



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

December 2023/2022 Report - Self-Catering

1.0 Introduction December 2023/2022

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

The SOAS Report: December 2023/2022 Self-Catering report showed a decline in the Self-Catering sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for December 2023 experienced a **2.58** percentage point decrease when comparing percentage unit occupancy rates with December 2022.

Data from the Scottish Retail Consortium showed that retail sales remained weak in December with growth of just 1.9%. Food and drink and health and beauty categories continued to drive sales, however, food sales in December were the weakest monthly performance in 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the December 2023 survey). The survey recorded 47% of respondents (a 5% decrease on the December 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, 28% of UK adults intend to take a domestic overnight trip in the first quarter of 2024, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months container to be the rising cost of living, UK weather and Personal finances. The figures above have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2024) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation continued to stall in December 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 6% decrease in year-to-date flights compared to 2019.

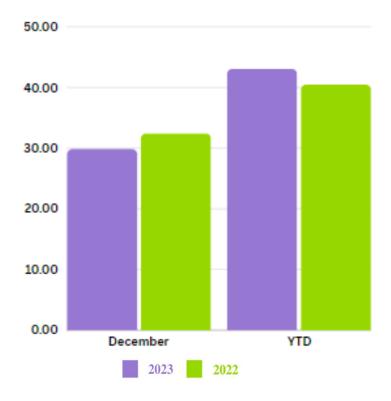




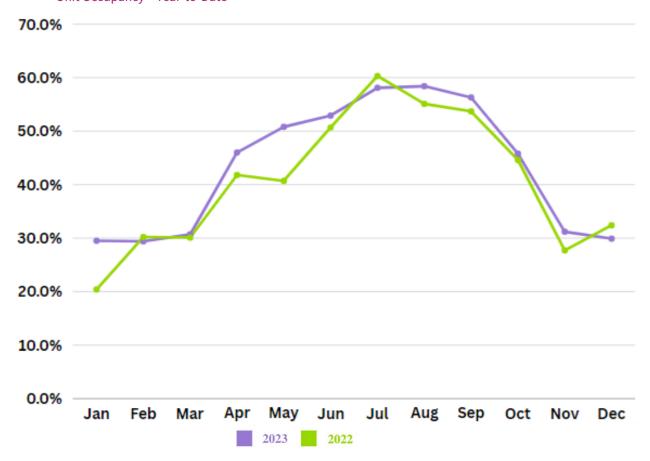
3.1 Performance by Self-Catering Category

Unit Occupancy – December 2023/2022

In the Self-Catering sector, the unit occupancy rate for December 2023 was 29.86% when compared to data from the previous year of 32.44% occupancy rate; this shows an overall percentage point decrease of 2.58.



Unit Occupancy – Year-to-Date







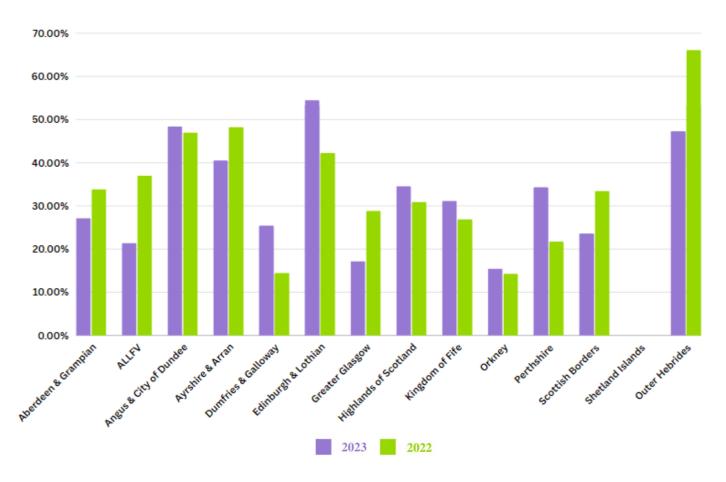
Unit occupancy rates (Sample Size >4) in the Edinburgh & Lothian Region were the highest in December 2023. Lodge/chalets, Other Urban areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during December 2023.

Unit Occupancy - December 2023/2022

Unit Occupancy	December 23	er December 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	29.86%	32.44%	-2.58	97	43.07%	40.49%	2.58	103

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – December 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 by Former VisitScotland Area – December 2023/2022

Area	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
Aberdeen & Grampian	27.17%	33.87%	-6.70	93	36.53%	41.39%	-4.86	95	
ALLFV	21.41%	37.02%	-15.61	84	44.73%	44.77%	-0.04	100	
Angus & City of Dundee	48.39%	47.01%	1.38	101	56.87%	61.64%	-4.77	95	
Ayrshire & Arran	40.54%	48.23%	-7.69	92	61.34%	63.17%	-1.83	98	
Dumfries & Galloway	25.43%	14.45%	10.98	111	27.80%	19.83%	7.97	108	
Edinburgh & Lothian	54.50%	42.26%	12.24	112	47.51%	41.41%	6.10	106	
Greater Glasgow	17.20%	28.87%	-11.67	88	27.04%	20.35%	6.69	107	
Highlands of Scotland	34.58%	30.94%	3.64	104	47.81%	43.72%	4.09	104	
Kingdom of Fife	31.18%	26.88%	4.30	104	40.01%	32.05%	7.96	108	
Orkney	15.48%	*	1.19	101	66.94%	56.96%	9.98	110	
Perthshire	34.32%	21.76%	12.56	113	47.17%	33.51%	13.66	114	
Scottish Borders	23.60%	33.47%	-9.87	90	30.56%	31.72%	-1.16	99	
Shetland Islands	-	-	-	-	64.67%	92.93%	-28.26	72	
Outer Hebrides	*	*	*	*	44.73%	55.62%	-10.89	89	
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included									

Unit Occupancy by Location (Accessibility & Density) - December 2023/2022

Location accessibility/density	December	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	23.83%	26.29%	-2.46	98	18.59%	15.83%	2.76	103
Other Urban Areas	45.90%	36.81%	9.09	109	45.52%	42.48%	3.04	103
Accessible Small Towns	19.86%	15.18%	4.68	105	29.13%	25.91%	3.22	103
Remote Small Towns	26.10%	34.16%	-8.06	92	37.61%	36.02%	1.59	102
Accessible Rural	30.58%	41.39%	-10.81	89	50.12%	50.96%	-0.84	99
Remote Rural	28.01%	31.38%	-3.37	97	42.74%	41.02%	1.72	102
- Sample Size = Nil	Nil *Sample Size (between 1 and 4) too small to be included							

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

Location (Geographic)	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	23.57%	15.92%	7.65	108	34.49%	27.26%	7.23	107
Inland	31.55%	37.26%	-5.71	94	44.35%	42.86%	1.49	101
Island	40.94%	49.04%	-8.10	92	62.11%	64.88%	-2.77	97
- Sample Size = Nil	*Samp	nple Size (between 1 and 4) too small to be included						

Unit Occupancy by Property Type – December 2023/2022

Property Type	Decemb	December December		Change	YTD 23	YTD 22	23/22	Change	
riopeity Type	23	22	23/22 Diff	Change	11023	11022	Diff	Change	
Bungalow	29.82%	46.85%	-17.03	83	46.88%	48.50%	-1.62	98	
Cottage	25.53%	24.93%	0.60	101	36.98%	34.04%	2.94	103	
Flat	17.36%	16.04%	1.32	101	23.56%	22.28%	1.28	101	
Glamping	38.02%	7.28%	30.74	131	21.93%	21.47%	0.46	100	
House	27.57%	28.51%	-0.94	99	38.91%	39.92%	-1.01	99	
Lodge or Chalet	46.27%	57.93%	-11.66	88	62.83%	64.63%	-1.80	98	
Other Property	15.70%	16.54%	-0.84	99	21.03%	24.02%	-2.99	97	
Static Caravan	39.05%	0.00%	39.05	139	35.09%	11.88%	23.21	123	
- Sample Size =	Nil *Sample Size (between 1 and 4) too small to be included								





Unit Occupancy by Tariff - December 2023/2022

Weekly Tariff	December 23	er December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	2.27%	8.69%	-6.42	94	9.38%	3.07%	6.31	106
Under £299	27.79%	11.52%	16.27	116	26.57%	11.35%	15.22	115
£300 - £499	8.03%	22.58%	-14.55	85	26.59%	26.11%	0.48	100
£500 - £799	21.25%	23.30%	-2.05	98	36.24%	33.16%	3.08	103
£800 or more	41.05%	41.68%	-0.63	99	54.16%	56.05%	-1.89	98
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Location Type - December 2023/2022

Location Type	December 23	er December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	11.70%	24.85%	-13.15	87	13.07%	13.28%	-0.21	100
Countryside Village	33.08%	31.75%	1.33	101	41.98%	39.78%	2.20	102
Seaside - Coastal	27.14%	36.51%	-9.37	91	49.12%	47.06%	2.06	102
Small Town	26.11%	17.93%	8.18	108	28.89%	27.52%	1.37	101
- Sample Size = Ni	*Sample Size (between 1 and 4) too small to be included							

Unit Occupancy by Grading - December 2023/2022

Grading	December 23	er December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	0.00%	0.00%	0.00	100
2 Stars	13.07%	35.34%	-22.27	78	30.64%	27.39%	3.25	103
3 Stars	29.63%	38.48%	-8.85	91	44.84%	40.65%	4.19	104
4 Stars	40.97%	36.87%	4.10	104	48.20%	40.28%	7.92	108
5 Stars	49.94%	33.11%	16.83	117	52.12%	51.43%	0.69	101
Unclassified	18.81%	31.40%	-12.59	87	38.86%	39.16%	-0.30	100
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								