SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

March 2023/2022 Report – Self-Catering - Revised

1.0 Introduction March 2023/2022

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

The SOAS Report: March 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 March 2023 experienced a **0.10** percentage point increase when comparing percentage unit occupancy rates with March 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions footfall increased by 14.5% in March 2023 compared to March 2022. Both Edinburgh and Glasgow seeing noticeable increases (27.8% and 16.7% respectively). However, when comparing footfall in March 2023 with March 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending and the slower return to urban working for some.

Domestic consumer sentiment provided by the GB National Tourist Boards for March 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions with caution in discretionary leisure expenditure.
Notably, some 23% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 29% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 73% for the following 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidenced the importance attached to holiday expenditure even in such 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 restrain growth. A highlight in air transport was from Scotland's Regional Carrier; Loganair, which saw a year-to-date growth of 29% 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 14% decrease in year-to-date flights compared to 2019.

The United Nations World Tourism Organisations World Tourism Barometer found global international tourist arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 (-20% compared to the same quarter of 2019) boosted by strong results in Europe and the Middle East, compared to a 66% recovery level for the year 2022 overall. An estimated 235 million tourists travelled internationally in the first three months, more than double those in the same period of 2022. Europe reached 90% of pre-pandemic levels in Q1 2023, supported by robust intra-regional demand.

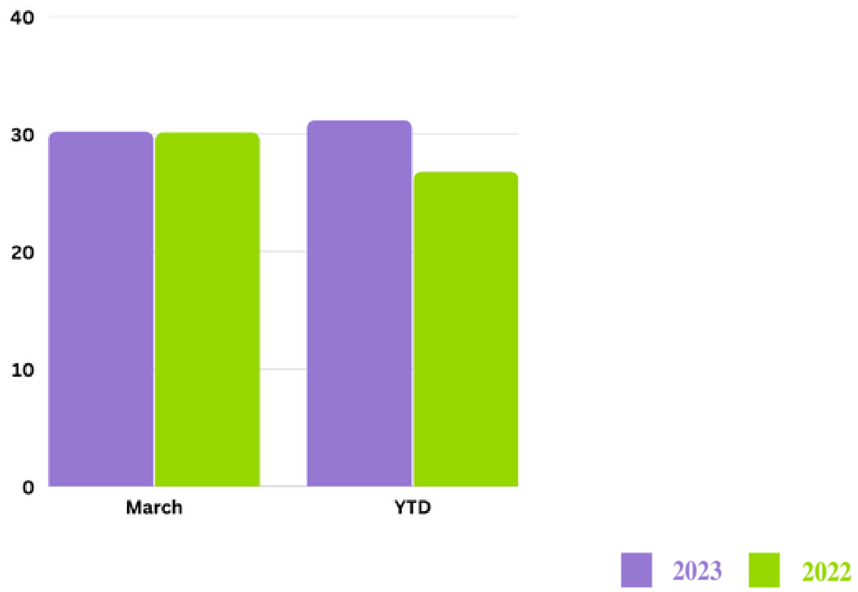
Looking ahead, the UNWTO Panel of Experts survey indicates that almost 70% of experts expect better performance in May-August 2023. Yet, most continue to believe international tourism will not return to 2019 levels until 2024 or later. The UNWTO also suggest strong results are expected in the coming Northern Hemisphere summer season backed by robust pent-up demand, the sustained recovery of air connectivity, and the recent reopening of China and other major Asian markets and destinations.
(Source: https://www.unwto.org/news/tourism-on-track-for-full-recovery-as-new-data-shows-strong-start-to-2023)

3.0 Self-Catering

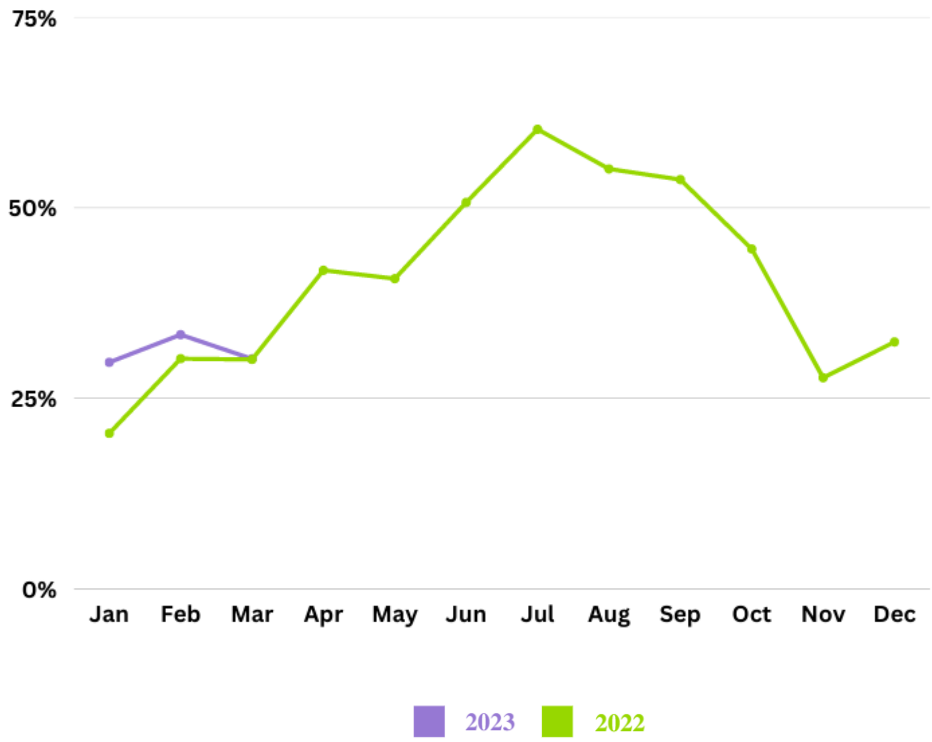
3.1 Performance by Self-Catering Category

Unit Occupancy – March 2023/2022

In the Self-Catering sector, the unit occupancy rate for March 2023 was 30.20% when compared to data from the previous year of 30.10% occupancy rate; this shows an overall percentage point increase of 0.10.



Unit Occupancy – Year to Date



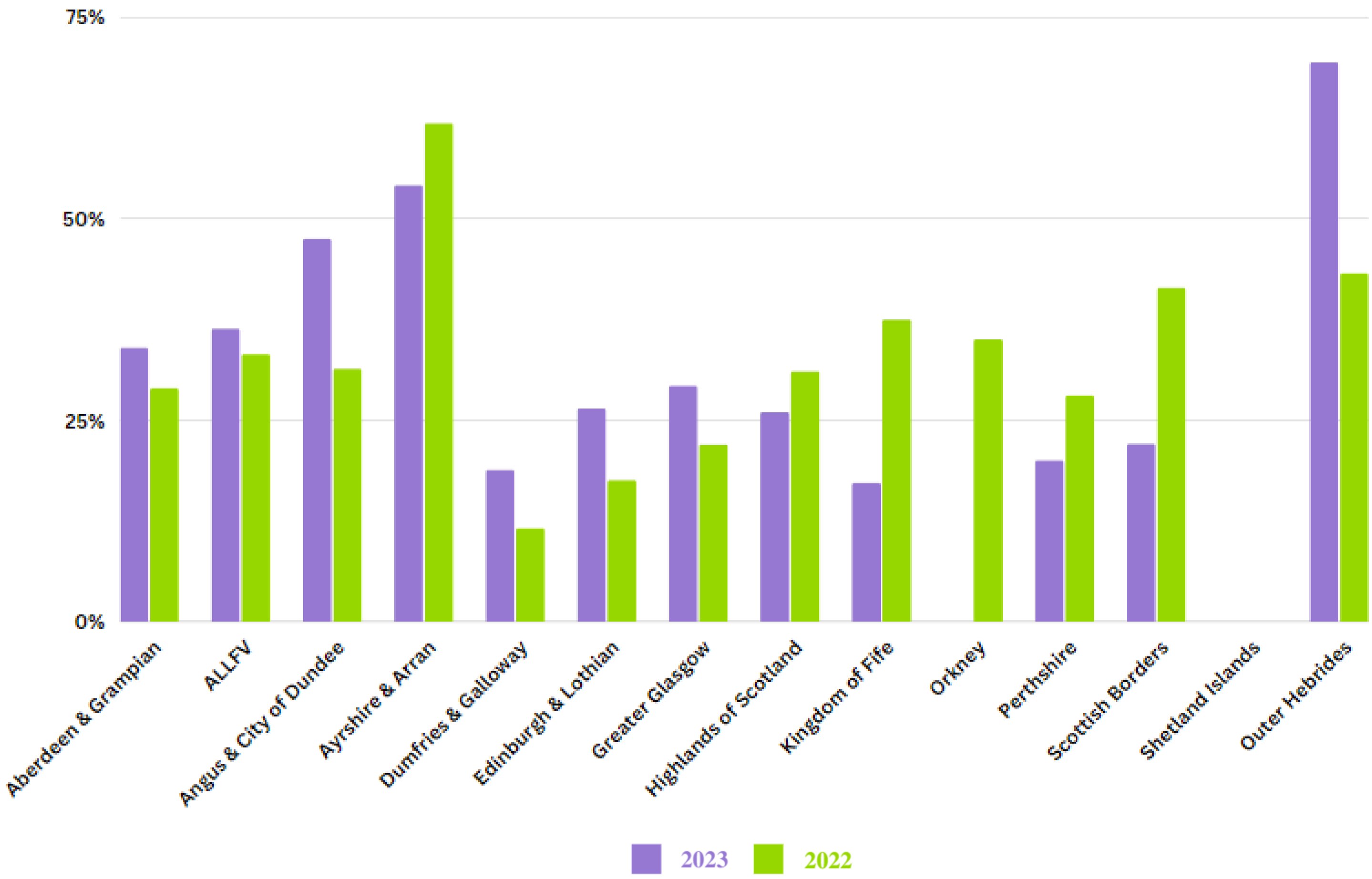
Unit Occupancy – March 2023/2022

Unit Occupancy	March 23	March 22	23/22 Diff[1]	Change[2]	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	30.20%	30.10%	0.10	100	31.16%	26.79%	4.37	104

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – March 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 the Outer Hebrides were the highest in March 2023, whereas in 2022 the highest occupancy rates were in Ayrshire in Arran. Lodge/chalets, Remote Small Towns, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during March 2023.

Unit Occupancy by Former VisitScotland Area – March 2023/2022

Area	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	33.97%	28.94%	5.03	105	33.95%	24.17%	9.78	110
ALLFV	36.31%	33.15%	3.16	103	38.79%	32.68%	6.11	106
Angus & City of Dundee	47.46%	31.34%	16.12	116	38.45%	38.73%	-0.28	100
Ayrshire & Arran	54.12%	61.79%	-7.67	92	61.40%	56.95%	4.45	104
Dumfries & Galloway	18.80%	11.58%	7.22	107	13.43%	8.78%	4.65	105
Edinburgh & Lothian	26.41%	17.54%	8.87	109	31.07%	22.99%	8.08	108
Greater Glasgow	29.21%	21.93%	7.28	107	37.04%	20.78%	16.26	116
Highlands of Scotland	25.98%	31.01%	-5.03	95	29.20%	24.83%	4.37	104
Kingdom of Fife	17.20%	37.42%	-20.22	80	18.57%	24.86%	-6.29	94
Orkney	*	34.95%	-34.95	65	*	29.26%	-5.07	95

Perthshire	19.96%	28.03%	-8.07	92	24.23%	23.86%	0.37	100
Scottish Borders	22.04%	41.39%	-19.35	81	20.50%	23.52%	-3.02	97
Shetland Islands	-	-	-	-		*	*	*
Outer Hebrides	*	43.22%	26.13	126	28.05%	21.86%	6.19	106

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

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

Location accessibility/density	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	13.00%	8.51%	4.49	104	15.01%	8.52%	6.49	106
Other Urban Areas	36.10%	28.53%	7.57	108	32.58%	29.39%	3.19	103
Accessible Small Towns	13.56%	16.19%	-2.63	97	17.06%	14.31%	2.75	103
Remote Small Towns	36.67%	34.04%	2.63	103	24.25%	22.29%	1.96	102
Accessible Rural	40.10%	40.11%	-0.01	100	43.48%	39.86%	3.62	104
Remote Rural	27.70%	31.60%	-3.90	96	29.30%	26.13%	3.17	103

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

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

Location (Geographic)	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	16.81%	17.85%	-1.04	99	17.00%	13.49%	3.51	104
Inland	33.17%	32.24%	0.93	101	35.40%	29.79%	5.61	106
Island	53.63%	56.48%	-2.85	97	47.40%	47.56%	-0.16	100

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

Unit Occupancy by Property Type – March 2023/2022

Property Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	39.20%	35.99%	3.21	103	41.60%	33.16%	8.44	108
Cottage	24.23%	22.09%	2.14	102	22.68%	19.83%	2.85	103
Flat	10.94%	18.08%	-7.14	93	14.85%	11.56%	3.29	103
Glamping	22.29%	13.44%	8.85	109	21.52%	6.12%	15.40	115
House	29.78%	20.58%	9.20	109	26.52%	19.86%	6.66	107
Lodge or Chalet	55.09%	60.57%	-5.48	95	52.70%	55.54%	-2.84	97
Other Property	29.72%	23.02%	6.70	107	21.33%	15.98%	5.35	105
Static Caravan	0.00%	0.41%	-0.41	100	0.00%	0.22%	-0.22	100

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

Unit Occupancy by Tariff – March 2023/2022

Weekly Tariff	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	8.18%	0.00%	8.18	108	6.02%	1.18%	4.84	105
Under £299	8.05%	17.78%	-9.73	90	18.96%	16.66%	2.30	102
£300 - £499	30.42%	23.06%	7.36	107	26.21%	18.45%	7.76	108
£500 - £799	26.51%	23.44%	3.07	103	24.86%	21.30%	3.56	104
£800 or more	36.79%	49.72%	-12.93	87	41.56%	46.24%	-4.68	95

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

Unit Occupancy by Location Type – March 2023/2022

Location Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22	Change

							Diff	
City - Large Town	12.22%	8.37%	3.85	104	14.09%	7.92%	6.17	106
Countryside Village	27.05%	28.18%	-1.13	99	27.57%	24.71%	2.86	103
Seaside - Coastal	38.78%	36.28%	2.50	103	38.56%	33.95%	4.61	105
Small Town	19.30%	29.20%	-9.90	90	23.36%	17.56%	5.80	106

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

Unit Occupancy by Grading – March 2023/2022

Grading	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	*	*	*	*
2 Stars	29.08%	21.13%	7.95	108	34.14%	16.31%	17.83	118
3 Stars	29.73%	27.14%	2.59	103	29.26%	23.19%	6.07	106
4 Stars	38.46%	26.82%	11.64	112	30.74%	24.92%	5.82	106
5 Stars	23.01%	57.40%	-34.39	66	34.56%	46.36%	-11.80	88
Unclassified	30.03%	30.53%	-0.50	100	31.00%	27.66%	3.34	103

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

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