

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## *October 2024/2023 Report – Self-Catering*

### 1.0 Introduction October 2024/2023

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

The SOAS Report: October 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 October 2024 experienced a **10.31** percentage point increase when comparing percentage unit occupancy rates with October 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to October 2024 is 2.3%, up from 1.7% in September. The CPI 12-month rate (%) for October 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.0% down from 3.8% in September. Inflation rates for restaurants and cafes were 4.3% up from 4.1% in September.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 0.7% in October, however, compared to the 2.9% increase in October 2023 this was disappointing growth in total sales.

Domestic consumer sentiment provided by the GB National Tourist Boards for October 2024 found that 18% of respondents said they had “...been hit hard - no option but to cut back on spending” (a 1% decrease on the September 2024 survey). The survey recorded 45% of respondents (a 2% decrease on the September 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, 25% 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 (78%). 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.

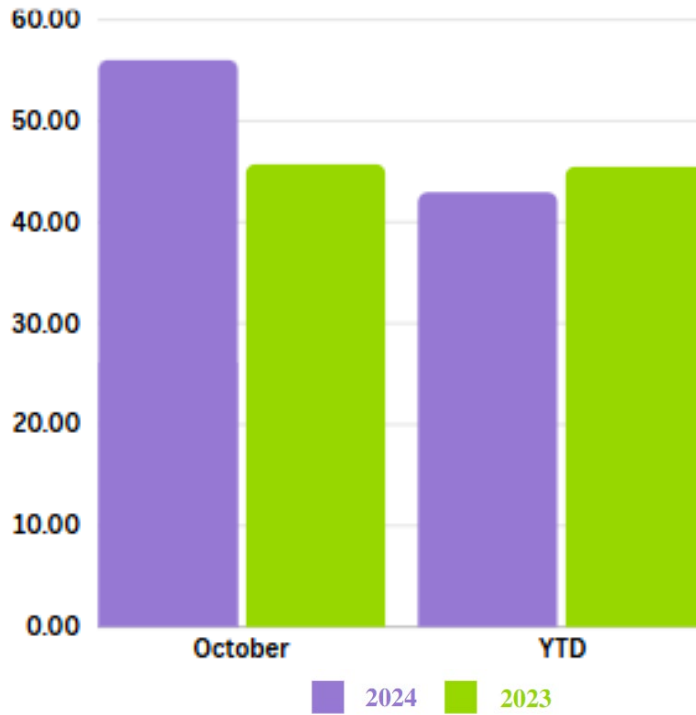
Eurocontrol (European Air Traffic Agency) indicated in October 2024 that UK air connectivity saw a 3% increase when compared to the same period in 2023, also, UK air connectivity saw a 3% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for October 2024 global air passenger demand, measured by revenue per kilometer, was up 7.1% compared to October 2023. International demand rose 9.5% over the same period with domestic demand increasing 3.5%. Asia-Pacific region was the biggest global air passenger growth driver in October 2024 at 12.7% when compared to Europe.

### 3.0 Self-Catering

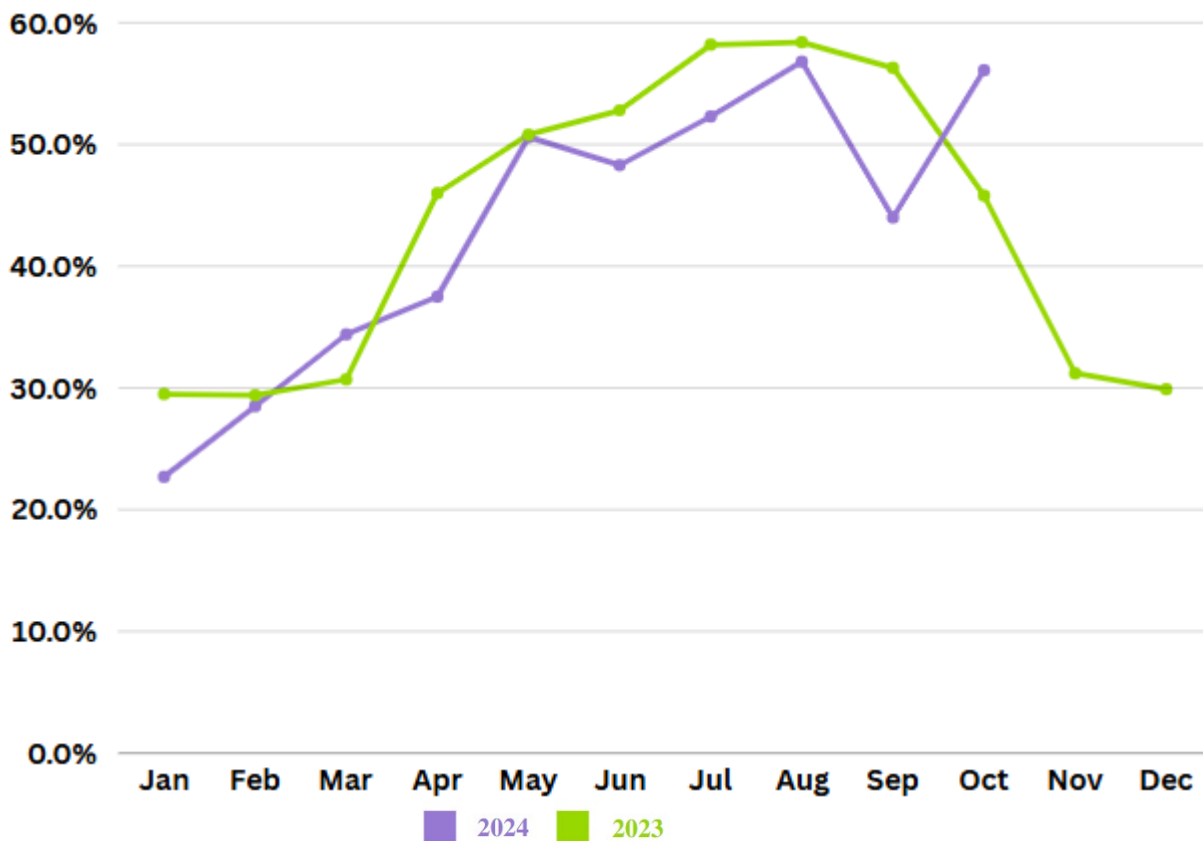
#### 3.1 Performance by Self-Catering Category

##### Unit Occupancy – October 2024/2023

In the Self-Catering sector, the unit occupancy rate for October 2024 was **56.08%** when compared to data from the previous year of **45.77%** occupancy rate; this shows an overall percentage point increase of **10.31**.



##### Unit Occupancy – Year-to-Date



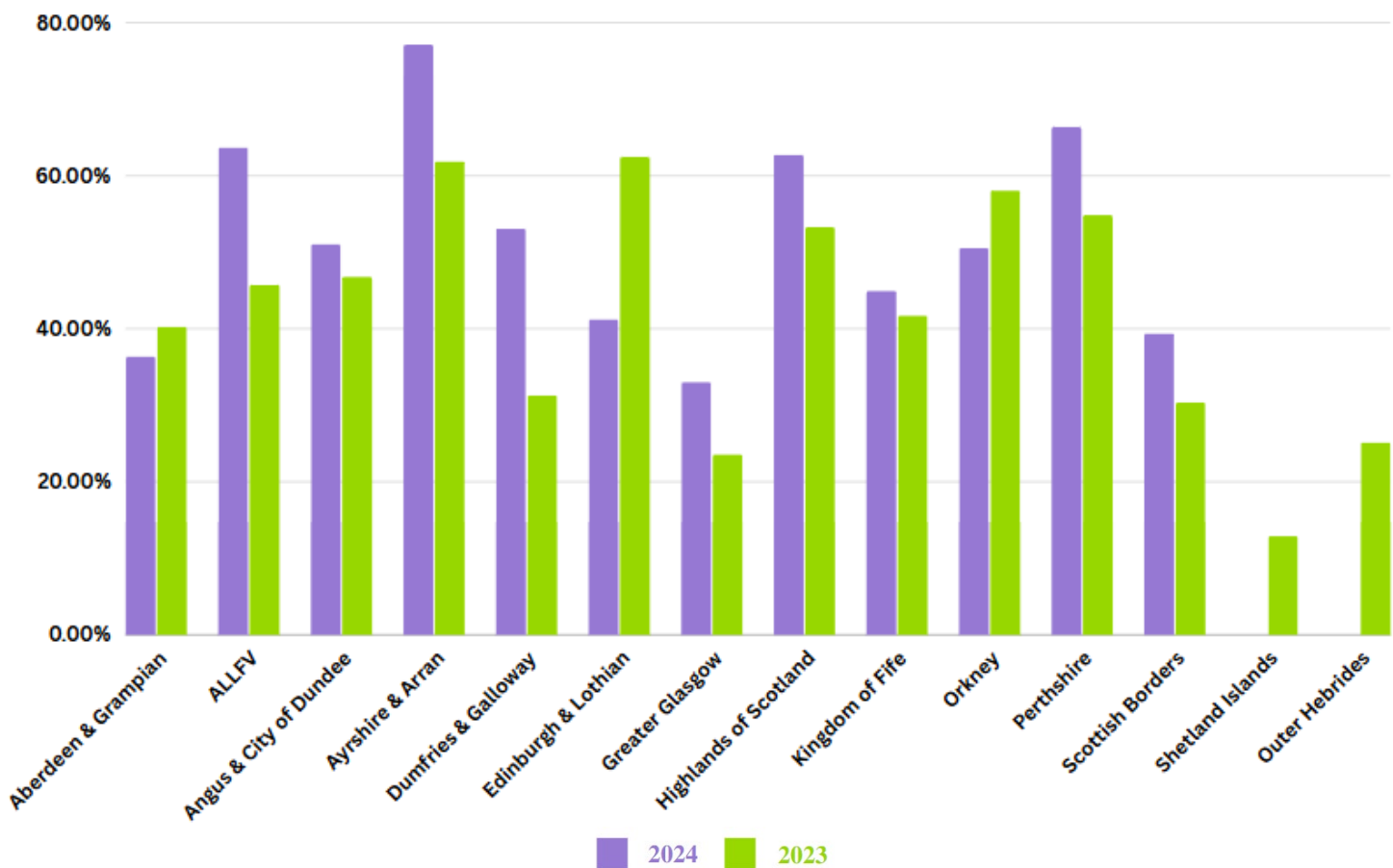
**Unit occupancy** rates (Sample Size >4) in the Ayrshire & Arran Region were the highest in October 2024. Lodges/chalets, large urban areas, island properties, and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during October 2024.

### Unit Occupancy – October 2024/2023

Unit Occupancy	Oct 24	Oct 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
Self-Catering	56.08	45.77%	10.31	110	42.98%	45.52%	-2.54	97

### Unit Occupancy by Former VisitScotland Area

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



<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 – October 2024/2023

Area	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	36.39%	40.27%	-3.88	96	26.60%	38.82%	-12.22	88
ALLFV	63.69%	45.71%	17.98	118	46.49%	47.51%	-1.02	99
Angus & City of Dundee	51.08%	46.77%	4.31	104	57.41%	58.42%	-1.01	99
Ayrshire & Arran	77.14%	61.88%	15.26	115	63.55%	64.03%	-0.48	100
Dumfries & Galloway	53.08%	31.30%	21.78	122	26.36%	29.28%	-2.92	97
Edinburgh & Lothian	41.24%	62.46%	-21.22	79	44.24%	46.82%	-2.58	97
Greater Glasgow	33.04%	23.60%	9.44	109	21.18%	29.20%	-8.02	92
Highlands of Scotland	62.74%	53.29%	9.45	109	50.42%	50.87%	-0.45	100
Kingdom of Fife	44.92%	41.74%	3.18	103	31.04%	41.56%	-10.52	89
Orkney	*	*	*	*	65.73%	74.95%	-9.22	91
Perthshire	66.36%	54.87%	11.49	111	49.92%	50.68%	-0.76	99
Scottish Borders	39.40%	30.41%	8.99	109	36.02%	33.22%	2.80	103
Shetland Islands	-	*	*	*	82.51%	64.67%	17.84	118
Outer Hebrides	-	25.16%	-25.16	75	65.33%	48.06%	17.27	117
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	80.20%	15.60%	64.60	165	26.46%	17.89%	8.57	109
Other Urban Areas	65.74%	51.88%	13.86	114	43.31%	46.59%	-3.28	97
Accessible Small Towns	46.02%	29.18%	16.84	117	38.13%	60.60%	-22.47	78
Remote Small Towns	45.96%	35.16%	10.80	111	32.83%	40.86%	-8.03	92
Accessible Rural	53.28%	51.96%	1.32	101	43.54%	52.78%	-9.24	91
Remote Rural	59.91%	46.17%	13.74	114	45.82%	45.85%	-0.03	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	48.04%	34.63%	13.41	113	33.67%	37.19%	-3.52	96
Inland	58.50%	50.59%	7.91	108	44.60%	46.39%	-1.79	98
Island	70.89%	55.88%	15.01	115	67.15%	66.05%	1.10	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Property Type	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Bungalow	65.55%	53.90%	11.65	112	51.92%	50.42%	1.50	102
Cottage	52.91%	37.75%	15.16	115	38.72%	39.65%	-0.93	99
Flat	55.44%	24.16%	31.28	131	26.17%	24.40%	1.77	102
Glamping	26.63%	24.63%	2.00	102	25.88%	24.36%	1.52	102
House	38.52%	38.10%	0.42	100	38.30%	41.74%	-3.44	97
Lodge or Chalet	71.90%	65.18%	6.72	107	60.89%	65.08%	-4.19	96
Other Property	47.23%	17.79%	29.44	129	14.50%	23.79%	-9.29	91
Static Caravan	46.11%	39.23%	6.88	107	12.55%	36.51%	-23.96	76

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

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

Weekly Tariff	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Unknown	41.68%	11.13%	30.55	131	31.27%	10.98%	20.29	120
Under £299	*	19.00%	-8.70	91	20.19%	26.91%	-6.72	93
£300 - £499	57.77%	34.06%	23.71	124	27.08%	29.15%	-2.07	98
£500 - £799	53.90%	37.75%	16.15	116	35.51%	39.20%	-3.69	96
£800 or more	57.82%	57.77%	0.05	100	51.75%	56.41%	-4.66	95

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

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

Location Type	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	46.95%	9.44%	37.51	138	19.95%	13.05%	6.90	107
Countryside Village	55.00%	48.05%	6.95	107	44.24%	44.26%	-0.02	100
Seaside - Coastal	59.40%	47.34%	12.06	112	45.14%	52.42%	-7.28	93
Small Town	46.21%	32.44%	13.77	114	28.19%	29.50%	-1.31	99

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

### Unit Occupancy by Grading – October 2024/2023

Grading	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	-	*	*	*	0.00%	0.00%	0.00	100
2 Stars	*	33.73%	-2.89	97	18.97%	32.51%	-13.54	86
3 Stars	61.37%	48.95%	12.42	112	52.93%	48.59%	4.34	104
4 Stars	59.10%	51.40%	7.70	108	47.78%	50.67%	-2.89	97
5 Stars	71.20%	69.00%	2.20	102	60.38%	52.16%	8.22	108
Unclassified	59.21%	38.59%	20.62	121	36.31%	41.52%	-5.21	95

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