

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: hugh.sheridan@gcu.ac.uk).

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 Scottish 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.

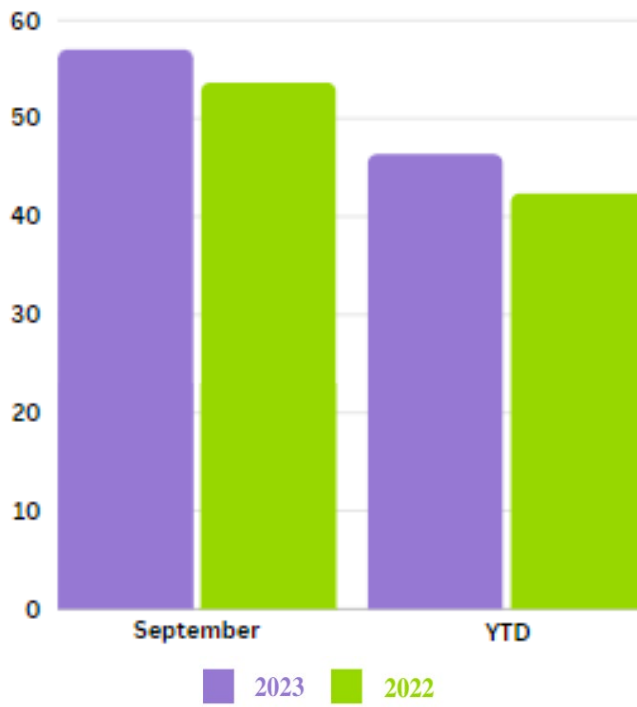
The recovery in international inbound visitation stalled in September 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 10% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

3.0 Self-Catering

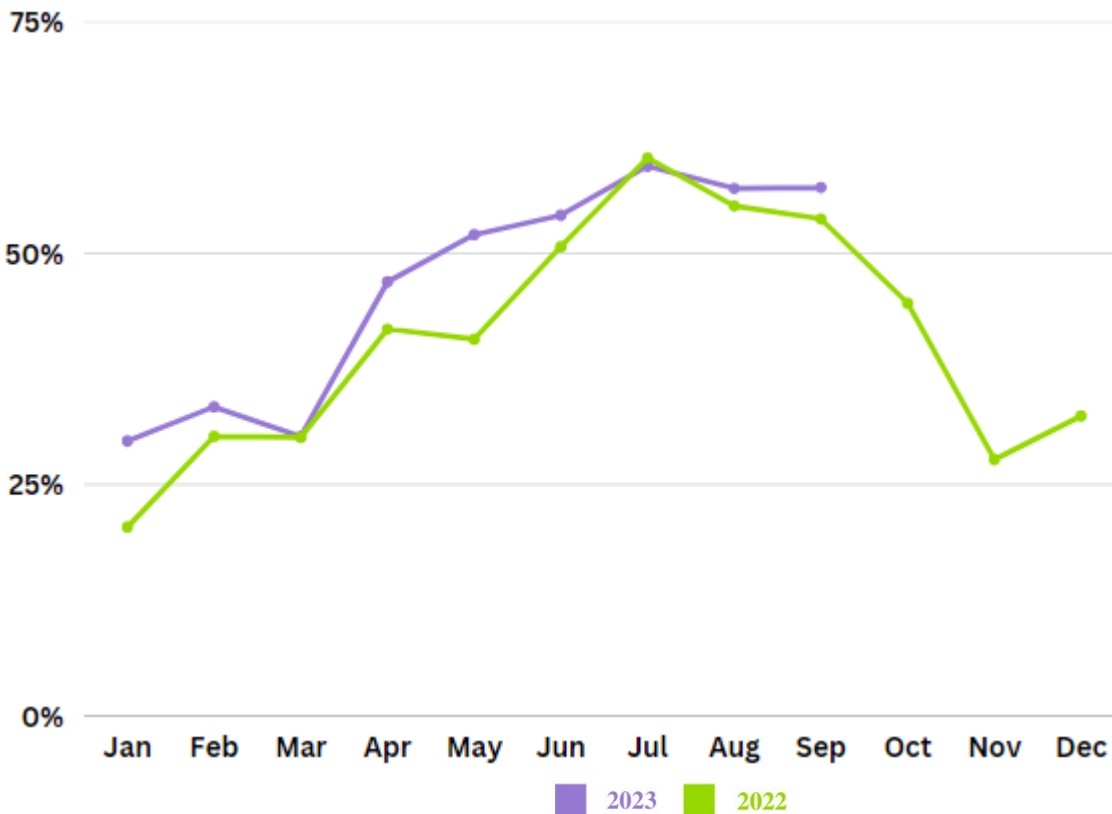
3.1 Performance by Self-Catering Category

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



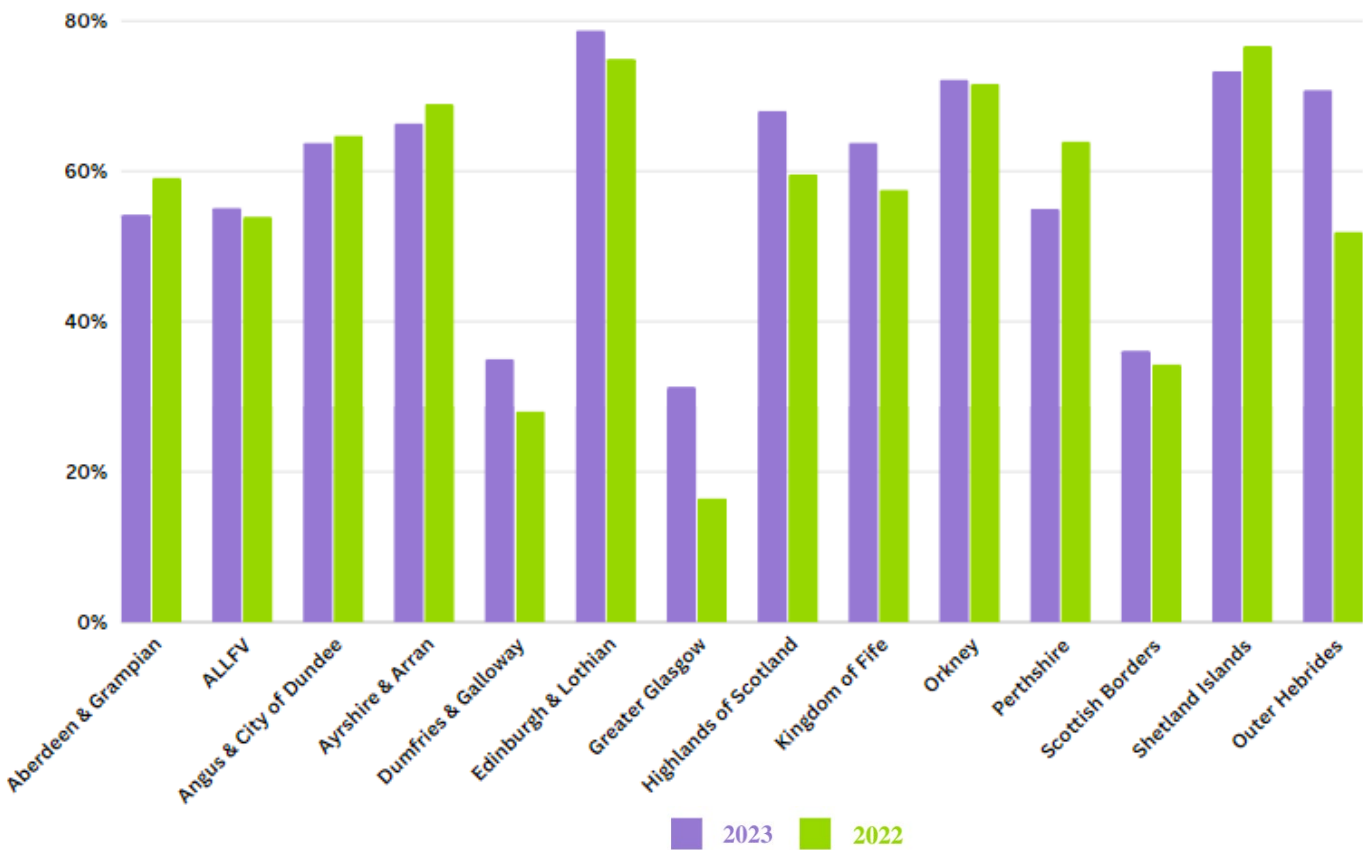
Unit occupancy rates (Sample Size >4) in the Highlands of Scotland Region were the highest in September 2023. Lodge/chalets, Accessible Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during September 2023.

Unit Occupancy – September 2023/2022

Unit Occupancy	September 23	September 22	23/22 Diff ¹	Change ²	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



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.

