

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2024/2023 Report – Self-Catering

1.0 Introduction November 2024/2023

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

The SOAS Report: November 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 November 2024 experienced a **8.50** percentage point increase when comparing percentage unit occupancy rates with November 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 November 2024 is 2.6%, up from 2.3% in October. The CPI 12-month rate (%) for November 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.6% up from 3.0% in October. Inflation rates for restaurants and cafes were 4.0% down from 4.3% in October.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.3% in November. However, this was disappointing growth compared to the 2.6% increase in November 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering November 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the October 2024 survey). The survey recorded 47% of respondents (a 2% increase on the October 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, 19% of UK adults intended to take a domestic overnight trip in the two months of 2024 and 78% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (77%). 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 Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

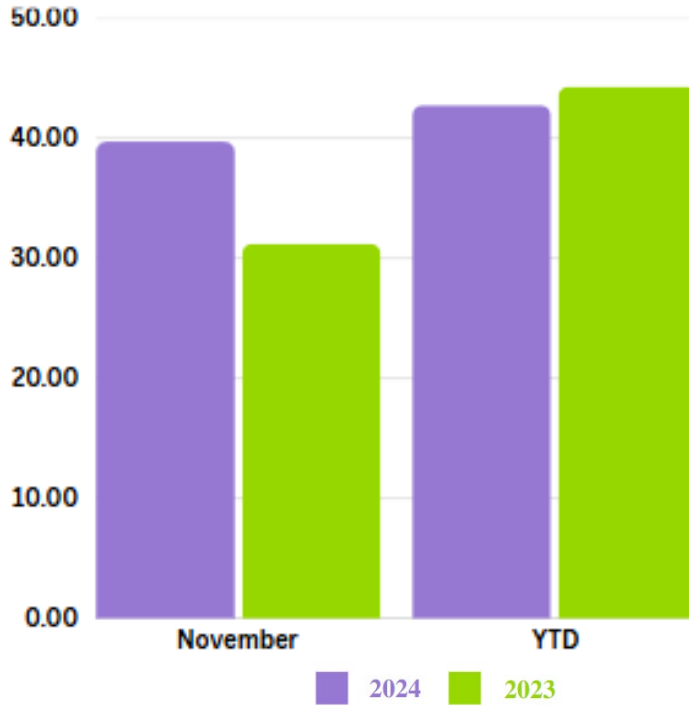
Eurocontrol (European Air Traffic Agency) indicated in November 2024 that UK air connectivity saw a 3% decrease when compared to the same period in 2023, also, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for November 2024 global air passenger demand, measured by revenue per kilometer, was up 8.1% compared to November 2023. International demand rose 11.6% over the same period with domestic demand increasing 3.1%. Asia-Pacific region was the biggest global air passenger growth driver in November 2024 at 19.9% when compared to Europe at 9.4%.

3.0 Self-Catering

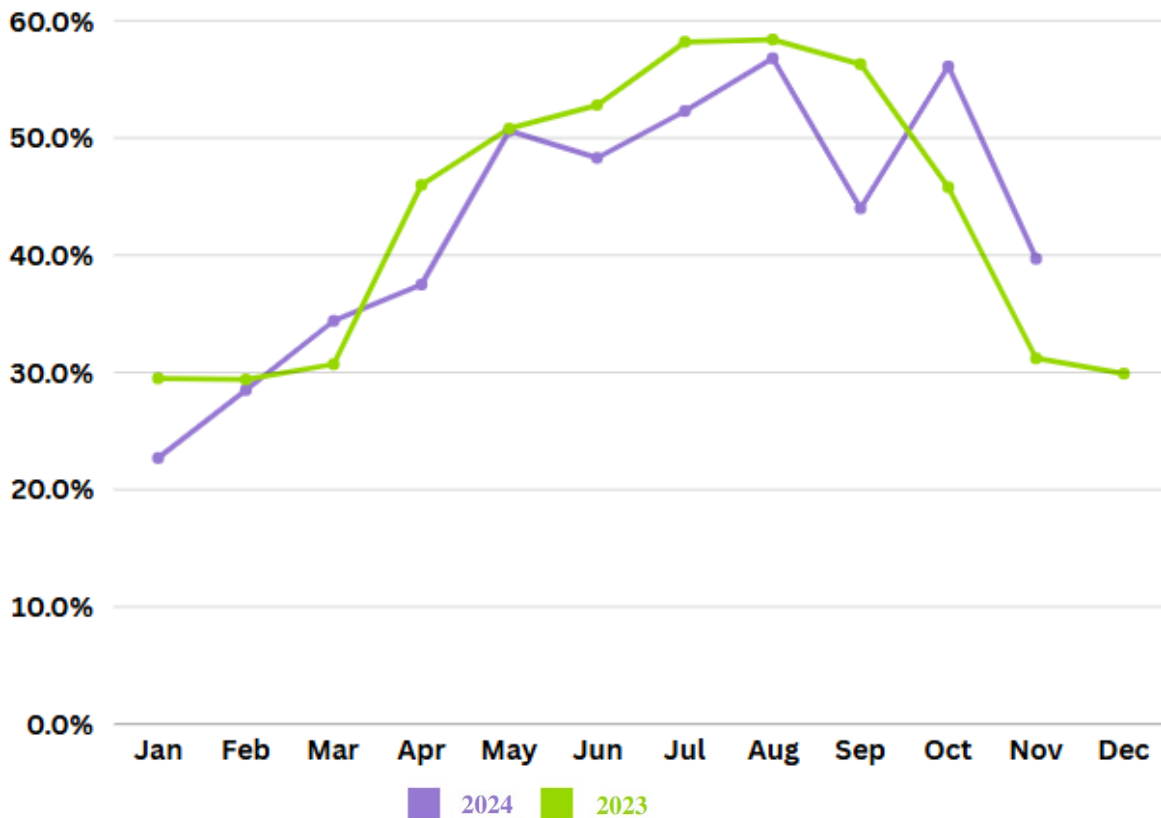
3.1 Performance by Self-Catering Category

Unit Occupancy – November 2024/2023

In the Self-Catering sector, the unit occupancy rate for November 2024 was **39.70%** when compared to data from the previous year of **31.20%** occupancy rate; this shows an overall percentage point increase of **8.50**.



Unit Occupancy – Year-to-Date



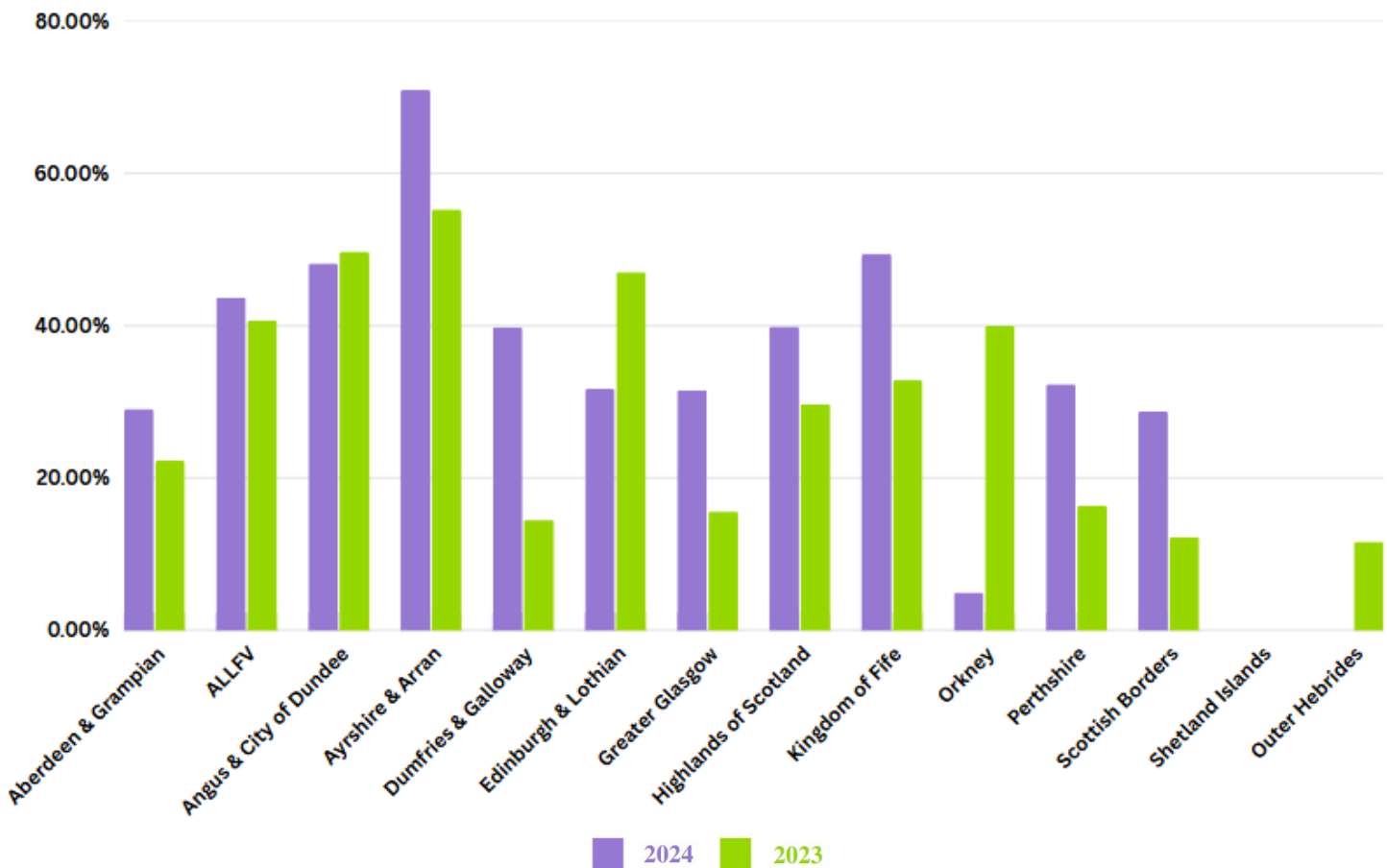
Unit occupancy rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in November 2024. Lodges/chalets, Other urban areas, island properties, and those charging a weekly tariff between £300 and £499 experienced the highest percentage unit occupancy rates during November 2024.

Unit Occupancy – November 2024/2023

Unit Occupancy	Nov 24	Nov 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	39.70%	31.20%	8.50	109	42.73%	44.28%	-1.55	98

Unit Occupancy by Former VisitScotland Area

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

Area	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	29.08%	22.31%	6.77	107	26.45%	37.38%	-10.93	89
ALLFV	43.70%	40.67%	3.03	103	46.28%	46.92%	-0.64	99
Angus & City of Dundee	48.17%	49.68%	-1.51	98	56.62%	57.65%	-1.03	99
Ayrshire & Arran	70.94%	55.27%	15.67	116	64.18%	63.25%	0.93	101
Dumfries & Galloway	39.81%	14.47%	25.34	125	27.35%	28.01%	-0.66	99
Edinburgh & Lothian	31.73%	47.03%	-15.30	85	43.29%	46.84%	-3.55	96
Greater Glasgow	31.52%	15.62%	15.90	116	21.89%	27.92%	-6.03	94
Highlands of Scotland	39.89%	29.72%	10.17	110	49.61%	49.00%	0.61	101
Kingdom of Fife	49.40%	32.86%	16.54	117	32.20%	40.80%	-8.60	91
Orkney	*	*	*	*	60.29%	71.77%	-11.48	89
Perthshire	32.33%	16.36%	15.97	116	48.51%	48.31%	0.20	100
Scottish Borders	28.75%	12.22%	16.53	117	35.54%	31.38%	4.16	104
Shetland Islands	-	-	-	-	82.51%	64.67%	17.84	118
Outer Hebrides	-	*	*	*	65.33%	44.47%	20.86	121

- Sample Size = Nil

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

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

Location accessibility/density	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	6.31%	32.81%	-26.50	74	29.75%	18.34%	11.41	111
Other Urban Areas	53.20%	34.33%	18.87	119	43.84%	45.49%	-1.65	98
Accessible Small Towns	33.72%	22.24%	11.48	111	37.79%	29.93%	7.86	108
Remote Small Towns	39.40%	20.73%	18.67	119	33.20%	39.01%	-5.81	94
Accessible Rural	42.59%	40.63%	1.96	102	43.47%	51.68%	-8.21	92
Remote Rural	36.05%	27.28%	8.77	109	45.03%	44.25%	0.78	101

- Sample Size = Nil

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

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

Location (Geographic)	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	30.57%	19.26%	11.31	111	33.43%	35.55%	-2.12	98
Inland	43.19%	35.83%	7.36	107	44.50%	45.50%	-1.00	99
Island	51.77%	42.91%	8.86	109	65.85%	64.02%	1.83	102

- Sample Size = Nil

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

Unit Occupancy by Property Type – November 2024/2023

Property Type	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Bungalow	47.28%	35.04%	12.24	112	51.56%	48.94%	2.62	103
Cottage	38.34%	22.36%	15.98	116	38.70%	38.18%	0.52	101
Flat	34.24%	19.51%	14.73	115	26.78%	24.07%	2.71	103
Glamping	13.44%	9.29%	4.15	104	24.45%	21.32%	3.13	103
House	25.10%	22.47%	2.63	103	37.13%	40.12%	-2.99	97
Lodge or Chalet	57.01%	51.98%	5.03	105	60.56%	63.90%	-3.34	97
Other Property	11.94%	9.57%	2.37	102	14.16%	21.86%	-7.70	92
Static Caravan	4.08%	6.48%	-2.40	98	12.45%	34.33%	-21.88	78

- Sample Size = Nil

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

Unit Occupancy by Tariff – November 2024/2023

Weekly Tariff	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	7.52%	5.39%	2.13	102	29.62%	10.47%	19.15	119
Under £299	*	21.00%	-11.93	88	19.56%	26.49%	-6.93	93
£300 - £499	48.86%	16.37%	32.49	132	28.93%	27.92%	1.01	101
£500 - £799	34.93%	20.99%	13.94	114	35.48%	37.55%	-2.07	98
£800 or more	43.36%	44.31%	-0.95	99	51.06%	55.41%	-4.35	96

- Sample Size = Nil

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

Unit Occupancy by Location Type – November 2024/2023

Location Type	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	42.22%	15.20%	27.02	127	21.82%	13.16%	8.66	109
Countryside Village	35.62%	27.37%	8.25	108	43.62%	42.84%	0.78	101
Seaside - Coastal	46.08%	37.56%	8.52	109	45.22%	51.08%	-5.86	94
Small Town	26.86%	26.21%	0.65	101	28.09%	29.14%	-1.05	99

- Sample Size = Nil

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

Unit Occupancy by Grading – November 2024/2023

Grading	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	-	*	*	*	0.00%	0.00%	0.00	100
2 Stars	31.27%	30.60%	0.67	101	19.74%	32.32%	-12.58	87
3 Stars	36.31%	21.62%	14.69	115	51.89%	46.29%	5.60	106
4 Stars	42.66%	32.76%	9.90	110	47.40%	48.95%	-1.55	98
5 Stars	55.93%	54.18%	1.75	102	59.97%	52.31%	7.66	108
Unclassified	43.24%	30.40%	12.84	113	36.69%	40.45%	-3.76	96

- Sample Size = Nil

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