



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

July 2023/2022 Report - Self-Catering

1.0 Introduction July 2023/2022

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

The SOAS Report: July 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 July 2023 experienced a **0.93** percentage point decrease when comparing percentage unit occupancy rates with July 2022.

Data from the Scottish Retail Consortium showed that total retail sales figures decreased by 3% year-on-year in July. Retail sales in Scotland held steady for July with a growth of 4.6%. Food sales continue to be the biggest growth area; however, many customers were seeking more warming traditional foods instead of the seasonal specials.

Domestic consumer sentiment provided by the GB National Tourist Boards for July 2023 found that 23% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the June 2023 survey). The survey recorded 45% of respondents (a 1% decrease on the June 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, 50% of UK adults intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 75% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were 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 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment 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 stalled in July 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 7% decrease in year-to-date flights compared to 2019.





3.0 Self-Catering

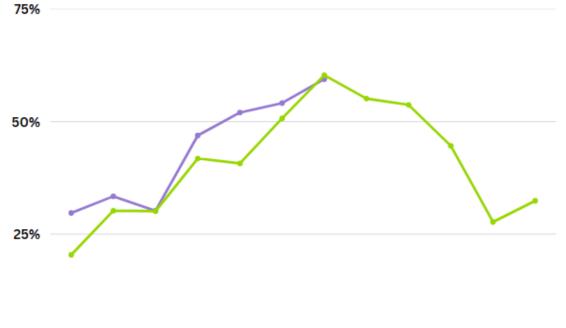
3.1 Performance by Self-Catering Category

Unit Occupancy – July 2023/2022

In the Self-Catering sector, the unit occupancy rate for July 2023 was 59.39% when compared to data from the previous year of 60.32% occupancy rate; this shows an overall percentage point decrease of 0.93.



Unit Occupancy – Year to Date







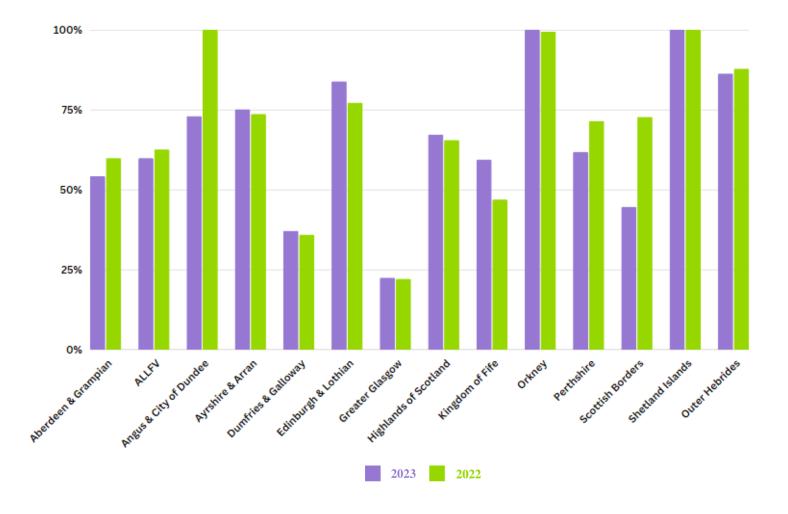
Unit occupancy rates (Sample Size >4) in Edinburgh & Lothian were the highest in July 2023. Lodge/chalets, Accessible Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during July 2023.

Unit Occupancy – July 2023/2022

Unit Occupancy	July 23	July 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	59.39%	60.32%	-0.93	99	43.40%	39.01%	4.39	104

Unit Occupancy by Former VisitScotland Area

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

Area	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change		
Aberdeen & Grampian	54.19%	59.84%	-5.65	94	42.91%	38.98%	3.93	104		
ALLFV	59.82%	62.54%	-2.72	97	47.25%	43.83%	3.42	103		
Angus & City of Dundee	72.98%	*	-27.02	73	55.99%	62.33%	-6.34	94		
Ayrshire & Arran	75.12%	73.64%	1.48	101	64.96%	63.58%	1.38	101		
Dumfries & Galloway	37.11%	35.91%	1.20	101	23.66%	16.77%	6.89	107		
Edinburgh & Lothian	*	77.17%	6.70	107	47.62%	34.61%	13.01	113		
Greater Glasgow	22.43%	22.09%	0.34	100	28.39%	18.94%	9.45	109		
Highlands of Scotland	67.23%	65.51%	1.72	102	46.17%	42.77%	3.40	103		
Kingdom of Fife	59.35%	46.92%	12.43	112	35.83%	34.33%	1.50	102		
Orkney	100.00%	99.35%	0.65	101	74.33%	64.01%	10.32	110		
Perthshire	61.78%	71.46%	-9.68	90	44.56%	30.16%	14.40	114		
Scottish Borders	44.62%	72.74%	-28.12	72	32.87%	28.32%	4.55	105		
Shetland Islands	*	*	*	*	*	*	*	*		
Outer Hebrides	*	87.80%	-1.51	98	46.07%	55.06%	-8.99	91		
- Sample Size = Nil	- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included									

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

Location accessibility/density	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	30.00%	32.43%	-2.43	98	17.60%	13.04%	4.56	105
Other Urban Areas	60.93%	63.12%	-2.19	98	43.54%	41.29%	2.25	102
Accessible Small Town	s 46.14%	46.30%	-0.16	100	24.98%	23.05%	1.93	102
Remote Small Towns	52.18%	58.67%	-6.49	94	35.93%	35.64%	0.29	100
Accessible Rural	72.88%	70.37%	2.51	103	56.15%	49.49%	6.66	107
Remote Rural	55.86%	57.48%	-1.62	98	42.33%	40.59%	1.74	102
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

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

Location (Geogr	aphic) July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	52.35%	45.45%	6.90	107	32.94%	26.21%	6.73	107
Inland	57.78%	63.27%	-5.49	95	45.10%	40.50%	4.60	105
Island	88.96%	86.55%	2.41	102	66.32%	67.20%	-0.88	99
- Sample Size	- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included							

Unit Occupancy by Property Type – July 2023/2022

Property Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
Bungalow	61.35%	62.65%	-1.30	99	49.36%	46.96%	2.40	102	
Cottage	47.89%	55.04%	-7.15	93	35.53%	32.51%	3.02	103	
Flat	38.17%	39.95%	-1.78	98	21.04%	21.24%	-0.20	100	
Glamping	42.94%	26.97%	15.97	116	35.63%	12.60%	23.03	123	
House	63.62%	67.25%	-3.63	96	41.08%	40.01%	1.07	101	
Lodge or Chalet	81.06%	76.54%	4.52	105	64.66%	65.70%	-1.04	99	
Other Property	20.91%	47.35%	-26.44	74	26.45%	24.34%	2.11	102	
Static Caravan	32.16%	33.42%	-1.26	99	28.73%	9.28%	19.45	119	
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included									





Unit Occupancy by Tariff – July 2023/2022

Weekly Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	4.44%	0.00%	4.44	104	9.84%	1.93%	7.91	108
Under £299	46.60%	1.49%	45.11	145	36.78%	10.38%	26.40	126
£300 - £499	25.25%	31.06%	-5.81	94	27.79%	22.89%	4.90	105
£500 - £799	47.58%	45.30%	2.28	102	35.60%	31.77%	3.83	104
£800 or more	74.12%	76.07%	-1.95	98	55.05%	57.28%	-2.23	98
- Sample Size =	Nil	*Sa	mple Size (betw	een 1 and 4)	too small to b	e included		

Unit Occupancy by Location Type – July 2023/2022

Location Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	23.88%	21.32%	2.56	103	15.95%	11.43%	4.52	105
Countryside Village	54.59%	62.58%	-7.99	92	39.93%	37.99%	1.94	102
Seaside - Coastal	65.68%	62.78%	2.90	103	51.00%	46.66%	4.34	104
Small Town	60.85%	46.01%	14.84	115	32.73%	24.82%	7.91	108
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included								

Unit Occupancy by Grading – July 2023/2022

Grading	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
1 Star	*	*	*	*	0.00%	0.00%	0.00	100	
2 Stars	32.96%	32.86%	0.10	100	30.94%	25.76%	5.18	105	
3 Stars	62.21%	55.15%	7.06	107	42.81%	37.42%	5.39	105	
4 Stars	64.06%	59.34%	4.72	105	47.98%	36.96%	11.02	111	
5 Stars	84.78%	84.33%	0.45	100	47.53%	54.52%	-6.99	93	
Unclassified	53.57%	56.60%	-3.03	97	40.81%	38.54%	2.27	102	
- 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.





