



# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

April 2024/2023 Report – Self-Catering

## 1.0 Introduction April 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering April 2024 and benchmarking against April 2023. The report reviews Accommodation performance throughout Scotland, highlighting trends across various industry sectors and categories. This report offers a snapshot of accommodation performance based on participating providers. Comments and feedback should be directed to Hugh Sheridan (Email: hugh.sheridan@gcu.ac.uk).

## 2.0 Executive Summary April 2024

The SOAS Report: April 2024/2023 Self-Catering report showed a decline in the Self-Catering sector in Scotland compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for April 2024 experienced a **7.67** percentage point decrease when comparing percentage unit occupancy rates with April 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to April 2024 is 2.3%, down from 3.2% in April. The inflation rate for April 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.6%. Inflation rates for restaurants and cafes were 6.1% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in April showed a 4% year-on-year decrease. It should be noted that with Easter falling in April the year-on-year figures will be distorted, therefore, by adjusting the April and April together this now shows a 0.2% decrease. After a strong start in the first quarter, total food sales dropped by 3.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the April 2024 survey). The survey recorded 48% of respondents (a 4% increase on the April 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

Despite consumer concern about the state of the economy, 33% of UK adults intended to take a domestic overnight trip in the second quarter of 2024, this is a slight decrease compared with April 2023, with 78% of UK adults intending to take a domestic overnight trip in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather and Personal finances.

The recovery in international inbound visitation continued to grow in April 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2023, however, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019.





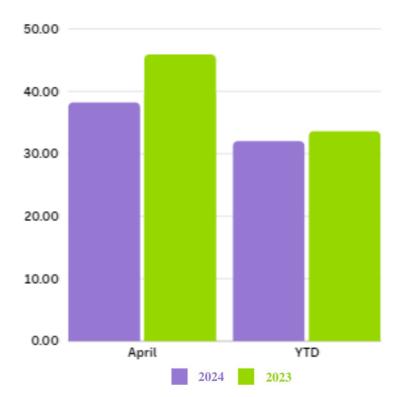


## 3.0 Self-Catering

#### 3.1 Performance by Self-Catering Category

Unit Occupancy – April 2024/2023

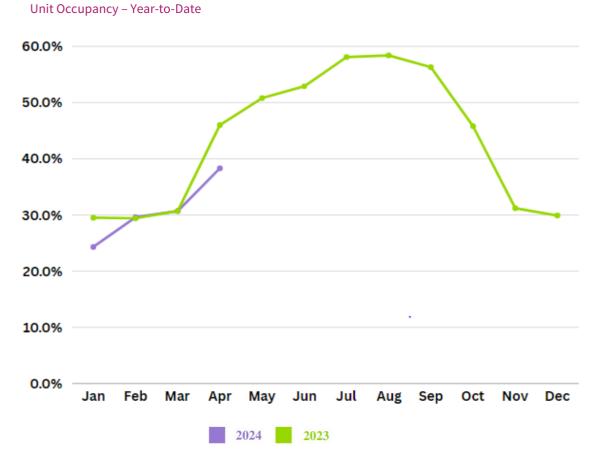
In the Self-Catering sector, the unit occupancy rate for April 2024 was 38.28% when compared to data from the previous year of 45.95% occupancy rate; this shows an overall percentage point increase of 7.67.











**Unit occupancy** rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in April 2024. Lodge/chalets, Remote Rural areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during April 2024.

#### Unit Occupancy – April 2024/2023

Unit Occupancy	April 24	April 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	38.28%	45.95%	-7.67	92	32.06%	33.67%	-1.61	98

<sup>&</sup>lt;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.



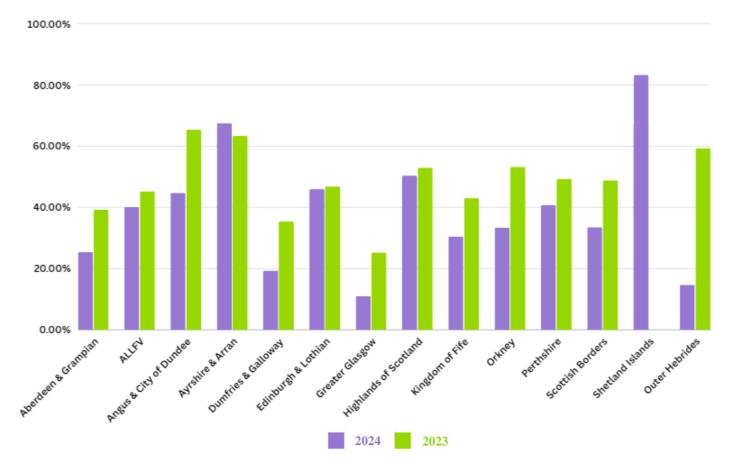
 $<sup>^1</sup>$  24/23 Diff throughout this report is expressed by % Point Change





## Unit Occupancy by Former VisitScotland Area









#### Unit Occupancy by Former VisitScotland Area – April 2024/2023

Area	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change	
Aberdeen & Grampian	25.39%	39.22%	-13.83	86	20.41%	29.96%	-9.55	90	
ALLFV	40.11%	45.25%	-5.14	95	40.39%	38.65%	1.74	102	
Angus & City of Dundee	44.73%	65.41%	-20.68	79	40.47%	45.43%	-4.96	95	
Ayrshire & Arran	67.47%	63.38%	4.09	104	55.55%	60.23%	-4.68	95	
Dumfries & Galloway	19.25%	35.37%	-16.12	84	17.14%	18.62%	-1.48	99	
Edinburgh & Lothian	45.95%	46.80%	-0.85	99	34.97%	27.17%	7.80	108	
Greater Glasgow	11.00%	25.26%	-14.26	86	12.14%	33.87%	-21.73	78	
Highlands of Scotland	50.37%	52.98%	-2.61	97	34.43%	34.05%	0.38	100	
Kingdom of Fife	30.49%	43.03%	-12.54	87	24.98%	24.15%	0.83	101	
Orkney	33.33%	53.19%	-19.86	80	29.75%	58.58%	-28.83	71	
Perthshire	40.80%	49.24%	-8.44	92	32.81%	32.11%	0.70	101	
Scottish Borders	33.53%	48.79%	-15.26	85	20.18%	27.08%	-6.90	93	
Shetland Islands	*	-	*	*	*	-	*	*	
Outer Hebrides	*	59.32%	-44.63	55	35.80%	26.81%	8.99	109	
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included									

## Unit Occupancy by Location (Accessibility & Density) – April 2024/2023

Location accessibility/density	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	11.51%	40.40%	-28.89	71	12.37%	13.79%	-1.42	99
Other Urban Areas	34.04%	48.52%	-14.48	86	32.26%	37.42%	-5.16	95
Accessible Small Towns	s 36.27%	37.18%	-0.91	99	21.87%	18.57%	3.30	103
Remote Small Towns	37.18%	47.82%	-10.64	89	23.56%	27.70%	-4.14	96
Accessible Rural	39.60%	51.13%	-11.53	88	41.46%	42.21%	-0.75	99
Remote Rural	40.09%	43.70%	-3.61	96	30.16%	33.25%	-3.09	97
- Sample Size = Nil	*Sample Size (between 1 and 4) too small to be included							

## Unit Occupancy by Location (Geographic) – April 2024/2023

Location (Geographic)	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	29.32%	39.75%	-10.43	90	20.27%	21.93%	-1.66	98
Inland	40.29%	46.14%	-5.85	94	36.07%	36.53%	-0.46	100
Island	56.93%	65.02%	-8.09	92	48.13%	52.37%	-4.24	96
- Sample Size = Nil	*Samp	le Size (betwe	en 1 and 4) to	o small to be i	ncluded			







## Unit Occupancy by Property Type – April 2024/2023

	April	April					24/23	
Property Type	24	23	24/23 Diff	Change	YTD 24	YTD 23	Diff	Change
Bungalow	44.86%	47.85%	-2.99	97	39.19%	42.24%	-3.05	97
Cottage	34.13%	37.95%	-3.82	96	23.83%	28.16%	-4.33	96
Flat	20.07%	29.12%	-9.05	91	12.81%	14.05%	-1.24	99
Glamping	13.48%	24.12%	-10.64	89	11.38%	17.43%	-6.05	94
House	35.56%	40.60%	-5.04	95	25.36%	27.69%	-2.33	98
Lodge or Chalet	56.53%	66.70%	-10.17	90	54.58%	54.39%	0.19	100
Other Property	20.84%	24.08%	-3.24	97	8.41%	23.58%	-15.17	85
Static Caravan	11.10%	26.81%	-15.71	84	5.04%	6.53%	-1.49	99
Lodge or Chalet Other Property	56.53% 20.84%	66.70% 24.08%	-10.17 -3.24	90 97	54.58% 8.41%	54.39% 23.58%	0.19 -15.17	100 85

- Sample Size = Nil

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

## Unit Occupancy by Tariff – April 2024/2023

Weekly Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	11.81%	13.65%	-1.84	98	4.52%	6.87%	-2.35	98
Under £299	8.34%	27.36%	-19.02	81	7.08%	31.93%	-24.85	75
£300 - £499	17.90%	32.65%	-14.75	85	17.57%	25.72%	-8.15	92
£500 - £799	31.24%	42.40%	-11.16	89	23.11%	28.20%	-5.09	95
£800 or more	48.40%	55.40%	-7.00	93	43.91%	41.81%	2.10	102
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- Sample Size = Nil

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

#### Unit Occupancy by Location Type – April 2024/2023

Location Type	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	8.22%	17.39%	-9.17	91	10.08%	11.57%	-1.49	99
Countryside Village	38.09%	43.32%	-5.23	95	30.51%	30.76%	-0.25	100
Seaside - Coastal	41.27%	52.63%	-11.36	89	36.49%	42.51%	-6.02	94
Small Town	24.26%	36.66%	-12.40	88	20.62%	18.49%	2.13	102
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

#### Unit Occupancy by Grading – April 2024/2023

Grading	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	*	*	*	*
2 Stars	6.79%	21.17%	-14.38	86	8.69%	29.55%	-20.86	79
3 Stars	43.00%	42.05%	0.95	101	32.45%	33.63%	-1.18	99
4 Stars	46.50%	50.07%	-3.57	96	33.21%	36.38%	-3.17	97
5 Stars	60.83%	70.67%	-9.84	90	48.18%	36.22%	11.96	112
Unclassified	32.19%	41.57%	-9.38	91	31.32%	33.12%	-1.80	98
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								