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

1.0   Introduction October 2023/2022

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

The SOAS Report: October 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 October 2023 experienced a **2.54** percentage point increase when comparing percentage unit occupancy rates with October 2022.

Data from the Scottish Retail Consortium showed that retail sales remained weak in October with growth of just 2.5%. Food and drink and health and beauty categories continued to drive sales. October's food and drink sales enjoyed a slight increase in volume and value sales compared to last year, but value sales were slightly down on September's performance.

Domestic consumer sentiment provided by the GB National Tourist Boards for October 2023 found that 21% of respondents said they were "…been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease on the September 2023 Survey) saying they were "…cautious - things are ok but I feel I have to be very careful". were "…been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease 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, 21% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 78% 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 stalled in October 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 10% increase when compared to the same period in 2022, however, UK air connectivity had seen a 7% decrease in year-to-date flights compared to 2019.
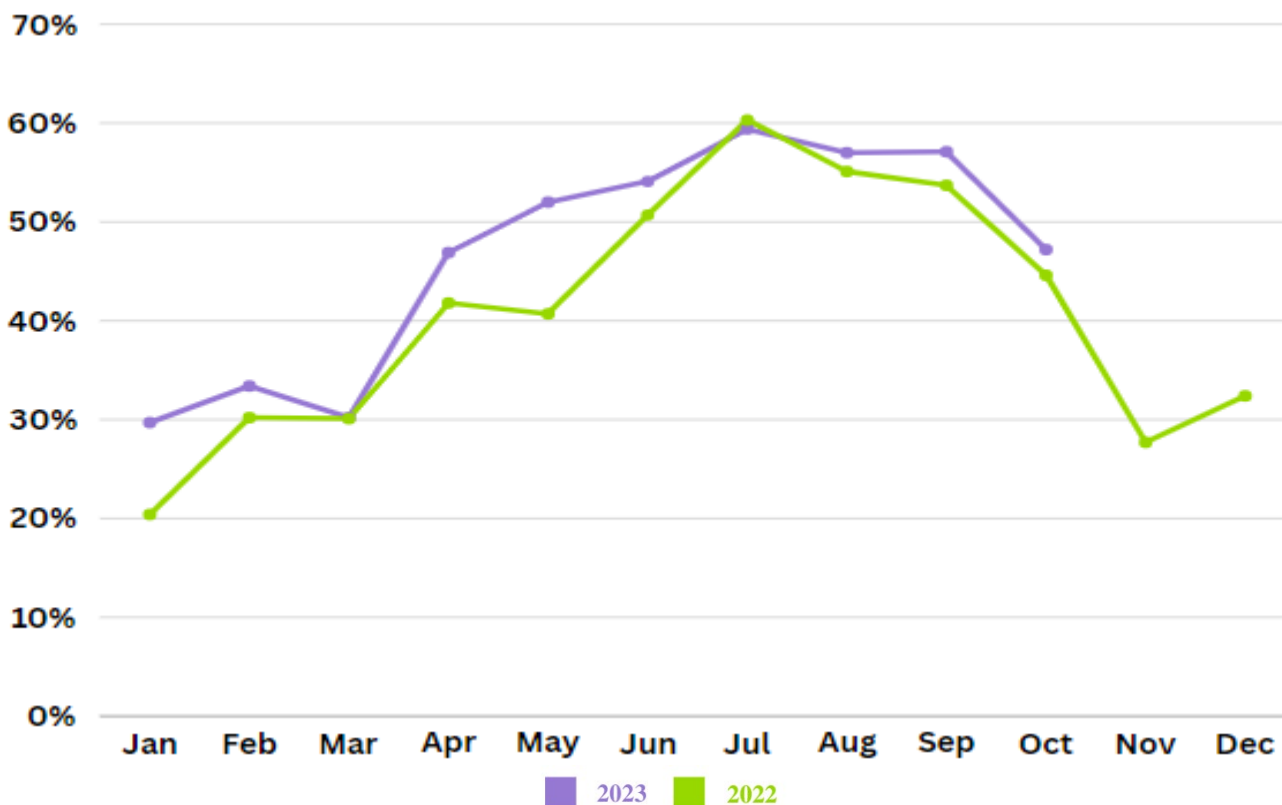
3.0   Self-Catering

3.1 Performance by Self-Catering Category

Unit Occupancy – October 2023/2022

In the Self-Catering sector, the unit occupancy rate for October 2023 was 47.17% when compared to data from the previous year of 44.63% occupancy rate; this shows an overall percentage point increase of 2.54.
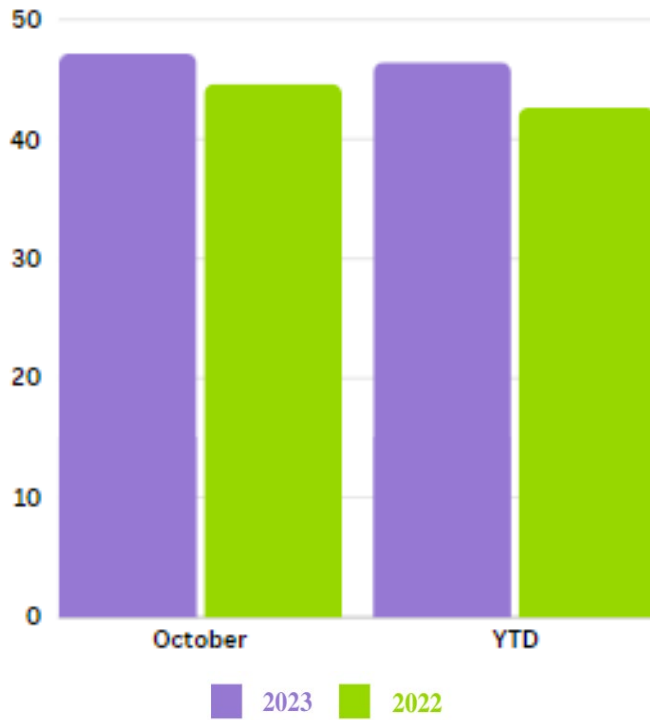

Unit Occupancy – Year-to-Date

Unit occupancy rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in October 2023. Lodge/chalets, Other Urban Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during October 2023.

Unit Occupancy – October 2023/2022

Unit Occupancy	October 23	October 22	23/22 Diff[1]	Change[2]	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	47.17%	44.63%	2.54	103	46.44%	42.64%	3.80	104

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – October 2023/2022

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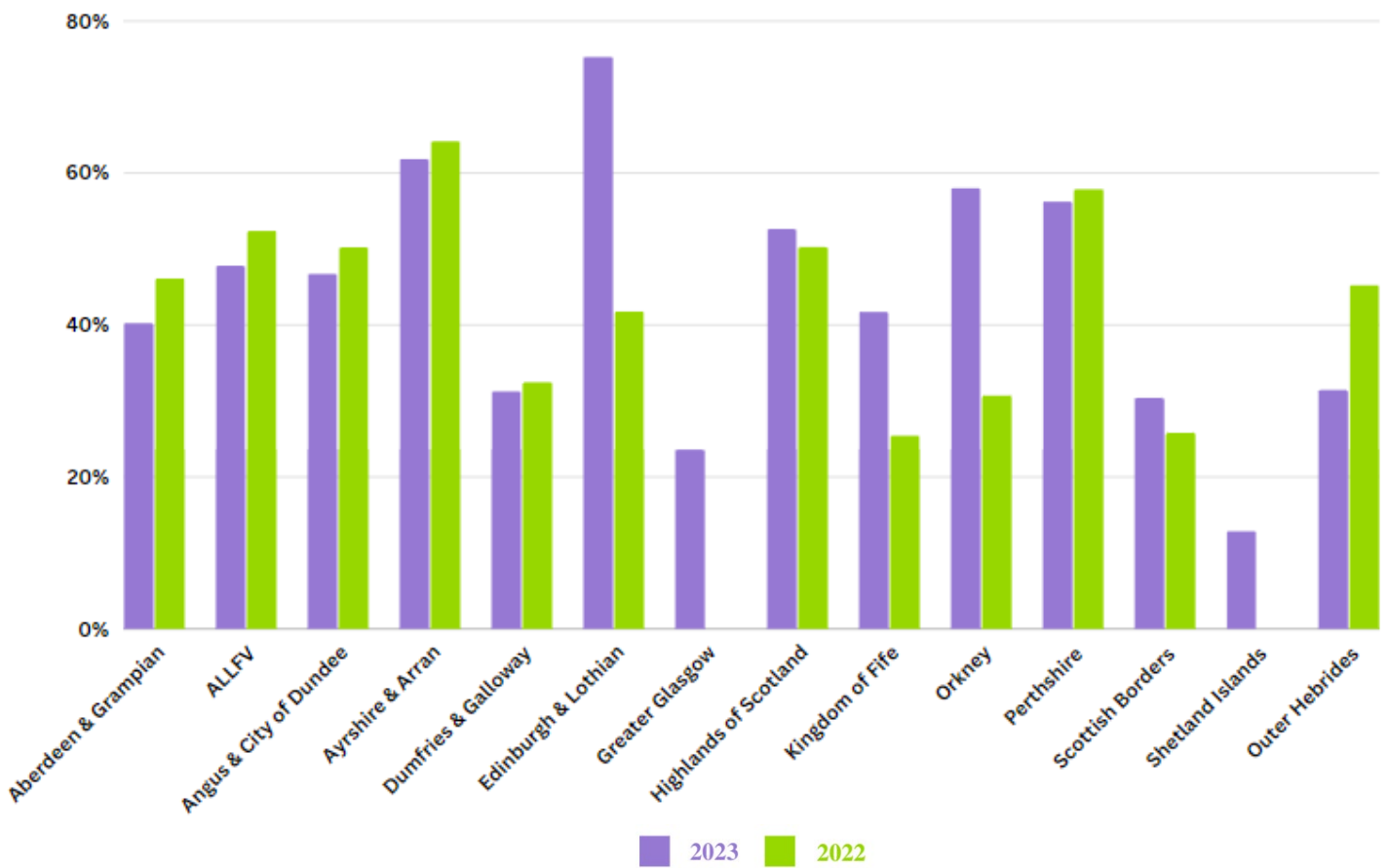
[1] 23/22 Diff throughout this report is expressed by % Point Change
[2] Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

Unit Occupancy by Former VisitScotland Area – October 2023/2022

Area	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	40.24%	46.13%	-5.89	94	43.12%	43.62%	-0.50	100
ALLFV	47.81%	52.39%	-4.58	95	47.70%	47.00%	0.70	101
Angus & City of Dundee	46.77%	50.23%	-3.46	97	58.05%	65.18%	-7.13	93
Ayrshire & Arran	61.88%	64.21%	-2.33	98	64.03%	65.18%	-1.15	99
Dumfries & Galloway	31.30%	32.46%	-1.16	99	28.94%	20.93%	8.01	108
Edinburgh & Lothian	75.27%	*	33.48	133	56.40%	43.53%	12.87	113
Greater Glasgow	23.60%	0.00%	23.60	124	29.20%	18.07%	11.13	111
Highlands of Scotland	52.66%	50.26%	2.40	102	50.82%	46.83%	3.99	104
Kingdom of Fife	41.74%	25.48%	16.26	116	41.56%	33.92%	7.64	108
Orkney	*	*	*	*	74.95%	64.89%	10.06	110
Perthshire	56.25%	57.86%	-1.61	98	51.06%	37.62%	13.44	113
Scottish Borders	30.41%	*	4.60	105	33.22%	30.87%	2.35	102
Shetland Islands	*	-	*	*	64.67%	92.93%	-28.26	72
Outer Hebrides	*	45.28%	-13.83	86	48.33%	55.40%	-7.07	93

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

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

Location accessibility/density	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	15.60%	19.46%	-3.86	96	17.64%	15.54%	2.10	102
Other Urban Areas	58.61%	36.99%	21.62	122	48.14%	43.88%	4.26	104
Accessible Small Towns	29.06%	38.05%	-8.99	91	29.87%	27.68%	2.19	102
Remote Small Towns	35.69%	29.22%	6.47	106	41.86%	37.32%	4.54	105
Accessible Rural	55.82%	55.84%	-0.02	100	56.38%	53.35%	3.03	103
Remote Rural	45.31%	46.06%	-0.75	99	45.91%	43.56%	2.35	102

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

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

Location (Geographic)	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	33.96%	33.40%	0.56	101	36.67%	30.04%	6.63	107
Inland	52.69%	47.82%	4.87	105	48.02%	44.46%	3.56	104
Island	55.56%	58.05%	-2.49	98	66.31%	68.04%	-1.73	98

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

Unit Occupancy by Property Type – October 2023/2022

Property Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	53.09%	50.56%	2.53	103	50.78%	48.55%	2.23	102
Cottage	33.02%	35.15%	-2.13	98	39.08%	36.11%	2.97	103
Flat	24.25%	26.93%	-2.68	97	24.52%	24.65%	-0.13	100
Glamping	25.91%	45.29%	-19.38	81	26.58%	22.43%	4.15	104
House	53.84%	33.99%	19.85	120	46.12%	42.97%	3.15	103
Lodge or Chalet	68.41%	66.10%	2.31	102	66.61%	67.06%	-0.45	100
Other Property	17.48%	23.52%	-6.04	94	23.23%	25.73%	-2.50	98
Static Caravan	39.23%	31.08%	8.15	108	33.71%	13.17%	20.54	121

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

Unit Occupancy by Tariff – October 2023/2022

Weekly Tariff	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	10.58%	3.35%	7.23	107	11.35%	2.35%	9.00	109
Under £299	19.55%	21.65%	-2.10	98	32.79%	10.12%	22.67	123
£300 - £499	33.86%	35.18%	-1.32	99	30.75%	26.09%	4.66	105
£500 - £799	37.84%	38.04%	-0.20	100	40.05%	34.96%	5.09	105
£800 or more	60.42%	58.05%	2.37	102	56.63%	60.19%	-3.56	96

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

Unit Occupancy by Location Type – October 2023/2022

Location Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	6.31%	12.64%	-6.33	94	14.00%	12.78%	1.22	101
Countryside Village	45.15%	43.59%	1.56	102	44.37%	41.83%	2.54	103
Seaside - Coastal	49.01%	51.64%	-2.63	97	52.77%	49.52%	3.25	103
Small Town	59.16%	30.82%	28.34	128	38.48%	29.77%	8.71	109

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

Unit Occupancy by Grading – October 2023/2022

Grading	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	33.75%	40.12%	-6.37	94	32.86%	28.26%	4.60	105
3 Stars	48.73%	47.84%	0.89	101	48.52%	41.22%	7.30	107
4 Stars	45.65%	36.58%	9.07	109	51.07%	41.31%	9.76	110
5 Stars	69.34%	62.75%	6.59	107	52.31%	58.86%	-6.55	93
Unclassified	45.66%	42.72%	2.94	103	42.64%	41.28%	1.36	101

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