

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## January 2023/2022 Report – Self-Catering - Revised

### 1.0 Introduction January 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering January 2023 and benchmarking against January 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](mailto: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 January 2023

The SOAS Report: January 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 January 2023 experienced a **9.35** percentage point increase when comparing percentage unit occupancy rates with January 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 12.2% footfall increase in visitors for January 2023 compared to the same period in 2022.

Domestic consumer sentiment provided by the GB National Tourist Boards for January 2023 found that 52% of respondents stated (a 5% increase on the December 2022 Survey) saying they were “cautious - things are OK but I feel I have to be very careful”.

The survey also recorded 21% of respondents (a 1% decrease on the December 2022 Survey) saying they are “...been hit hard - no option but to cut back on spending”. Despite consumer concern about the state of the economy, 16% of UK adults intend to take a domestic overnight trip in the first quarter of 2023 and 70% in the next 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023).

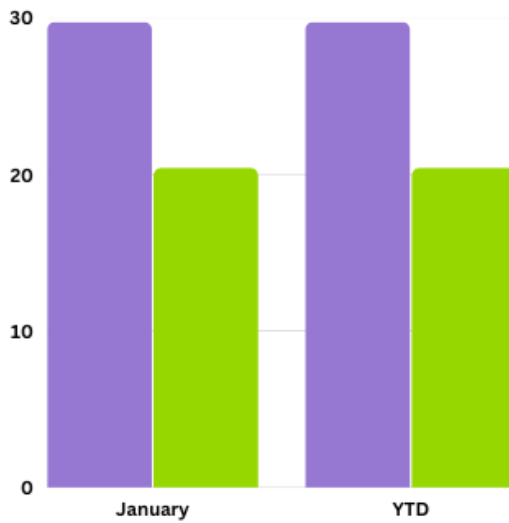
The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 remained the major barrier to growth. One highlight in air transport is from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 42% in daily flights compared to 2019. Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a 17% decrease in year-to-date flights when compared to the same time in 2019, however, the UK was the busiest state within the network in 2023, with an average of 4,044 flights per day this is a 69% increase compared to the same time in 2022 (Eurocontrol, 2023), however, the start of 2023 saw Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.

### 3.0 Self-Catering

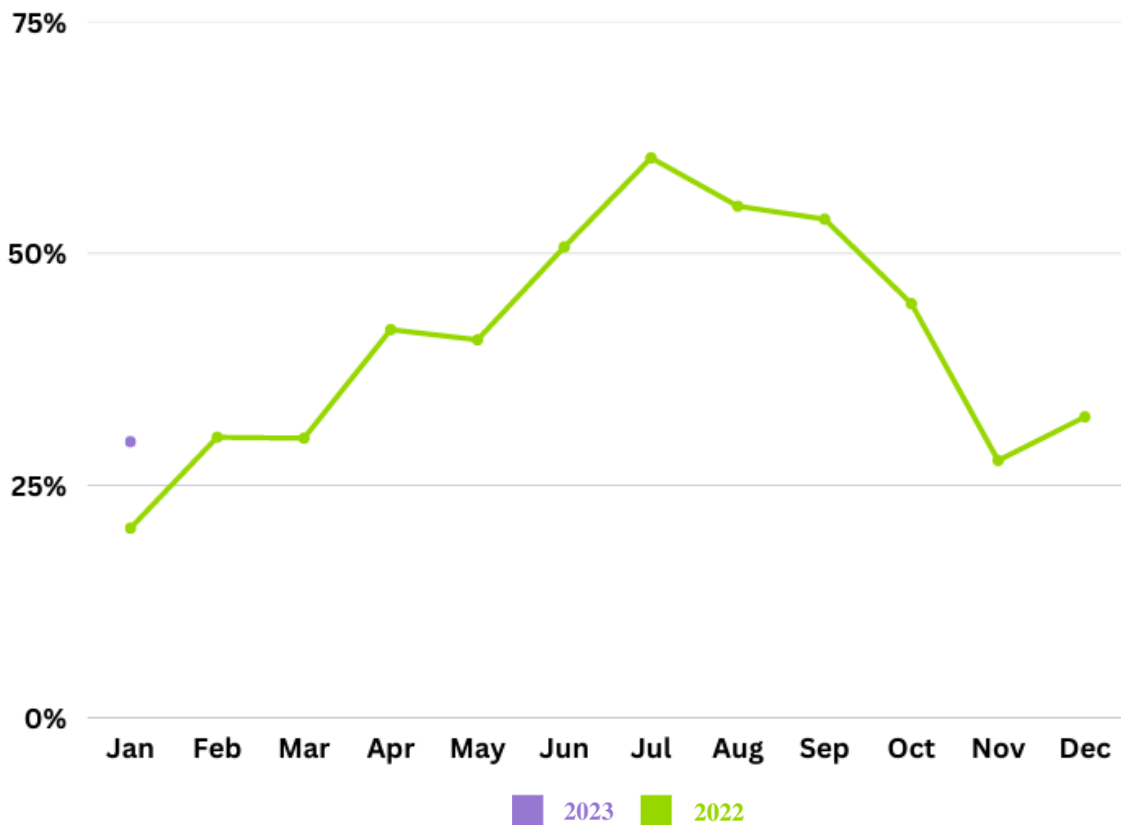
#### 3.1 Performance by Self-Catering Category

##### Unit Occupancy – January 2023/2022

In the Self-Catering sector, the unit occupancy rate for January 2022 was 29.72% when compared to data from the previous year of 20.37% occupancy rate; this shows an overall percentage point increase of 9.35.



##### Unit Occupancy – Year to Date

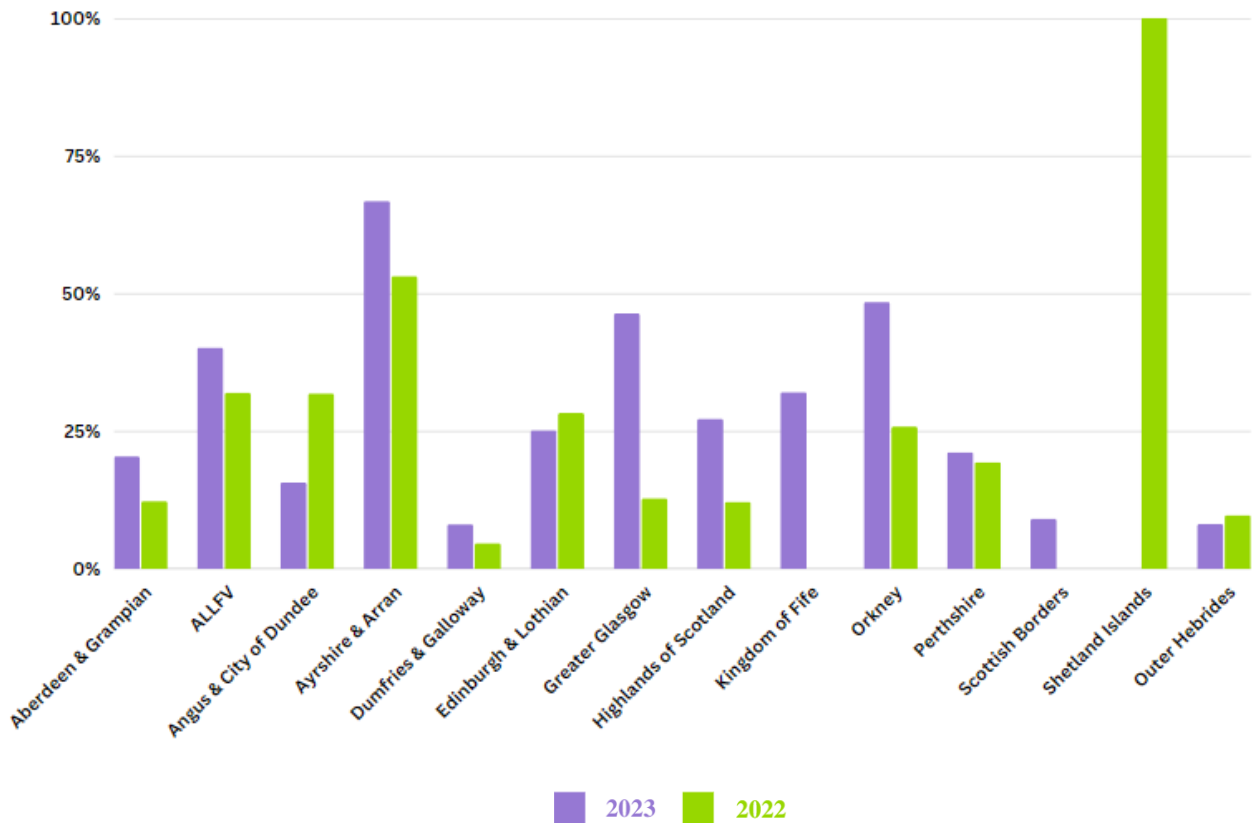


### Unit Occupancy – January 2023/2022

Unit Occupancy	Jan 23	Jan 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	29.72%	20.37%	9.35	109	29.72%	20.37%	9.35	109

### Unit Occupancy by Former VisitScotland Area

#### Unit Occupancy by Former VisitScotland Area – January 2023/2022



**Unit occupancy** rates were highest in Ayrshire and Arran in January 2023, compared to the Shetland Islands in January 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 January 2022. The profile for January 2023 is very similar except for Bungalows being slightly more popular than lodges and chalets.

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

<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 – January 2023/2022

Area	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	20.35%	12.26%	8.09	108	20.35%	12.26%	8.09	108
ALLFV	40.15%	31.94%	8.21	108	40.15%	31.94%	8.21	108
Angus & City of Dundee	15.67%	31.80%	-16.13	84	15.67%	31.80%	-16.13	84
Ayrshire & Arran	66.75%	53.12%	13.63	114	66.75%	53.12%	13.63	114
Dumfries & Galloway	8.03%	4.61%	3.42	103	8.03%	4.61%	3.42	103
Edinburgh & Lothian	25.09%	28.24%	-3.15	97	25.09%	28.24%	-3.15	97
Greater Glasgow	46.33%	12.78%	33.55	134	46.33%	12.78%	33.55	134
Highlands of Scotland	27.21%	12.17%	15.04	115	27.21%	12.17%	15.04	115
Kingdom of Fife	31.99%	0.00%	31.99	132	31.99%	0.00%	31.99	132
Orkney	*	*	*	*	*	*	*	*
Perthshire	21.14%	19.33%	1.81	102	21.14%	19.33%	1.81	102
Scottish Borders	8.97%	0.00%	8.97	109	8.97%	0.00%	8.97	109
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	*	*	*	*
<b>- Sample Size = Nil</b>			<b>*Sample Size (between 1 and 4) too small to be included</b>					

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

Location accessibility/density	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	14.00%	4.98%	9.02	109	14.00%	4.98%	9.02	109
Other Urban Areas	25.39%	27.67%	-2.28	98	25.39%	27.67%	-2.28	98
Accessible Small Towns	13.95%	9.51%	4.44	104	13.95%	9.51%	4.44	104
Remote Small Towns	14.49%	8.62%	5.87	106	14.49%	8.62%	5.87	106
Accessible Rural	51.74%	36.90%	14.84	115	51.74%	36.90%	14.84	115
Remote Rural	26.85%	16.88%	9.97	110	26.85%	16.88%	9.97	110
<b>- Sample Size = Nil</b>			<b>*Sample Size (between 1 and 4) too small to be included</b>					

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

Location (Geographic)	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	16.49%	5.00%	11.49	111	16.49%	5.00%	11.49	111
Inland	33.79%	23.54%	10.25	110	33.79%	23.54%	10.25	110
Island	41.97%	43.61%	-1.64	98	41.97%	43.61%	-1.64	98
<b>- Sample Size = Nil</b>			<b>*Sample Size (between 1 and 4) too small to be included</b>					

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

Property Type	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	48.03%	27.65%	20.38	120	48.03%	27.65%	20.38	120
Cottage	21.37%	13.35%	8.02	108	21.37%	13.35%	8.02	108
Flat	12.42%	4.82%	7.60	108	12.42%	4.82%	7.60	108
Glamping	*	5.31%	20.57	121	*	5.31%	20.57	121
House	16.45%	20.32%	-3.87	96	16.45%	20.32%	-3.87	96
Lodge or Chalet	45.95%	44.92%	1.03	101	45.95%	44.92%	1.03	101
Other Property	-	2.81%	-2.81	97	-	2.81%	-2.81	97

Static Caravan	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

### Unit Occupancy by Tariff – January 2023/2022

Weekly Tariff	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	0.99%	1.08%	-0.09	100	0.99%	1.08%	-0.09	100
Under £299	35.13%	14.99%	20.14	120	35.13%	14.99%	20.14	120
£300 - £499	20.77%	12.12%	8.65	109	20.77%	12.12%	8.65	109
£500 - £799	20.61%	14.64%	5.97	106	20.61%	14.64%	5.97	106
£800 or more	40.45%	38.92%	1.53	102	40.45%	38.92%	1.53	102
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

### Unit Occupancy by Location Type – January 2023/2022

Location Type	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	14.00%	5.64%	8.36	108	14.00%	5.64%	8.36	108
Countryside Village	23.39%	16.07%	7.32	107	23.39%	16.07%	7.32	107
Seaside - Coastal	40.25%	29.64%	10.61	111	40.25%	29.64%	10.61	111
Small Town	20.16%	17.08%	3.08	103	20.16%	17.08%	3.08	103
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

### Unit Occupancy by Grading – January 2023/2022

Grading	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	-	*	*	*	-	*	*	*
2 Stars	27.64%	7.37%	20.27	120	27.64%	7.37%	20.27	120
3 Stars	24.09%	17.47%	6.62	107	24.09%	17.47%	6.62	107
4 Stars	23.04%	14.54%	8.50	109	23.04%	14.54%	8.50	109
5 Stars	34.74%	30.49%	4.25	104	34.74%	30.49%	4.25	104
Unclassified	35.01%	25.39%	9.62	110	35.01%	25.39%	9.62	110
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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