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

1.0   Introduction November 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering November 2023 and benchmarking against November 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 November 2023

The SOAS Report: November 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 November 2023 experienced a **3.21** percentage point increase when comparing percentage unit occupancy rates with November 2022.

Data from the Scottish Retail Consortium showed that retail sales remained weak in November with growth of just 3.1% despite the Black Friday deals. Food and drink and health and beauty categories continued to drive sales. November's food and drink sales rose by 5.8%, which was still below the 3-month average.

Domestic consumer sentiment provided by the GB National Tourist Boards for November 2023 found that 20% of respondents said they have "…been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2023 survey). The survey recorded 52% of respondents (a 7% increase on the September 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, 14% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 77% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months container 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 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

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

3.0   Self-Catering

3.1 Performance by Self-Catering Category

Unit Occupancy – November 2023/2022

In the Self-Catering sector, the unit occupancy rate for November 2023 was 30.86% when compared to data from the previous year of 27.65% occupancy rate; this shows an overall percentage point increase of 3.21.

3.1 Performance by Self-Catering Category

Unit Occupancy – November 2023/2022
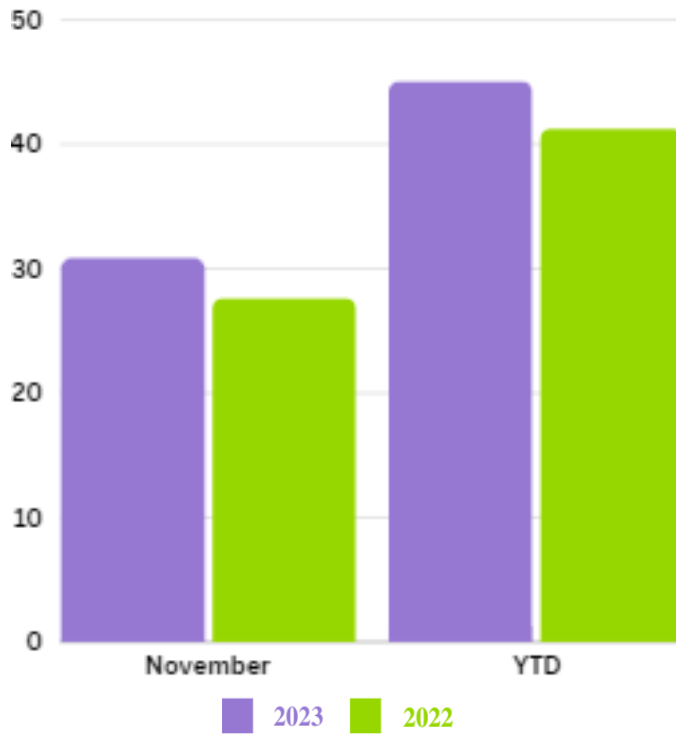
Unit Occupancy – Year-to-Date

Legend: 2023 (purple), 2022 (green)
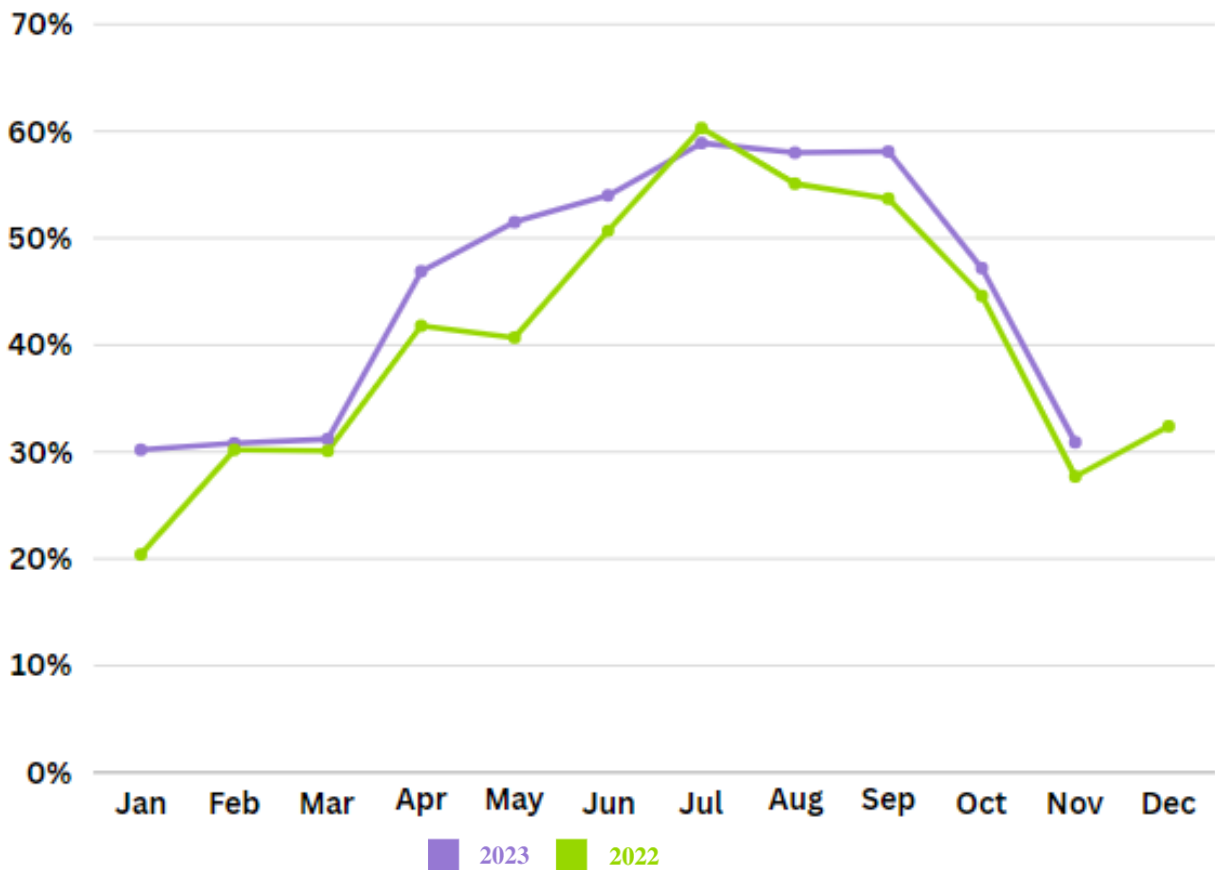
Unit occupancy rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in November 2023. Lodge/chalets, Accessible Rural areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during November 2023.

Unit Occupancy – November 2023/2022

Unit Occupancy	November 23	November 22	23/22 Diff[1]	Change[2]	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	30.86%	27.65%	3.21	103	45.08%	41.26%	3.82	104

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – November 2023/2022
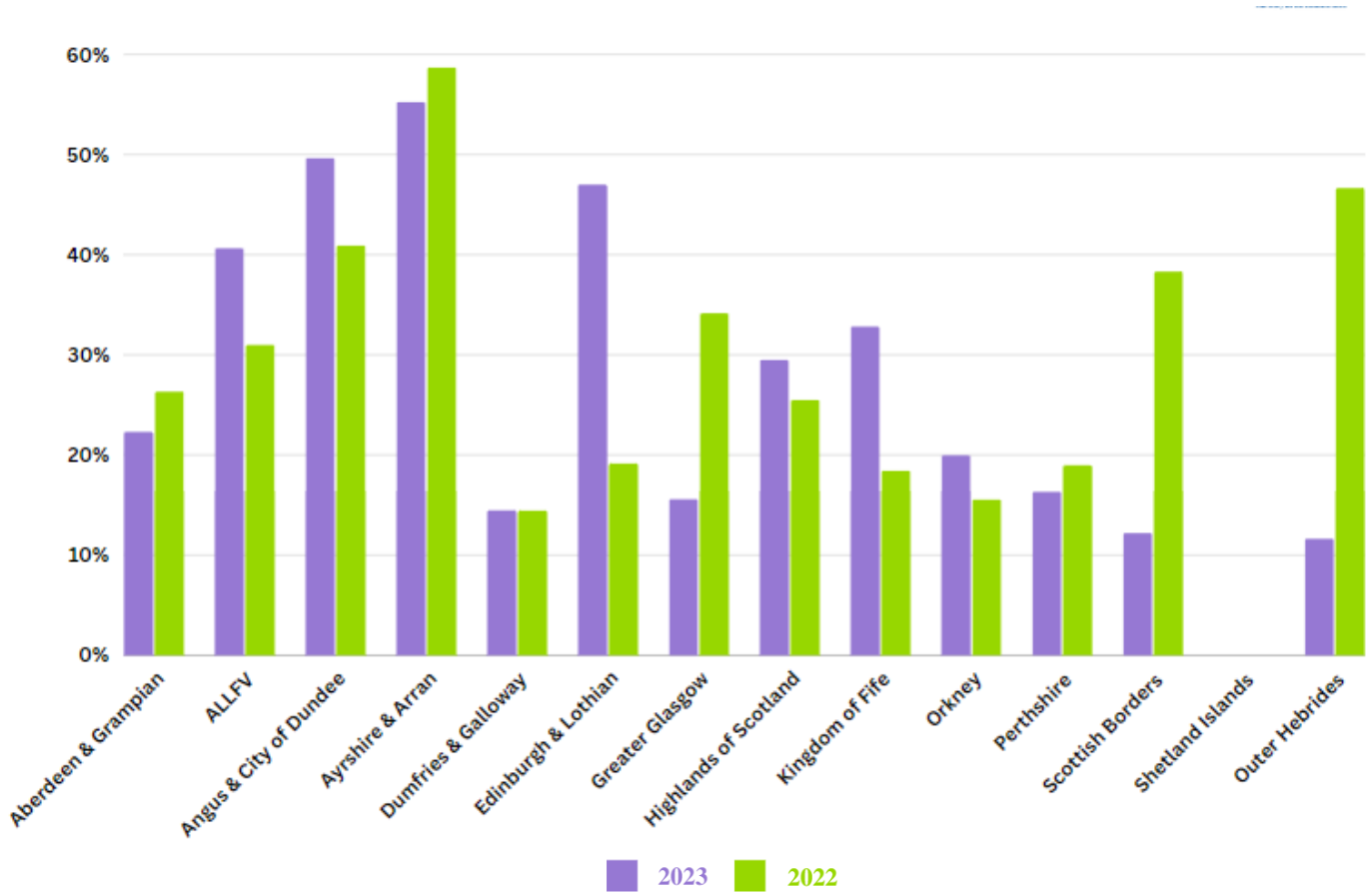
Unit Occupancy by Former VisitScotland Area – November 2023/2022

Area	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	22.31%	26.35%	-4.04	96	41.32%	42.07%	-0.75	99
ALLFV	40.67%	31.03%	9.64	110	47.10%	45.49%	1.61	102
Angus & City of Dundee	49.68%	40.94%	8.74	109	57.31%	63.00%	-5.69	94
Ayrshire & Arran	55.27%	58.71%	-3.44	97	63.25%	64.60%	-1.35	99
Dumfries & Galloway	14.47%	14.44%	0.03	100	27.70%	20.35%	7.35	107
Edinburgh & Lothian	47.00%	19.15%	27.85	128	55.44%	41.34%	14.10	114
Greater Glasgow	15.62%	34.17%	-18.55	81	27.92%	19.54%	8.38	108
Highlands of Scotland	29.53%	25.52%	4.01	104	48.93%	44.92%	4.01	104
Kingdom of Fife	32.86%	18.45%	14.41	114	40.80%	32.53%	8.27	108
Orkney	*	*	*	*	69.96%	60.69%	9.27	109
Perthshire	16.36%	18.98%	-2.62	97	48.64%	35.21%	13.43	113
Scottish Borders	12.22%	38.33%	-26.11	74	31.38%	31.54%	-0.16	100
Shetland Islands	-	-	-	-	64.67%	92.93%	-28.26	72
Outer Hebrides	*	*	*	*	44.78%	54.46%	-9.68	90

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

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

Location accessibility/density	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	32.27%	9.23%	23.04	123	18.07%	14.58%	3.49	103
Other Urban Areas	34.33%	33.21%	1.12	101	46.93%	43.01%	3.92	104
Accessible Small Towns	22.27%	17.17%	5.10	105	29.11%	26.80%	2.31	102
Remote Small Towns	20.73%	26.03%	-5.30	95	39.92%	36.19%	3.73	104
Accessible Rural	39.81%	36.26%	3.55	104	54.78%	51.81%	2.97	103
Remote Rural	27.14%	26.82%	0.32	100	44.36%	41.99%	2.37	102

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

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

Location (Geographic)	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	19.04%	12.86%	6.18	106	35.04%	28.27%	6.77	107
Inland	35.82%	32.68%	3.14	103	46.99%	43.41%	3.58	104
Island	39.86%	47.63%	-7.77	92	63.99%	66.25%	-2.26	98

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

Unit Occupancy by Property Type – November 2023/2022

Property Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	34.98%	50.03%	-15.05	85	49.25%	48.67%	0.58	101
Cottage	21.47%	21.80%	-0.33	100	37.61%	34.88%	2.73	103
Flat	19.47%	11.51%	7.96	108	24.81%	22.97%	1.84	102
Glamping	9.37%	19.73%	-10.36	90	22.54%	22.21%	0.33	100
House	22.36%	17.21%	5.15	105	44.21%	41.01%	3.20	103
Lodge or Chalet	51.97%	48.96%	3.01	103	65.26%	65.26%	0.00	100
Other Property	9.57%	17.12%	-7.55	92	21.42%	24.91%	-3.49	97
Static Caravan	6.48%	0.00%	6.48	106	31.69%	12.50%	19.19	119

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

Unit Occupancy by Tariff – November 2023/2022

Weekly Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	7.13%	3.85%	3.28	103	10.92%	2.51%	8.41	108
Under £299	11.34%	19.79%	-8.45	92	31.04%	11.33%	19.71	120
£300 - £499	16.37%	28.60%	-12.23	88	29.30%	26.35%	2.95	103
£500 - £799	20.99%	21.70%	-0.71	99	38.37%	33.87%	4.50	105
£800 or more	44.32%	34.72%	9.60	110	55.61%	57.79%	-2.18	98

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

Unit Occupancy by Location Type – November 2023/2022

Location Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	14.97%	8.98%	5.99	106	14.07%	12.29%	1.78	102
Countryside Village	27.31%	27.28%	0.03	100	42.95%	40.57%	2.38	102
Seaside - Coastal	36.99%	33.20%	3.79	104	51.36%	48.02%	3.34	103
Small Town	26.21%	17.15%	9.06	109	37.00%	28.42%	8.58	109

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

Unit Occupancy by Grading – November 2023/2022

Grading	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	30.62%	12.40%	18.22	118	32.63%	26.86%	5.77	106
3 Stars	19.44%	34.18%	-14.74	85	46.36%	40.81%	5.55	106
4 Stars	32.38%	31.26%	1.12	101	49.14%	40.56%	8.58	109
5 Stars	54.27%	26.96%	27.31	127	52.44%	54.14%	-1.70	98
Unclassified	30.44%	27.16%	3.28	103	41.54%	39.91%	1.63	102

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