

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: *February 2023/2022 Report – Self-Catering - Revised*

1.0 Introduction February 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering February 2023 and benchmarking against February 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).

Please note that this report was revised from a previous version published earlier in the year and therefore any previous versions should be discarded.

2.0 Executive Summary February 2023

The SOAS Report: February 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 February 2023 experienced a **3.17** percentage point increase when comparing percentage unit occupancy rates with February 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 14.5% footfall increase in visitors for February 2023 compared to February 2022, with both Edinburgh and Glasgow seeing significant increases (27.8% and 16.7% respectively). However, when comparing footfall in February 2023 with February 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the wider cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for February 2023 evidenced similar findings with 47% of respondents undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

Notably, some 25% of respondents Recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 11% of UK adults intended to take a domestic overnight trip in the first quarter of 2023 although that figure rose to 72% in the following 12 months. These figures 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.

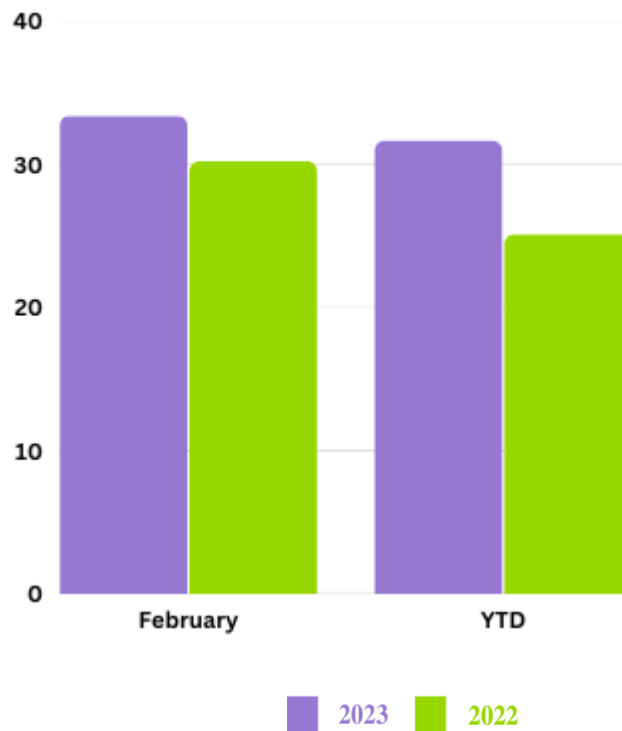
The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 continues to be restrain growth. A highlight in air transport was from Scotland's Regional Carrier, Loganair which saw a year-to-date growth of 17% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a 15% decrease in year-to-date flights when compared to 2019.

3.0 Self-Catering

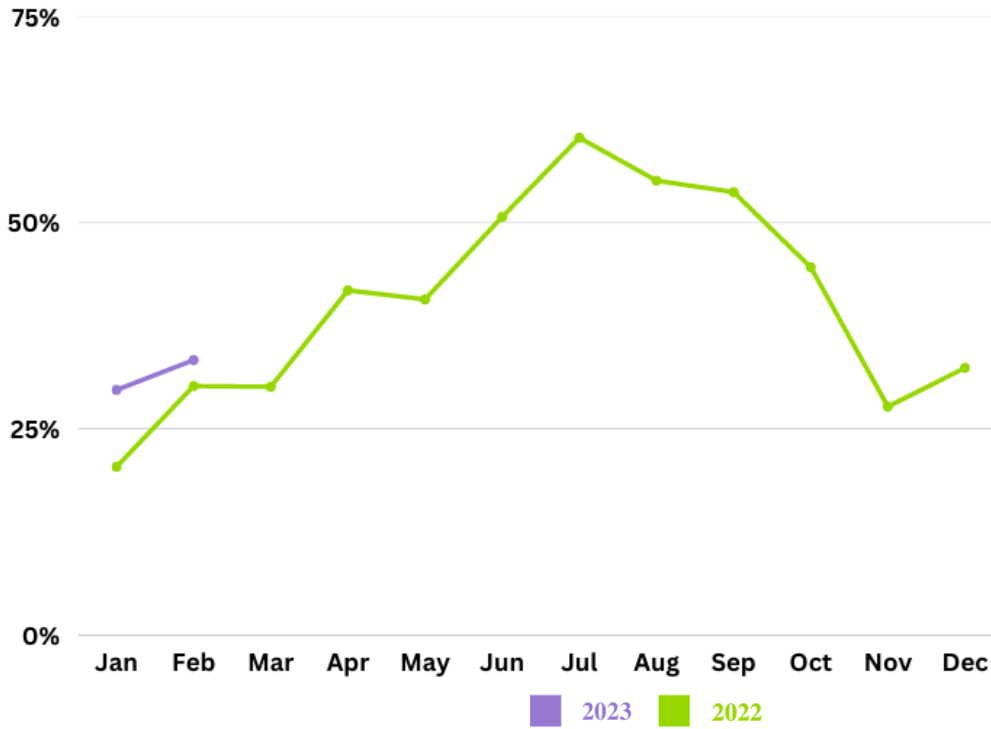
3.1 Performance by Self-Catering Category

Unit Occupancy – February 2023/2022

In the Self-Catering sector, the unit occupancy rate for February 2023 was 33.35% when compared to data from the previous year of 30.18% occupancy rate; this shows an overall percentage point increase of 3.17.



Unit Occupancy – Year to Date



Unit Occupancy – February 2023/2022

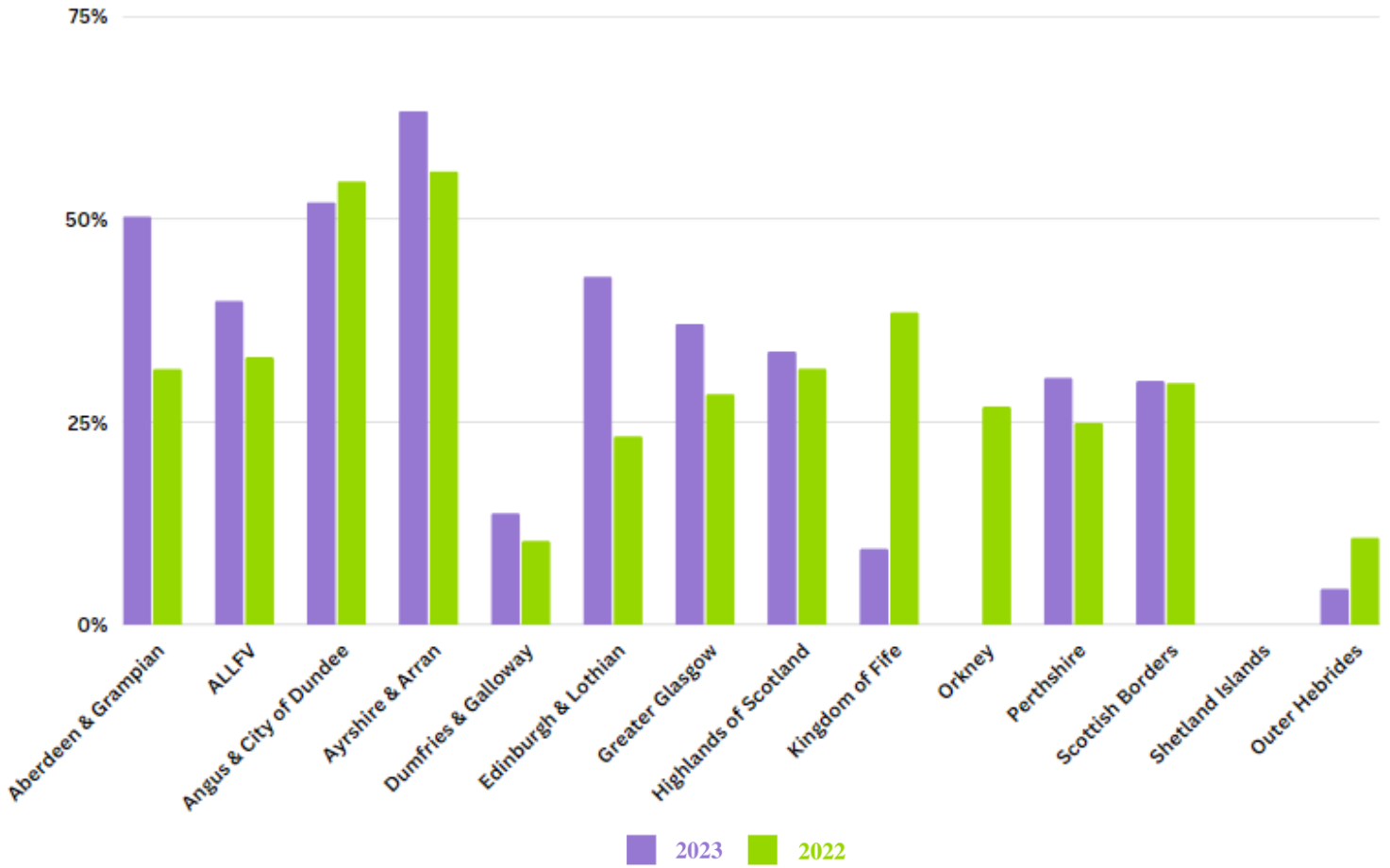
Unit Occupancy	February 23	February 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	33.35%	30.18%	3.17	103	31.62%	25.07%	6.55	107

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – February 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.



Unit occupancy rates in Ayrshire & Arran were the highest in February 2023 as well as February 2022. 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 February 2023.

Unit Occupancy by Former VisitScotland Area – February 2023/2022

Area	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	50.29%	31.51%	18.78	119	33.93%	21.67%	12.26	112
ALLFV	39.90%	32.95%	6.95	107	40.02%	32.43%	7.59	108
Angus & City of Dundee	52.04%	54.58%	-2.54	97	32.93%	42.61%	-9.68	90
Ayrshire & Arran	63.31%	55.84%	7.47	107	64.96%	54.41%	10.55	111
Dumfries & Galloway	13.70%	10.29%	3.41	103	11.45%	7.31%	4.14	104
Edinburgh & Lothian	*	23.22%	19.64	120	33.52%	25.86%	7.66	108
Greater Glasgow	37.05%	28.39%	8.66	109	41.44%	20.18%	21.26	121
Highlands of Scotland	33.64%	31.54%	2.10	102	30.75%	21.45%	9.30	109

Kingdom of Fife	9.37%	38.49%	-29.12	71	19.10%	18.27%	0.83	101
Orkney	-	*	*	*	*	26.27%	22.12	122
Perthshire	30.39%	24.85%	5.54	106	25.81%	21.95%	3.86	104
Scottish Borders	30.00%	29.76%	0.24	100	19.57%	14.12%	5.45	105
Shetland Islands	-	-	-	-	-	*	*	*
Outer Hebrides	*	*	*	*	6.35%	10.16%	-3.81	96

- Sample Size = Nil

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

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

Location accessibility/density	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	12.64%	17.83	118	16.96%	8.53%	8.43	108
Other Urban Areas	36.12%	32.55%	3.57	104	31.13%	29.80%	1.33	101
Accessible Small Towns	24.28%	17.55%	6.73	107	18.89%	13.33%	5.56	106
Remote Small Towns	18.94%	26.95%	-8.01	92	17.16%	17.04%	0.12	100
Accessible Rural	39.70%	42.73%	-3.03	97	45.10%	39.72%	5.38	105
Remote Rural	32.89%	29.63%	3.26	103	30.00%	23.18%	6.82	107

- Sample Size = Nil

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

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

Location (Geographic)	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	17.65%	17.65%	0.00	100	17.10%	11.11%	5.99	106
Inland	38.78%	33.96%	4.82	105	36.41%	28.53%	7.88	108
Island	46.36%	42.89%	3.47	103	44.11%	43.28%	0.83	101

- Sample Size = Nil

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

Unit Occupancy by Property Type – February 2023/2022

Property Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	38.62%	37.00%	1.62	102	42.66%	31.77%	10.89	111
Cottage	22.24%	24.43%	-2.19	98	21.86%	18.65%	3.21	103
Flat	24.68%	11.57%	13.11	113	17.82%	8.04%	9.78	110
Glamping	18.01%	2.40%	15.61	116	21.20%	3.98%	17.22	117
House	28.36%	18.56%	9.80	110	25.03%	19.50%	5.53	106
Lodge or Chalet	59.27%	61.29%	-2.02	98	51.84%	52.86%	-1.02	99
Other Property	17.56%	23.13%	-5.57	94	17.56%	12.46%	5.10	105
Static Caravan	0.00%	0.20%	-0.20	100	0.00%	0.11%	-0.11	100

- Sample Size = Nil

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

Unit Occupancy by Tariff – February 2023/2022

Weekly Tariff	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	8.81%	2.52%	6.29	106	4.80%	1.73%	3.07	103
Under £299	8.85%	17.57%	-8.72	91	22.48%	16.22%	6.26	106
£300 - £499	25.15%	30.14%	-4.99	95	23.66%	15.81%	7.85	108
£500 - £799	27.05%	26.06%	0.99	101	24.17%	20.27%	3.90	104
£800 or more	47.85%	50.21%	-2.38	98	43.92%	44.32%	-0.40	100

- Sample Size = Nil

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

Unit Occupancy by Location Type – February 2023/2022

Location Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	10.02%	12.26	112	15.91%	7.69%	8.22	108
Countryside Village	32.02%	30.41%	1.61	102	27.82%	22.91%	4.91	105
Seaside - Coastal	36.78%	35.97%	0.81	101	38.46%	32.72%	5.74	106
Small Town	26.68%	5.89%	20.79	121	25.62%	12.02%	13.60	114
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Grading – February 2023/2022

Grading	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	*	*	*	*
2 Stars	46.83%	20.63%	26.20	126	36.63%	13.54%	23.09	123
3 Stars	34.23%	26.02%	8.21	108	29.09%	21.31%	7.78	108
4 Stars	31.79%	32.53%	-0.74	99	26.76%	23.86%	2.90	103
5 Stars	47.13%	52.35%	-5.22	95	40.07%	40.76%	-0.69	99
Unclassified	29.35%	27.15%	2.20	102	31.49%	26.20%	5.29	105
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Disclaimer

This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted. We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.