

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: *January 2024/2023 Report – Self-Catering*

## 1.0 Introduction January 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering January 2024 and benchmarking against January 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](mailto:hugh.sheridan@gcu.ac.uk)).

## 2.0 Executive Summary January 2024

The SOAS Report: January 2024/2023 Self-Catering report showed a decline in the Self-Catering sector in Scotland when compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for January 2024 experienced a **5.21** percentage point decrease when comparing percentage unit occupancy rates with January 2023.

Data from the Scottish Retail Consortium showed that total sales remained weak in January with growth of just 1.9%. Total food sales continued to drive sales, with a 5.4% increase when compared with monthly performance in January 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 19% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 2% decrease on the December 2023 survey). The survey recorded 48% of respondents (a 1% decrease on the December 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, 21% of UK adults intended to take a domestic overnight trip in the first quarter of 2024 and 79% in the following 12 months. These figures show a significant increase in those planning an overnight trip compared with January 2023 (16% and 70% respectively). However, the key three barriers to taking an overnight UK trip in the next six months continue to be 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 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

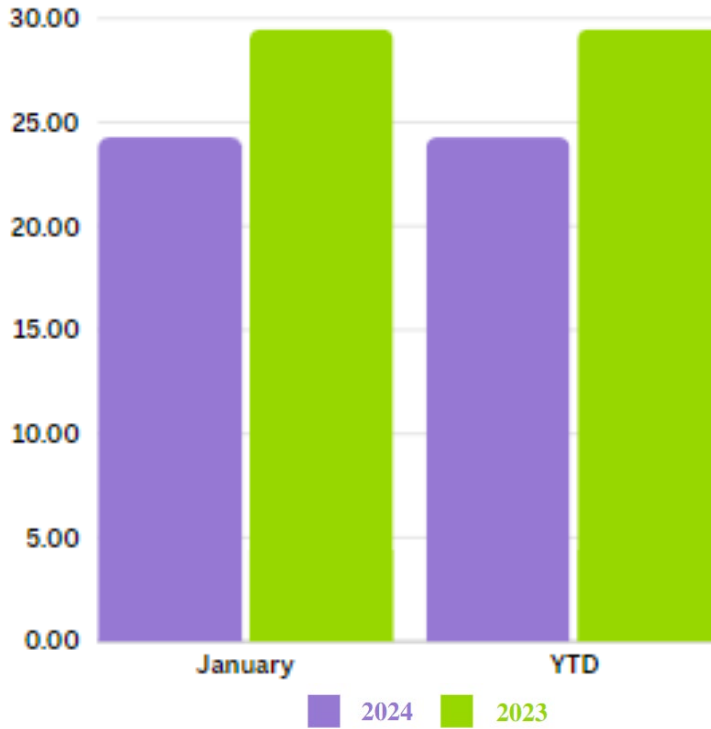
The recovery in international inbound visitation continued to stall in December 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 3% increase when compared to the same period in 2023, however, UK air connectivity had seen a 11% decrease in year-to-date flights compared to 2019.

### 3.0 Self-Catering

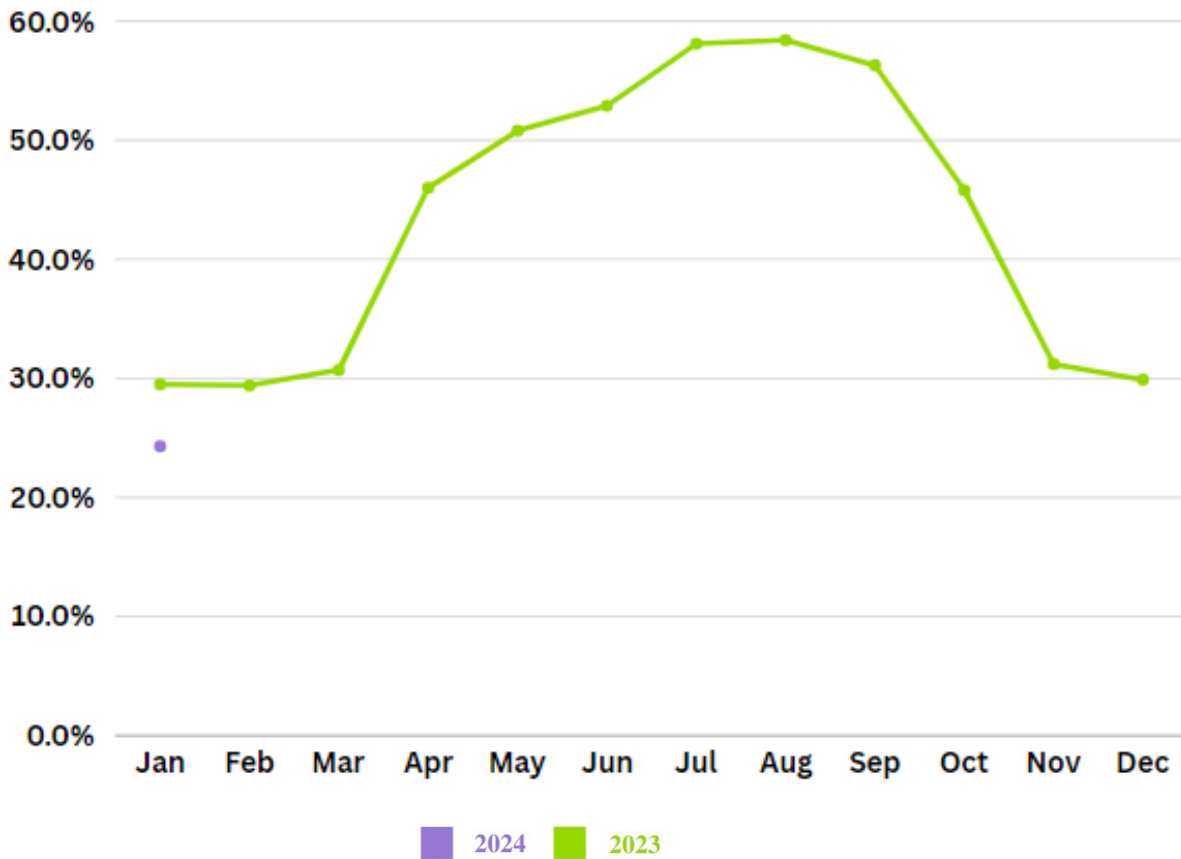
#### 3.1 Performance by Self-Catering Category

##### Unit Occupancy – January 2024/2023

In the Self-Catering sector, the unit occupancy rate for January 2024 was 24.28% when compared to data from the previous year of 29.49% occupancy rate; this shows an overall percentage point decrease of 5.21.



Unit Occupancy – Year-to-Date



**Unit occupancy** rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in January 2024. 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 January 2024.

Unit Occupancy – January 2024/2023

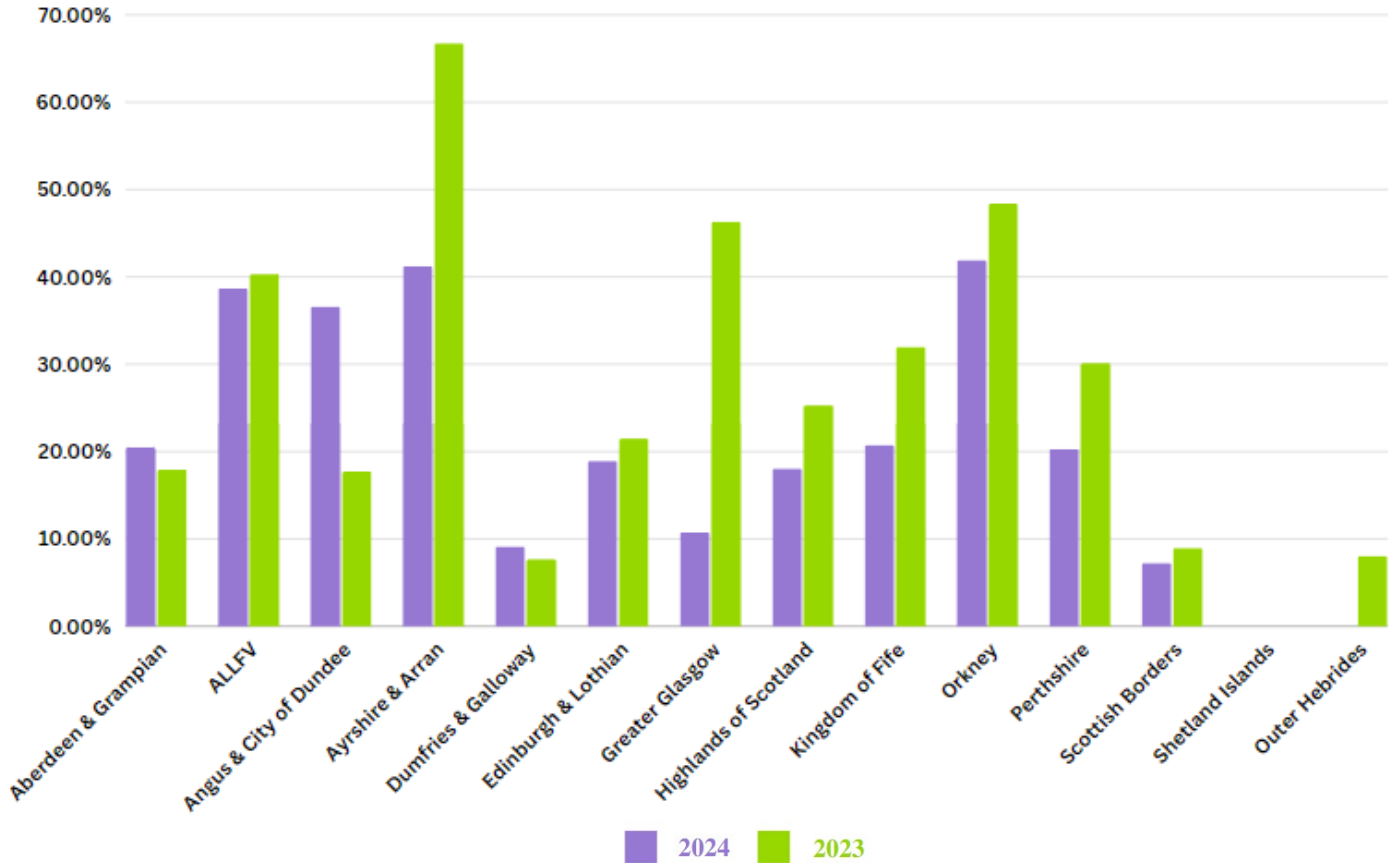
Unit Occupancy	January 24	January 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	24.28%	29.49%	-5.21	95	24.28%	29.49%	-5.21	95

<sup>1</sup> 24/23 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.

## Unit Occupancy by Former VisitScotland Area

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



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

Area	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	20.47%	17.92%	2.55	103	20.47%	17.92%	2.55	103
ALLFV	38.69%	40.32%	-1.63	98	38.69%	40.32%	-1.63	98
Angus & City of Dundee	36.60%	17.74%	18.86	119	36.60%	17.74%	18.86	119
Ayrshire & Arran	41.23%	66.75%	-25.52	74	41.23%	66.75%	-25.52	74
Dumfries & Galloway	9.14%	7.66%	1.48	101	9.14%	7.66%	1.48	101
Edinburgh & Lothian	18.93%	21.50%	-2.57	97	18.93%	21.50%	-2.57	97
Greater Glasgow	10.75%	46.33%	-35.58	64	10.75%	46.33%	-35.58	64
Highlands of Scotland	18.06%	25.28%	-7.22	93	18.06%	25.28%	-7.22	93
Kingdom of Fife	20.76%	31.99%	-11.23	89	20.76%	31.99%	-11.23	89
Orkney	*	*	*	*	*	*	*	*
Perthshire	20.29%	30.12%	-9.83	90	20.29%	30.12%	-9.83	90
Scottish Borders	7.25%	8.97%	-1.72	98	7.25%	8.97%	-1.72	98
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	*	*	*	-	*	*	*

- Sample Size = Nil

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

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

Location accessibility/density	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	18.01%	14.18%	3.83	104	18.01%	14.18%	3.83	104
Other Urban Areas	26.09%	24.84%	1.25	101	26.09%	24.84%	1.25	101
Accessible Small Towns	6.67%	13.99%	-7.32	93	6.67%	13.99%	-7.32	93
Remote Small Towns	9.16%	13.68%	-4.52	95	9.16%	13.68%	-4.52	95
Accessible Rural	45.49%	47.75%	-2.26	98	45.49%	47.75%	-2.26	98
Remote Rural	18.93%	27.29%	-8.36	92	18.93%	27.29%	-8.36	92

- Sample Size = Nil

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

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

Location (Geographic)	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	9.47%	15.67%	-6.20	94	9.47%	15.67%	-6.20	94
Inland	30.19%	33.96%	-3.77	96	30.19%	33.96%	-3.77	96
Island	36.02%	39.76%	-3.74	96	36.02%	39.76%	-3.74	96

- Sample Size = Nil

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

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

Property Type	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Bungalow	24.46%	45.04%	-20.58	79	24.46%	45.04%	-20.58	79
Cottage	13.23%	22.97%	-9.74	90	13.23%	22.97%	-9.74	90
Flat	6.19%	11.80%	-5.61	94	6.19%	11.80%	-5.61	94
Glamping	16.92%	*	-5.75	94	16.92%	*	-5.75	94
House	10.45%	14.86%	-4.41	96	10.45%	14.86%	-4.41	96
Lodge or Chalet	53.90%	45.72%	8.18	108	53.90%	45.72%	8.18	108
Other Property	0.12%	-	0.12	100	0.12%	-	0.12	100
Static Caravan	2.75%	0.00%	2.75	103	2.75%	0.00%	2.75	103

- Sample Size = Nil

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

### Unit Occupancy by Tariff – January 2024/2023

Weekly Tariff	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	2.56%	0.86%	1.70	102	2.56%	0.86%	1.70	102
Under £299	3.65%	34.88%	-31.23	69	3.65%	34.88%	-31.23	69
£300 - £499	12.66%	18.49%	-5.83	94	12.66%	18.49%	-5.83	94
£500 - £799	13.93%	19.99%	-6.06	94	13.93%	19.99%	-6.06	94
£800 or more	37.98%	40.59%	-2.61	97	37.98%	40.59%	-2.61	97

- Sample Size = Nil

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

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

Location Type	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	13.32%	12.28%	1.04	101	13.32%	12.28%	1.04	101
Countryside Village	21.79%	23.73%	-1.94	98	21.79%	23.30%	-1.51	98
Seaside - Coastal	30.12%	39.47%	-9.35	91	30.12%	39.47%	-9.35	91
Small Town	8.08%	19.67%	-11.59	88	8.08%	19.67%	-11.59	88

- Sample Size = Nil

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

**Unit Occupancy by Grading – January 2024/2023**

Grading	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	-	*	*	*	-	*	*
2 Stars	10.88%	28.12%	-17.24%	83	10.88%	28.12%	-17.24%	83
3 Stars	17.83%	25.19%	-7.36%	93	17.83%	25.19%	-7.36%	93
4 Stars	20.62%	24.87%	-4.25%	96	20.62%	24.87%	-4.25%	96
5 Stars	41.04%	34.71%	6.33%	106	41.04%	34.71%	6.33%	106
Unclassified	27.64%	34.64%	-7.00%	93	27.64%	34.64%	-7.00%	93
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						