

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

May 2023/2022 Report – Self-Catering - Revised

1.0 Introduction May 2023/2022

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

The SOAS Report: May 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 May 2023 experienced an **11.28** percentage point increase when comparing percentage unit occupancy rates with May 2022.

Data from the Scottish Retail Consortium showed that the additional Bank Holiday, the King's Coronation and dry, warm weather saw total retail sales figures increase by 10.9% year-on-year in May. Retail sales in Scotland held steady for May with a growth of 7.7%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for May 2023 found that 49% of respondents were cautious about demand and were concerned with cost escalation. The survey recorded 18% of respondents (a 3% decrease on the April 2023 Survey) saying they were "...been hit hard - no option but to cut back on spending". Despite consumer concern about the state of the economy, 20% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 76% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were; 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.

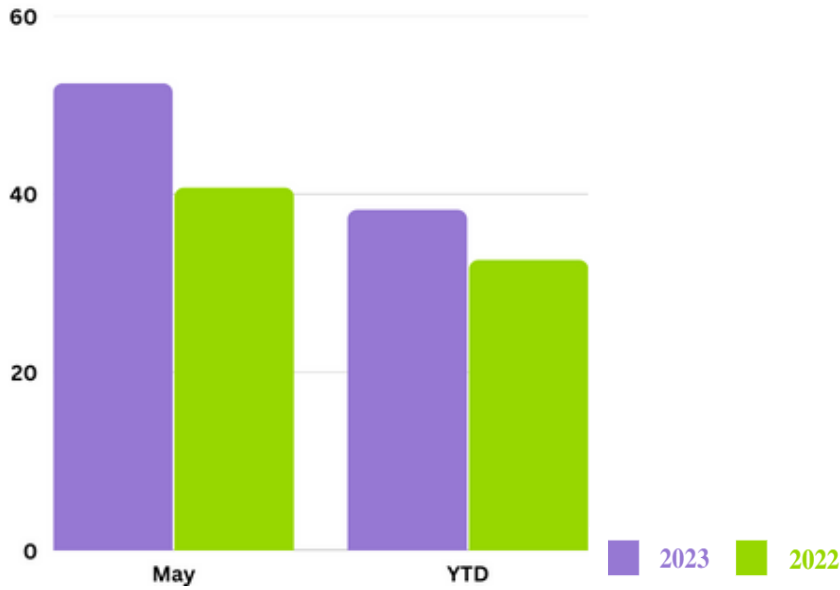
The recovery in international inbound visitation continues in May 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2022, however, UK air connectivity had seen a 10% decrease in year-to-date flights compared to 2019.

3.0 Self-Catering

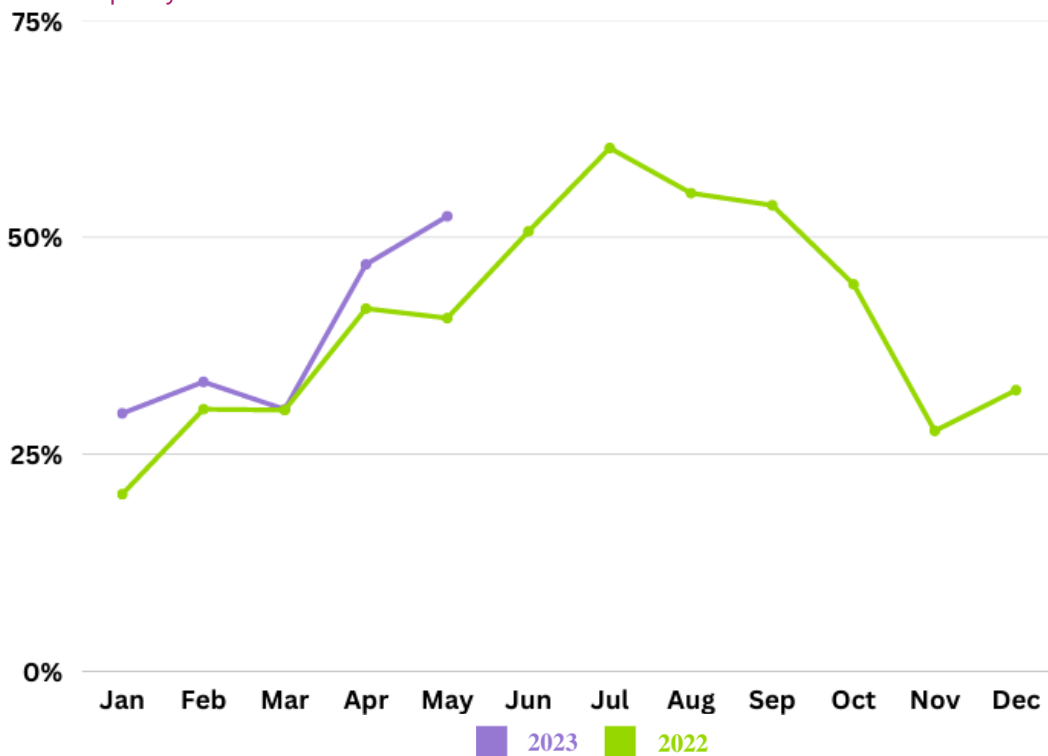
3.1 Performance by Self-Catering Category

Unit Occupancy – May 2023/2022

In the Self-Catering sector, the unit occupancy rate for May 2023 was 51.99% when compared to data from the previous year of 40.71% occupancy rate; this shows an overall percentage point increase of 11.28.



Unit Occupancy – Year to Date

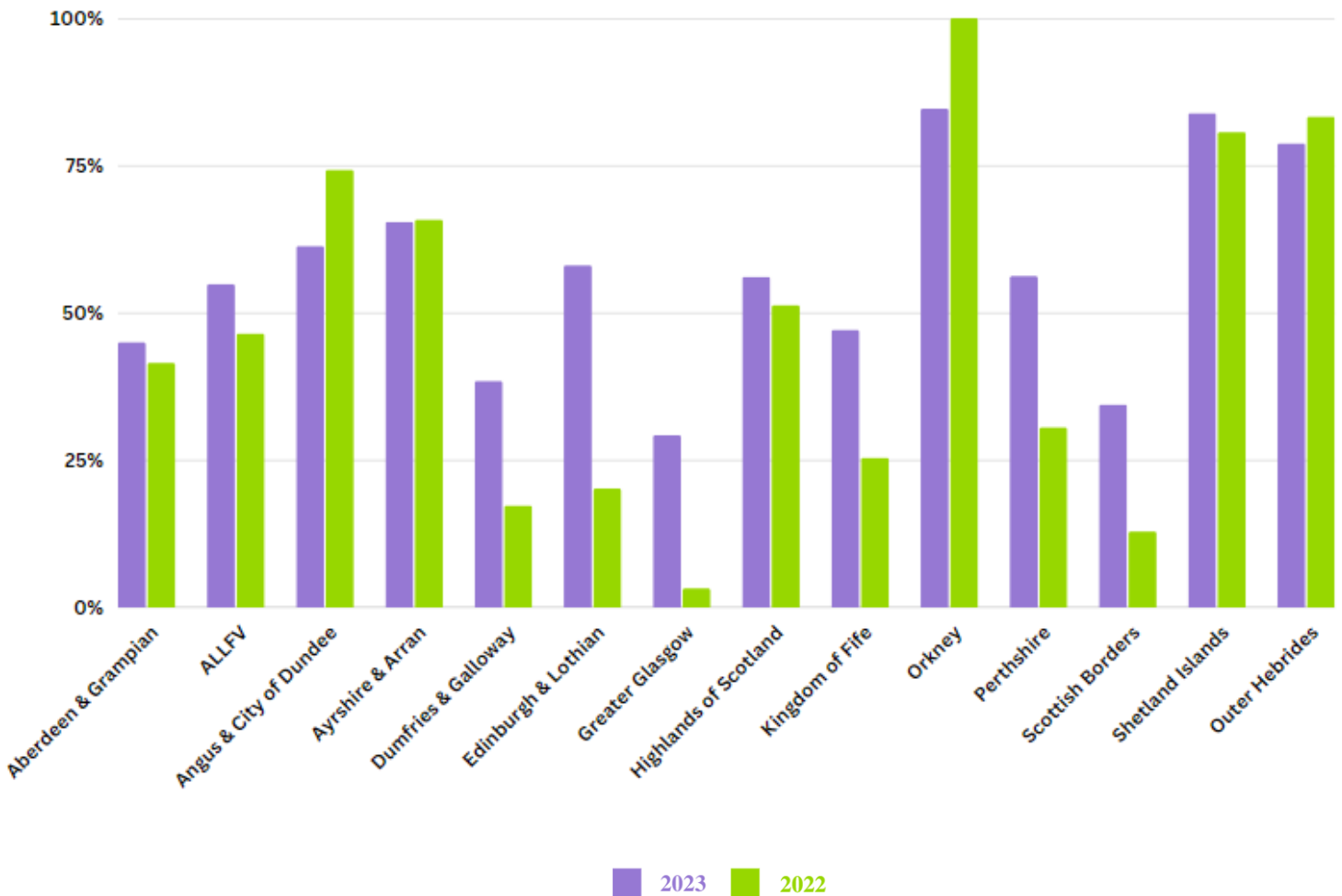


Unit Occupancy – May 2023/2022

Unit Occupancy	May 23	May 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Self-Catering	51.99%	40.71%	11.28	111	38.13%	32.57%	5.56	106

Unit Occupancy by Former VisitScotland Area

Unit Occupancy by Former VisitScotland Area – May 2023/2022



Unit Occupancy rates in Orkney were the highest in May 2023 as well as in May 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 May 2023. The same could be said for April 2022 apart from the location when Remote Rural had highest occupancy.

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 – May 2023/2022

Area	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	44.99%	41.45%	3.54	104	38.92%	31.76%	7.16	107
ALLFV	54.84%	46.45%	8.39	108	43.41%	38.71%	4.70	105
Angus & City of Dundee	61.29%	74.19%	-12.90	87	48.16%	*	-4.54	95
Ayrshire & Arran	65.42%	65.76%	-0.34	100	62.88%	60.56%	2.32	102
Dumfries & Galloway	38.39%	17.29%	21.10	121	20.93%	12.43%	8.50	109
Edinburgh & Lothian	58.06%	20.16%	37.90	138	41.70%	21.58%	20.12	120
Greater Glasgow	29.14%	3.23%	25.91	126	32.89%	17.31%	15.58	116
Highlands of Scotland	56.10%	51.28%	4.82	105	38.86%	35.20%	3.66	104
Kingdom of Fife	47.10%	25.38%	21.72	122	27.69%	26.56%	1.13	101
Orkney	84.60%	99.98%	-15.38	85	45.62%	50.09%	-4.47	96
Perthshire	56.21%	30.53%	25.68	126	33.56%	26.69%	6.87	107
Scottish Borders	34.40%	*	21.50	122	27.79%	24.61%	3.18	103
Shetland Islands	*	*	*	*	*	*	*	*
Outer Hebrides	78.71%	83.25%	-4.54	95	42.90%	44.71%	-1.81	98
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location accessibility/density	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	31.67%	13.17%	18.50	119	18.53%	10.77%	7.76	108
Other Urban Areas	46.24%	34.05%	12.19	112	38.50%	33.06%	5.44	105
Accessible Small Towns	33.50%	22.74%	10.76	111	22.69%	18.26%	4.43	104
Remote Small Towns	40.96%	45.75%	-4.79	95	31.02%	29.20%	1.82	102
Accessible Rural	63.39%	45.36%	18.03	118	49.98%	42.10%	7.88	108
Remote Rural	52.60%	50.67%	1.93	102	36.64%	35.55%	1.09	101
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	46.62%	27.57%	19.05	119	27.55%	19.77%	7.78	108
Inland	50.71%	39.86%	10.85	111	40.49%	34.37%	6.12	106
Island	77.69%	78.79%	-1.10	99	57.12%	59.39%	-2.27	98
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Unit Occupancy by Property Type – May 2023/2022

Property Type	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Bungalow	52.48%	54.68%	-2.20	98	45.16%	41.25%	3.91	104
Cottage	44.39%	35.01%	9.38	109	30.20%	25.86%	4.34	104
Flat	31.97%	21.54%	10.43	110	18.82%	16.51%	2.31	102
Glamping	39.02%	16.29%	22.73	123	28.21%	8.53%	19.68	120
House	41.44%	45.68%	-4.24	96	31.99%	29.12%	2.87	103
Lodge or Chalet	75.43%	69.82%	5.61	106	59.81%	61.56%	-1.75	98
Other Property	29.17%	33.47%	-4.30	96	21.62%	19.22%	2.40	102

Static Caravan	60.04%	11.61%	48.43	148	26.15%	5.72%	20.43	120
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Tariff – May 2023/2022

Weekly Tariff	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Unknown	19.01%	3.26%	15.75	116	9.29%	2.31%	6.98	107
Under £299	29.13%	5.00%	24.13	124	19.64%	12.38%	7.26	107
£300 - £499	31.32%	26.49%	4.83	105	28.08%	20.93%	7.15	107
£500 - £799	44.54%	35.33%	9.21	109	31.74%	27.25%	4.49	104
£800 or more	64.14%	53.70%	10.44	110	49.64%	49.58%	0.06	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Location Type – May 2023/2022

Location Type	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	25.44%	10.77%	14.67	115	16.78%	9.57%	7.21	107
Countryside Village	49.24%	42.16%	7.08	107	34.83%	31.49%	3.34	103
Seaside - Coastal	59.05%	51.29%	7.76	108	45.27%	40.73%	4.54	105
Small Town	28.62%	16.81%	11.81	112	27.20%	17.78%	9.42	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Unit Occupancy by Grading – May 2023/2022

Grading	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	*	0.00%	0.00	100
2 Stars	25.38%	49.27%	-23.89	76	29.69%	21.97%	7.72	108
3 Stars	51.71%	45.16%	6.55	107	37.27%	31.26%	6.01	106
4 Stars	56.28%	41.85%	14.43	114	40.87%	30.67%	10.20	110
5 Stars	73.22%	46.19%	27.03	127	43.69%	46.29%	-2.60	97
Unclassified	45.49%	36.97%	8.52	109	35.88%	32.31%	3.57	104
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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