



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

June 2024/2023 Report - Self-Catering

1.0 Introduction June 2024/2023

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

The SOAS Report: June 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 June 2024 experienced a **5.96** percentage point decrease when comparing percentage unit occupancy rates with June 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to June 2024 is 2.0%. The inflation rate for June 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.9%. Inflation rates for restaurants and cafes were 6.2% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.6% in June, however, compared to the 8.8% increase in June 2023 this was disappointing growth in total sales. Total food sales decreased by 1.1% compared to the monthly performance of June 2023, when they had increased by 15.8%.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the May 2024 survey). The survey recorded 44% of respondents (a 2% decrease on the May 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, 55% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% 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 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 five 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 stalled in June 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw no increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.



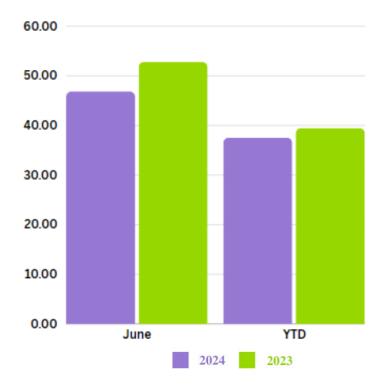


3.0 Self-Catering

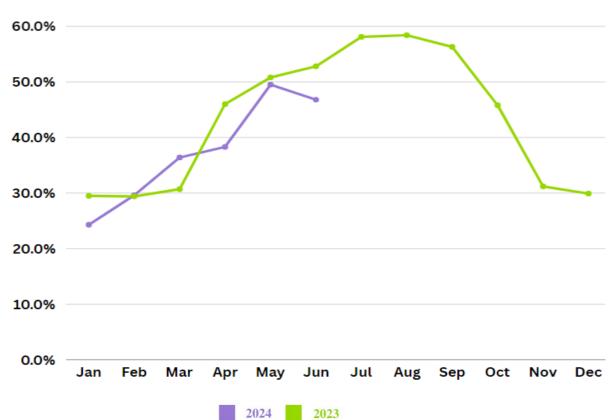
3.1 Performance by Self-Catering Category

Unit Occupancy – June 2024/2023

In the Self-Catering sector, the unit occupancy rate for June 2024 was **46.83**% when compared to data from the previous year of **52.79**% occupancy rate; this shows an overall percentage point decrease of **5.96**.



Unit Occupancy - Year-to-Date







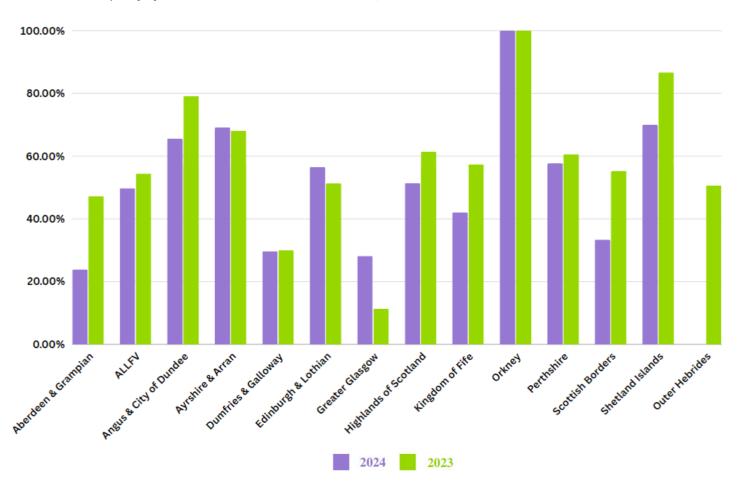
Unit occupancy rates (Sample Size >4) in the Orkney Region were the highest in June 2024. Lodge/chalets, Remote Rural areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during June 2024.

Unit Occupancy - June 2024/2023

Unit Occupancy	June 24	June 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	46.83%	52.79%	-5.96	94	37.53%	39.47%	-1.94	98

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – June 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 – June 2024/2023

Area	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	23.85%	47.23%	-23.38	77	22.85%	33.70%	-10.85	89
ALLFV	49.77%	54.44%	-4.67	95	42.75%	43.42%	-0.67	99
Angus & City of Dundee	65.57%	79.16%	-13.59	86	48.51%	53.51%	-5.00	95
Ayrshire & Arran	69.14%	68.11%	1.03	101	60.34%	62.19%	-1.85	98
Dumfries & Galloway	29.67%	29.97%	-0.30	100	22.06%	23.72%	-1.66	98
Edinburgh & Lothian	56.50%	51.32%	5.18	105	44.12%	34.80%	9.32	109
Greater Glasgow	28.17%	11.34%	16.83	117	16.84%	29.54%	-12.70	87
Highlands of Scotland	51.38%	61.43%	-10.05	90	42.72%	42.18%	0.54	101
Kingdom of Fife	42.04%	57.33%	-15.29	85	29.43%	33.32%	-3.89	96
Orkney	100.00%	100.00%	0.00	100	51.28%	69.82%	-18.54	81
Perthshire	57.71%	60.55%	-2.84	97	40.68%	40.46%	0.22	100
Scottish Borders	33.33%	55.24%	-21.91	78	25.14%	32.32%	-7.18	93
Shetland Islands	*	*	*	*	*	*	*	*
Outer Hebrides	-	50.66%	-50.66	49	35.80%	38.49%	-2.69	97
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

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

Location accessibility/density	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	36.49%	30.63%	5.86	106	22.05%	15.66%	6.39	106
Other Urban Areas	46.29%	44.79%	1.50	102	38.03%	40.27%	-2.24	98
Accessible Small Towns	39.13%	44.83%	-5.70	94	28.97%	24.59%	4.38	104
Remote Small Towns	31.99%	52.07%	-20.08	80	27.36%	33.89%	-6.53	93
Accessible Rural	47.11%	62.72%	-15.61	84	42.96%	47.86%	-4.90	95
Remote Rural	52.13%	51.29%	0.84	101	37.73%	39.54%	-1.81	98
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Location (Geographic) – June 2024/2023

Location (Geogra	phic) June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	35.89%	47.30%	-11.41	89	27.25%	30.21%	-2.96	97
Inland	48.82%	50.86%	-2.04	98	40.25%	40.65%	-0.40	100
Island	79.39%	79.71%	-0.32	100	58.32%	60.83%	-2.51	97
- Sample Size :	= Nil	*Sa	mple Size (betw	een 1 and 4)	too small to b	e included		





Unit Occupancy by Property Type – June 2024/2023

	June	June					24/23	
Property Type	24	23	24/23 Diff	Change	YTD 24	YTD 23	Diff	Change
Bungalow	44.07%	55.86%	-11.79	88	42.12%	46.10%	-3.98	96
Cottage	42.61%	44.60%	-1.99	98	31.14%	33.75%	-2.61	97
Flat	30.81%	39.79%	-8.98	91	19.75%	19.55%	0.20	100
Glamping	27.75%	41.17%	-13.42	87	18.50%	21.24%	-2.74	97
House	41.69%	50.62%	-8.93	91	31.72%	34.67%	-2.95	97
Lodge or Chalet	71.19%	70.51%	0.68	101	59.02%	59.67%	-0.65	99
Other Property	19.80%	33.65%	-13.85	86	12.73%	25.85%	-13.12	87
Static Caravan	15.09%	44.18%	-29.09	71	8.86%	28.82%	-19.96	80
- Sample Size = Nil *Sample Size (hetween 1 and 4) too small to be included								

⁻ Sample Size = Nil

Unit Occupancy by Tariff – June 2024/2023

Weekly Tariff	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	26.43%	19.40%	7.03	107	10.33%	10.31%	0.02	100
Under £299	36.05%	27.45%	8.60	109	14.09%	30.55%	-16.46	84
£300 - £499	32.43%	30.65%	1.78	102	22.26%	27.02%	-4.76	95
£500 - £799	36.81%	45.75%	-8.94	91	28.23%	33.98%	-5.75	94
£800 or more	55.23%	64.49%	-9.26	91	48.89%	48.89%	0.00	100
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Location Type - June 2024/2023

Location Type	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	30.36%	13.98%	16.38	116	18.36%	12.30%	6.06	106
Countryside Village	45.63%	50.57%	-4.94	95	36.94%	36.84%	0.10	100
Seaside - Coastal	51.84%	60.53%	-8.69	91	41.05%	48.19%	-7.14	93
Small Town	28.94%	37.03%	-8.09	92	24.18%	23.68%	0.50	101
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Grading – June 2024/2023

Grading	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	33.75%	36.39%	-2.64	97	16.09%	29.85%	-13.76	86
3 Stars	55.20%	49.00%	6.20	106	41.30%	39.92%	1.38	101
4 Stars	52.88%	58.39%	-5.51	94	41.42%	43.86%	-2.44	98
5 Stars	72.32%	70.73%	1.59	102	55.87%	43.07%	12.80	113
Unclassified	35.66%	48.63%	-12.97	87	33.02%	37.58%	-4.56	95
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								