

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.

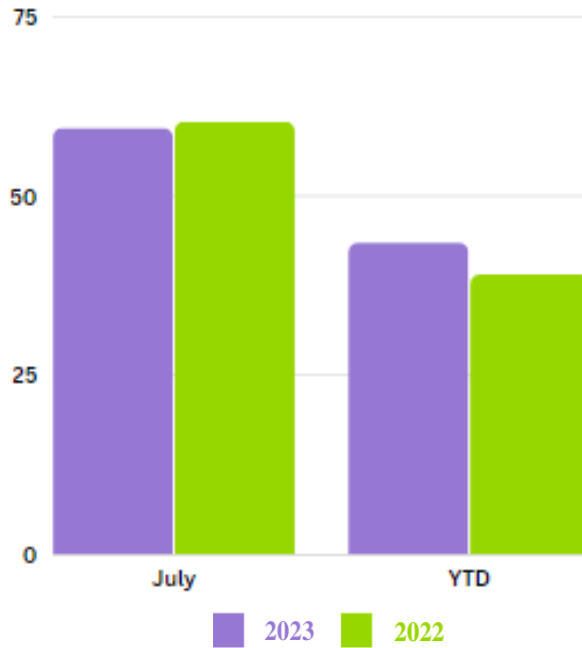
The recovery in international inbound visitation stalled in July 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 7% decrease in year-to-date flights compared to 2019.

3.0 Self-Catering

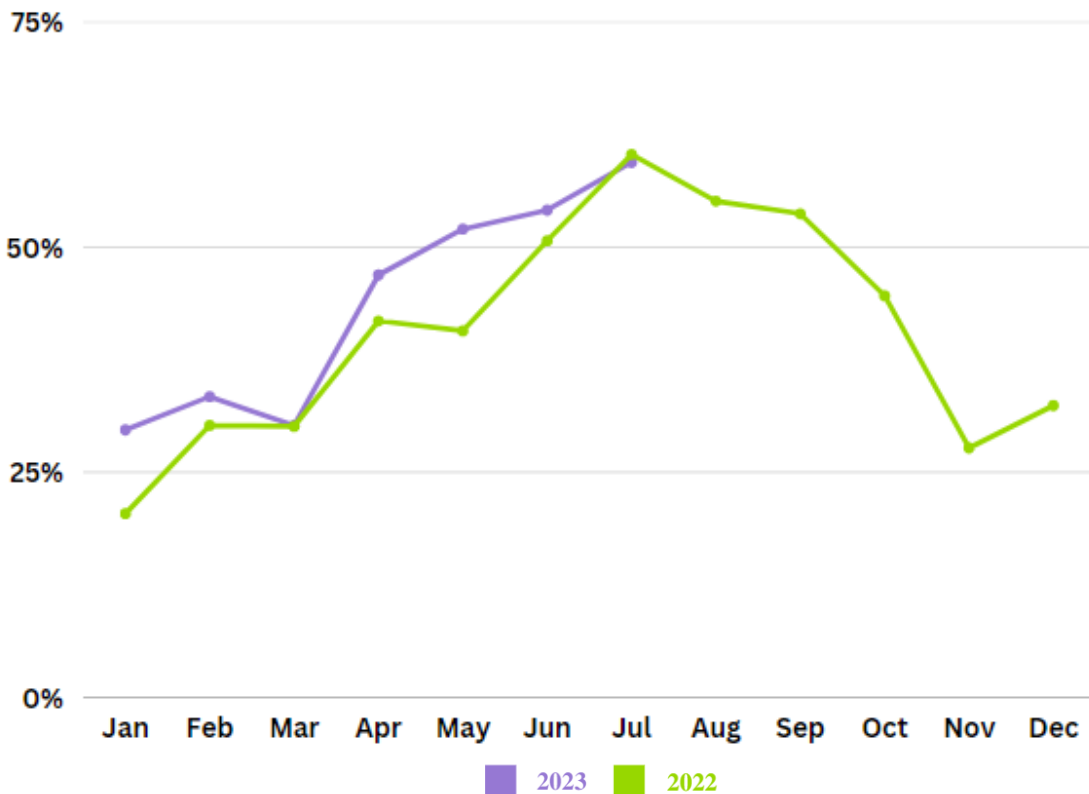
3.1 Performance by Self-Catering Category

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



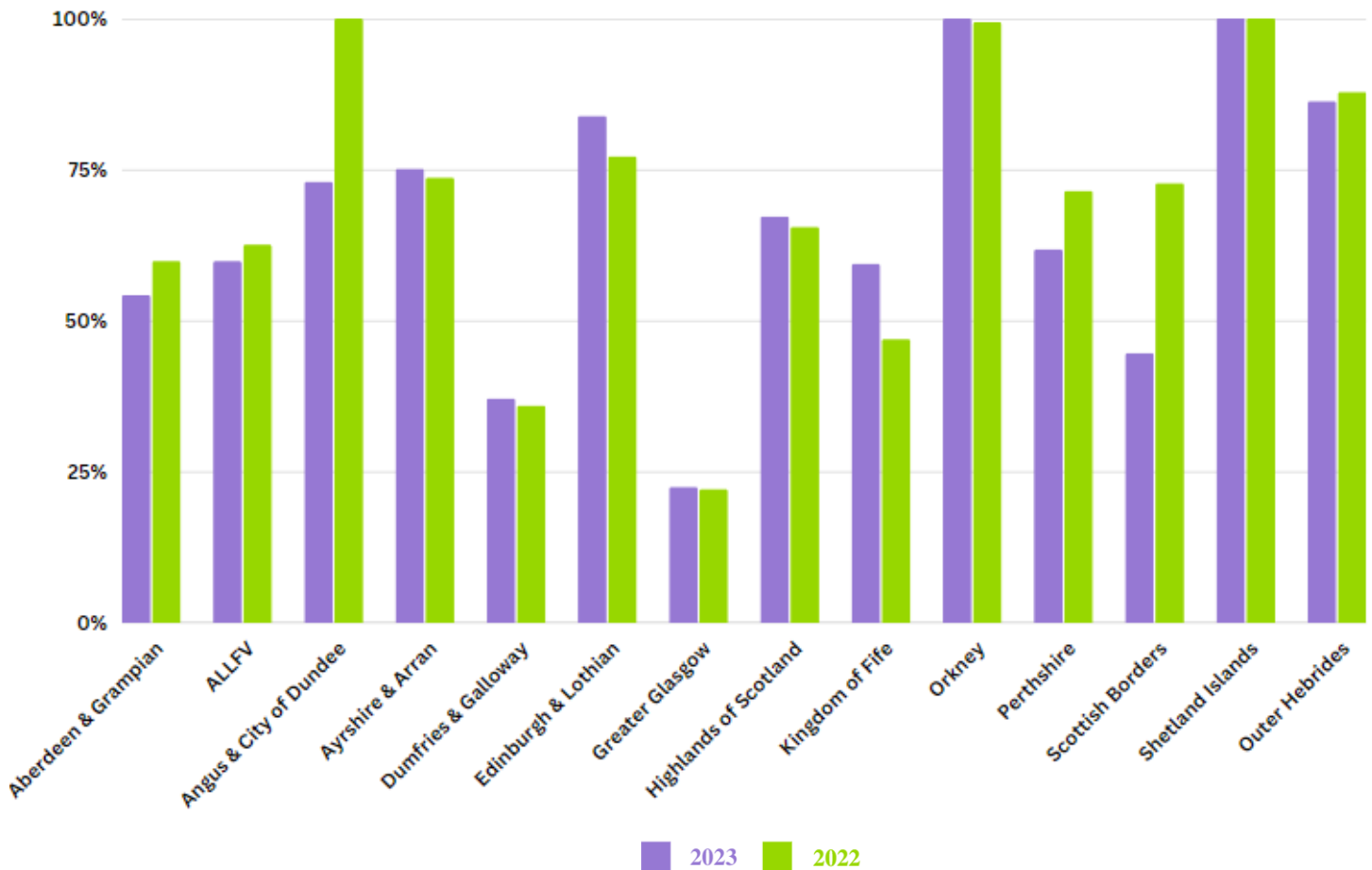
Unit occupancy rates (Sample Size >4) in Edinburgh & Lothian were the highest in July 2023. Lodge/chalets, Accessible Rural Areas, Island properties and those charging a weekly tariff of £800 or more experienced the highest percentage unit occupancy rates during July 2023.

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 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

*Sample Size (between 1 and 4) too small to be 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

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