

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

1.0 Introduction April 2023/2022

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

The SOAS Report: April 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 April 2023 experienced a **5.09** percentage point increase when comparing percentage unit occupancy rates with April 2022.

Data from the Scottish Retail Consortium showed that Easter provided a slender but nonetheless welcome uplift to retail sales in Scotland last month. The real terms value of retail sales edged back into positive territory after the decline witnessed in March. Retail sales in Scotland held steady in April with decent growth of 9.1%. Food sales are the biggest growth area, aided by the Easter weekend and family gatherings. From the Visitor Attraction Barometer, Scottish Retail Attractions footfall increased by 2% in April 2023 compared to April 2022. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the broader cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

Notably, some 21% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 34% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 77% 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.

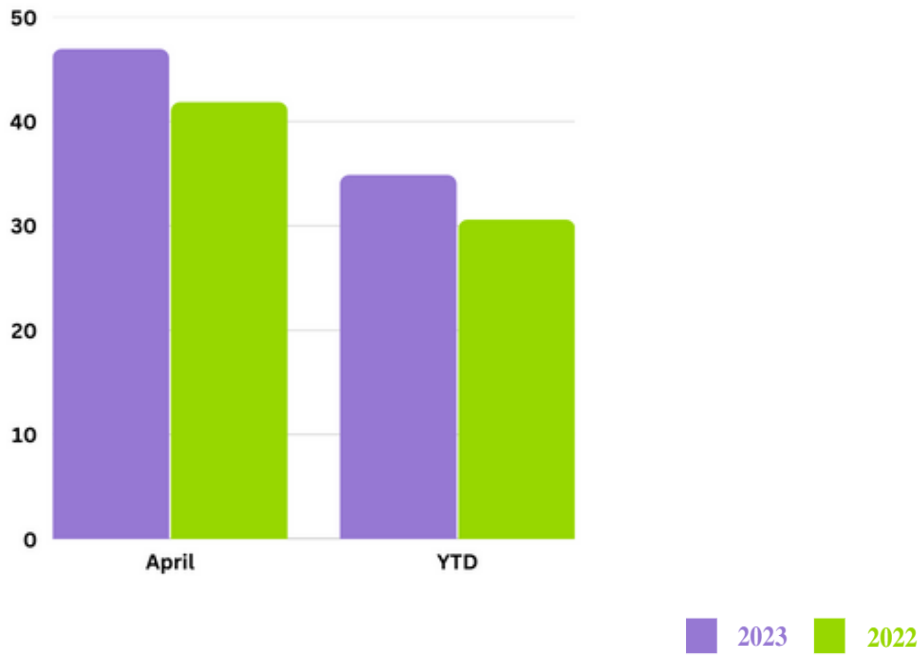
The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 continues to restrain growth. A highlight in air transport was from Scotland's Regional Carrier, Loganair which saw a year-to-date growth of 16% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a 12% decrease in year-to-date flights compared to 2019.

3.0 Self-Catering

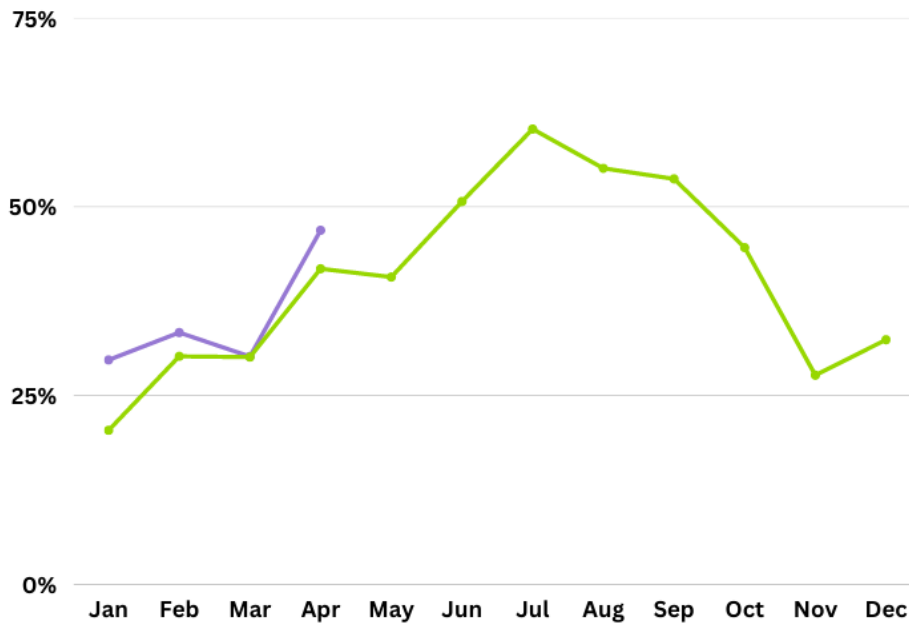
3.1 Performance by Self-Catering Category

Unit Occupancy – April 2023/2022

In the Self-Catering sector, the unit occupancy rate for April 2023 was 46.88% when compared to data from the previous year of 41.79% occupancy rate; this shows an overall percentage point increase of 5.09.



Unit Occupancy – Year to Date



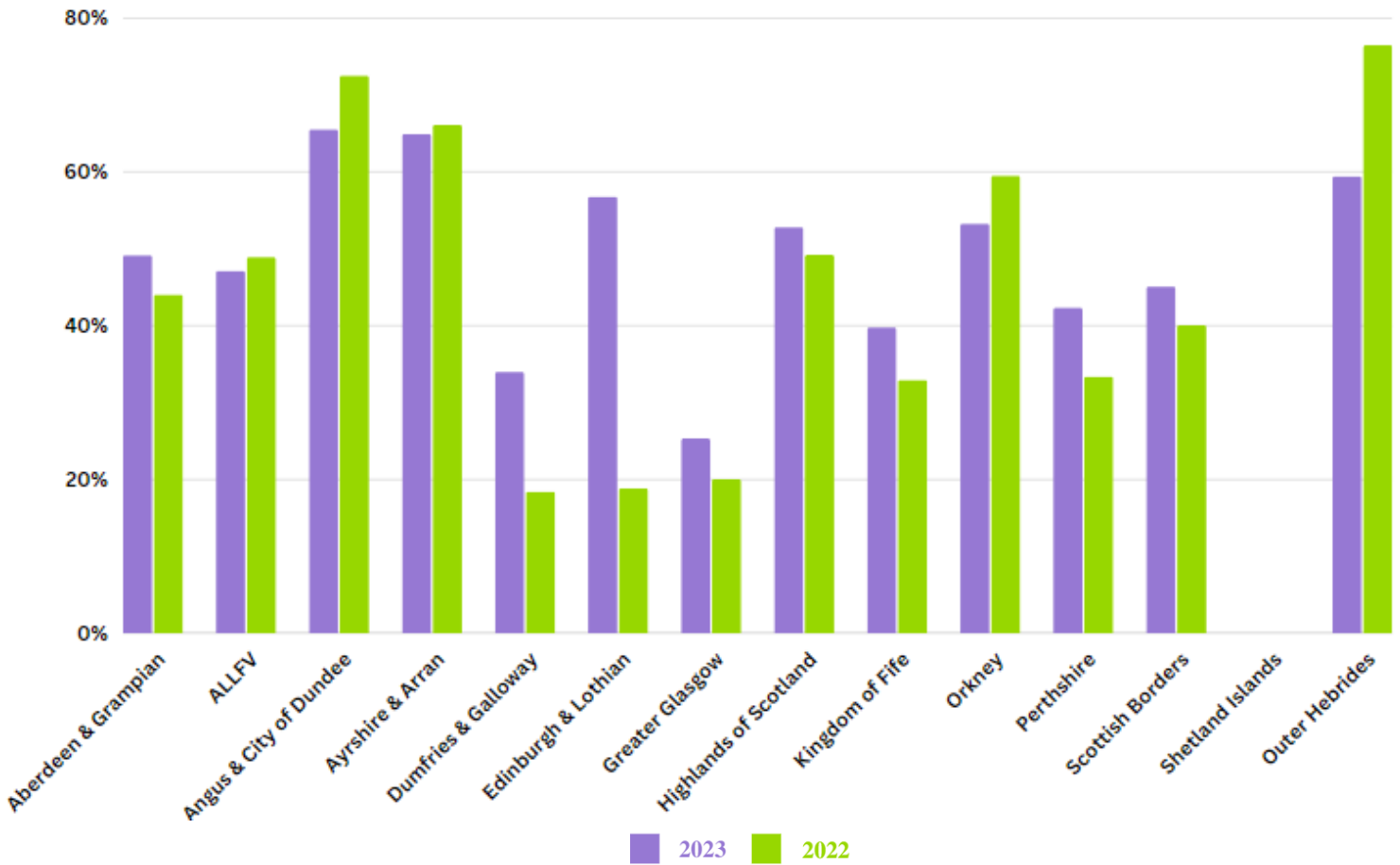
2023 2022

Unit Occupancy – April 2023/2022

Unit Occupancy	April 23	April 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	46.88%	41.79%	5.09	105	34.82%	30.55%	4.27	104

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – April 2023/2022



Unit occupancy rates in Angus & Dundee were the highest in April 2023, compared to the Outer Hebrides in April 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 April 2023. The same could be said for April 2022 apart from the choice of area, where Remote Rural was most popular.

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 by Former VisitScotland Area – April 2023/2022

Area	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	49.08%	43.98%	5.10	105	37.36%	29.22%	8.14	108
ALLFV	47.04%	48.83%	-1.79	98	40.70%	36.67%	4.03	104
Angus & City of Dundee	65.41%	72.38%	-6.97	93	44.91%	47.14%	-2.23	98
Ayrshire & Arran	64.81%	66.02%	-1.21	99	62.27%	59.22%	3.05	103
Dumfries & Galloway	33.90%	18.38%	15.52	116	17.54%	11.18%	6.36	106
Edinburgh & Lothian	56.66%	18.82%	37.84	138	37.47%	21.95%	15.52	116
Greater Glasgow	25.26%	20.00%	5.26	105	33.87%	20.59%	13.28	113
Highlands of Scotland	52.70%	49.12%	3.58	104	34.68%	31.05%	3.63	104
Kingdom of Fife	39.67%	32.87%	6.80	107	23.49%	26.87%	-3.38	97
Orkney	53.19%	59.40%	-6.21	94	33.26%	38.47%	-5.21	95
Perthshire	42.24%	33.31%	8.93	109	28.49%	26.30%	2.19	102
Scottish Borders	45.00%	39.99%	5.01	105	26.20%	27.64%	-1.44	99
Shetland Islands	-	-	-	-	-	*	*	*
Outer Hebrides	59.32%	76.37%	-17.05	83	34.85%	34.81%	0.04	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	12.81%	28.02	128	17.06%	9.96%	7.10	107
Other Urban Areas	36.64%	48.20%	-11.56	88	20.26%	32.88%	-12.62	87
Accessible Small Towns	36.64%	23.78%	12.86	113	20.26%	16.98%	3.28	103
Remote Small Towns	46.96%	40.00%	6.96	107	28.89%	26.49%	2.40	102
Accessible Rural	57.10%	44.50%	12.60	113	46.67%	41.08%	5.59	106
Remote Rural	42.68%	51.12%	-8.44	92	32.59%	32.20%	0.39	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	38.76%	30.98%	7.78	108	22.41%	18.00%	4.41	104
Inland	48.12%	42.49%	5.63	106	38.23%	32.98%	5.25	105
Island	66.23%	75.57%	-9.34	91	52.05%	53.88%	-1.83	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Property Type – April 2023/2022

Property Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	49.04%	57.75%	-8.71	91	43.42%	38.30%	5.12	105
Cottage	37.35%	36.33%	1.02	101	26.36%	23.86%	2.50	103
Flat	24.79%	20.07%	4.72	105	16.51%	14.49%	2.02	102
Glamping	56.05%	12.04%	44.01	144	25.81%	7.11%	18.70	119
House	39.63%	37.87%	1.76	102	29.60%	24.14%	5.46	105
Lodge or Chalet	69.18%	72.37%	-3.19	97	56.66%	59.67%	-3.01	97

Other Property	16.85%	18.35%	-1.50	99	19.92%	16.50%	3.42	103
Static Caravan	25.74%	14.51%	11.23	111	6.33%	4.09%	2.24	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Tariff – April 2023/2022

Weekly Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	13.14%	8.61%	4.53	105	7.55%	2.17%	5.38	105
Under £299	9.72%	0.91%	8.81	109	17.52%	13.89%	3.63	104
£300 - £499	32.44%	26.64%	5.80	106	27.48%	19.87%	7.61	108
£500 - £799	42.65%	38.86%	3.79	104	28.93%	25.43%	3.50	104
£800 or more	57.81%	52.14%	5.67	106	45.65%	48.23%	-2.58	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Location Type – April 2023/2022

Location Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	30.06%	11.84%	18.22	118	15.67%	9.14%	6.53	107
Countryside Village	43.55%	41.25%	2.30	102	31.35%	28.90%	2.45	102
Seaside - Coastal	52.14%	52.50%	-0.36	100	41.88%	38.34%	3.54	104
Small Town	41.73%	19.78%	21.95	122	26.91%	18.10%	8.81	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Grading – April 2023/2022

Grading	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	*	*	*	*
2 Stars	24.05%	23.75%	0.30	100	30.94%	18.25%	12.69	113
3 Stars	42.73%	48.51%	-5.78	94	33.24%	28.45%	4.79	105
4 Stars	51.03%	41.54%	9.49	109	36.03%	28.48%	7.55	108
5 Stars	72.38%	46.27%	26.11	126	39.72%	46.33%	-6.61	93
Unclassified	42.34%	41.13%	1.21	101	33.77%	30.99%	2.78	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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