 Guest House, B&B Peak/Off-Peak Tariffs 2023/2022



In 2023, the average peak tariff amongst participating Guest House/B&B accommodation was £100.70 per person per night, whilst the off-peak average tariff was £79.89.

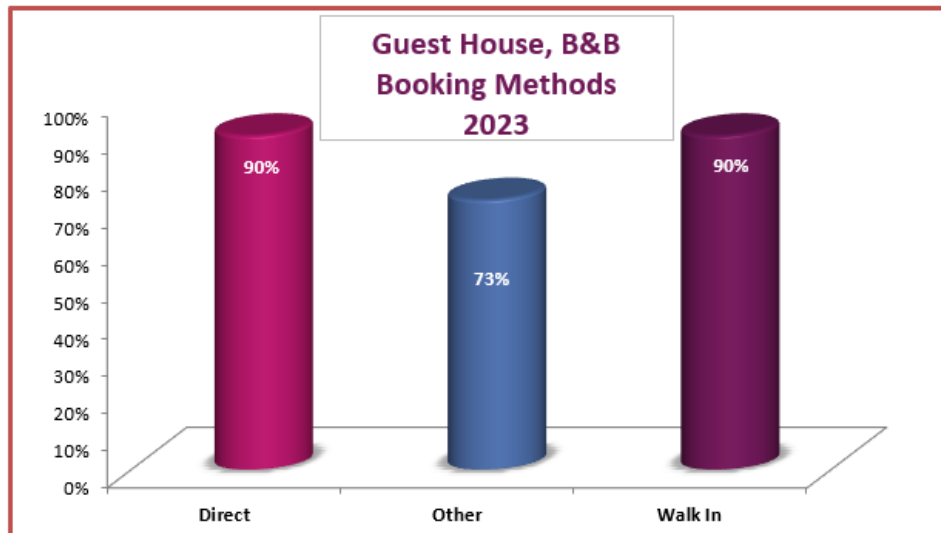
In 2022, the average peak tariff amongst participating Guest House/B&B accommodation was £56.64 per person per night, whilst the off-peak average tariff was £58.27.



## Serviced Accommodation

### 3.2.5. Guest House, B&B Booking Methods 2023

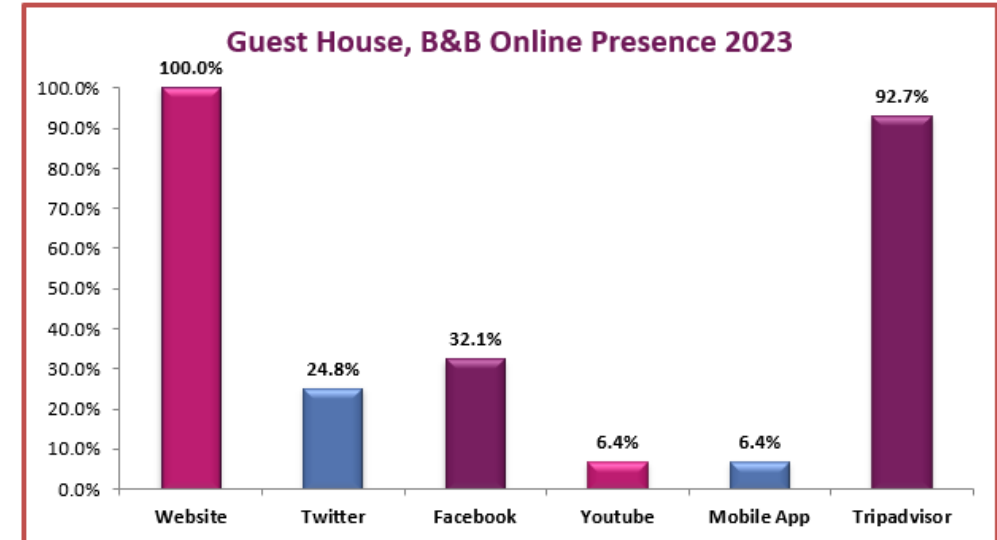
Figure 10 Booking Methods 2023



In 2023, Guest House/B&B accommodation providers noted the most popular booking methods were 'direct' booking and 'walk-in'. 'Other' booking channels such as booking sites, proved less popular in 2023.

### 3.2.6. Guest House, B&B Online Presence 2023

Figure 11 Online Presence 2023



In 2023, 100% of participating Guest House/B&B providers had their website, with the majority also being listed on Tripadvisor (92.7%). Facebook was used by just under one-third of Guest House/B&B providers to promote their accommodation. Twitter was used by just under one-quarter of Guest House/B&B providers in 2023.

## 4 Self-Catering Accommodation



### 4.1. % Unit Occupancy

Table 13 Self-Catering % Unit Occupancy Analysis 2023/2022

Unit Occupancy	2023	2022	23/22 Diff <sup>4</sup>	Change <sup>5</sup>
	43.07%	40.49%	2.58	103
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	36.53%	41.39%	-4.86	95
ALLFV	44.73%	44.77%	-0.04	100
Angus & City of Dundee	56.87%	61.64%	-4.77	95
Ayrshire & Arran	61.34%	63.17%	-1.83	98
Dumfries & Galloway	27.80%	19.83%	7.97	108
Edinburgh & Lothian	47.51%	41.41%	6.10	106
Greater Glasgow	27.04%	20.35%	6.69	107
Highlands of Scotland	47.81%	43.72%	4.09	104
Kingdom of Fife	40.01%	32.05%	7.96	108
Orkney	66.94%	56.96%	9.98	110
Perthshire	47.17%	33.51%	13.66	114
Scottish Borders	30.56%	31.72%	-1.16	99
Shetland Islands	64.67%	92.93%	-28.26	72
Outer Hebrides	44.73%	55.62%	-10.89	89
<b>Property Type</b>				
Bungalow	46.88%	48.50%	-1.62	98
Cottage	36.98%	34.04%	2.94	103
Flat	23.56%	22.28%	1.28	101
Glamping	21.93%	21.47%	0.46	100
House	38.91%	39.92%	-1.01	99
Lodge/Chalet	62.83%	64.63%	-1.80	98
Other Property	21.03%	24.02%	-2.99	97
Static Caravan	35.09%	11.88%	23.21	123

Unit Occupancy	2023	2022	23/22 Diff <sup>4</sup>	Change <sup>5</sup>
<b>Tariff</b>				
Unknown	9.38%	3.07%	6.31	106
Up to £299	26.57%	11.35%	15.22	115
£300 to £499	26.59%	26.11%	0.48	100
£500 to £799	36.25%	33.16%	3.09	103
£800 or more	54.15%	56.05%	-1.90	98
<b>Location</b>				
Coastal	34.49%	27.26%	7.23	107
Inland	44.35%	42.86%	1.49	101
Island	62.11%	64.88%	-2.77	97
<b>Urban/Rural</b>				
Large Urban Areas	18.59%	15.83%	2.76	103
Other Urban Areas	42.52%	42.48%	0.04	100
Accessible Small Towns	29.13%	25.91%	3.22	103
Remote Small Towns	37.61%	36.02%	1.59	102
Accessible Rural	50.12%	50.96%	-0.84	99
Remote Rural	42.74%	41.02%	1.72	102
<b>Grading</b>				
1 Star	0.00%	0.00%	0.00	100
2 Stars	30.64%	27.39%	3.25	103
3 Stars	44.84%	40.65%	4.19	104
4 Stars	48.20%	40.28%	7.92	108
5 Stars	52.12%	51.43%	0.69	101
Unclassified	38.86%	39.16%	-0.30	100

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>4</sup> 23/22 Diff throughout this report is expressed by % Point Change

<sup>5</sup> 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 2023/2019

Unit Occupancy	2023	2019	22/19 Diff <sup>6</sup>	Change
	43.07%	47.57%	-4.50	96
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	36.53%	44.70%	-8.17	92
ALLFV	44.73%	54.42%	-9.69	90
Angus & City of Dundee	56.87%	56.94%	-0.07	100
Ayrshire & Arran	61.34%	50.65%	10.69	111
Dumfries & Galloway	27.80%	26.19%	1.61	102
Edinburgh & Lothian	47.51%	36.86%	10.65	111
Greater Glasgow	27.04%	40.58%	-13.54	86
Highlands of Scotland	47.81%	54.85%	-7.04	93
Kingdom of Fife	40.01%	51.27%	-11.26	89
Orkney	66.94%	43.49%	23.45	123
Perthshire	47.17%	38.39%	8.78	109
Scottish Borders	30.56%	52.22%	-21.66	78
Shetland Islands	64.67%	24.60%	40.07	140
Outer Hebrides	44.73%	51.73%	-7.00	93
<b>Property Type</b>				
Bungalow	46.88%	54.43%	-7.55	92
Cottage	36.98%	42.11%	-5.13	95
Flat	23.56%	30.56%	-7.00	93
Glamping	21.93%	40.14%	-18.21	82
House	38.91%	30.32%	8.59	109
Lodge/Chalet	62.83%	70.88%	-8.05	92
Other Property	21.03%	52.90%	-31.87	68
Static Caravan	35.09%	39.67%	-4.58	95
<b>Tariff</b>				
Unknown	9.38%	11.45%	-2.07	98
Up to £299	26.57%	30.90%	-4.33	96
£300 to £499	26.59%	38.47%	-11.88	88
£500 to £799	36.25%	47.37%	-11.12	89
£800 or more	54.15%	58.22%	-4.07	96

Unit Occupancy	2023	2019	22/19 Diff <sup>6</sup>	Change
<b>Location</b>				
Coastal	34.49%	38.10%	-3.61	96
Inland	44.35%	49.56%	-5.21	95
Island	62.11%	57.54%	4.57	105
<b>Urban/Rural</b>				
Large Urban Areas	18.59%	34.58%	-15.99	84
Other Urban Areas	42.52%	50.61%	-8.09	92
Accessible Small Towns	29.13%	42.04%	-12.91	87
Remote Small Towns	37.61%	44.27%	-6.66	93
Accessible Rural	50.12%	56.69%	-6.57	93
Remote Rural	42.74%	47.65%	-4.91	95
<b>Grading</b>				
1 Star	0.00%	38.71%	-38.71	61
2 Stars	30.64%	26.59%	4.05	104
3 Stars	44.84%	46.34%	-1.50	99
4 Stars	48.20%	49.56%	-1.36	99
5 Stars	52.12%	54.72%	-2.60	97
Unclassified	38.86%	46.62%	-7.76	92

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>6</sup> 23/19 Diff throughout this report is expressed by % Point Change



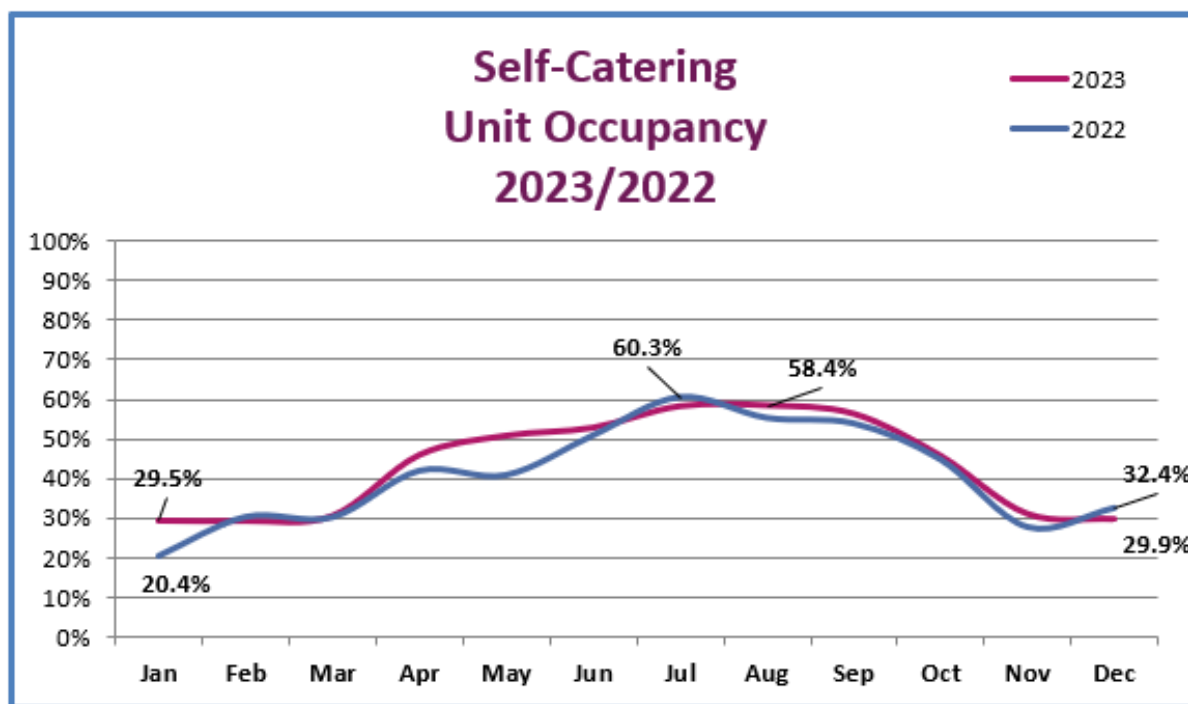
## Self-Catering Accommodation

### 4.2. Self-Catering Monthly Distribution by % Unit Occupancy 2023/2022

Table 15 Self-Catering Monthly Distribution by % Unit Occupancy 2023/2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	29.5	29.4	30.7	46.0	50.8	52.8	58.2	58.4	56.3	45.8	31.2	29.9
2022	20.4	30.2	30.1	41.8	40.7	50.7	60.3	55.1	53.7	44.6	27.7	32.4

Figure 12 Self-Catering Monthly Distribution by % Room Occupancy 2023/2022



In 2023, Self-Catering Unit occupancy reached a peak in August at 58.4% whilst maintaining a unit occupancy rate of over 50% between May and September before reducing in October.

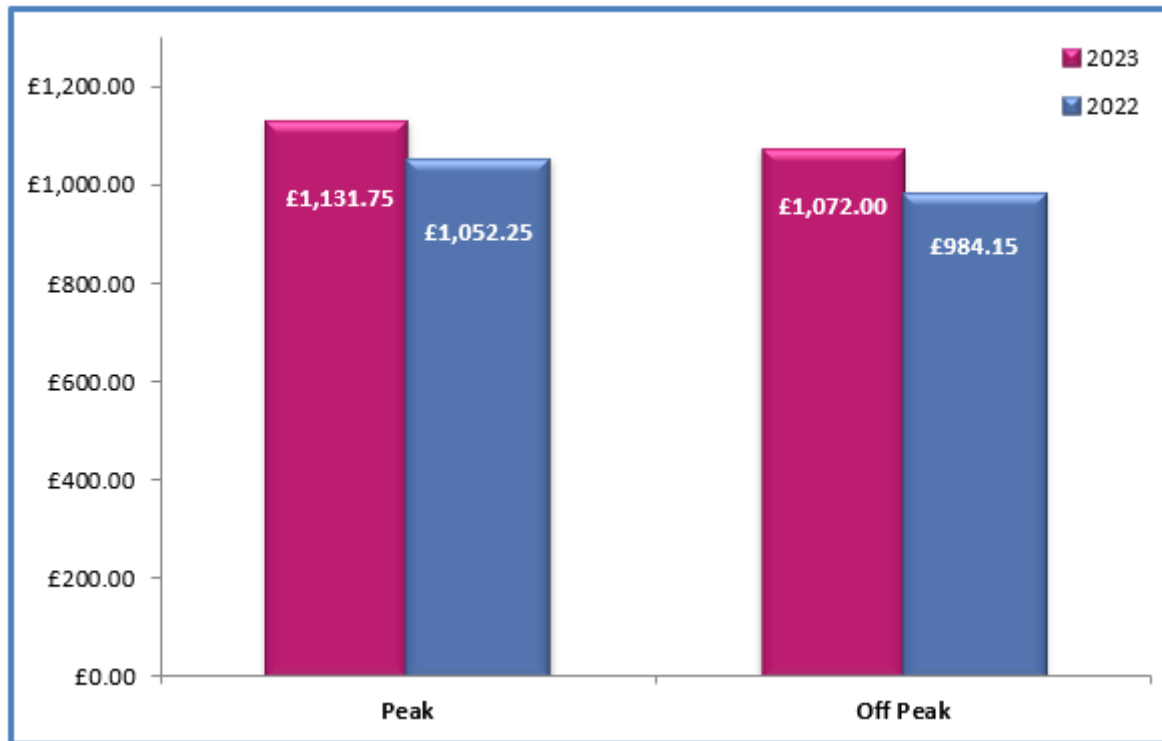
In 2022, Self-Catering Unit occupancy reached a peak in July at 60.3%.

## Self-Catering Accommodation



### 4.3. Self-Catering Peak/Off-Peak Tariffs

Figure 13 Self-Catering Peak/Off-Peak Tariffs 2023/2022



In 2023, the average peak tariff amongst participating Self-Catering accommodation was £1,131.75 per week, whilst the off-peak average tariff was £1,072.00 per week.

In 2022, the average peak tariff amongst participating Self-Catering accommodation was £1,052.25 per week, whilst the off-peak average tariff was £984.15 per week.





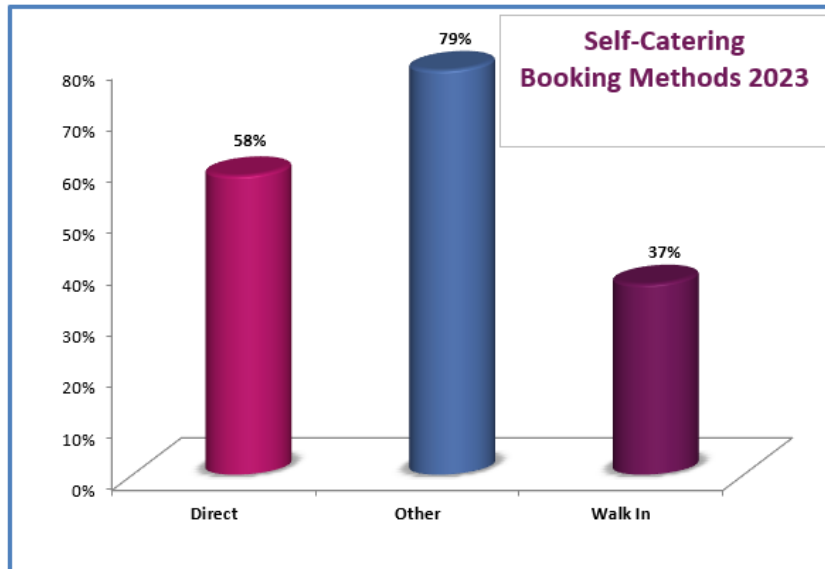
# Self-Catering Accommodation



## 4.4. Self-Catering Booking Methods 2023

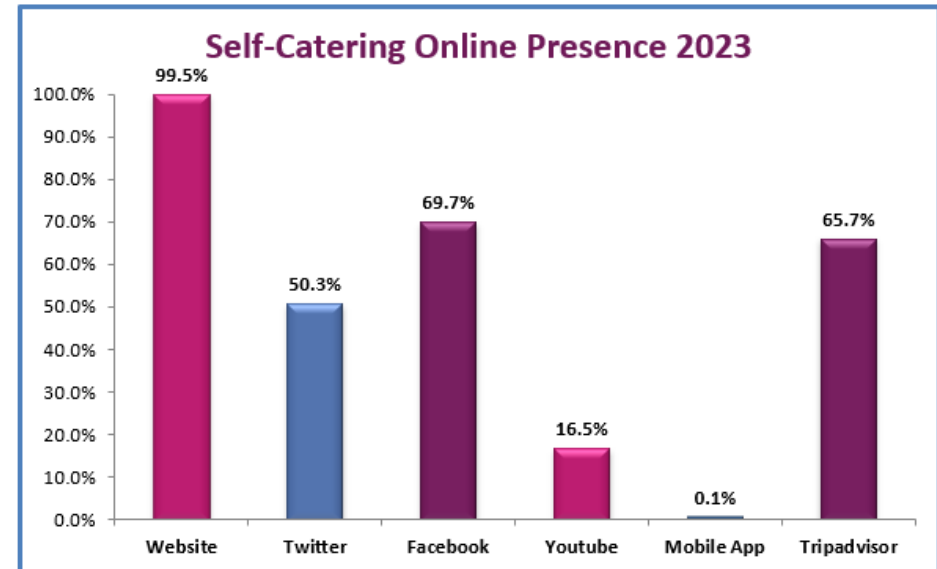
## 4.5. Self-Catering Online Presence 2023

Figure 14 Self-Catering Booking Methods 2023



In 2023, 'Other' booking methods were cited as the most popular by 79% of Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland.

Figure 15 Self-Catering Online Presence 2023



In 2023, 99.5% of all participating Self-Catering accommodation providers had their own website. Just over two-thirds had a Facebook page, with just over 65% of participants using Tripadvisor. Twitter was used by just over 50% of participants, however under a fifth used YouTube (16%) in 2023.

## 5 Touring Accommodation



### 5.1. % Pitch Occupancy

Table 16 % Pitch Occupancy Analysis 2023/2022

Pitch Occupancy	2023	2022	23/22 Diff <sup>7</sup>	Change <sup>8</sup>
<b>Net Pitch</b>	37.72%	31.24%	6.48	106
<b>Whole Park</b>	37.27%	29.23%	8.04	108
<b>Caravan</b>	46.94%	45.97%	0.97	101
<b>Tent</b>	21.73%	26.15%	-4.42	96
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	35.34%	23.02%	12.32	112
ALLFV	41.18%	41.89%	-0.71	99
Angus & City of Dundee	-	-	-	100
Ayrshire & Arran	49.67%	46.87%	2.80	103
Dumfries & Galloway	45.30%	46.84%	-1.54	98
Edinburgh & Lothian	36.34%	38.18%	-1.84	98
Greater Glasgow	-	*	0.00	100
Highlands of Scotland	36.08%	17.65%	18.43	118
Kingdom of Fife	62.52%	63.02%	-0.50	100
Orkney	-	-	-	100
Perthshire	28.55%	40.22%	-11.67	88
Scottish Borders	42.78%	34.76%	8.02	108
Shetland Islands	-	-	-	100
Outer Hebrides	*	-	15.00	115
<b>Tariff</b>				
Under £10	*	-	17.20	117
£10-£14.99	19.84%	11.31%	8.53	109
£15- £17.99	26.49%	49.03%	-22.54	77
£18- £19.99	22.48%	15.80%	6.68	107
£20 +	38.14%	31.61%	6.53	107

Pitch Occupancy	2023	2022	23/22 Diff <sup>7</sup>	Change <sup>8</sup>
<b>Location</b>				
Coastal	41.37%	25.03%	16.34	116
Inland	35.55%	37.02%	-1.47	99
Island	45.31%	38.40%	6.91	107
<b>Urban/Rural</b>				
Large Urban Areas	-	-	-	100
Other Urban Areas	19.18%	33.13%	-13.95	86
Accessible Small Towns	35.32%	32.38%	2.94	103
Remote Small Towns	45.60%	39.42%	6.18	106
Accessible Rural	35.31%	36.38%	-1.07	99
Remote Rural	45.83%	27.15%	18.68	119
<b>Grading</b>				
1	-	-	-	100
2	54.03%	45.17%	8.86	109
3	28.43%	22.90%	5.53	106
4	38.47%	28.91%	9.56	110
5	35.38%	41.52%	-6.14	94
Unclassified	40.46%	36.33%	4.13	104

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>7</sup> 23/22 Diff throughout this report is expressed by % Point Change

<sup>8</sup> 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 2023/2019

Pitch Occupancy	2023	2019	22/19 Diff <sup>9</sup>	Change
<b>Net Pitch</b>	37.72%	41.22%	-3.50	97
<b>Whole Park</b>	37.27%	43.23%	-5.96	94
<b>Caravan</b>	46.94%	43.82%	3.12	103
<b>Tent</b>	21.73%	19.72%	2.01	102
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	35.34%	23.04%	12.30	112
ALLFV	41.18%	43.12%	-1.94	98
Angus & City of Dundee	-	-	-	100
Ayrshire & Arran	49.67%	46.82%	2.85	103
Dumfries & Galloway	45.30%	52.04%	-6.74	93
Edinburgh & Lothian	36.34%	29.19%	7.15	107
Greater Glasgow	-	39.86%	-39.86	60
Highlands of Scotland	36.08%	45.89%	-9.81	90
Kingdom of Fife	62.52%	40.51%	22.01	122
Orkney	-	-	-	100
Perthshire	28.55%	45.30%	-16.75	83
Scottish Borders	42.78%	43.11%	-0.33	100
Shetland Islands	-	-	-	100
Outer Hebrides	*	-	15.00	115
<b>Tariff</b>				
Under £10	*	30.76%	-13.56	86
£10-£14.99	19.84%	19.59%	0.25	100
£15- £17.99	26.49%	32.25%	-5.76	94
£18- £19.99	22.48%	20.90%	1.58	102
£20 +	38.14%	43.19%	-5.05	95

Pitch Occupancy	2023	2019	22/19 Diff <sup>9</sup>	Change
<b>Location</b>				
Coastal	41.37%	44.68%	-3.31	97
Inland	35.55%	39.07%	-3.52	96
Island	45.31%	48.59%	-3.28	97
<b>Urban/Rural</b>				
Large Urban Areas	-	34.30%	-34.30	66
Other Urban Areas	19.18%	42.08%	-22.90	77
Accessible Small Towns	35.32%	30.04%	5.28	105
Remote Small Towns	45.60%	55.05%	-9.45	91
Accessible Rural	35.31%	33.99%	1.32	101
Remote Rural	45.83%	47.10%	-1.27	99
<b>Grading</b>				
1	-	-	-	100
2	54.03%	53.56%	0.47	100
3	28.43%	33.83%	-5.40	95
4	38.47%	41.10%	-2.63	97
5	35.38%	41.09%	-5.71	94
Unclassified	40.46%	45.43%	-4.97	95

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>9</sup> 23/19 Diff throughout this report is expressed by % Point Change

## Touring Accommodation

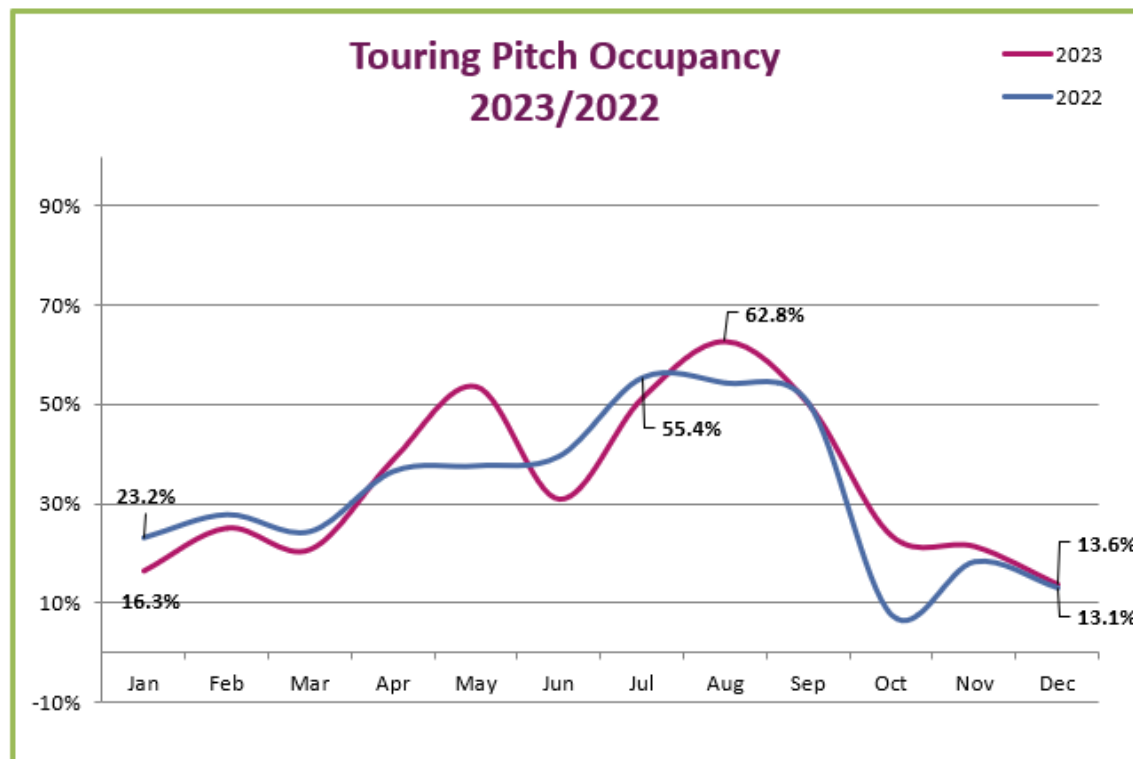


### 5.2. Touring Monthly Distribution by % Pitch Occupancy 2023/2022

Table 18 Touring Monthly Distribution by % Pitch Occupancy 2023/2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	16.3	25.0	20.7	38.9	53.7	30.8	51.3	62.8	50.1	23.4	21.3	13.6
2022	23.2	27.8	24.4	36.5	37.6	39.6	55.4	54.3	50.2	7.6	18.3	13.1

Figure 16 Touring Monthly Distribution by % Pitch Occupancy 2023/2022



In 2023, Touring Pitch occupancy reached a peak in August at 62.8%.

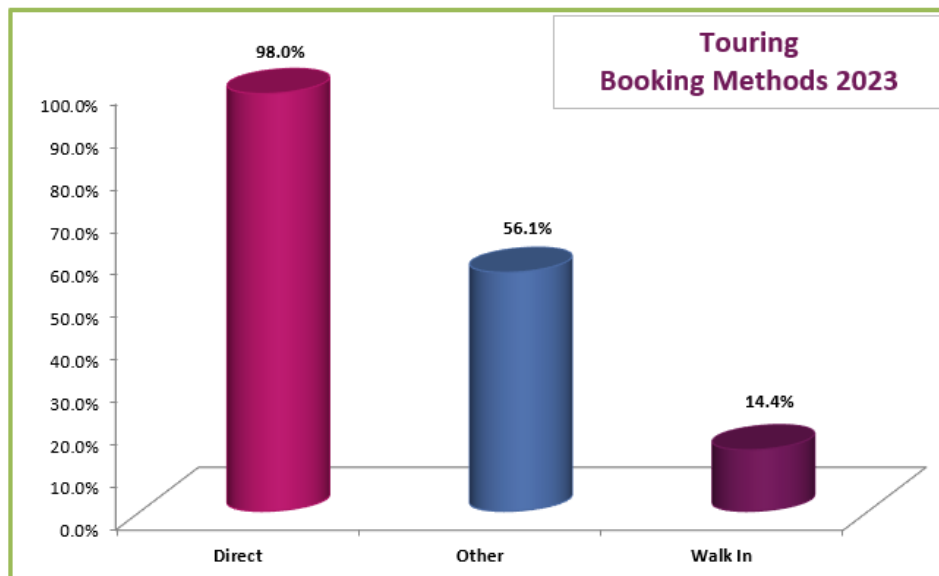
In 2022, Touring Pitch occupancy reached a peak in July at 55.4%.

## Touring Accommodation



### 5.3. Touring Booking Methods 2023

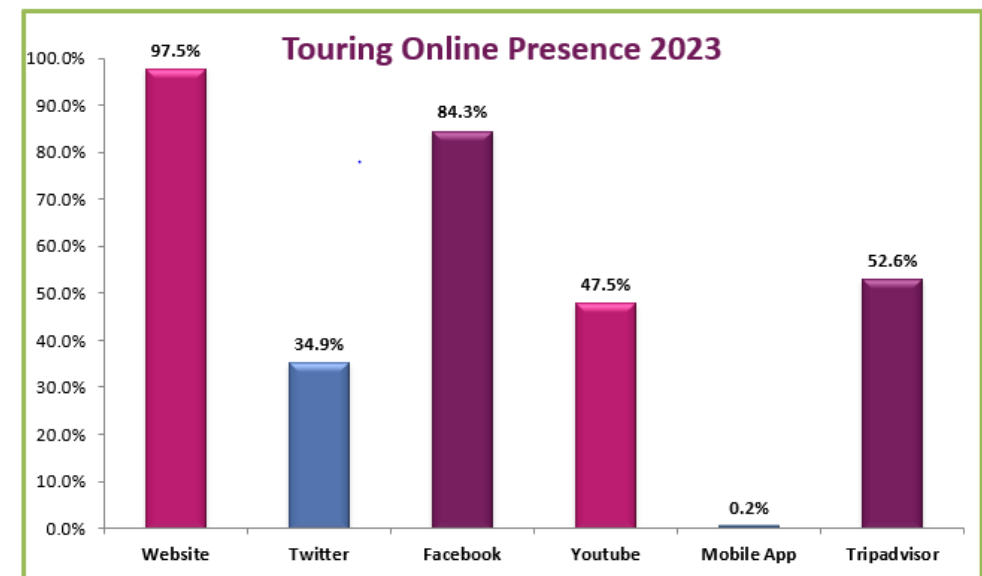
Figure 17 Touring Booking Methods 2023



In 2023, 'Direct' booking methods were cited as most popular by 98% Touring accommodation providers. 'Other' booking methods (56%) and Walk-in (14%) were less popular when booking touring pitches in 2023.

### 5.4. Touring Online Presence 2023

Figure 18 Touring Online Presence 2023



In 2023, 98% of all participating Touring accommodation providers had their own website. Just under 85% of providers had a Facebook page. Over half were listed on Tripadvisor, while just under 35% had a presence on Twitter in 2023.

## 6 Hostel Accommodation



### 6.1. % Bed Occupancy

Table 19 % Bed Occupancy Analysis 2023/2022

Bed Occupancy	2023	2022	23/22 Diff <sup>10</sup>	Change <sup>11</sup>
	58.50%	53.67%	4.83	105
<b>Type</b>				
SYHA	59.63%	55.39%	4.24	104
Independent	49.81%	14.50%	35.31	135
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	45.30%	41.98%	3.32	103
ALLFV	64.40%	35.27%	29.13	129
Angus & City of Dundee	*	-	32.45	132
Ayrshire & Arran	59.09%	68.05%	-8.96	91
Dumfries & Galloway	-	0.00%	0.00	100
Edinburgh & Lothian	55.58%	59.56%	-3.98	96
Greater Glasgow	56.90%	63.34%	-6.44	94
Highlands of Scotland	59.57%	62.85%	-3.28	97
Kingdom of Fife	-	-	-	100
Orkney	49.28%	61.17%	-11.89	88
Perthshire	63.18%	67.89%	-4.71	95
Scottish Borders	-	-	-	100
Shetland Islands	-	-	-	100
Outer Hebrides	-	-	-	100
<b>Grading</b>				
1	52.76%	65.45%	-12.69	87
2	54.14%	66.54%	-12.40	88
3	61.23%	44.37%	16.86	117
4	60.63%	58.20%	2.43	102
5	55.72%	58.69%	-2.97	97
Unclassified	0.00%	0.00%	0.00	100

Bed Occupancy	2023	2022	23/22 Diff <sup>10</sup>	Change <sup>11</sup>
<b>Location</b>				
Coastal	53.55%	52.09%	1.46	101
Inland	59.58%	63.01%	-3.43	97
Island	63.93%	34.07%	29.86	130
<b>Urban/Rural</b>				
Large Urban Areas	57.69%	61.06%	-3.37	97
Other Urban Areas	53.42%	53.32%	0.10	100
Accessible Small Towns	58.58%	56.98%	1.60	102
Remote Small Towns	51.60%	42.72%	8.88	109
Accessible Rural	57.96%	66.15%	-8.19	92
Remote Rural	62.93%	48.25%	14.68	115

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>10</sup> 23/22 Diff throughout this report is expressed by % Point Change

<sup>11</sup> 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 2023/2019**

Bed Occupancy	2023	2019	22/19 Diff <sup>12</sup>	Change
	58.50%	60.15%	-1.65	98
<b>Type</b>				
SYHA	59.63%	57.57%	2.06	102
Independent	49.81%	70.07%	-20.26	80
<b>Former VisitScotland Area</b>				
Aberdeen & Grampian	45.30%	35.22%	10.08	110
ALLFV	64.40%	50.17%	14.23	114
Angus & City of Dundee	*	-	32.45	132
Ayrshire & Arran	59.09%	47.43%	11.66	112
Dumfries & Galloway	-	44.10%	-44.10	56
Edinburgh & Lothian	55.58%	71.91%	-16.33	84
Greater Glasgow	56.90%	65.37%	-8.47	92
Highlands of Scotland	59.57%	59.99%	-0.42	100
Kingdom of Fife	-	-	-	100
Orkney	49.28%	59.89%	-10.61	89
Perthshire	63.18%	58.88%	4.30	104
Scottish Borders	-	-	-	100
Shetland Islands	-	-	-	100
Outer Hebrides	-	-	-	100
<b>Grading</b>				
1	52.76%	60.30%	-7.54	92
2	54.14%	56.61%	-2.47	98
3	61.23%	63.49%	-2.26	98
4	60.63%	51.72%	8.91	109
5	55.72%	54.73%	0.99	101
Unclassified	0.00%	67.41%	-67.41	33
<b>Location</b>				
Coastal	53.55%	51.52%	2.03	102
Inland	59.58%	61.90%	-2.32	98
Island	63.93%	67.67%	-3.74	96

Bed Occupancy	2023	2019	22/19 Diff <sup>12</sup>	Change
<b>Urban/Rural</b>				
Large Urban Areas	57.69%	64.70%	-7.01	93
Other Urban Areas	53.42%	53.62%	-0.20	100
Accessible Small Towns	58.58%	51.15%	7.43	107
Remote Small Towns	51.60%	44.12%	7.48	107
Accessible Rural	57.96%	63.94%	-5.98	94
Remote Rural	62.93%	62.96%	-0.03	100

- Sample Size = Nil

\*Sample Size (between 1 and 4) too small to be included

<sup>12</sup> 23/19 Diff throughout this report is expressed by % Point Change



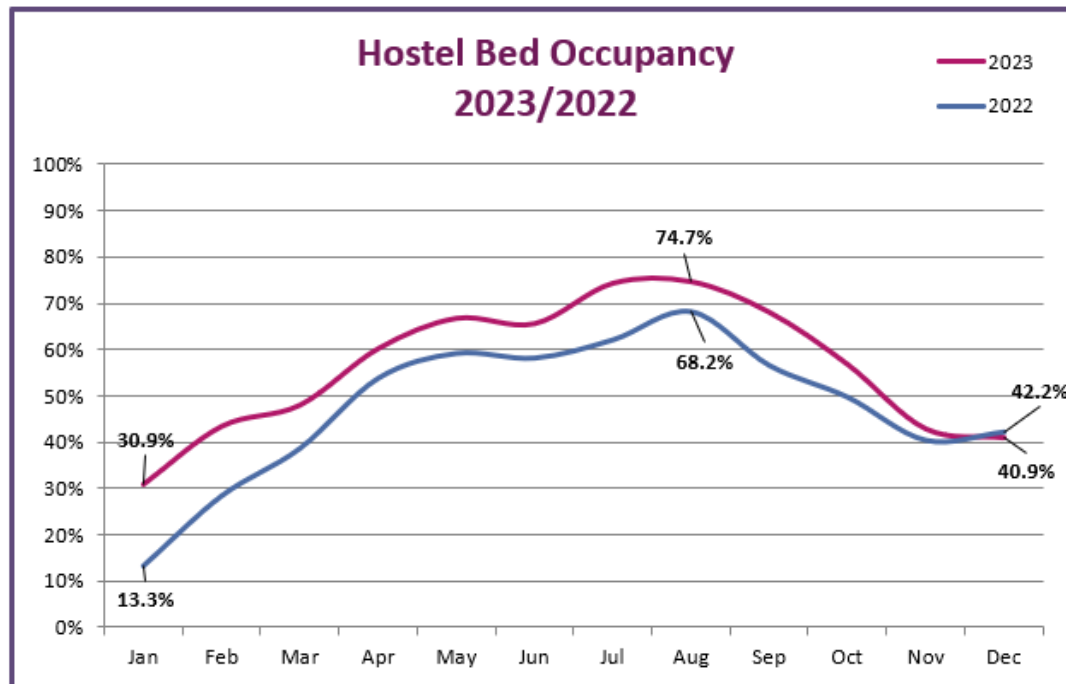
## Hostel Accommodation

### 6.2. Hostel Monthly Distribution by % Bed Occupancy 2023/2022

Table 21 Hostel Monthly Distribution by % Bed Occupancy 2023/2022

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2023	30.9	43.4	48.0	60.2	66.7	65.6	74.3	74.7	68.1	56.8	42.9	40.9
2022	13.3	28.4	38.7	53.8	59.2	58.2	62.1	68.2	56.6	49.7	40.4	42.2

Figure 19 Hostel Monthly Distribution by % Bed Occupancy 2023/2022



In 2023, Hostel Bed occupancy reached a peak in August at 74.7%, whilst maintaining a bed occupancy rate of over 60% between April and September before reducing in October.

In 2022, Hostel Bed occupancy reached a peak in August at 68.2%.

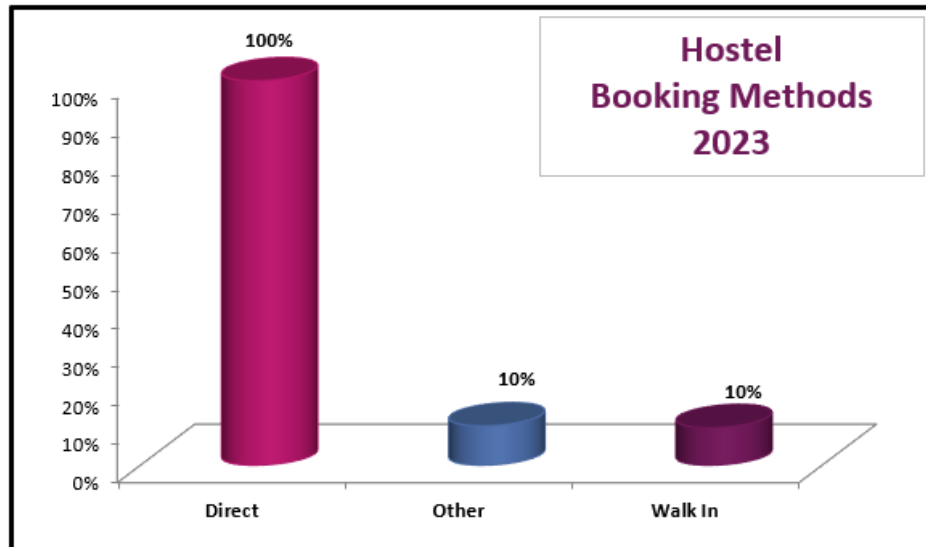


# Hostel Accommodation



## 6.3. Hostel Booking Methods 2023

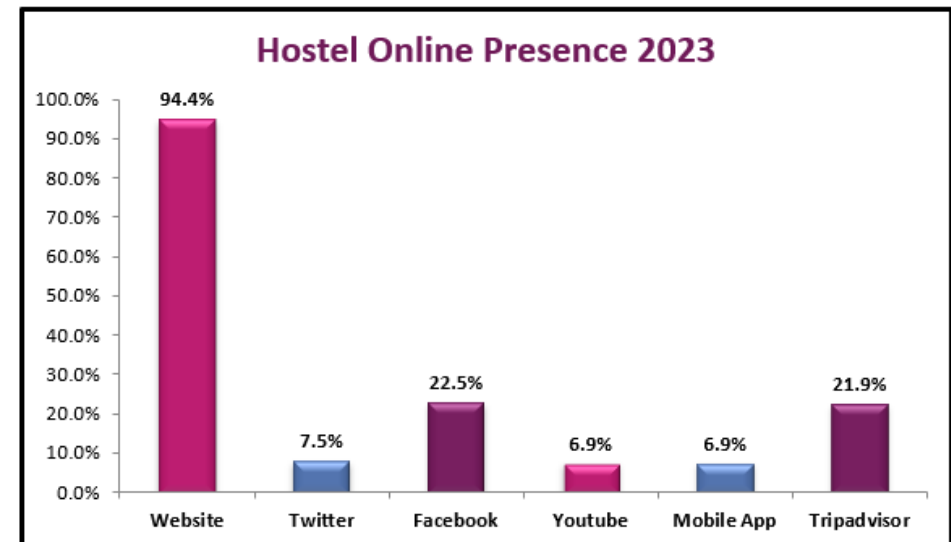
Figure 20 Hostel Booking Methods 2023



In 2023, 'direct' booking methods were cited as most popular by 100% of Hostel accommodation providers.

## 6.4. Hostel Online Presence 2023

Figure 21 Hostel Online Presence 2023



In 2023, the majority of participating Hostel accommodation providers had their website (94.4%). Just over a fifth of Hostel accommodation providers also used Facebook and Tripadvisor (22.5% and 21.9% respectively), with just over 7% using Twitter to promote their accommodation.

# 7 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](http://www.metoffice.gov.uk)).

Figure 22 Average Maximum Temperature

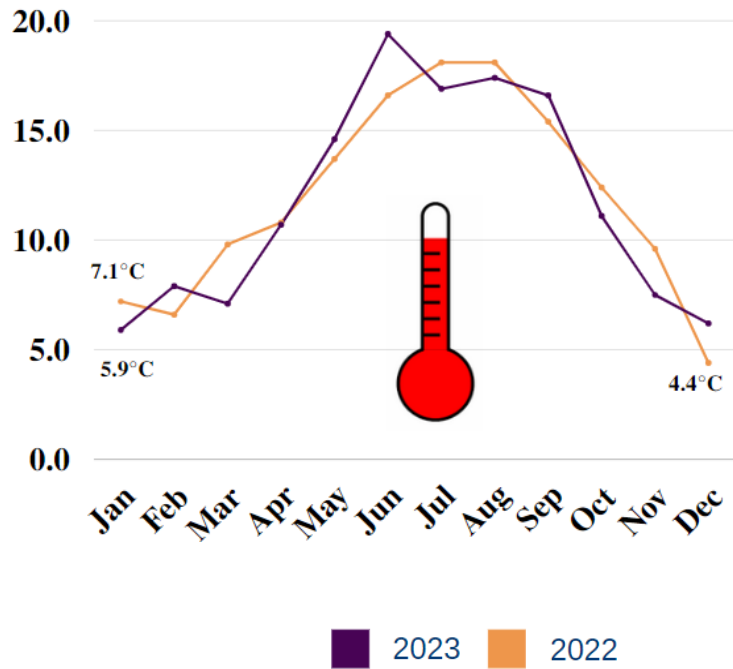


Figure 23 Average Rainfall

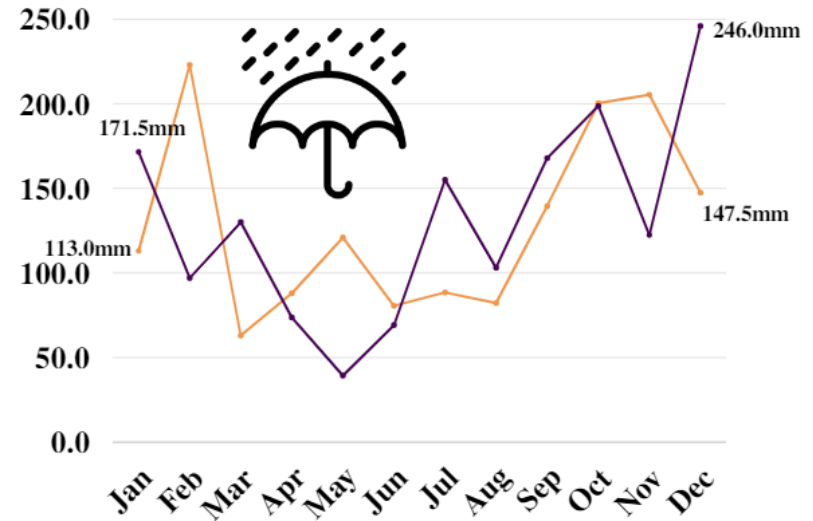
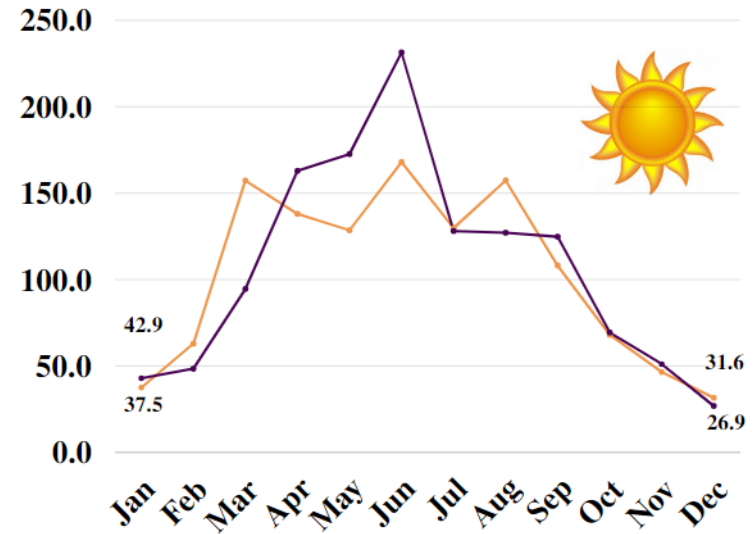


Figure 24 Average Hours of Sunshine



## Currency

The currency information is based on the averages for the full month from data sourced through OFX ([www.ofx.com](http://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

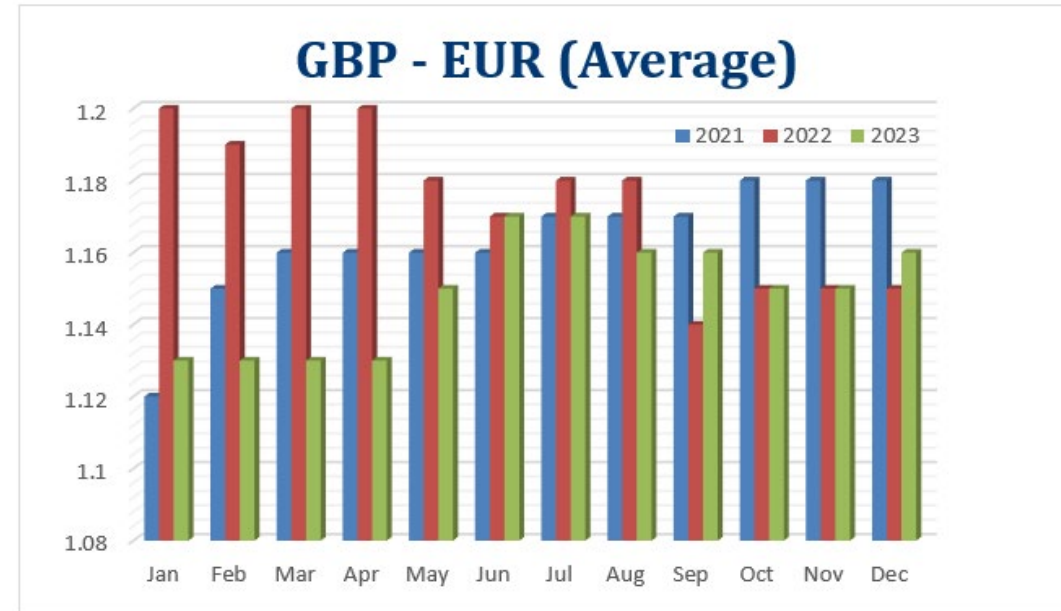
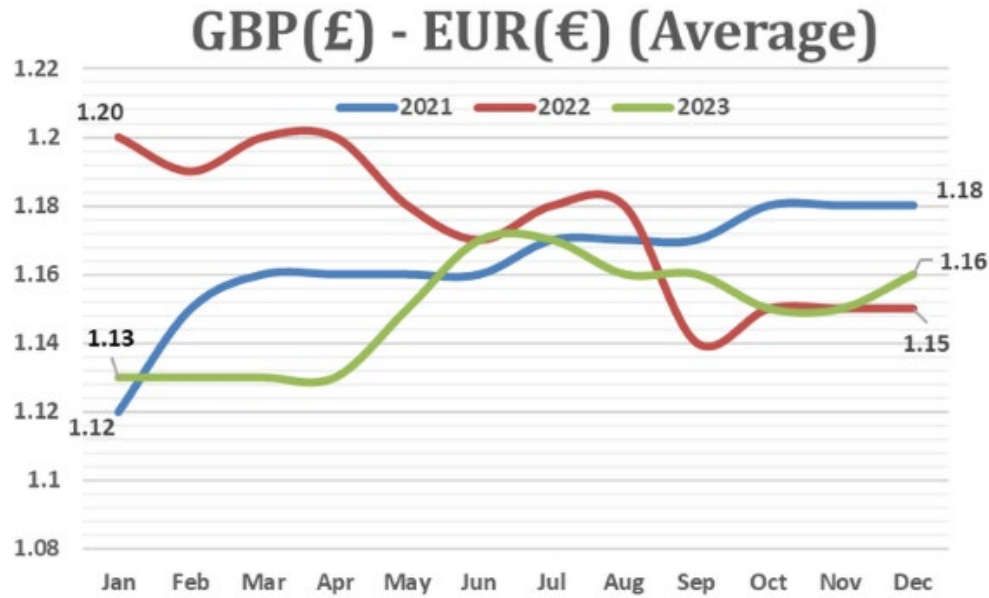
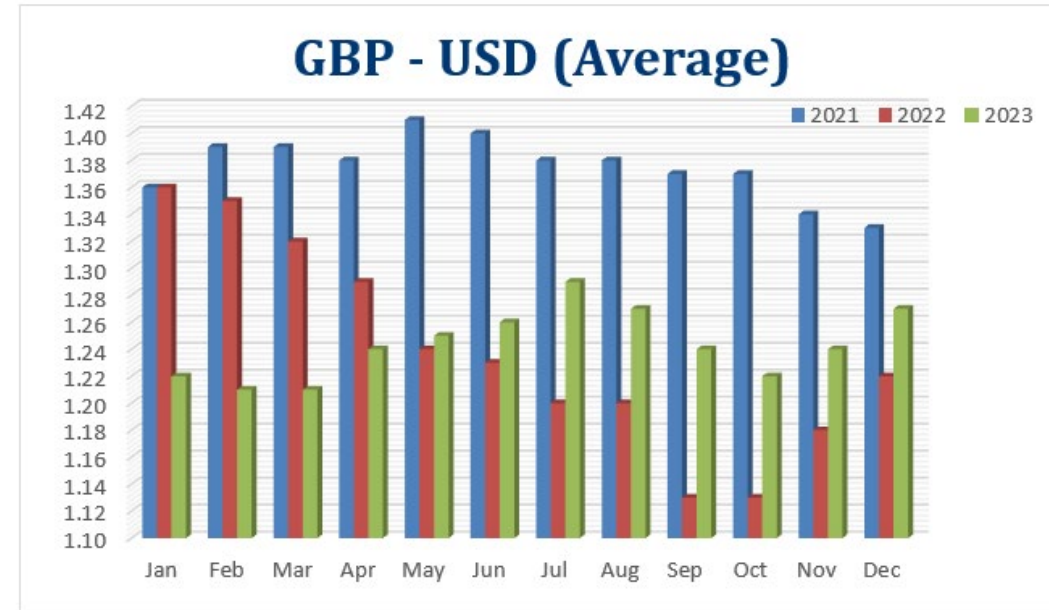
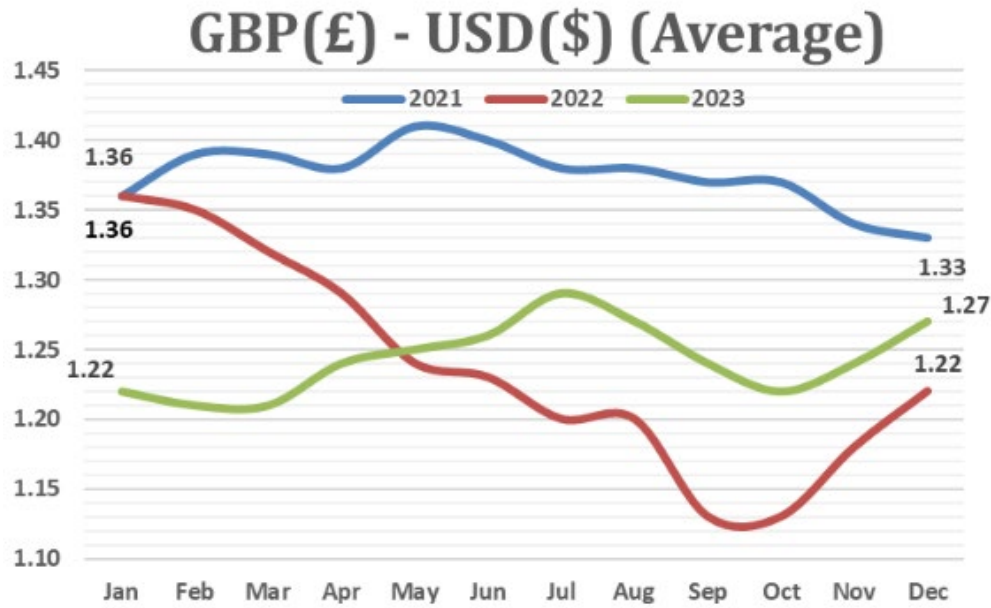


Figure 26 GBP – US Dollar Average Exchange rates



## 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 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](http://www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification)