SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:
August 2023/2022 Report – Self-Catering

1.0   Introduction August 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2023 and benchmarking against August 2022. 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 August 2023

The SOAS Report: August 2023/2022 Self-Catering report continued to show growth in the Self-Catering sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for August 2023 experienced a **1.92** percentage point decrease when comparing percentage unit occupancy rates with August 2022.

Data from the Scottish Retail Consortium showed that the retail sales figures in Scotland improved by 5.6% year-on-year in August, however, this is well below the three-month average of 7.5%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2023 found that 22% of respondents said they were "…been hit hard - no option but to cut back on spending" (a 1% increase on the August 2023 survey). The survey recorded 45% of respondents (No change on the August 2023 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 intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% 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 figures above have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in August 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 8% decrease in year-to-date flights compared to 2019.
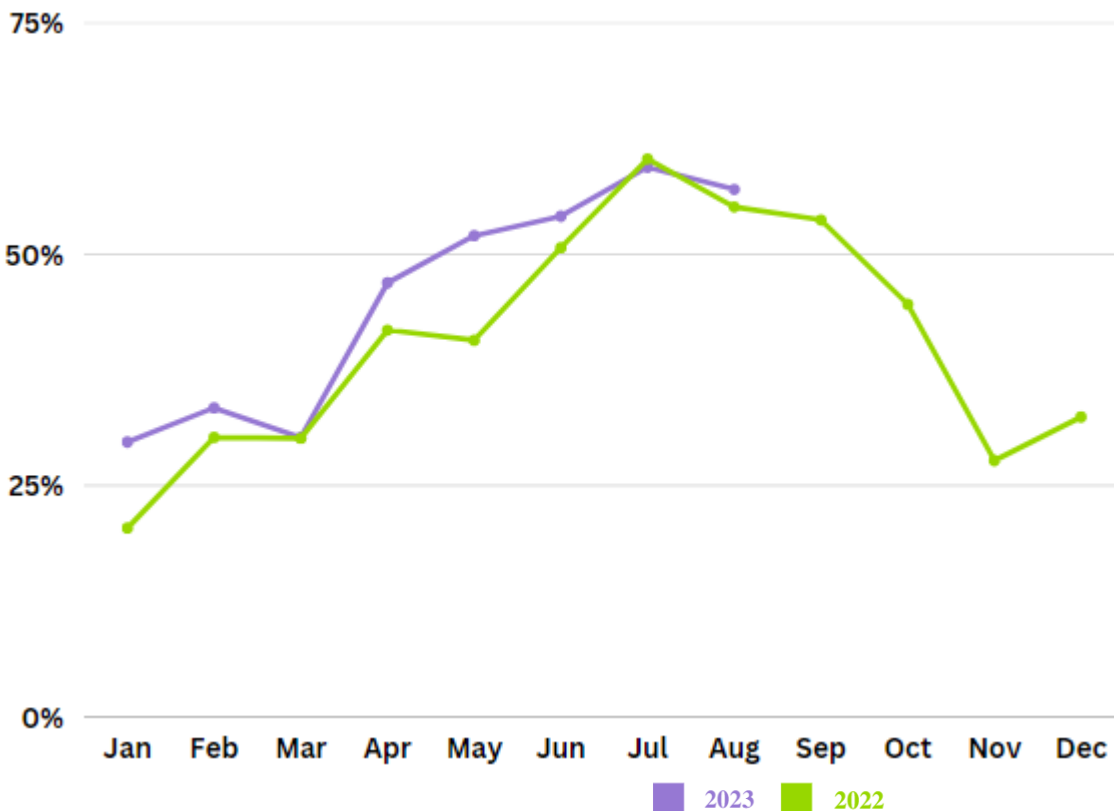
3.0   Self-Catering

3.1 Performance by Self-Catering Category

Unit Occupancy – August 2023/2022

In the Self-Catering sector, the unit occupancy rate for August 2023 was 57.01% when compared to data from the previous year of 55.09% occupancy rate; this shows an overall percentage point decrease of 1.92.
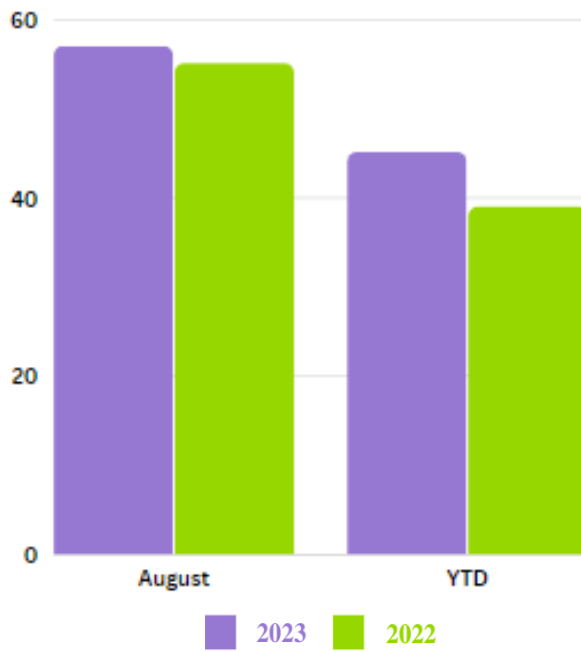

Unit Occupancy – Year-to-Date

Unit occupancy rates (Sample Size >4) in the Orkneys Region were the highest in August 2023. Lodge/chalets, Accessible Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during August 2023.

Unit Occupancy – August 2023/2022

Unit Occupancy	August 23	August 22	23/22 Diff[1]	Change[2]	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	57.01%	55.09%	1.92	102	45.10%	41.03%	4.07	104

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – August 2023/2022

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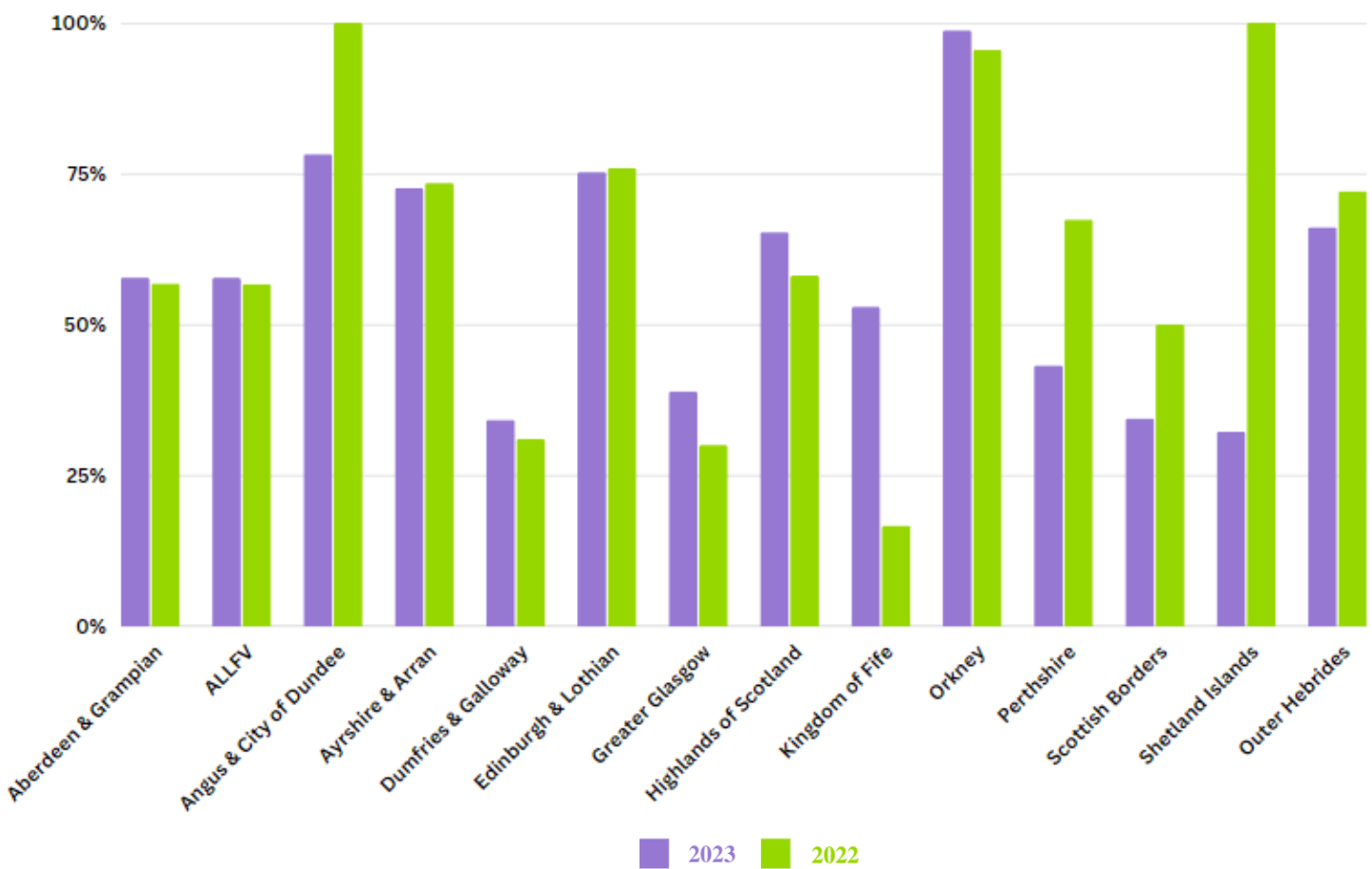
[1] 23/22 Diff throughout this report is expressed by % Point Change

[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.

Unit Occupancy by Former VisitScotland Area – August 2023/2022

Area	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	57.74%	56.77%	0.97	101	44.81%	41.35%	3.46	103
ALLFV	57.69%	56.65%	1.04	101	48.50%	45.45%	3.05	103
Angus & City of Dundee	78.22%	*	-21.78	78	58.77%	67.14%	-8.37	92
Ayrshire & Arran	72.53%	73.39%	-0.86	99	65.32%	64.83%	0.49	100
Dumfries & Galloway	34.17%	30.97%	3.20	103	24.82%	18.58%	6.24	106
Edinburgh & Lothian	*	75.86%	-0.65	99	51.83%	39.88%	11.95	112
Greater Glasgow	38.87%	30.00%	8.87	109	29.64%	20.36%	9.28	109
Highlands of Scotland	65.29%	58.09%	7.20	107	48.51%	44.77%	3.74	104
Kingdom of Fife	52.90%	16.66%	36.24	136	38.90%	32.08%	6.82	107
Orkney	98.71%	95.48%	3.23	103	77.49%	68.17%	9.32	109
Perthshire	43.22%	67.37%	-24.15	76	44.68%	31.74%	12.94	113
Scottish Borders	34.41%	50.00%	-15.59	84	33.06%	31.09%	1.97	102
Shetland Islands	*	*	*	*	*	96.10%	-20.49	80
Outer Hebrides	*	72.05%	-5.93	94	47.23%	57.29%	-10.06	90

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

Unit Occupancy by Location (Accessibility & Density) – August 2023/2022

Location accessibility/density	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	35.80%	-35.80	64	17.33%	14.34%	2.99	103
Other Urban Areas	59.45%	53.77%	5.68	106	45.99%	43.33%	2.66	103
Accessible Small Towns	41.18%	46.32%	-5.14	95	27.71%	25.61%	2.10	102
Remote Small Towns	61.61%	49.48%	12.13	112	39.66%	37.35%	2.31	102
Accessible Rural	66.76%	66.62%	0.14	100	57.47%	51.58%	5.89	106
Remote Rural	53.16%	52.87%	0.29	100	43.58%	42.17%	1.41	101

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

Unit Occupancy by Location (Geographic) – August 2023/2022

Location (Geographic)	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	47.99%	39.72%	8.27	108	35.01%	28.02%	6.99	107
Inland	58.38%	58.50%	-0.12	100	46.80%	42.65%	4.15	104
Island	74.51%	79.36%	-4.85	95	66.95%	68.88%	-1.93	98

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

Unit Occupancy by Property Type – August 2023/2022

Property Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	55.73%	48.83%	6.90	107	50.05%	47.23%	2.82	103
Cottage	47.37%	49.35%	-1.98	98	37.05%	34.67%	2.38	102
Flat	38.32%	38.62%	-0.30	100	22.49%	22.94%	-0.45	100
Glamping	53.21%	37.90%	15.31	115	38.29%	15.01%	23.28	123
House	63.62%	63.98%	-0.36	100	45.04%	43.52%	1.52	102
Lodge or Chalet	72.81%	73.64%	-0.83	99	65.69%	66.73%	-1.04	99
Other Property	14.56%	33.65%	-19.09	81	24.21%	25.35%	-1.14	99
Static Caravan	51.82%	25.17%	26.65	127	31.38%	10.89%	20.49	120

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

Unit Occupancy by Tariff – August 2023/2022

Weekly Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	12.72%	0.00%	12.72	113	10.20%	1.74%	8.46	108
Under £299	0.70%	0.93%	-0.23	100	34.29%	9.38%	24.91	125
£300 - £499	25.33%	33.84%	-8.51	91	27.56%	23.60%	3.96	104
£500 - £799	49.46%	40.10%	9.36	109	37.63%	32.73%	4.90	105
£800 or more	68.72%	72.30%	-3.58	96	56.78%	59.67%	-2.89	97

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

Unit Occupancy by Location Type – August 2023/2022

Location Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	6.71%	22.33%	-15.62	84	15.19%	12.26%	2.93	103
Countryside Village	55.32%	56.09%	-0.77	99	41.77%	40.24%	1.53	102
Seaside - Coastal	59.71%	57.67%	2.04	102	52.07%	48.14%	3.93	104
Small Town	63.54%	46.65%	16.89	117	39.81%	27.66%	12.15	112

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

Unit Occupancy by Grading – August 2023/2022

Grading	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	46.05%	40.21%	5.84	106	32.82%	27.81%	5.01	105
3 Stars	59.37%	50.82%	8.55	109	45.53%	39.17%	6.36	106
4 Stars	59.14%	58.61%	0.53	101	49.26%	39.84%	9.42	109
5 Stars	73.48%	78.18%	-4.70	95	49.50%	56.77%	-7.27	93
Unclassified	52.47%	49.67%	2.80	103	42.35%	40.08%	2.27	102

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