

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

December 2024/2023 Report – Self-Catering

1.0 Introduction December 2024/2023

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

The SOAS Report: December 2024/2023 Self-Catering report showed an increase in the Self-Catering sector in Scotland compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for December 2024 experienced a **0.88** percentage point decrease when comparing percentage unit occupancy rates with December 2023.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to December 2024 is 2.5%, up from 2.6% in November. The CPI 12-month rate (%) for December 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.4% down from 3.6% in November. Inflation rates for restaurants and cafes were 3.4% down from 4.0% in November.

Data from the Scottish Retail Consortium showed that total sales in Scotland increased by 0.8% in December compared to the same period in 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering December 2024 found that 19% of respondents said they had “...been hit hard - no option but to cut back on spending” (no change on the November 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the November 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, 26% of UK adults intended to take a domestic overnight trip in the first quarter of 2025 and 80% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (78%). However, the three key barriers to taking an overnight UK trip in the next six months continue to be the UK weather, rising cost of living, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

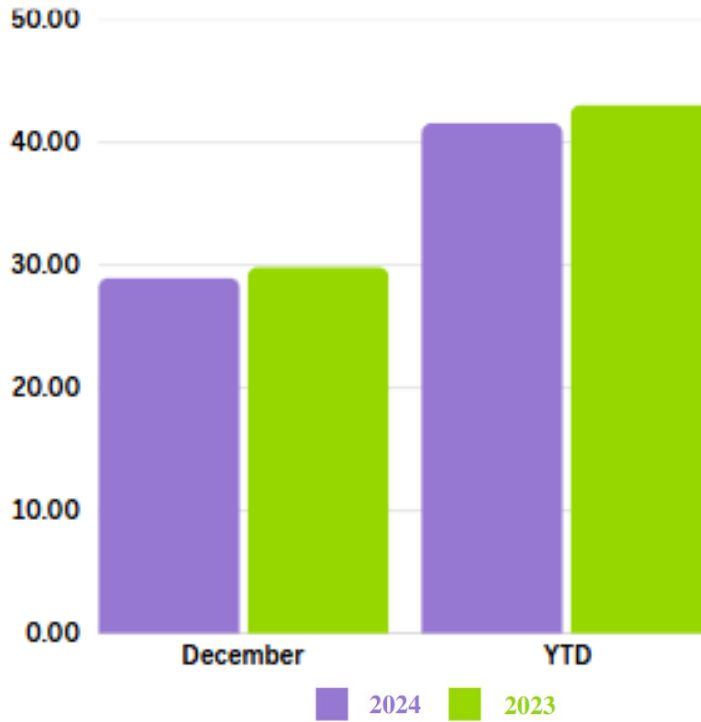
Eurocontrol (European Air Traffic Agency) indicated in December 2024 that UK air connectivity saw a 1% decrease when compared to the same period in 2023, also, UK air connectivity saw a 9% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for December 2024 global air passenger demand, measured by revenue per kilometer, was up 8.6% compared to December 2023. International demand rose 10.6% over the same period with domestic demand increasing 5.5%. Asia-Pacific region was the biggest global air passenger growth driver in December 2024 at 16.9% when compared to Europe at 8.7%.

3.0 Self-Catering

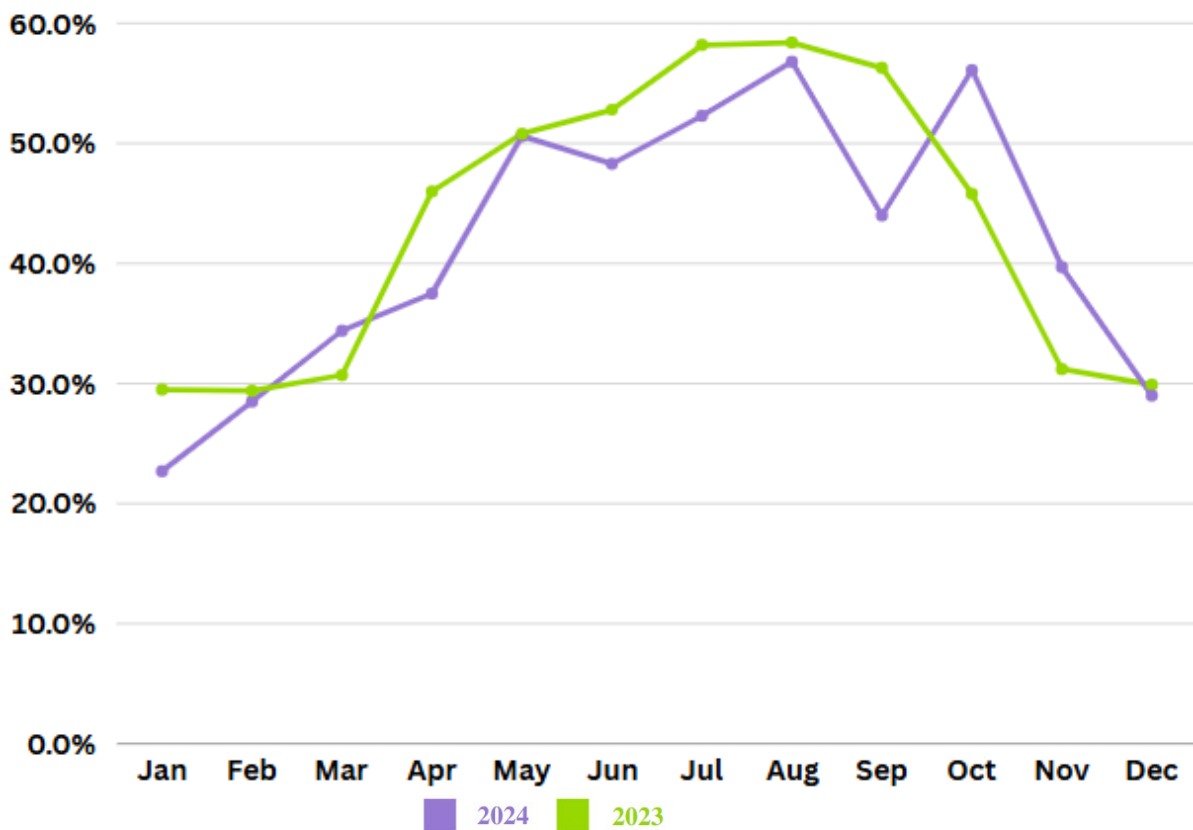
3.1 Performance by Self-Catering Category

Unit Occupancy – December 2024/2023

In the Self-Catering sector, the unit occupancy rate for December 2024 was **28.98%** when compared to data from the previous year of **29.86%** occupancy rate; this shows an overall percentage point decrease of **0.88**.



Unit Occupancy – Year-to-Date



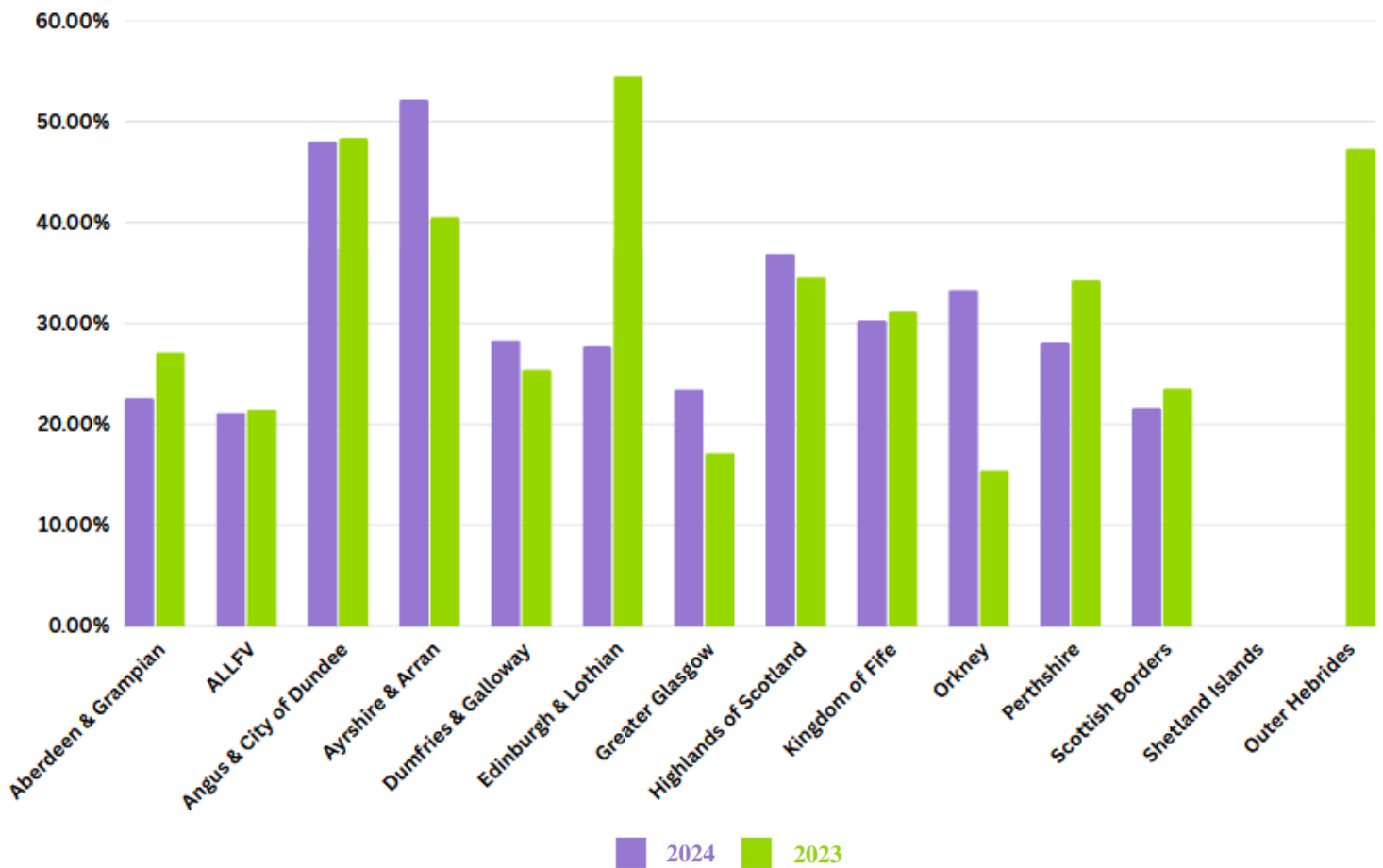
Unit occupancy rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in December 2024. Lodges/chalets, Large urban areas, island properties, and those charging a weekly tariff £800 and over experienced the highest percentage unit occupancy rates during December 2024.

Unit Occupancy – December 2024/2023

Unit Occupancy	Dec 24	Dec 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	28.98%	29.86%	-0.88	99	41.58%	43.07%	-1.49	99

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – December 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 Property Type – December 2024/2023

Property Type	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Bungalow	30.32%	29.82%	0.50	101	49.47%	46.88%	2.59	103
Cottage	27.28%	25.53%	1.75	102	37.81%	36.98%	0.83	101
Flat	24.86%	17.36%	7.50	108	26.62%	23.56%	3.06	103
Glamping	8.57%	38.02%	-29.45	71	22.82%	21.93%	0.89	101
House	22.21%	27.57%	-5.36	95	35.62%	38.91%	-3.29	97
Lodge or Chalet	44.68%	46.27%	-1.59	98	59.32%	62.83%	-3.51	96
Other Property	7.58%	15.70%	-8.12	92	13.00%	21.03%	-8.03	92
Static Caravan	1.82%	39.05%	-37.23	63	12.34%	35.09%	-22.75	77
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Tariff – December 2024/2023

Weekly Tariff	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	9.65%	2.27%	7.38	107	28.24%	9.38%	18.86	119
Under £299	9.44%	27.79%	-18.35	82	18.53%	26.57%	-8.04	92
£300 - £499	22.20%	8.03%	14.17	114	28.46%	26.59%	1.87	102
£500 - £799	23.47%	21.25%	2.22	102	34.59%	36.25%	-1.66	98
£800 or more	34.33%	41.05%	-6.72	93	49.53%	54.15%	-4.62	95
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Location Type – December 2024/2023

Location Type	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	25.86%	11.70%	14.16	114	22.10%	13.07%	9.03	109
Countryside Village	32.37%	33.10%	-0.73	99	42.67%	42.00%	0.67	101
Seaside - Coastal	27.97%	27.12%	0.85	101	43.84%	49.09%	-5.25	95
Small Town	13.88%	26.11%	-12.23	88	26.49%	28.89%	-2.40	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Grading – December 2024/2023

Grading	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	36.60%	13.07%	23.53	124	20.64%	30.64%	-10.00	90
3 Stars	38.64%	29.63%	9.01	109	50.91%	44.84%	6.07	106
4 Stars	36.38%	40.97%	-4.59	95	46.64%	48.20%	-1.56	98
5 Stars	52.58%	49.94%	2.64	103	59.23%	52.12%	7.11	107
Unclassified	18.02%	18.57%	-0.55	99	35.25%	38.77%	-3.52	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						