



#### SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

September 2023/2022 Report - Self-Catering

#### 1.0 Introduction September 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering September 2023 and benchmarking against September 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: <a href="https://hugh.sheridan@gcu.ac.uk">hugh.sheridan@gcu.ac.uk</a>).

#### 2.0 Executive Summary September 2023

The SOAS Report: September 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 September 2023 experienced a **3.39** percentage point increase when comparing percentage unit occupancy rates with September 2022.

Data from the Scotlish Retail Consortium showed that the September retail sales figures in Scotland rose to 6.1% from 5.6% in August, however. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for September 2023 found that 18% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% decrease on the August 2023 survey). The survey recorded 46% of respondents (a 1% increase on the August 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, 33% of UK adults intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 76% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, Personal finances and the UK weather. 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 September 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 9% decrease in year-to-date flights compared to 2019.



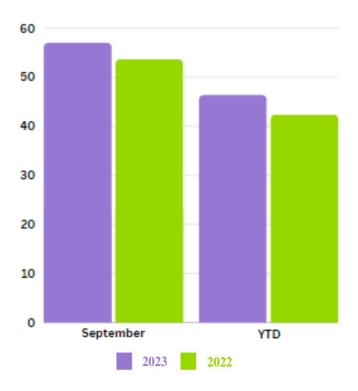


# 3.0 Self-Catering

### 3.1 Performance by Self-Catering Category

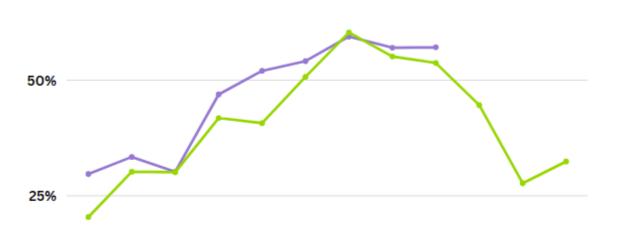
Unit Occupancy - September 2023/2022

In the Self-Catering sector, the unit occupancy rate for September 2023 was 57.08 when compared to data from the previous year of 53.69% occupancy rate; this shows an overall percentage point increase of 3.39.



Unit Occupancy – Year-to-Date

75%









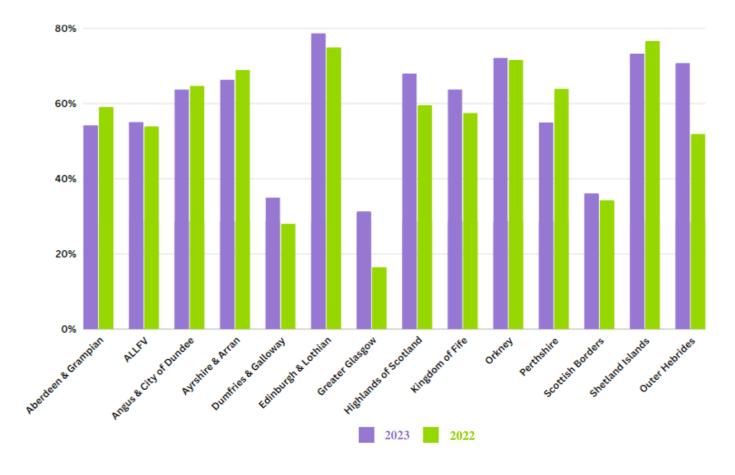
**Unit occupancy** rates (Sample Size >4) in the Highlands of Scotland Region were the highest in September 2023. Lodge/chalets, Accessible Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during September 2023.

#### **Unit Occupancy – September 2023/2022**

Unit Occupancy		erSeptember 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	57.08%	53.69%	3.39	103	46.40%	42.41%	3.99	104

#### Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – September 2023/2022



<sup>&</sup>lt;sup>1</sup> 23/22 Diff throughout this report is expressed by % Point Change

<sup>&</sup>lt;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 – September 2023/2022

Area	Septembe 23	rSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	54.22%	59.17%	-4.95	95	45.83%	43.31%	2.52	103
ALLFV	55.14%	53.97%	1.17	101	49.20%	46.39%	2.81	103
Angus & City of Dundee	63.80%	64.76%	-0.96	99	59.31%	66.88%	-7.57	92
Ayrshire & Arran	66.40%	68.95%	-2.55	97	65.44%	65.29%	0.15	100
Dumfries & Galloway	35.04%	28.07%	6.97	107	25.81%	19.62%	6.19	106
Edinburgh & Lothian	*	74.94%	3.82	104	55.32%	43.73%	11.59	112
Greater Glasgow	31.33%	16.50%	14.83	115	29.84%	19.94%	9.90	110
Highlands of Scotland	68.05%	59.63%	8.42	108	50.63%	46.43%	4.20	104
Kingdom of Fife	63.81%	57.55%	6.26	106	41.54%	34.88%	6.66	107
Orkney	*	71.66%	0.56	101	76.90%	68.57%	8.33	108
Perthshire	55.00%	63.99%	-8.99	91	45.82%	34.12%	11.70	112
Scottish Borders	36.11%	34.33%	1.78	102	33.38%	31.44%	1.94	102
Shetland Islands	*	*	*	*	75.16%	92.93%	-17.77	82
Outer Hebrides	*	51.97%	18.86	119	49.53%	56.59%	-7.06	93
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

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

Location accessibility/density	Septembe	rSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	31.39%	-5.78	94	17.76%	15.24%	2.52	103
Other Urban Areas	57.78%	56.30%	1.48	101	47.36%	45.07%	2.29	102
Accessible Small Towns	44.32%	39.45%	4.87	105	29.44%	26.71%	2.73	103
Remote Small Towns	53.97%	44.51%	9.46	109	41.24%	38.08%	3.16	103
Accessible Rural	64.04%	64.84%	-0.80	99	58.10%	53.05%	5.05	105
Remote Rural	56.83%	51.68%	5.15	105	45.10%	43.29%	1.81	102
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

## Unit Occupancy by Location (Geographic) – September 2023/2022

Location (Geographic)	Septembe 23	rSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	43.94%	42.72%	1.22	101	35.88%	29.65%	6.23	106
Inland	59.51%	55.79%	3.72	104	48.24%	44.07%	4.17	104
Island	76.59%	71.45%	5.14	105	68.05%	69.19%	-1.14	99
- Sample Size = Nil		*Sampl	e Size (betwee	n 1 and 4) to	o small to be ir	ıcluded		

### Unit Occupancy by Property Type – September 2023/2022

Septemb 23	erSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
57.43%	57.45%	-0.02	100	50.89%	48.32%	2.57	103
48.23%	48.82%	-0.59	99	38.25%	36.21%	2.04	102
37.02%	39.84%	-2.82	97	23.76%	24.40%	-0.64	99
28.58%	57.30%	-28.72	71	37.43%	19.49%	17.94	118
67.20%	47.90%	19.30	119	48.41%	44.03%	4.38	104
72.70%	70.52%	2.18	102	66.40%	67.20%	-0.80	99
21.61%	31.86%	-10.25	90	23.85%	26.02%	-2.17	98
46.50%	24.73%	21.77	122	32.85%	12.12%	20.73	121
	23 57.43% 48.23% 37.02% 28.58% 67.20% 72.70% 21.61%	57.43% 57.45% 48.23% 48.82% 37.02% 39.84% 28.58% 57.30% 67.20% 47.90% 72.70% 70.52% 21.61% 31.86%	23   22   23/22 Diff     57.43%   57.45%   -0.02     48.23%   48.82%   -0.59     37.02%   39.84%   -2.82     28.58%   57.30%   -28.72     67.20%   47.90%   19.30     72.70%   70.52%   2.18     21.61%   31.86%   -10.25	23 22   57.43% 57.45% -0.02 100   48.23% 48.82% -0.59 99   37.02% 39.84% -2.82 97   28.58% 57.30% -28.72 71   67.20% 47.90% 19.30 119   72.70% 70.52% 2.18 102   21.61% 31.86% -10.25 90	23 22   57.43% 57.45% -0.02 100 50.89%   48.23% 48.82% -0.59 99 38.25%   37.02% 39.84% -2.82 97 23.76%   28.58% 57.30% -28.72 71 37.43%   67.20% 47.90% 19.30 119 48.41%   72.70% 70.52% 2.18 102 66.40%   21.61% 31.86% -10.25 90 23.85%	23 22 23/22 Diff Change YTD 23 YTD 22   57.43% 57.45% -0.02 100 50.89% 48.32%   48.23% 48.82% -0.59 99 38.25% 36.21%   37.02% 39.84% -2.82 97 23.76% 24.40%   28.58% 57.30% -28.72 71 37.43% 19.49%   67.20% 47.90% 19.30 119 48.41% 44.03%   72.70% 70.52% 2.18 102 66.40% 67.20%   21.61% 31.86% -10.25 90 23.85% 26.02%	23     22     23/22 Diff     Change     Y1D 23     Y1D 22     Diff       57.43%     57.45%     -0.02     100     50.89%     48.32%     2.57       48.23%     48.82%     -0.59     99     38.25%     36.21%     2.04       37.02%     39.84%     -2.82     97     23.76%     24.40%     -0.64       28.58%     57.30%     -28.72     71     37.43%     19.49%     17.94       67.20%     47.90%     19.30     119     48.41%     44.03%     4.38       72.70%     70.52%     2.18     102     66.40%     67.20%     -0.80       21.61%     31.86%     -10.25     90     23.85%     26.02%     -2.17





## Unit Occupancy by Tariff – September 2023/2022

Weekly Tariff	Septemb 23	erSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	17.79%	8.89%	8.90	109	0.00%	2.23%	-2.23	98
Under £299	6.91%	10.28%	-3.37	97	32.85%	9.49%	23.36	123
£300 - £499	35.74%	42.82%	-7.08	93	28.35%	25.20%	3.15	103
£500 - £799	54.16%	47.78%	6.38	106	39.88%	34.57%	5.31	105
£800 or more	69.32%	66.52%	2.80	103	57.99%	60.44%	-2.45	98
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

### Unit Occupancy by Location Type - September 2023/2022

Location Type	Septemb 23	erSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	12.44%	20.06%	-7.62	92	14.90%	12.79%	2.11	102
Countryside Village	55.71%	53.48%	2.23	102	43.23%	41.65%	1.58	102
Seaside - Coastal	59.31%	57.44%	1.87	102	52.83%	49.25%	3.58	104
Small Town	68.85%	46.50%	22.35	122	44.47%	29.60%	14.87	115
- Sample Size = Ni	Nil *Sample Size (between 1 and 4) too small to be included							

## Unit Occupancy by Grading - September 2023/2022

Grading	Septemb 23	erSeptember 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	32.33%	25.74%	6.59	107	32.77%	27.56%	5.21	105
3 Stars	56.10%	51.17%	4.93	105	46.71%	40.49%	6.22	106
4 Stars	59.51%	58.06%	1.45	101	50.31%	41.77%	8.54	109
5 Stars	76.84%	73.54%	3.30	103	51.83%	58.40%	-6.57	93
Unclassified	53.15%	48.38%	4.77	105	43.58%	41.08%	2.50	103

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