



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2024/2023 Report - Self-Catering

1.0 Introduction August 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2024 and benchmarking against August 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 August 2024

The SOAS Report: August 2024/2023 Self-Catering report showed a increase in the Self-Catering sector in Scotland compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for August 2024 experienced a **0.24** percentage point increase when comparing percentage unit occupancy rates with August 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to August 2024 is 2.2%, unchanged from July. The inflation 12-month rate (%) for August 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.0%. Inflation rates for restaurants and cafes were 4.3% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in August, however, compared to the 5.6% increase in August 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of August 2023, when they had increased by 8.6%.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the July 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the July 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 August to September sector of 2024 and 79% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, the three key 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 as mentioned earlier have been consistent across previously published GB National Tourist Survey s(VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation grew in August 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 1% increase when compared to the same period in 2023, however, UK air connectivity saw a 5% decrease in year-to-date flights compared to 2019.



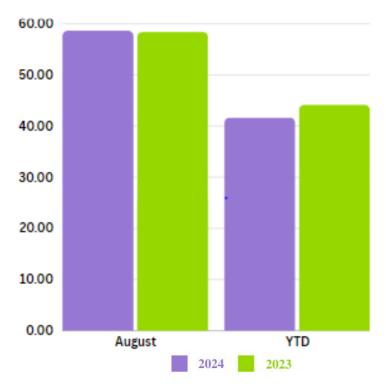


3.0 Self-Catering

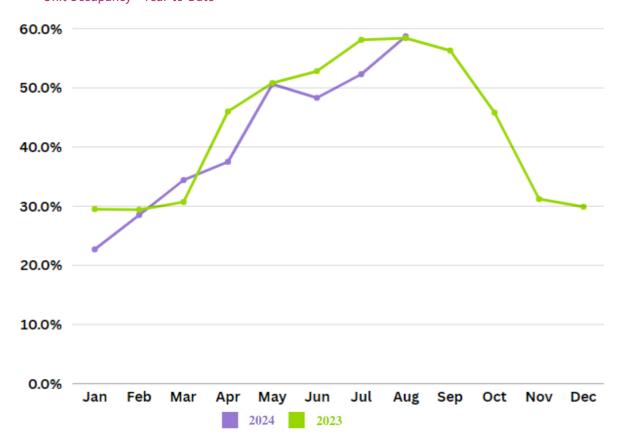
3.1 Performance by Self-Catering Category

Unit Occupancy – August 2024/2023

In the Self-Catering sector, the unit occupancy rate for August 2024 was **58.65**% when compared to data from the previous year of **58.41**% occupancy rate; this shows an overall percentage point increase of **0.24**.



Unit Occupancy – Year-to-Date







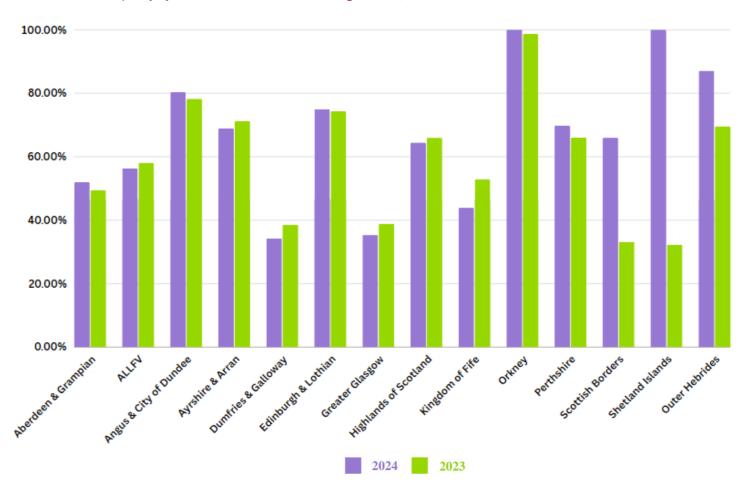
Unit occupancy rates (Sample Size >4) in the Edinburgh & Lothian Region were the highest in August 2024. Lodge/chalets, Other Urban Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during August 2024.

Unit Occupancy - August 2024/2023

Unit Occupancy	August 24	August 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	58.65%	58.41%	0.24	100	41.67%	44.18%	-2.51	97

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area - August 2024/2023



¹ 24/23 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 2024/2023

Area	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	51.98%	49.47%	2.51	103	27.61%	37.51%	-9.90	90
ALLFV	56.37%	58.09%	-1.72	98	45.48%	46.96%	-1.48	99
Angus & City of Dundee	80.39%	78.22%	2.17	102	58.73%	59.03%	-0.30	100
Ayrshire & Arran	68.97%	71.26%	-2.29	98	62.08%	64.11%	-2.03	98
Dumfries & Galloway	34.25%	38.51%	-4.26	96	24.19%	27.94%	-3.75	96
Edinburgh & Lothian	74.98%	74.33%	0.65	101	45.11%	42.97%	2.14	102
Greater Glasgow	35.32%	38.87%	-3.55	96	20.13%	29.64%	-9.51	90
Highlands of Scotland	64.47%	65.99%	-1.52	98	47.59%	48.38%	-0.79	99
Kingdom of Fife	43.93%	52.90%	-8.97	91	28.69%	38.90%	-10.21	90
Orkney	*	98.71%	1.29	101	66.93%	77.49%	-10.56	89
Perthshire	69.78%	66.04%	3.74	104	46.97%	48.05%	-1.08	99
Scottish Borders	66.00%	33.18%	32.82	133	33.80%	33.84%	-0.04	100
Shetland Islands	*	*	*	*	85.62%	*	10.01	110
Outer Hebrides	*	69.52%	17.58	118	65.33%	47.80%	17.53	118
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

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

Location accessibility/density	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	29.32%	34.71%	-5.39	95	20.46%	17.66%	2.80	103
Other Urban Areas	63.35%	59.39%	3.96	104	42.53%	45.25%	-2.72	97
Accessible Small Towns	56.13%	45.13%	11.00	111	36.01%	29.38%	6.63	107
Remote Small Towns	40.04%	61.14%	-21.10	79	31.30%	39.74%	-8.44	92
Accessible Rural	56.58%	64.81%	-8.23	92	44.41%	52.08%	-7.67	92
Remote Rural	61.31%	57.21%	4.10	104	43.38%	44.16%	-0.78	99
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Location (Geographic) - August 2024/2023

Location (Geographic)	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	49.27%	52.07%	-2.80	97	31.73%	36.17%	-4.44	96
Inland	59.90%	58.72%	1.18	101	43.44%	44.63%	-1.19	99
Island	83.69%	75.24%	8.45	108	66.04%	66.14%	-0.10	100
- Sample Size = Nil		*Samp	ole Size (betwe	en 1 and 4) to	oo small to be i	ncluded		





Unit Occupancy by Property Type – August 2024/2023

	August	August					24/23	
Property Type	24	23	24/23 Diff	Change	YTD 24	YTD 23	Diff	Change
Bungalow	66.39%	58.07%	8.32	108	50.17%	49.28%	0.89	101
Cottage	51.51%	54.02%	-2.51	97	35.83%	38.37%	-2.54	97
Flat	34.66%	38.05%	-3.39	97	23.79%	23.45%	0.34	100
Glamping	53.71%	42.61%	11.10	111	29.12%	24.47%	4.65	105
House	67.14%	54.89%	12.25	112	41.04%	40.26%	0.78	101
Lodge or Chalet	73.17%	73.56%	-0.39	100	60.07%	64.10%	-4.03	96
Other Property	20.67%	20.12%	0.55	101	12.32%	24.57%	-12.25	88
Static Caravan	18.06%	52.85%	-34.79	65	10.69%	35.10%	-24.41	76
- Sample Size -	Mil	*\$2	mnla Siza (hatw	oon 1 and 4)	too small to h	o included		

- Sample Size = Nil

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

Unit Occupancy by Tariff - August 2024/2023

Weekly Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	56.53%	12.81%	43.72	144	28.33%	10.02%	18.31	118
Under £299	30.25%	8.00%	22.25	122	20.35%	28.97%	-8.62	91
£300 - £499	21.27%	28.00%	-6.73	93	24.61%	27.01%	-2.40	98
£500 - £799	40.13%	49.47%	-9.34	91	33.17%	37.66%	-4.49	96
£800 or more	70.19%	69.76%	0.43	100	51.96%	54.95%	-2.99	97

- Sample Size = Nil

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

Unit Occupancy by Location Type - August 2024/2023

Location Type	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	13.59%	19.09%	-5.50	95	17.43%	13.27%	4.16	104
Countryside Village	59.11%	60.33%	-1.22	99	42.01%	42.11%	-0.10	100
Seaside - Coastal	59.77%	61.56%	-1.79	98	44.47%	52.32%	-7.85	92
Small Town	60.86%	39.10%	21.76	122	31.99%	27.82%	4.17	104
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Grading – August 2024/2023

Grading	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	25.41%	49.17%	-23.76	76	18.40%	32.61%	-14.21	86
3 Stars	71.50%	63.65%	7.85	108	51.72%	46.68%	5.04	105
4 Stars	62.76%	66.15%	-3.39	97	44.99%	49.25%	-4.26	96
5 Stars	78.64%	70.74%	7.90	108	57.99%	48.66%	9.33	109
Unclassified	48.34%	50.75%	-2.41	98	35.52%	40.98%	-5.46	95
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

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