

Scottish Accommodation Occupancy Survey 2022



Acknowledgements

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1 Executive Summary 2022

January 2022 saw the continued easing of covid restrictions. On the 6th of January the need of individuals travelling to Scotland from international destinations who are fully vaccinated against Covid-19 (or under 18 years of age) were no longer be required to take a pre-departure Covid test. Large outdoor events were able to take place without physical distancing or capacity limits and the Scottish Government announced that restrictions including the one-metre physical distancing in hospitality and leisure settings and attendance limits at indoor events would be removed from the 24th of January 2022.

2022 has shown a steady rise in occupancy levels across all sectors due to a gradual recovery within the industry post Covid-19. Occupancy within the Serviced Sector has shown strong percentage point increases from the start of the year, peaking in the months March and April, coinciding with Easter, which show over 40% increases on the previous years figures. Self-catering properties also saw a significant occupancy rise, with a 36% increase in April and a steady rise over the summer months in comparison with 2021. We also see revenue per available room (RevPAR) within serviced accommodation significantly increased when compared with 2021.

Some providers reported an increase in international guests compared with the previous year and stock availability increases with several providers beginning trading again following an extended closure over the lockdown period. Various Independent guest house/B&B's have reported a continued lull in business due to the extended effect of Covid-19. Other factors reported were closures of tourist attractions in certain areas and also because of the increasing popularity of Air BNB.

The Touring sector showed a decrease of occupancy in certain months of 2022 following a significant rise in 2021, which peaked as a result of lockdown restrictions relating to serviced accommodation. However, occupancy in peak season (August) matched the previous year's figures. Compared to 2019, there was just a marginal difference in occupancy.

The recovery in international inbound visitation continues in 2022; however, the reduced availability of flights and routes remained the major barrier to growth. One highlight in air transport is from Scotland's Regional Carrier, Loganair, which saw a year-to-date growth of 12% in daily flights compared to 2019. Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a -20% 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 2022, with an average of 4,728 flights per day (Eurocontrol, 2022).

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2 Methodology

The Moffat Centre began managing VisitScotland's Scottish Accommodation Occupancy Survey in December 2016.

In respect of the 2022 survey, initial emails were circulated to all accommodation providers from February 2022 requesting January data. Accompanying this email were detailed instructions on submitting data onto the RIBOS platform. At the same time, telephone enquiries were answered and participants offered assistance with navigating RIBOS. A reminder email was circulated 2 weeks later, with telephone chase ups beginning at the same time.

This data capture process was repeated each month in the following accommodation sectors: Serviced, Self-Catering, Touring and Hostels.

Data was collated via RIBOS, the online web platform; by email via excel/word documents and by telephone. Several intermediaries were used to provide Self-Catering accommodation data.

Participating in the Scottish Accommodation Occupancy Survey

If you are a Scottish based accommodation business, and you would like to contribute your occupancy figures to the Scottish Accommodation Occupancy Survey, please contact the Moffat Centre.

Email: info@moffatcentre.com

3 Highlights

Serviced Accommodation

All Serviced accommodation experienced a Room Occupancy increase of 15.37 percentage points when comparing 2022 with 2021. Hotel Room Occupancy saw an increase of 15.34 points when comparing 2022 with 2021, however, when comparing the same period in 2019, Room occupancy experienced a decrease of 6.17 percentage points. In 2022, the average peak tariff amongst all Serviced accommodation was £122.16 whilst the average off-peak tariff was £113.68. In 2021, the average peak tariff was £112.18, whilst the off-peak average tariff was £109.36.

Hotel room occupancy saw an increase of 15.34 percentage points when comparing 2022 with 2021. However, when comparing with the same period in 2019, room occupancy experienced a decrease of 6.17 points. Hotel room occupancy reached a peak in July and August at 83.7%, compared with a peak of 74.9% in September 2021. The average peak tariff amongst Hotel accommodation was £144.38, whilst the average off-peak tariff was £136.21. In 2021, the average peak tariff was £135.37, whilst the average off-peak tariff was £129.49. These are increases of £9.01 and £6.72 respectively. In 2022, some 99.1% of all participating Hotels had their own website, with the majority also listing on Tripadvisor (87.0%).

Guest House, B&B Room Occupancy increased by 12.67 percentage points when comparing 2022 with 2021, when comparing the same period in 2019 Bed occupancy experienced a small increase of 4.63 points. In 2022, Guest House, B&B room occupancy peaked in July at 74.8%, whilst in 2021 room occupancy peaked in August at 74.4%. In 2022, the average peak tariff amongst participating Guest House, B&B accommodation was £56.64 per person per night, whilst the average off-peak tariff was £58.27 per person per night. The average peak tariff for 2022 was £57.77 per person per night, with the average off-peak tariff was £60.16 per person per night. These are decreases of £1.13 and £1.89 respectively. In 2022, all participating Guest House, B&B providers had their own website, with the majority also listing on Tripadvisor (83.4%).

Self-Catering Accommodation

In 2022, Self-Catering unit occupancy experienced an increase of 12.39 percentage points when comparing with 2021. However, when comparing with the same period in 2019, unit occupancy experienced a decrease of 7.07 percentage points. In 2022, Self-Catering unit occupancy peaked in July at 60.3%, whilst in 2021, unit occupancy peaked at 52.8% in August.

In 2022, the average peak tariff amongst participating Self-Catering accommodation was £1,072.00 per week, whilst the average off-peak tariff was £984.17 per week. In 2021, the average peak tariff was £937.38 per week, whilst the average off-peak tariff was £890.92 per week. These are increases of £134.62 and £93.25 respectively.

In 2022, 96.5% of providers had their own website and 61% were listed on TripAdvisor. Regarding social media, 66.9% of businesses had Facebook and 52.1% had Twitter. In 2022, Other booking methods were cited as most popular by 79% of Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland and were more popular than direct booking or walk-ins.

Touring Accommodation

Touring Accommodation saw a Net Pitch Occupancy decrease of 16.20 percentage points when comparing 2022 with 2021. However, when comparing the same period in 2019, this decrease was 9.98 percentage points. In 2022, Touring Pitch occupancy reached a peak in July at 55.4%, whilst in 2021, it peaked in July at 67.5%.

In 2022, Direct booking methods were cited as the most popular by 98.4% of Touring accommodation providers. 'Other' booking methods (56%) and 'Walk in' (4%) were less popular when booking touring pitches in 2022. In 2022, 97.6% of all participating Touring accommodation providers had their own website and only 50.8% had a TripAdvisor page. For social media however, 90% of businesses had a Facebook page and 52.1% had YouTube.

Hostel Accommodation

Hostel accommodation saw a Bed Occupancy increase of 18.61 percentage points when comparing 2022 with 2021. However, when comparing with the same period in 2019, Bed occupancy experienced a decrease of 6.48 points. In 2022, Hostel occupancy peaked in August at 68.2%, whereas in 2021, Hostel occupancy peaked in the same month at 50.5%.

In 2022, 76.9% of all participating Hostel accommodation providers had their own website. Just under a quarter of Hostel accommodation providers also utilised Facebook and TripAdvisor (23.1% for each) with just over 17% using Twitter to promote their accommodation. Direct booking methods were cited as most popular by 100% of Hostel accommodation providers, with only 6% accepting walk-ins.

4 Serviced Accommodation



4.1. Hotels

4.1.1. % Room Occupancy

Table 1 Hotel % Room Occupancy Analysis 2022/2021

Room Occupancy	2022	2021	22/21 Diff ¹	Change ²
	61.02%	45.48%	15.54	116
Former VisitScotland Area				
Aberdeen & Grampian	61.03%	49.80%	11.23	111
ALLFV	71.24%	58.38%	12.86	113
Angus & City of Dundee	58.34%	53.42%	4.92	105
Ayrshire & Arran	76.36%	60.17%	16.19	116
Dumfries & Galloway	57.62%	56.91%	0.71	101
Edinburgh & Lothian	63.99%	44.42%	19.57	120
Greater Glasgow	48.36%	38.76%	9.60	110
Highlands of Scotland	71.89%	35.66%	36.23	136
Kingdom of Fife	47.02%	52.25%	-5.23	95
Orkney	0.00%	0.00%	0.00	100
Perthshire	62.60%	49.47%	13.13	113
Scottish Borders	51.14%	51.64%	-0.50	100
Shetland Islands	*	*	0.00	100
Outer Hebrides	69.23%	54.15%	15.08	115
Location				
Coastal	47.79%	34.72%	13.07	113
Inland	55.46%	36.95%	15.51	116
Island	68.96%	55.54%	13.42	113
Tariff				
£20 - £29.99	0.00%	0.00%	0.00	100
£30 - £39.99	0.00%	1.62%	-1.62	98
£40 - £49.99	32.64%	40.35%	-7.74	92
£50 - £59.99	65.93%	22.82%	43.11	143
£60 - £69.99	62.64%	53.71%	8.93	109

Room Occupancy	2022	2021	22/21 Diff ¹	Change ²
£70 +	61.10%	48.55%	12.55	113
Size				
1 to 3	*	*	0.00	100
4 to 10	57.54%	60.17%	-2.63	97
11 to 25	55.81%	49.59%	6.22	106
26 to 50	72.19%	58.76%	13.43	113
51 to 100	76.98%	53.13%	23.85	124
Over 100	43.67%	27.41%	16.26	116
Urban/Rural				
Large Urban Areas	33.53%	18.54%	14.99	115
Other Urban Areas	56.01%	28.61%	27.40	127
Accessible Small Towns	59.60%	38.09%	21.51	122
Remote Small Towns	59.58%	40.41%	19.17	119
Accessible Rural	41.82%	35.33%	6.49	106
Remote Rural	39.13%	27.76%	11.37	111
Grading				
1 Star	-	-	-	100
2 Stars	57.54%	60.17%	-2.63	97
3 Stars	55.81%	49.59%	6.22	106
4 Stars	72.19%	58.76%	13.43	113
5 Stars	76.98%	53.13%	23.85	124
Unclassified	43.67%	27.41%	16.26	116

*Sample Size (4 or under) too small to be included

¹ 22/21 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.

Table 2 Hotel % Room Occupancy Analysis 2022/2019

Room Occupancy	2022	2019	22/19 Diff ³	Change
	61.02%	70.31%	-9.29	91
Former VisitScotland Area				
Aberdeen & Grampian	61.03%	56.46%	4.57	105
ALLFV	71.24%	74.45%	-3.21	97
Angus & City of Dundee	58.34%	68.01%	-9.67	90
Ayrshire & Arran	76.36%	72.65%	3.71	104
Dumfries & Galloway	57.62%	55.80%	1.82	102
Edinburgh & Lothian	63.99%	74.34%	-10.35	90
Greater Glasgow	48.36%	78.97%	-30.61	69
Highlands of Scotland	71.89%	67.53%	4.36	104
Kingdom of Fife	47.02%	65.81%	-18.79	81
Orkney	0.00%	58.68%	-58.68	41
Perthshire	62.60%	66.02%	-3.42	97
Scottish Borders	51.14%	56.70%	-5.56	94
Shetland Islands	0.00%	0.00%	0.00	100
Outer Hebrides	69.23%	69.45%	-0.22	100
Location				
Coastal	61.96%	59.54%	2.42	102
Inland	59.74%	73.25%	-13.51	86
Island	71.76%	66.05%	5.71	106
Tariff				
£20 - £29.99	0.00%	56.19%	-56.19	44
£30 - £39.99	0.00%	65.47%	-65.47	35

Room Occupancy	2022	2019	22/19 Diff ³	Change
£40 - £49.99	32.64%	49.47%	-16.83	83
£50 - £59.99	65.93%	68.36%	-2.43	98
£60 - £69.99	62.64%	55.71%	6.93	107
£70 +	61.10%	72.20%	-11.10	89
Size				
1 to 3	0.00%	3.81%	-3.81	96
4 to 10	57.54%	52.11%	5.43	105
11 to 25	55.81%	57.25%	-1.44	99
26 to 50	72.19%	78.36%	-6.17	94
51 to 100	76.98%	73.03%	3.95	104
Over 100	43.67%	74.46%	-30.79	69
Urban/Rural				
Large Urban Areas	51.86%	75.56%	-23.70	76
Other Urban Areas	69.53%	68.68%	0.85	101
Accessible Small Towns	64.65%	81.92%	-17.27	83
Remote Small Towns	57.19%	58.37%	-1.18	99
Accessible Rural	49.21%	65.67%	-16.46	84
Remote Rural	65.82%	57.64%	8.18	108
Grading				
1 Star	-	-	-	100
2 Stars	72.14%	61.60%	10.54	111
3 Stars	63.97%	64.11%	-0.14	100
4 Stars	56.57%	76.84%	-20.27	80
5 Stars	54.80%	75.81%	-21.01	79
Unclassified	64.99%	65.18%	-0.19	100

***Sample Size (4 or under) too small to be included**

³ 22/19 Diff throughout this report is expressed by % Point Change

Serviced Accommodation



4.1.2. % Bed Occupancy

Table 3 Hotel % Bed Occupancy Analysis 2022/2021

Bed Occupancy	2022	2021	22/21 Diff	Change
	51.91%	37.20%	14.71	115
Former VisitScotland Area				
Aberdeen & Grampian	46.47%	29.89%	16.58	117
ALLFV	59.37%	41.20%	18.17	118
Angus & City of Dundee	34.97%	38.29%	-3.32	97
Ayrshire & Arran	51.47%	45.47%	6.00	106
Dumfries & Galloway	32.13%	47.88%	-15.75	84
Edinburgh & Lothian	53.61%	28.91%	24.70	125
Greater Glasgow	51.87%	33.46%	18.41	118
Highlands of Scotland	60.00%	44.08%	15.92	116
Kingdom of Fife	39.31%	50.09%	-10.78	89
Orkney	*	*	0.00	100
Perthshire	48.35%	39.21%	9.14	109
Scottish Borders	47.82%	44.71%	3.11	103
Shetland Islands	*	*	0.00	100
Outer Hebrides	55.85%	40.45%	15.40	115
Location				
Coastal	47.79%	34.72%	13.07	113
Inland	52.46%	36.95%	15.51	116
Island	68.96%	55.54%	13.42	113
Tariff				
£20 - £29.99	*	*	0.00	100
£30 - £39.99	*	*	0.00	100
£40 - £49.99	25.37%	27.43%	-2.06	98
£50 - £59.99	38.37%	36.89%	1.48	101
£60 - £69.99	51.27%	31.88%	19.39	119
£70 +	52.75%	37.88%	14.87	115

Bed Occupancy	2022	2021	22/21 Diff	Change
Size				
1 to 3	*	9.00%	-9.00	91
4 to 10	38.07%	36.66%	1.41	101
11 to 25	50.03%	38.68%	11.35	111
26 to 50	58.35%	48.46%	9.89	110
51 to 100	66.61%	46.07%	20.54	121
Over 100	37.33%	23.43%	13.90	114
Urban/Rural				
Large Urban Areas	53.47%	28.27%	25.20	125
Other Urban Areas	54.89%	42.96%	11.93	112
Accessible Small Towns	47.90%	47.75%	0.15	100
Remote Small Towns	53.23%	43.43%	9.80	110
Accessible Rural	41.81%	30.97%	10.84	111
Remote Rural	50.69%	43.32%	7.37	107
Grading				
1 Star	-	-	-	100
2 Stars	57.53%	36.99%	20.54	121
3 Stars	55.85%	43.26%	12.59	113
4 Stars	50.13%	30.47%	19.66	120
5 Stars	45.59%	39.89%	5.70	106
Unclassified	44.03%	34.85%	9.18	109

*Sample Size (4 or under) too small to be included

Table 4 Hotel % Bed Occupancy Analysis 2022/2019

Bed Occupancy	2022	2019	22/19 Diff	Change
	51.91%	52.57%	-0.66	99
Former VisitScotland Area				
Aberdeen & Grampian	46.47%	33.01%	13.46	113
ALLFV	59.37%	49.43%	9.94	110
Angus & City of Dundee	34.97%	50.32%	-15.35	85
Ayrshire & Arran	51.47%	54.23%	-2.76	97
Dumfries & Galloway	32.13%	43.10%	-10.97	89
Edinburgh & Lothian	53.61%	58.13%	-4.52	95
Greater Glasgow	51.87%	57.93%	-6.06	94
Highlands of Scotland	60.00%	55.54%	4.46	104
Kingdom of Fife	39.31%	52.64%	-13.33	87
Orkney	*	41.46%	-41.46	59
Perthshire	48.35%	59.26%	-10.91	89
Scottish Borders	47.82%	43.78%	4.04	104
Shetland Islands	*	*	0.00	100
Outer Hebrides	55.85%	53.96%	1.89	102
Location				
Coastal	47.79%	44.82%	2.97	103
Inland	52.46%	55.22%	-2.76	97
Island	68.96%	57.40%	11.56	112
Tariff				
£20 - £29.99	0.00%	38.14%	-38.14	62
£30 - £39.99	0.00%	47.98%	-47.98	52
£40 - £49.99	25.37%	34.57%	-9.20	91
£50 - £59.99	38.37%	58.11%	-19.74	80
£60 - £69.99	51.27%	38.29%	12.98	113
£70 +	52.75%	54.03%	-1.28	99
Size				
1 to 3	*	3.83%	-3.83	96
4 to 10	38.07%	33.70%	4.37	104
11 to 25	50.03%	47.08%	2.95	103
26 to 50	58.35%	57.61%	0.74	101
51 to 100	66.61%	58.93%	7.68	108
Over 100	37.33%	55.59%	-18.26	82

Bed Occupancy	2022	2019	22/19 Diff	Change
Urban/Rural				
Large Urban Areas	53.47%	57.24%	-3.77	96
Other Urban Areas	54.89%	56.95%	-2.06	98
Accessible Small Towns	47.90%	56.76%	-8.86	91
Remote Small Towns	53.23%	44.99%	8.24	108
Accessible Rural	41.81%	51.60%	-9.79	90
Remote Rural	50.69%	44.49%	6.20	106
Grading				
1 Star	-	-	-	100
2 Stars	57.53%	50.82%	6.71	107
3 Stars	55.85%	51.11%	4.74	105
4 Stars	50.13%	58.01%	-7.88	92
5 Stars	45.59%	58.55%	-12.96	87
Unclassified	44.03%	36.21%	7.82	108



Serviced Accommodation

4.1.3. Hotel Monthly Distribution by % Occupancy 2022/2021

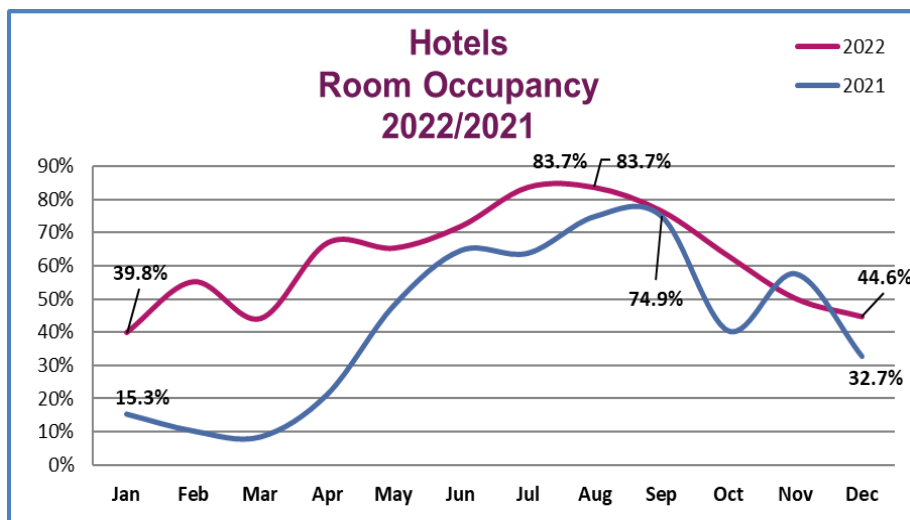
Table 5 Monthly Distribution by % Room Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	39.8	55.2	44.0	66.9	65.4	71.9	83.7	83.7	46.6	63.0	50.1	44.6
2021	15.3	10.2	8.4	21.2	48.1	64.6	63.7	74.8	74.9	40.4	57.6	32.7

Table 6 Monthly Distribution by % Bed Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	33.4	45.3	51.2	54.2	51.7	58.4	71.1	70.0	65.3	55.2	39.2	35.2
2021	7.6	4.8	3.7	11.2	35.7	49.0	50.6	55.1	61.2	56.8	46.8	34.0

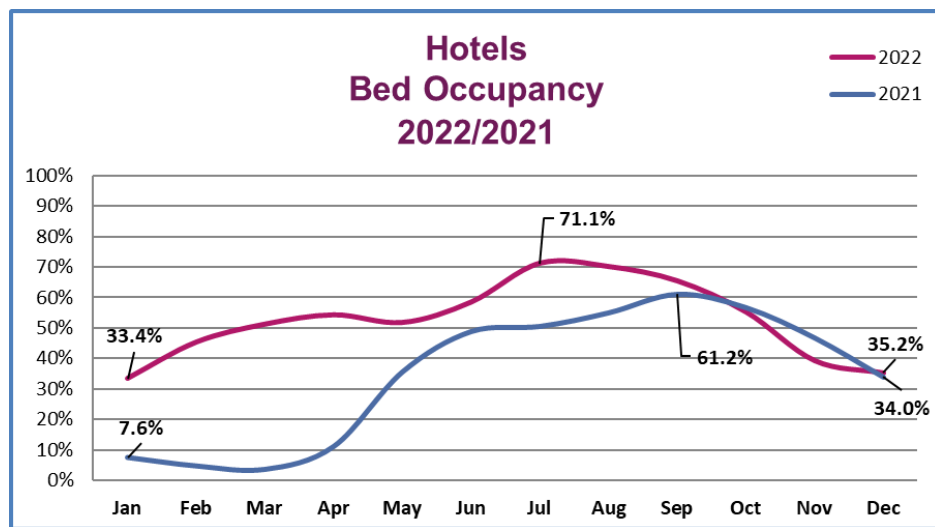
Figure 1 Hotel Monthly Distribution by % Room Occupancy 2022/2021



In 2022, Hotel room occupancy reached a peak in July & August at 83.7% before reducing sharply in September.

In 2021, Hotel room occupancy reached a peak in September at 74.9%, whilst maintaining a room occupancy rate of over 50% between in June and September.

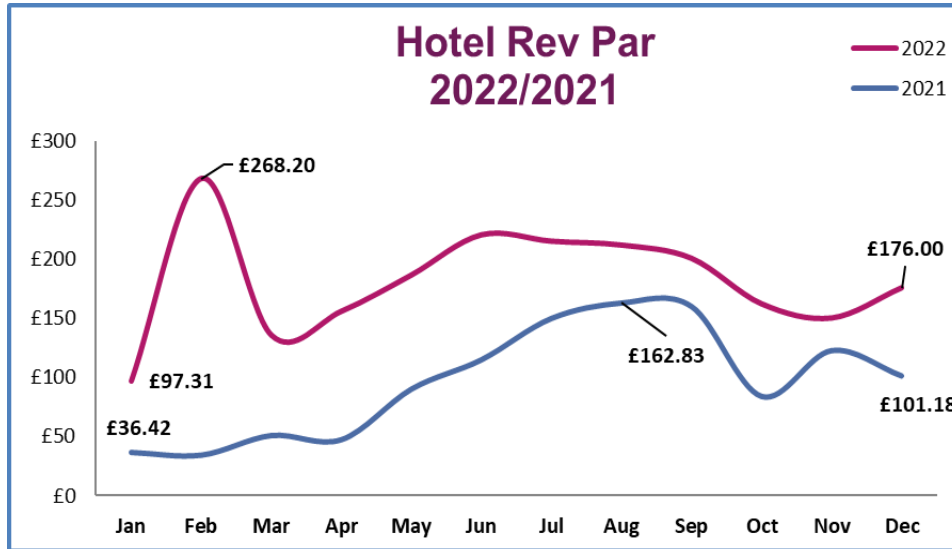
Figure 2 Hotel Monthly Distribution by % Bed Occupancy 2022/2021



Serviced Accommodation

4.1.4. Hotel Rev Par 2022/2021

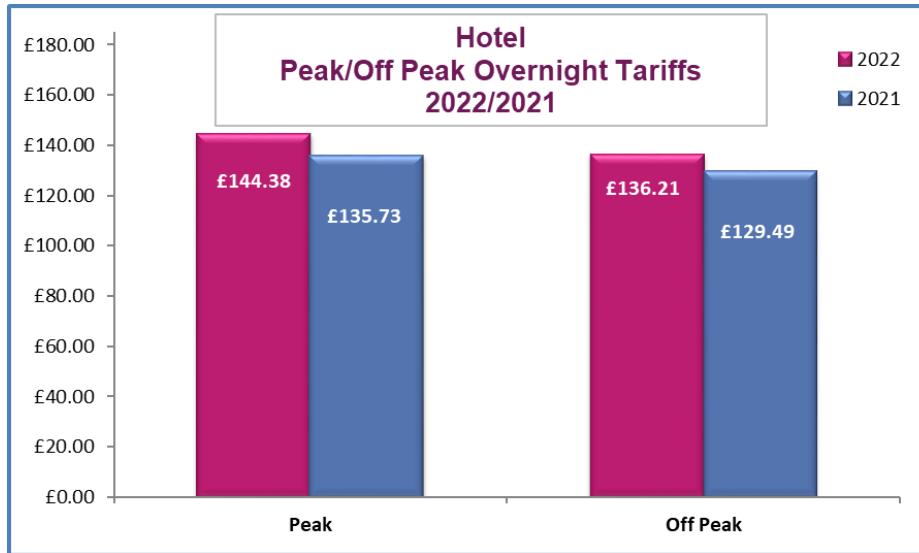
Figure 3 Hotel Rev Par 2022/2021



In 2022, average peak Rev Par was £268.20, was achieved in February.

In 2021, average peak Rev Par was £162.83, achieved in August.

Figure 4 Hotel Peak/Off-Peak Tariffs 2022/2021



In 2022, the average peak tariff amongst participating hotels was £144.38, whilst the off-peak average tariff was £136.21.

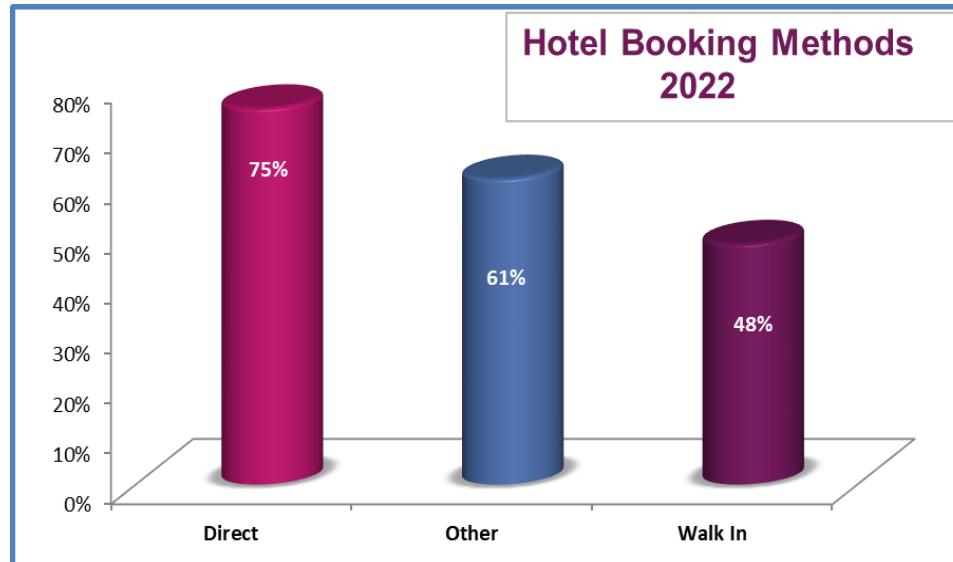
In 2021, the average peak tariff amongst participating hotels was £135.73, whilst the off-peak average tariff was £129.49.

Serviced Accommodation



4.1.5. Hotel Booking Methods 2022

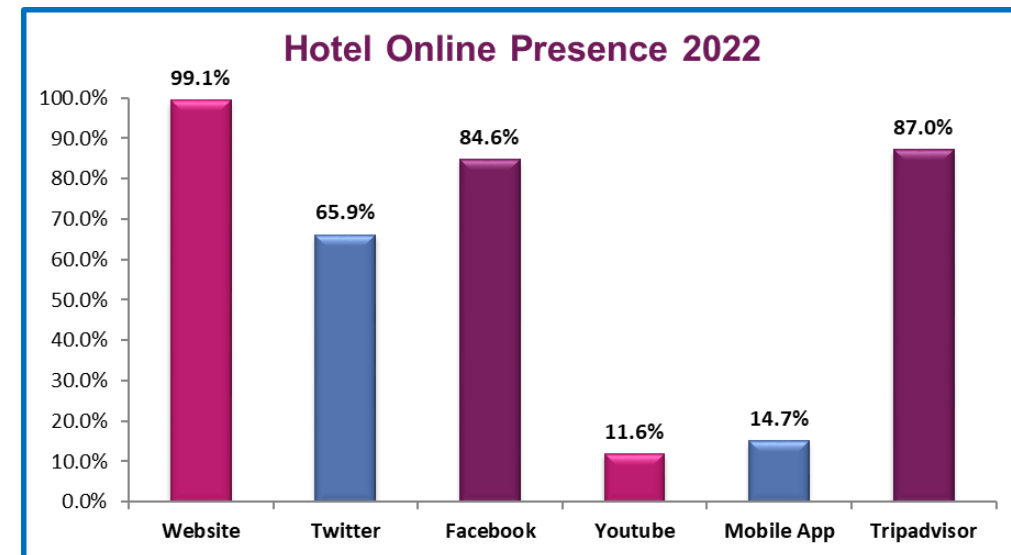
Figure 5 Booking Methods 2022



In 2022, the most popular booking method was directly with Hotel accommodation, followed by 'Other', which includes booking sites, such as Booking.com; expedia, laterooms.com and agents. Just under half of all of participating hotels welcomed 'walk-in' guests.

4.1.6. Hotel Online Presence 2022

Figure 6 Online Presence 2022



In 2022, 99% of all participating Hotels had their own website, with the majority also listing on Tripadvisor (87%). Facebook continued to be popular in 2022 with 85% having their own page to promote their accommodation. Youtube was only used by 12% of Hotels respectively in 2022.



Serviced Accommodation

4.2. Guest House, B&B

4.2.1. % Room Occupancy

Table 7 Guest House, B&B % Room Occupancy Analysis 2022/2021

Room Occupancy	2022	2021	22/21 Diff	Change
Guest House / B&B	54.67%	42.00%	12.67	113
Former VisitScotland Area				
Aberdeen & Grampian	*	*	0.00	100
ALLFV	43.19%	42.02%	1.17	101
Angus & City of Dundee	25.68%	30.22%	-4.54	95
Ayrshire & Arran	32.96%	45.74%	-12.78	87
Dumfries & Galloway	88.92%	55.78%	33.14	133
Edinburgh & Lothian	77.65%	72.22%	5.43	105
Greater Glasgow	38.55%	23.48%	15.07	115
Highlands of Scotland	66.19%	45.59%	20.60	121
Kingdom of Fife	*	*	0.00	100
Orkney	38.03%	27.48%	10.55	111
Perthshire	39.35%	32.01%	7.34	107
Scottish Borders	34.81%	41.93%	-7.12	93
Shetland Islands	*	*	0.00	100
Outer Hebrides	0.00%	9.58%	-9.58	90
Location				
Coastal	27.58%	39.99%	-12.41	88
Inland	61.26%	46.39%	14.87	115
Island	61.77%	69.18%	-7.41	93
Tariff				
£20 - £29.99	*	*	0.00	100
£30 - £39.99	31.92%	19.12%	12.80	113
£40 - £49.99	50.34%	41.82%	8.52	109
£50 - £59.99	63.26%	60.92%	2.34	102

Tariff (Cont)

Room Occupancy	2022	2021	22/21 Diff	Change
£60 - £69.99	77.34%	24.28%	53.06	153
£70 +	46.95%	50.82%	-3.87	96
Size				
1 to 3	46.19%	38.03%	8.16	108
4 to 10	63.56%	42.15%	21.41	121
11 to 25	52.35%	57.47%	-5.12	95
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
Urban/Rural				
Large Urban Areas	73.78%	53.10%	20.68	121
Other Urban Areas	55.24%	36.06%	19.18	119
Accessible Small Towns	25.78%	36.62%	-10.84	89
Remote Small Towns	73.11%	50.01%	23.10	123
Accessible Rural	33.01%	21.48%	11.53	112
Remote Rural	56.75%	40.52%	16.23	116
Grading				
1 Star	-	-	-	100
2 Stars	0.00%	0.00%	0.00	100
3 Stars	57.28%	42.66%	14.62	115
4 Stars	44.50%	34.99%	9.51	110
5 Stars	0.00%	91.23%	-91.23	9
Unclassified	45.61%	42.34%	3.27	103

*Sample Size (4 or under) too small to be included

Serviced Accommodation

Table 8 Guest House, B&B % Room Occupancy Analysis 2022/2019

Room Occupancy	2022	2019	22/19 Diff	Change
Guest House / B&B	54.67%	50.04%	4.63	105
Former VisitScotland Area				
Aberdeen & Grampian	*	2.38	-2.38	98
ALLFV	43.19%	51.55%	-8.36	92
Angus & City of Dundee	25.68%	29.67%	-3.99	96
Ayrshire & Arran	32.96%	33.79%	-0.83	99
Dumfries & Galloway	88.92%	51.44%	37.48	137
Edinburgh & Lothian	77.65%	82.07%	-4.42	96
Greater Glasgow	38.55%	26.52%	12.03	112
Highlands of Scotland	66.19%	44.07%	22.12	122
Kingdom of Fife	0.00%	0.00%	0.00	100
Orkney	38.03%	50.18%	-12.15	88
Perthshire	39.35%	39.24%	0.11	100
Scottish Borders	34.81%	39.29%	-4.48	96
Shetland Islands	0.00%	4.84%	-4.84	95
Outer Hebrides	0.00%	49.09%	-49.09	51
Location				
Coastal	27.58%	39.41%	-11.83	88
Inland	61.26%	55.45%	5.81	106
Island	61.77%	50.87%	10.90	111
Tariff				
£20 - £29.99	*	23.60%	-23.60	76
£30 - £39.99	31.92%	43.98%	-12.06	88
£40 - £49.99	50.34%	49.96%	0.38	100
£50 - £59.99	63.26%	44.02%	19.24	119
£60 - £69.99	77.34%	59.60%	17.74	118
£70 +	46.95%	54.07%	-7.12	93

Room Occupancy	2022	2019	22/19 Diff	Change
1 to 3	46.19%	34.21%	11.98	112
4 to 10	63.56%	54.37%	9.19	109
11 to 25	52.35%	87.93%	-35.58	64
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
Urban/Rural				
Large Urban Areas	73.78%	70.86%	2.92	103
Other Urban Areas	55.24%	63.22%	-7.98	92
Accessible Small Towns	25.78%	43.93%	-18.15	82
Remote Small Towns	73.11%	54.65%	18.46	118
Accessible Rural	33.01%	26.24%	6.77	107
Remote Rural	56.75%	36.07%	20.68	121
Grading				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	57.28%	47.96%	9.32	109
4 Stars	44.50%	46.94%	-2.44	98
5 Stars	0.00%	31.63%	-31.63	68
Unclassified	45.61%	35.57%	10.04	110

*Sample Size (4 or under) too small to be included

4.2.2. % Bed Occupancy

Table 9 Guest House, B&B % Bed Occupancy Analysis 2022/2021

Bed Occupancy	2022	2021	22/21 Diff	Change
Guest House / B&B	46.88%	35.50%	11.38	111
Former VisitScotland Area				
Aberdeen & Grampian	*	*	0.00	100
ALLFV	34.53%	32.44%	2.09	102
Angus & City of Dundee	9.44%	25.14%	-15.70	84
Ayrshire & Arran	21.14%	28.43%	-7.29	93
Dumfries & Galloway	69.22%	45.64%	23.58	124
Edinburgh & Lothian	68.92%	67.11%	1.81	102
Greater Glasgow	30.05%	15.52%	14.53	115
Highlands of Scotland	60.84%	42.40%	18.44	118
Kingdom of Fife	0.00%	0.00%	0.00	100
Orkney	33.63%	25.27%	8.36	108
Perthshire	38.10%	29.08%	9.02	109
Scottish Borders	26.06%	29.76%	-3.70	96
Shetland Islands	*	*	0.00	100
Outer Hebrides	0.00%	6.71%	-6.71	93
Location				
Coastal	19.20%	34.72%	-15.52	84
Inland	54.01%	36.95%	17.06	117
Island	55.23%	55.54%	-0.31	100
Tariff				
£20 - £29.99	*	*	0.00	100
£30 - £39.99	25.86%	15.83%	10.03	110
£40 - £49.99	46.28%	38.76%	7.52	108
£50 - £59.99	58.89%	52.48%	6.41	106
£60 - £69.99	62.83%	19.22%	43.61	144
£70 +	39.01%	41.65%	-2.64	97

Bed Occupancy	2022	2021	22/21 Diff	Change
Size				
1 to 3	39.76%	31.29%	8.47	108
4 to 10	54.19%	36.55%	17.64	118
11 to 25	44.81%	47.76%	-2.95	97
26 to 50	-	-	-	100
51 to 100	-	-	-	100
Over 100	-	-	-	100
Urban/Rural				
Large Urban Areas	68.02%	50.35%	17.67	118
Other Urban Areas	44.63%	30.18%	14.45	114
Accessible Small Towns	18.97%	31.22%	-12.25	88
Remote Small Towns	58.13%	39.67%	18.46	118
Accessible Rural	32.34%	13.67%	18.67	119
Remote Rural	49.43%	35.03%	14.40	114
Grading				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	47.84%	34.96%	12.88	113
4 Stars	37.62%	31.56%	6.06	106
5 Stars	0.00%	86.99%	-86.99	13
Unclassified	34.32%	32.06%	2.26	102

*Sample Size (4 or under) too small to be included

Table 10 Guest House, B&B % Bed Occupancy Analysis 2022/2019

Bed Occupancy	2022	2019	22/19 Diff	Change
Guest House / B&B	46.88%	42.21%	4.67	105
Former VisitScotland Area				
Aberdeen & Grampian	*	2.38%	-2.38	98
ALLFV	34.53%	42.19%	-7.66	92
Angus & City of Dundee	9.44%	24.53%	-15.09	85
Ayrshire & Arran	21.14%	25.94%	-4.80	95
Dumfries & Galloway	69.22%	40.85%	28.37	128
Edinburgh & Lothian	68.92%	74.67%	-5.75	94
Greater Glasgow	30.05%	16.63%	13.42	113
Highlands of Scotland	60.84%	37.15%	23.69	124
Kingdom of Fife	*	*	0.00	100
Orkney	33.63%	42.01%	-8.38	92
Perthshire	38.10%	29.68%	8.42	108
Scottish Borders	26.06%	27.86%	-1.80	98
Shetland Islands	0.00%	3.23%	-3.23	97
Outer Hebrides	0.00%	31.25%	-31.25	69
Location				
Coastal	19.20%	30.15%	-10.95	89
Inland	54.01%	48.52%	5.49	105
Island	55.23%	40.27%	14.96	115
Tariff				
£20 - £29.99	*	23.60%	-23.60	76
£30 - £39.99	25.86%	36.68%	-10.82	89
£40 - £49.99	46.28%	39.75%	6.53	107
£50 - £59.99	58.89%	36.81%	22.08	122
£60 - £69.99	62.83%	49.62%	13.21	113
£70 +	39.01%	47.45%	-8.44	92
Size				
1 to 3	39.76%	26.65%	13.11	113
4 to 10	54.19%	44.83%	9.36	109
11 to 25	44.81%	80.83%	-36.02	64
26 to 50	-	-	-	100
51 to 100	-	-	-	100

Bed Occupancy	2022	2019	22/19 Diff	Change
Over 100	-	-	-	100
Urban/Rural				
Large Urban Areas	68.02%	65.28%	2.74	103
Other Urban Areas	44.63%	51.71%	-7.08	93
Accessible Small Towns	18.97%	33.17%	-14.20	86
Remote Small Towns	58.13%	44.09%	14.04	114
Accessible Rural	32.34%	21.22%	11.12	111
Remote Rural	49.43%	30.10%	19.33	119
Grading				
1 Star	-	-	-	100
2 Stars	-	-	-	100
3 Stars	47.84%	39.40%	8.44	108
4 Stars	37.62%	39.80%	-2.18	98
5 Stars	*	29.73%	-29.73	70
Unclassified	34.32%	27.74%	6.58	107

*Sample Size (4 or under) too small to be included



Serviced Accommodation

4.2.3. Guest House, B&B Monthly Distribution by % Occupancy 2022/20

Table 11 Guest House, B&B Monthly Distribution by % Room Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	18.5	33.3	36.4	59.9	65.7	73.4	74.8	71.3	60.4	36.3	27.8	37.2
2021	2.2	1.2	5.2	10.4	27.8	50.5	64.3	74.4	63.3	47.7	40.2	28.5

Figure 7 Guest House, B&B Monthly Distribution by % Room Occupancy 2022/2021

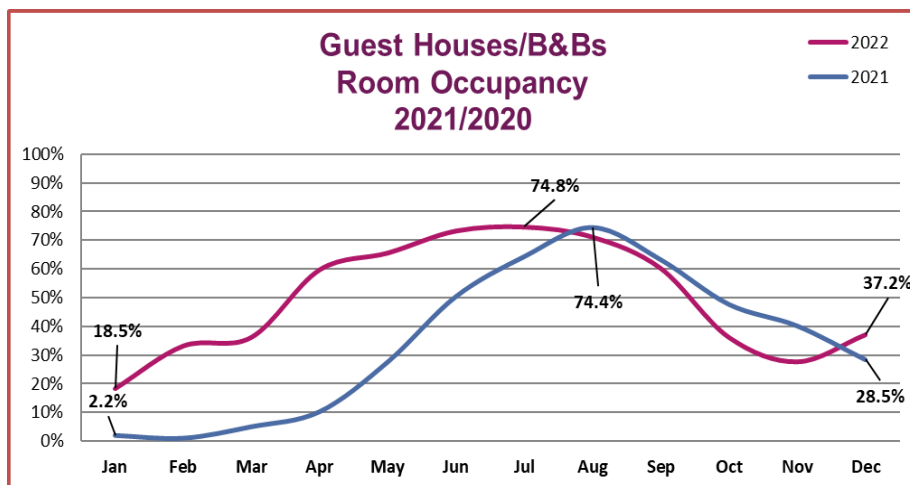
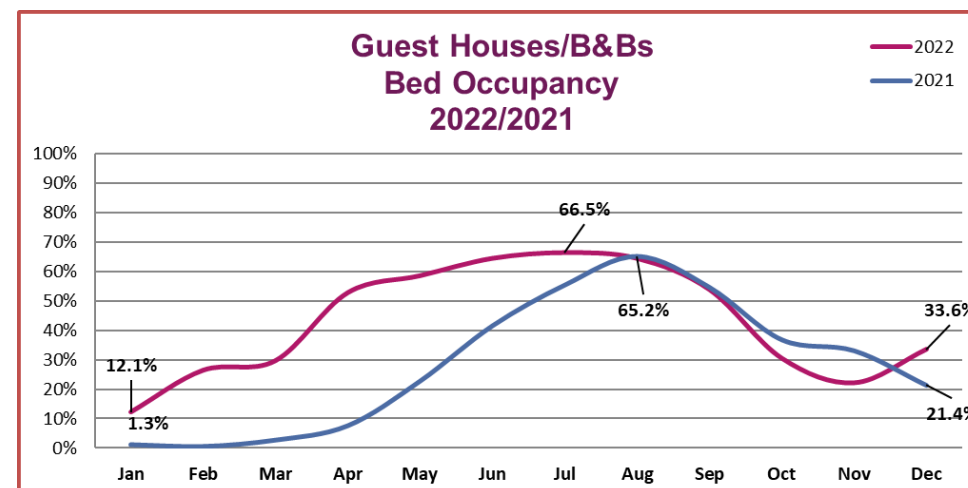


Table 12 Guest House, B&B Monthly Distribution by % Bed Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	12.1	26.4	29.6	52.8	58.6	64.6	66.5	64.5	53.9	30.4	22.1	33.6
2021	1.3	0.7	2.8	7.7	22.9	41.7	55.5	65.2	54.7	36.9	33.2	21.4

Figure 8 Guest House, B&B Monthly Distribution by % Bed Occupancy 2022/2021



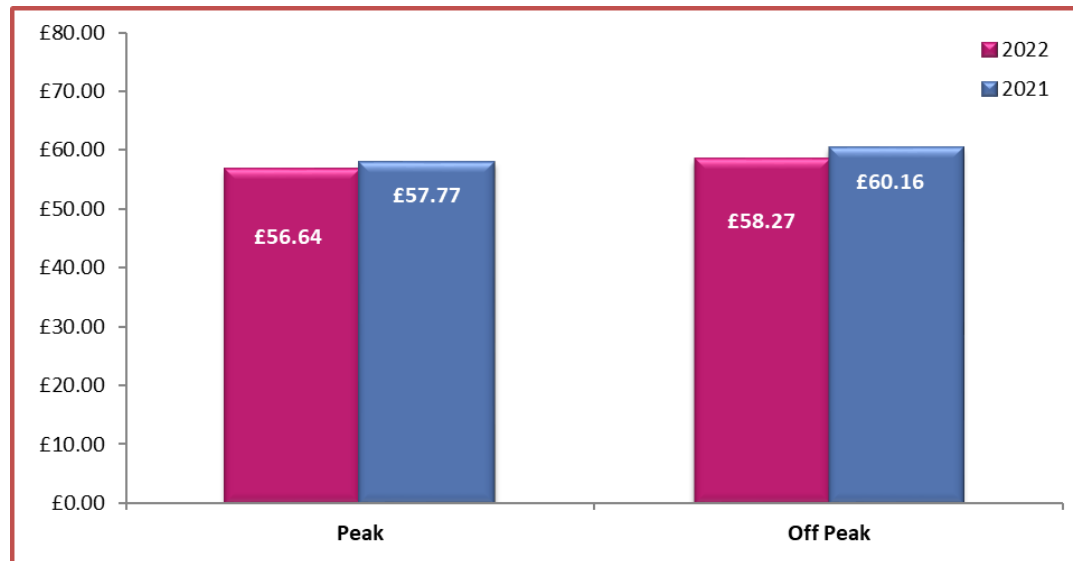
In 2022, Guest Houses/B&Bs room occupancy reached a peak in July at 74.8% whilst maintaining a room occupancy rate of over 60% between in May and September before reducing sharply in October.

In 2021, Hotel room occupancy reached a peak in August at 74.4%, whilst maintaining a room occupancy rate of over 50% between in June and September.



4.2.4. Guest House, B&B Peak/Off-Peak Tariffs

Figure 9 Guest House, B&B Peak/Off-Peak Tariffs 2022/2021



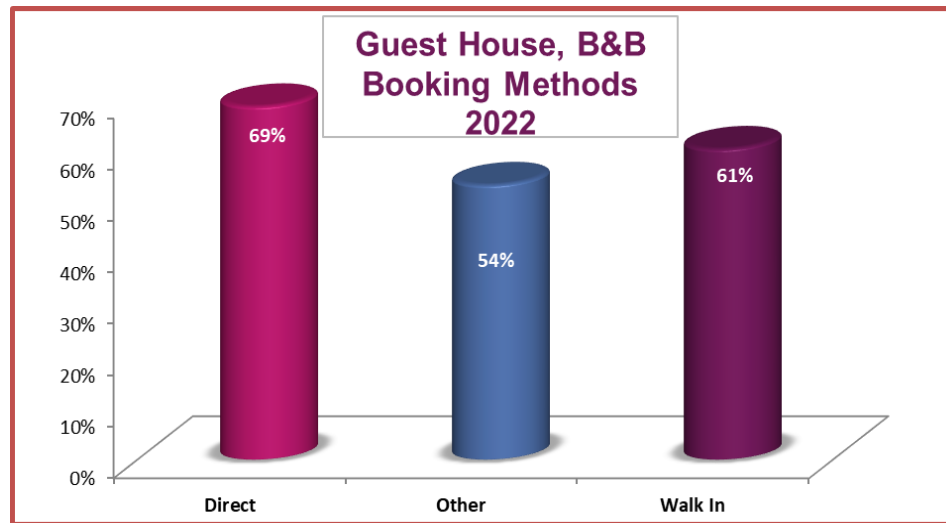
In 2022, the average peak tariff amongst participating Guest House, B&B accommodation was £56.64 per person per night, whilst the off-peak average tariff was £58.27.

In 2021, the average peak tariff amongst participating Guest House, B&B accommodation was £57.77 per person per night, whilst the off-peak average tariff was £60.16.

Serviced Accommodation

4.2.5. Guest House, B&B Booking Methods 2022

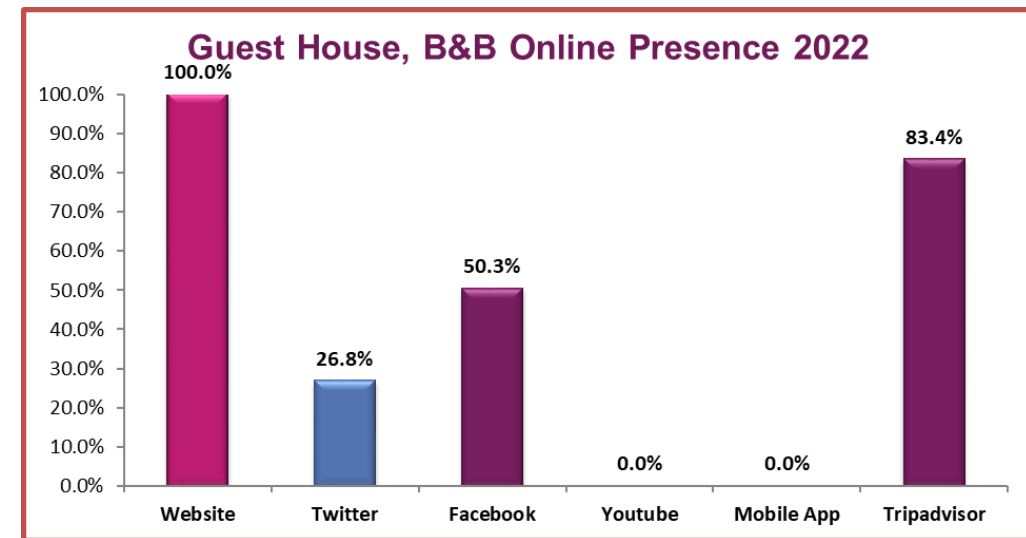
Figure 10 Booking Methods 2022



In 2022, Guest House, B&B accommodation providers noted the most popular booking method was direct booking, followed by 'walk-in'. 'Other' booking channels such as booking sites, proved less popular in 2022.

4.2.6. Guest House, B&B Online Presence 2022

Figure 11 Online Presence 2022



In 2022, all participating Guest House, B&B providers had their own website, with the majority also listing on Tripadvisor (83%). Facebook was also popular in 2022 with over 50% providers having their own page to promote their accommodation. Twitter was only used by just over a quarter of Guest House, B&B providers in 2022.

5 Self-Catering Accommodation



5.1. % Unit Occupancy

Table 13 Self-Catering % Unit Occupancy Analysis 2022/2021

Unit Occupancy	2022	2021	22/21 Diff ⁴	Change ⁵
	40.49%	28.10%	12.39	112
Former VisitScotland Area				
Aberdeen & Grampian	41.39%	32.56%	8.83	109
ALLFV	44.77%	29.70%	15.07	115
Angus & City of Dundee	61.64%	44.67%	16.97	117
Ayrshire & Arran	63.17%	35.83%	27.34	127
Dumfries & Galloway	19.83%	13.47%	6.36	106
Edinburgh & Lothian	41.41%	18.20%	23.21	123
Greater Glasgow	20.35%	17.48%	2.87	103
Highlands of Scotland	43.72%	33.48%	10.24	110
Kingdom of Fife	32.05%	24.73%	7.32	107
Orkney	56.96%	49.01%	7.95	108
Perthshire	33.51%	17.29%	16.22	116
Scottish Borders	31.72%	32.49%	-0.77	99
Shetland Islands	92.93%	29.18%	63.75	164
Outer Hebrides	55.62%	46.80%	8.82	109
Property Type				
Bungalow	48.50%	33.73%	14.77	115
Cottage	34.04%	27.06%	6.98	107
Flat	22.28%	14.72%	7.56	108
Glamping	21.47%	20.79%	0.68	101
House	39.92%	25.54%	14.38	114
Lodge/Chalet	64.63%	43.59%	21.04	121
Other Property	24.02%	19.04%	4.98	105
Static Caravan	11.88%	20.48%	-8.60	91

Unit Occupancy	2022	2021	22/21 Diff ⁴	Change ⁵
Tariff				
Unknown	3.07%	9.39%	-6.32	94
Up to £299	11.35%	7.36%	3.99	104
£300 to £499	26.11%	21.28%	4.83	105
£500 to £799	33.16%	28.79%	4.37	104
£800 or more	56.05%	34.89%	21.16	121
Location				
Coastal	27.26%	20.88%	6.38	106
Inland	42.86%	28.64%	14.22	114
Island	64.88%	46.28%	18.60	119
Urban/Rural				
Large Urban Areas	15.83%	13.75%	2.08	102
Other Urban Areas	42.48%	33.32%	9.16	109
Accessible Small Towns	26.01%	20.64%	5.37	105
Remote Small Towns	36.02%	29.91%	6.11	106
Accessible Rural	50.96%	28.03%	22.93	123
Remote Rural	40.96%	30.95%	10.01	110
Grading				
1 Star	*	*	*	100
2 Stars	27.39%	22.62%	4.77	105
3 Stars	40.49%	33.01%	7.48	107
4 Stars	40.28%	29.36%	10.92	111
5 Stars	51.43%	31.22%	20.21	120
Unclassified	39.21%	25.40%	13.81	114

⁴ 22/21 Diff throughout this report is expressed by % Point Change

⁵ 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.

Self-Catering Accommodation



Table 14 Self-Catering % Unit Occupancy Analysis 2022/2019

Unit Occupancy	2022	2019	22/19 Diff ⁶	Change
	40.49%	47.56%	-7.07	93
Former VisitScotland Area				
Aberdeen & Grampian	41.39%	44.87%	-3.48	97
ALLFV	44.77%	54.42%	-9.65	90
Angus & City of Dundee	61.64%	56.94%	4.70	105
Ayrshire & Arran	63.17%	50.65%	12.52	113
Dumfries & Galloway	19.83%	26.19%	-6.36	94
Edinburgh & Lothian	41.41%	36.87%	4.54	105
Greater Glasgow	20.35%	40.58%	-20.23	80
Highlands of Scotland	43.72%	54.85%	-11.13	89
Kingdom of Fife	32.05%	51.27%	-19.22	81
Orkney	56.96%	43.49%	13.47	113
Perthshire	33.51%	38.39%	-4.88	95
Scottish Borders	31.72%	52.22%	-20.50	80
Shetland Islands	92.93%	24.60%	68.33	168
Outer Hebrides	55.62%	51.73%	3.89	104
Property Type				
Bungalow	48.50%	54.43%	-5.93	94
Cottage	34.04%	42.11%	-8.07	92
Flat	22.28%	30.56%	-8.28	92
Glamping	21.47%	40.14%	-18.67	81
House	39.92%	30.32%	9.60	110
Lodge/Chalet	64.63%	70.78%	-6.15	94
Other Property	24.02%	52.90%	-28.88	71
Static Caravan	11.88%	39.67%	-27.79	72
Tariff				
Unknown	3.07%	11.45%	-8.38	92
Up to £299	11.35%	30.90%	-19.55	80
£300 to £499	26.11%	38.47%	-12.36	88
£500 to £799	33.16%	47.35%	-14.19	86
£800 or more	56.05%	58.22%	-2.17	98

Unit Occupancy	2022	2019	22/19 Diff ⁶	Change
Location				
Coastal	27.26%	38.10%	-10.84	89
Inland	42.86%	49.55%	-6.69	93
Island	64.88%	57.54%	7.34	107
Urban/Rural				
Large Urban Areas	15.83%	34.58%	-18.75	81
Other Urban Areas	42.48%	50.61%	-8.13	92
Accessible Small Towns	26.01%	42.07%	-16.06	84
Remote Small Towns	36.02%	44.27%	-8.25	92
Accessible Rural	50.96%	56.61%	-5.65	94
Remote Rural	40.96%	47.64%	-6.68	93
Grading				
1 Star	*	38.71%	-38.71	61
2 Stars	27.39%	26.59%	0.80	101
3 Stars	40.49%	46.29%	-5.80	94
4 Stars	40.28%	49.47%	-9.19	91
5 Stars	51.43%	54.72%	-3.29	97
Unclassified	39.21%	46.65%	-7.44	93

⁶ 22/19 Diff throughout this report is expressed by % Point Change



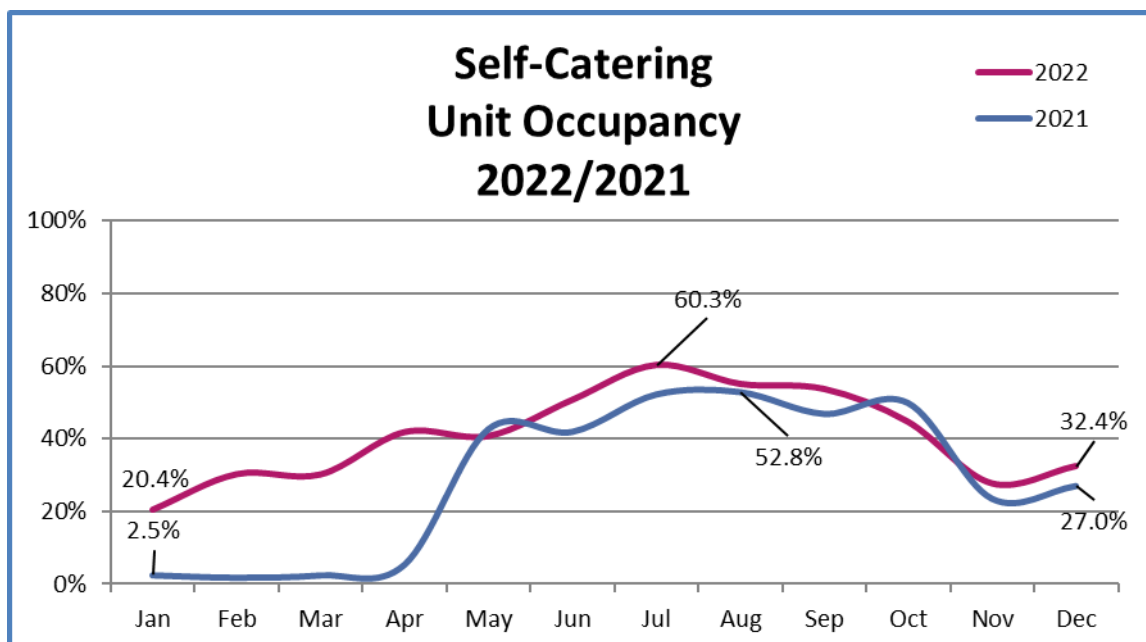
Self-Catering Accommodation

5.2. Self-Catering Monthly Distribution by % Unit Occupancy 2022/2021

Table 15 Self-Catering Monthly Distribution by % Unit Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	20.4	30.2	30.1	41.8	40.7	50.7	60.3	55.1	53.7	44.6	27.7	32.4
2021	2.5	1.8	2.5	5.4	42.6	41.9	52.2	52.8	46.8	49.8	23.5	27.0

Figure 12 Self-Catering Monthly Distribution by % Room Occupancy 2022/2021



In 2022, Self-Catering Unit occupancy reached a peak in July at 60.3% whilst maintaining a unit occupancy rate of over 50% between in June and September before reducing in October.

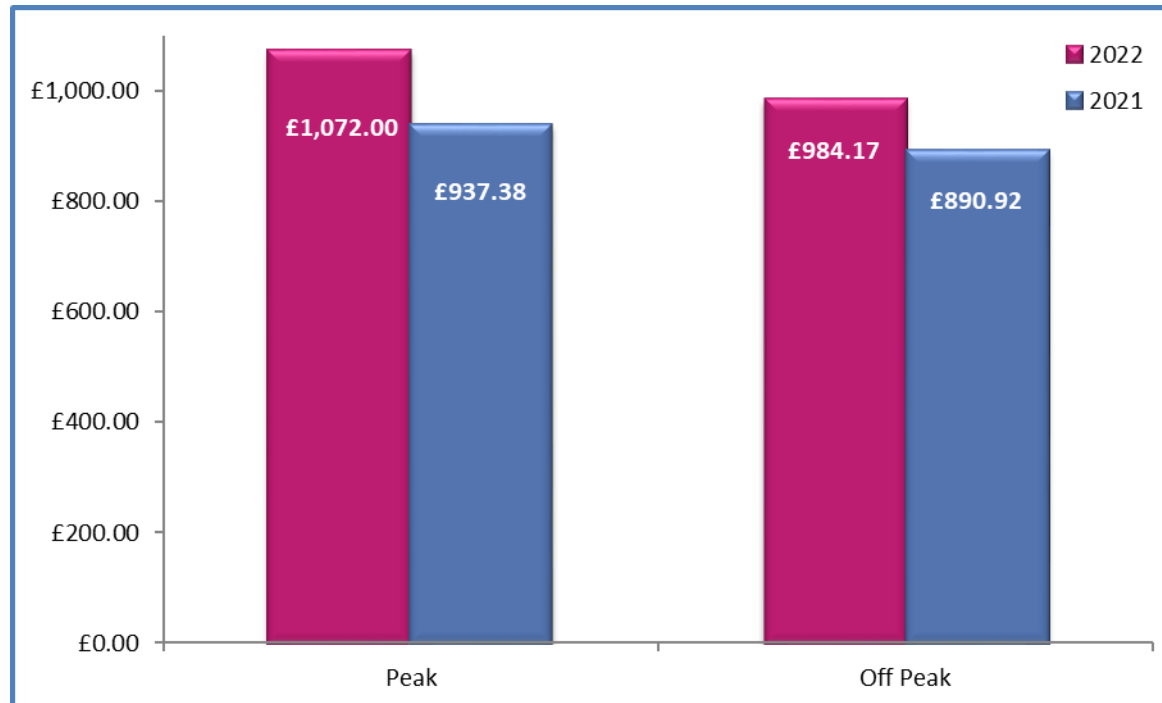
In 2021, Self-Catering Unit occupancy in the first quarter did not exceed 2.5%, this was due to the ongoing Level 4 Lockdown, a significant increase can be seen in May when the lockdown was relaxed with it reaching a peak in August at 52.8%.

Self-Catering Accommodation



5.3. Self-Catering Peak/Off-Peak Tariffs

Figure 13 Self-Catering Peak/Off-Peak Tariffs 2022/2021



In 2022, the average peak tariff amongst participating Self-Catering accommodation was £1,072.00 per week, whilst the off -peak average tariff was £984.17 per week.

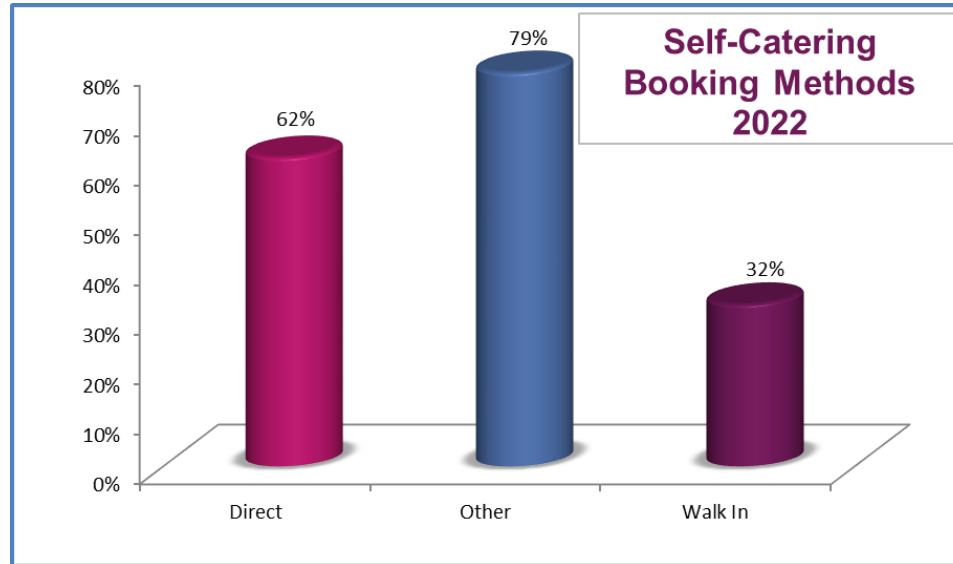
In 2021, the average peak tariff amongst participating Self-Catering accommodation was £937.38 per week, whilst the off- peak average tariff was £890.92 per week.

Self-Catering Accommodation



5.4. Self-Catering Booking Methods 2022

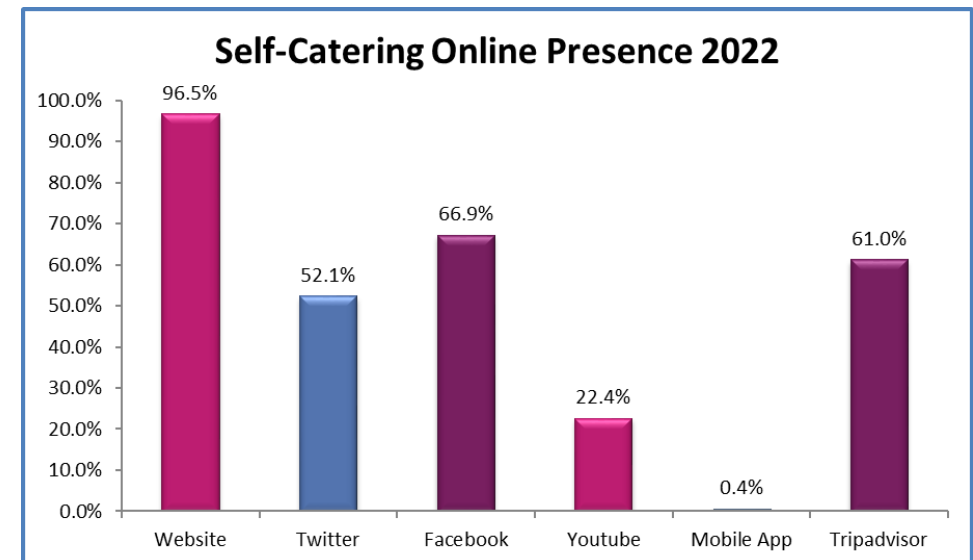
Figure 14 Self-Catering Booking Methods 2022



In 2022, Other booking methods were cited as most popular by 79% Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland.

5.5. Self-Catering Online Presence 2022

Figure 15 Self-Catering Online Presence 2022



In 2022, 97% of all participating Self-Catering accommodation providers had their own website. Just over two-thirds had a facebook page, with just over 60% of participants using Tripadvisor. Twitter was used by just over 50% of participants, however just over a fifth used Youtube (22%) in 2022.



6 Touring Accommodation

6.1. % Pitch Occupancy

Table 16 % Pitch Occupancy Analysis 2022/2021

Pitch Occupancy	2022	2021	22/21 Diff ⁷	Change ⁸
Net Pitch	31.24%	47.44%	-16.20	84
Whole Park	29.23%	54.49%	-25.26	75
Caravan	45.97%	36.47%	9.50	110
Tent	26.15%	22.46%	3.69	104
Former VisitScotland Area				
Aberdeen & Grampian	23.02%	34.00%	-10.98	89
ALLFV	41.89%	46.48%	-4.59	95
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	46.87%	58.15%	-11.28	89
Dumfries & Galloway	46.84%	49.72%	-2.88	97
Edinburgh & Lothian	38.18%	29.96%	8.22	108
Greater Glasgow	*	*	0.00	100
Highlands of Scotland	17.65%	67.04%	-49.39	51
Kingdom of Fife	63.02%	60.61%	2.41	102
Orkney	0.00%	0.00%	0.00	100
Perthshire	40.22%	54.85%	-14.63	85
Scottish Borders	34.76%	28.96%	5.80	106
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Tariff				
Under £10	*	*	0.00	100
£10-£14.99	11.31%	20.92%	-9.61	90
£15- £17.99	49.03%	54.98%	-5.95	94
£18- £19.99	15.80%	21.10%	-5.30	95
£20 +	31.61%	48.48%	-16.87	83

Pitch Occupancy	2022	2021	22/21 Diff ⁷	Change ⁸
Location				
Coastal	25.03%	50.37%	-25.34	75
Inland	37.02%	45.09%	-8.07	92
Island	38.40%	56.04%	-17.64	82
Urban/Rural				
Large Urban Areas	*	62.48%	-62.48	38
Other Urban Areas	33.13%	47.78%	-14.65	85
Accessible Small Towns	32.38%	25.25%	7.13	107
Remote Small Towns	39.42%	25.25%	14.17	114
Accessible Rural	36.38%	39.62%	-3.24	97
Remote Rural	27.15%	59.43%	-32.28	68
Grading				
1	-	-	-	100
2	45.17%	27.69%	17.48	117
3	22.90%	40.58%	-17.68	82
4	28.91%	47.36%	-18.45	82
5	41.52%	65.37%	-23.85	76
Unclassified	36.33%	38.47%	-2.14	98

⁷ 22/21 Diff throughout this report is expressed by % Point Change

⁸ 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.

Touring Accommodation



Table 17 % Pitch Occupancy Analysis 2022/2019

Pitch Occupancy	2022	2019	22/19 Diff ⁹	Change
Net Pitch	31.24%	41.22%	-9.98	90
Whole Park	29.23%	43.23%	-14.00	86
Caravan	45.97%	43.82%	2.15	102
Tent	26.15%	19.72%	6.43	106
Former VisitScotland Area				
Aberdeen & Grampian	23.02%	23.04%	-0.02	100
ALLFV	41.89%	43.12%	-1.23	99
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	46.87%	46.82%	0.05	100
Dumfries & Galloway	46.84%	52.04%	-5.20	95
Edinburgh & Lothian	38.18%	29.19%	8.99	109
Greater Glasgow	*	39.86%	-39.86	60
Highlands of Scotland	17.65%	45.89%	-28.24	72
Kingdom of Fife	63.02%	40.51%	22.51	123
Orkney	*	*	0.00	100
Perthshire	40.22%	45.30%	-5.08	95
Scottish Borders	34.76%	43.11%	-8.35	92
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Tariff				
Under £10	*	30.76%	-30.76	69
£10-£14.99	11.31%	19.59%	-8.28	92
£15- £17.99	49.03%	32.25%	16.78	117
£18- £19.99	15.80%	20.90%	-5.10	95
£20 +	31.61%	43.19%	-11.58	88

Pitch Occupancy	2022	2019	22/19 Diff ⁹	Change
Location				
Coastal	25.03%	44.68%	-19.65	80
Inland	37.02%	39.07%	-2.05	98
Island	38.40%	48.59%	-10.19	90
Urban/Rural				
Large Urban Areas	*	34.30%	-34.30	66
Other Urban Areas	33.13%	42.08%	-8.95	91
Accessible Small Towns	32.38%	30.04%	2.34	102
Remote Small Towns	39.42%	55.05%	-15.63	84
Accessible Rural	36.38%	33.99%	2.39	102
Remote Rural	27.15%	47.10%	-19.95	80
Grading				
1	-	-	-	100
2	45.17%	53.56%	-8.39	92
3	22.90%	33.83%	-10.93	89
4	28.91%	41.10%	-12.19	88
5	41.52%	41.09%	0.43	100
Unclassified	36.33%	45.43%	-9.10	91

⁹ 22/19 Diff throughout this report is expressed by % Point Change



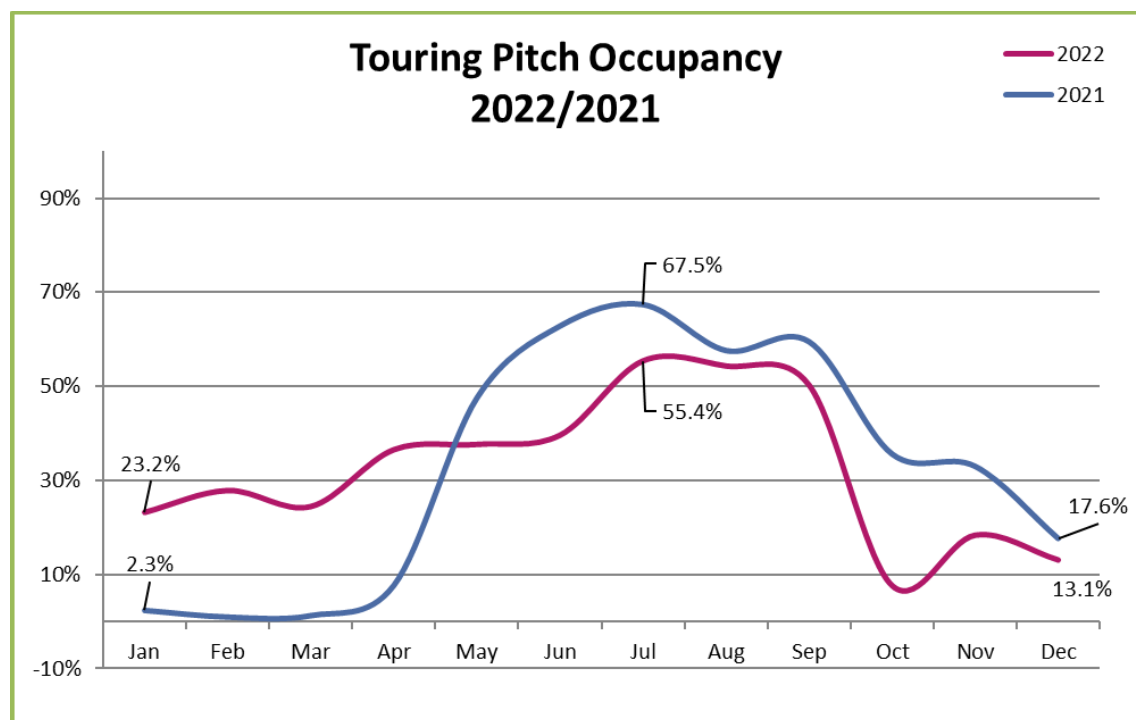
Touring Accommodation

6.2. Touring Monthly Distribution by % Pitch Occupancy 2022/2021

Table 18 Touring Monthly Distribution by % Pitch Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	23.2	27.8	24.4	36.5	37.6	39.6	55.4	54.3	50.2	7.6	18.3	13.1
2021	2.3	0.9	1.2	7.7	47.6	62.9	67.5	57.7	59.6	35.6	33.0	17.6

Figure 16 Touring Monthly Distribution by % Pitch Occupancy 2022/2021



In 2022, Touring Pitch occupancy reached a peak in July at 55.4% this is a drop when compared with the same period in 2021.

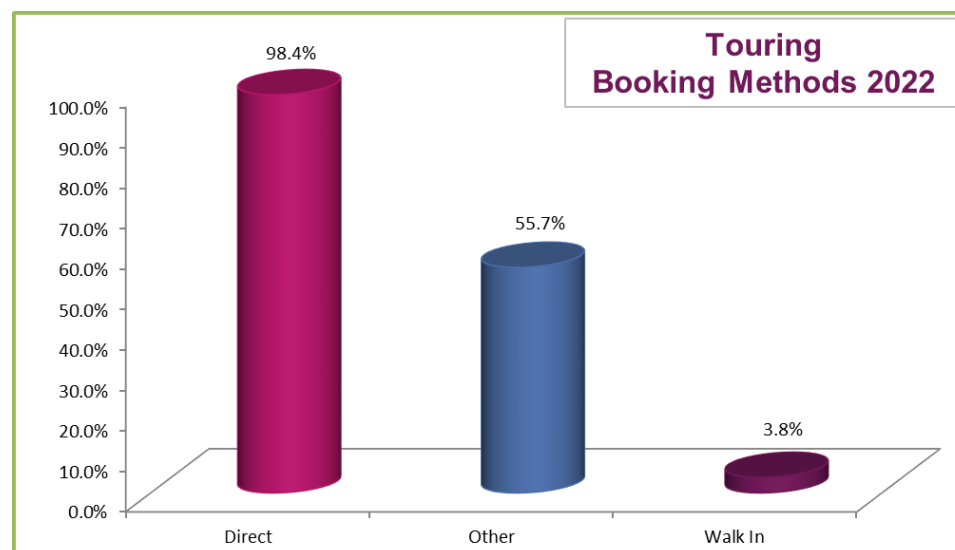
In 2021, Touring Pitch occupancy during the first quarter of 2022 was less than 2.5% due to the ongoing Level 4 lockdown, with the relaxation of restrictions May observed a significant increase, with occupancy reaching a peak in July at 67.5%.



Touring Accommodation

6.3. Touring Booking Methods 2022

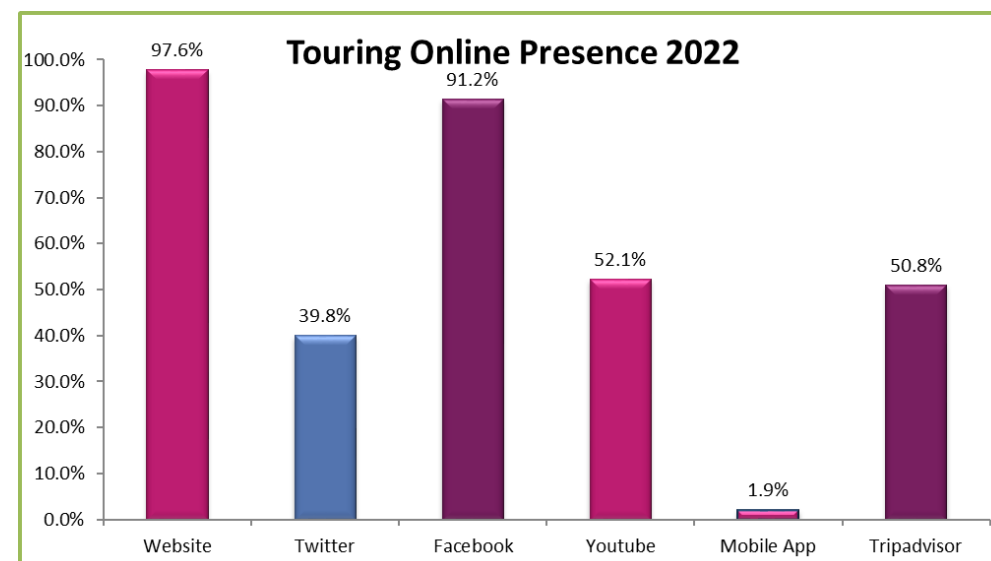
Figure 17 Touring Booking Methods 2022



In 2022, Direct booking methods were cited as most popular by 98% Touring accommodation providers. Other booking methods (55%) and Walk in (3.8%) were less popular when booking touring pitches in 2022.

6.4. Touring Online Presence 2022

Figure 18 Touring Online Presence 2022



In 2022, 98% of all participating Touring accommodation providers had their own website. Just over 90% providers had a Facebook page. Over half were listed on Tripadvisor and Youtube at 51% and 52% respectively, just under 40% had a presence on Twitter in 2022.

7 Hostel Accommodation



7.1. % Bed Occupancy

Table 19 % Bed Occupancy Analysis 2022/2021

Bed Occupancy	2022	2021	22/21 Diff ¹⁰	Change ¹¹
	53.67%	35.06%	18.61	119
Type				
SYHA	55.39%	36.88%	18.51	119
Independent	14.50%	12.51%	1.99	102
Former VisitScotland Area				
Aberdeen & Grampian	41.98%	20.58%	21.40	121
ALLFV	35.27%	29.72%	5.55	106
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	68.05%	12.35%	55.70	156
Dumfries & Galloway	0.00%	0.00%	0.00	100
Edinburgh & Lothian	59.56%	28.58%	30.98	131
Greater Glasgow	63.34%	36.20%	27.14	127
Highlands of Scotland	62.85%	40.81%	22.04	122
Kingdom of Fife	*	*	0.00	100
Orkney	61.17%	0.00%	61.17	161
Perthshire	67.89%	47.24%	20.65	121
Scottish Borders	*	*	0.00	100
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Grading				
1	65.45%	0.00%	65.45	165
2	66.54%	0.00%	66.54	167
3	44.37%	44.87%	-0.50	100
4	58.20%	31.60%	26.60	127
5	58.69%	31.40%	27.29	127
Unclassified	*	*	0.00	100

Bed Occupancy	2022	2021	22/21 Diff ¹⁰	Change ¹¹
Location				
Coastal	52.09%	32.38%	19.71	120
Inland	63.01%	34.92%	28.09	128
Island	34.07%	46.45%	-12.38	88
Urban/Rural				
Large Urban Areas	61.06%	29.59%	31.47	131
Other Urban Areas	53.32%	25.88%	27.44	127
Accessible Small Towns	56.98%	39.33%	17.65	118
Remote Small Towns	42.72%	25.39%	17.33	117
Accessible Rural	66.15%	40.78%	25.37	125
Remote Rural	48.25%	45.53%	2.72	103

¹⁰ 22/21 Diff throughout this report is expressed by % Point Change

¹¹ 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.

Bed Occupancy	2022	2019	22/19 Diff ¹²	Change
	53.67%	60.15%	-6.48	94
Type				
SYHA	55.39%	57.57%	-2.18	98
Independent	14.50%	70.07%	-55.57	44
Former VisitScotland Area				
Aberdeen & Grampian	41.98%	35.22%	6.76	107
ALLFV	35.27%	50.17%	-14.90	85
Angus & City of Dundee	*	*	0.00	100
Ayrshire & Arran	68.05%	47.43%	20.62	121
Dumfries & Galloway	0.00%	44.10%	-44.10	56
Edinburgh & Lothian	59.56%	71.91%	-12.35	88
Greater Glasgow	63.34%	65.37%	-2.03	98
Highlands of Scotland	62.85%	59.99%	2.86	103
Kingdom of Fife	*	*	0.00	100
Orkney	61.17%	59.89%	1.28	101
Perthshire	67.89%	58.88%	9.01	109
Scottish Borders	*	*	0.00	100
Shetland Islands	*	*	0.00	100
Outer Hebrides	*	*	0.00	100
Grading				
1	65.45%	60.30%	5.15	105
2	66.54%	56.61%	9.93	110
3	44.37%	63.49%	-19.12	81
4	58.20%	51.73%	6.47	106
5	58.69%	54.73%	3.96	104
Unclassified	0.00%	67.41%	-67.41	33
Location				
Coastal	52.09%	51.52%	0.57	101
Inland	63.01%	61.90%	1.11	101
Island	34.07%	67.67%	-33.60	66

Table 20 % Bed Occupancy Analysis 2022/2019

Bed Occupancy	2022	2019	22/19 Diff ¹²	Change
Urban/Rural				
Large Urban Areas	61.06%	64.70%	-3.64	96
Other Urban Areas	53.32%	53.62%	-0.30	100
Accessible Small Towns	56.98%	51.15%	5.83	106
Remote Small Towns	42.72%	44.12%	-1.40	99
Accessible Rural	66.15%	63.94%	2.21	102
Remote Rural	48.25%	62.96%	-14.71	85

¹² 22/19 Diff throughout this report is expressed by % Point Change



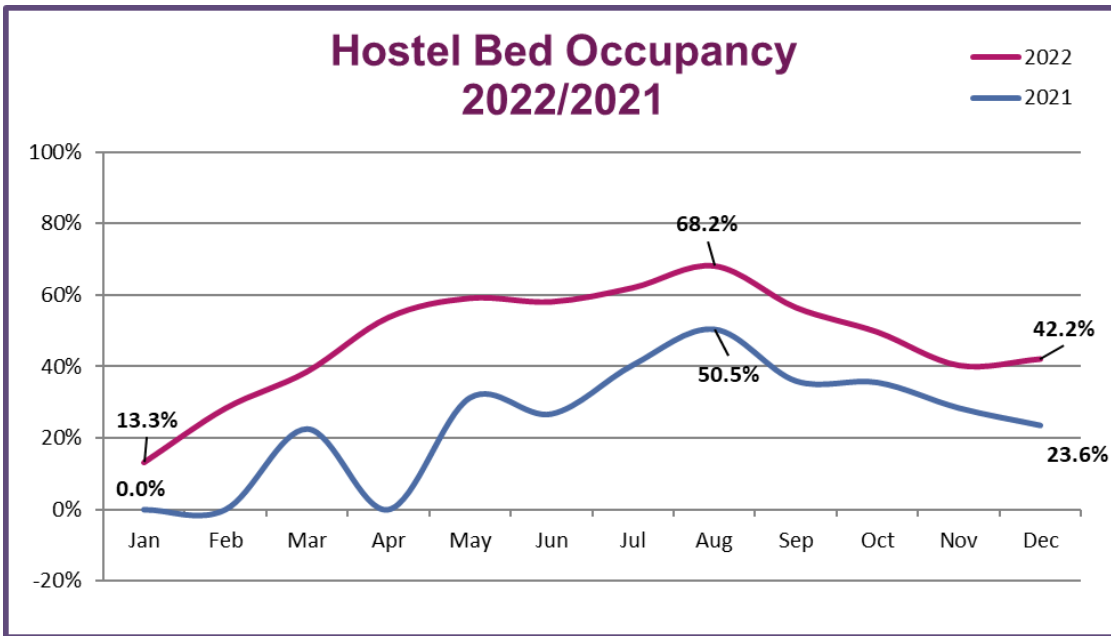
Hostel Accommodation

7.2. Hostel Monthly Distribution by % Bed Occupancy 2022/2021

Table 21 Hostel Monthly Distribution by % Bed Occupancy 2022/2021

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2022	13.3	28.4	38.7	53.8	59.2	58.2	62.1	68.2	56.6	49.7	40.4	42.2
2021	0.0	0.0	22.6	0.0	31.3	26.8	40.5	50.5	36.0	35.6	28.5	23.6

Figure 19 Hostel Monthly Distribution by % Bed Occupancy 2022/2021



In 2022, Hostel Bed occupancy reached a peak in August at 68.2%.

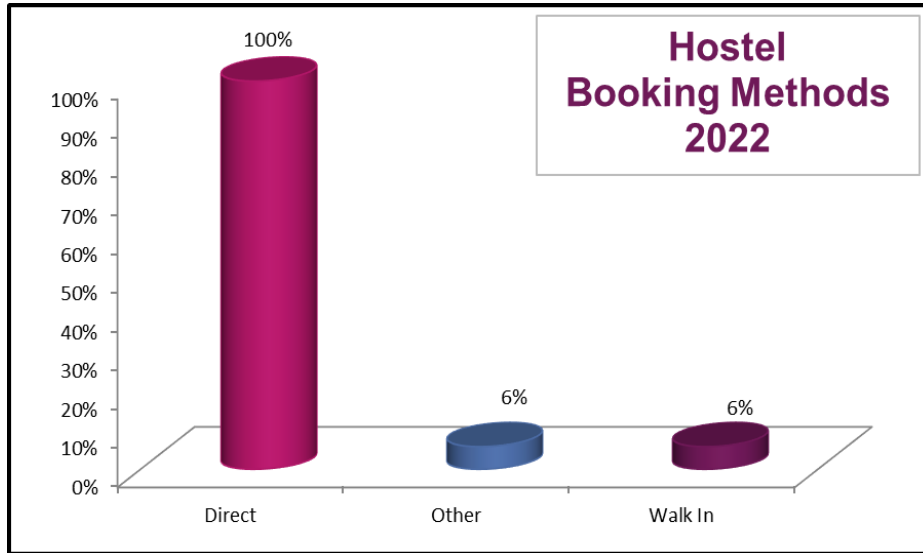
In 2021, Hostel Bed occupancy during the Level 4 lockdown collapsed to 0%. The peak was seen in August with 50.5% bed occupancy. Once the Covid-19 Level system for infection control was reintroduced the occupancy % again dropped dramatically, due to the nature of the multi-guest accommodation and the 2 metre distance regulations. As a consequence many Hostel providers either remained closed or significantly reduced their occupancy levels.

Hostel Accommodation



7.3. Hostel Booking Methods 2022

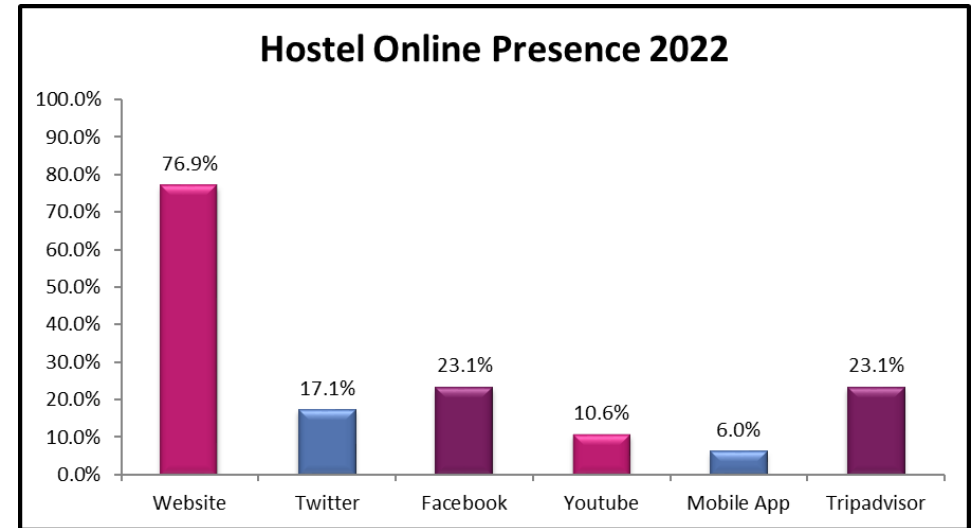
Figure 20 Hostel Booking Methods 2022



In 2022, Direct booking methods were cited as most popular by 100% of Hostel accommodation providers.

7.4. Hostel Online Presence 2022

Figure 21 Hostel Online Presence 2022



In 2022, just over three quarters of participating Hostel accommodation providers had their own website (76.9%). Just under a quarter of Hostel accommodation providers also using Facebook and Tripadvisor (23.1%), with just over 17% using Twitter to promote their accommodation.

8 Weather & Currency Data

Weather

The weather information is based on the averages for the full year month from data sourced through the MetOffice (www.metoffice.gov.uk).

Figure 22 Average Maximum Temperature

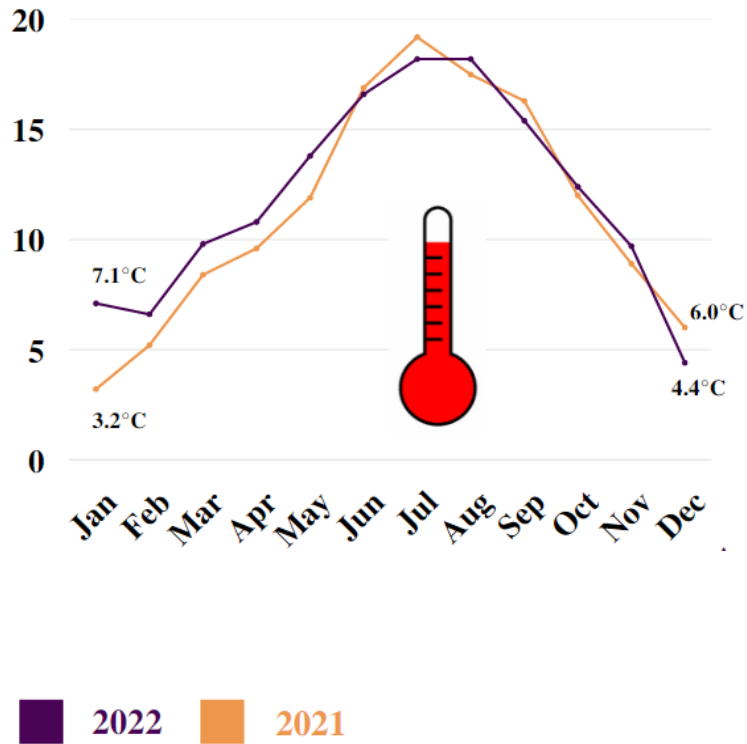


Figure 23 Average Rainfall

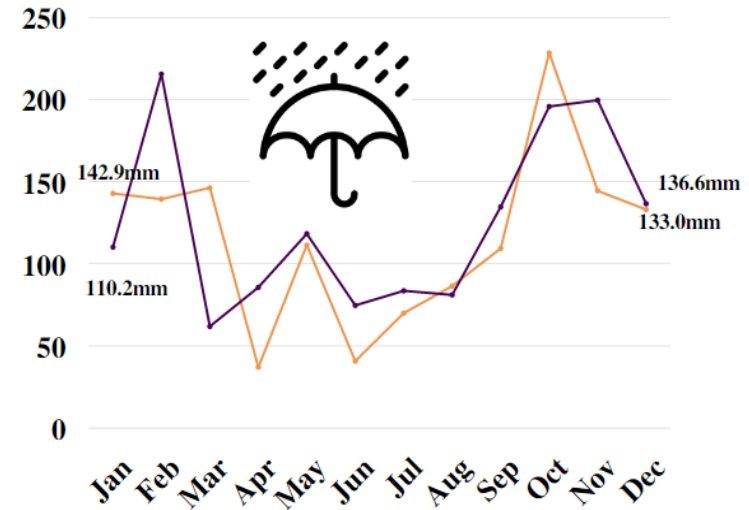
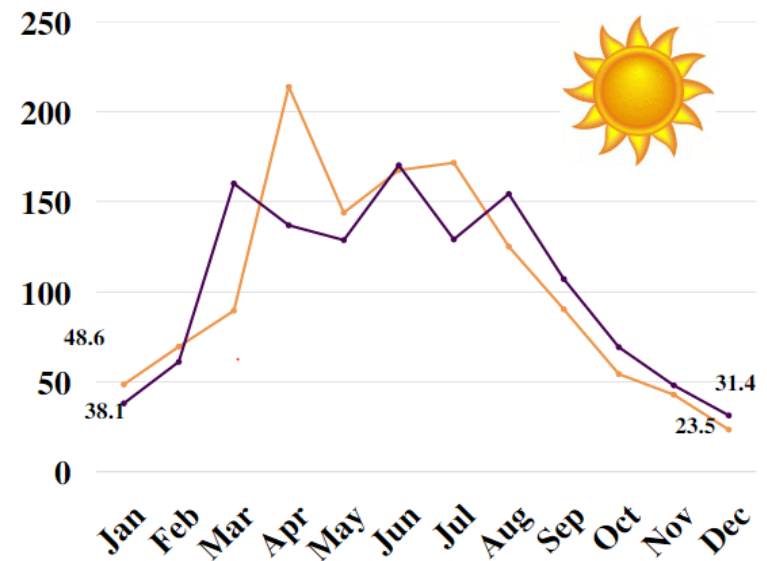


Figure 24 Average Hours of Sunshine



Currency

The currency information is based on the averages for the full month from data sourced through OFX (www.ofx.com). The currency data provided offers a month on month comparison of Sterling against the Euro and the US Dollar with a trend average (3 years).

Figure 25 GBP - Euro Average Exchange rates

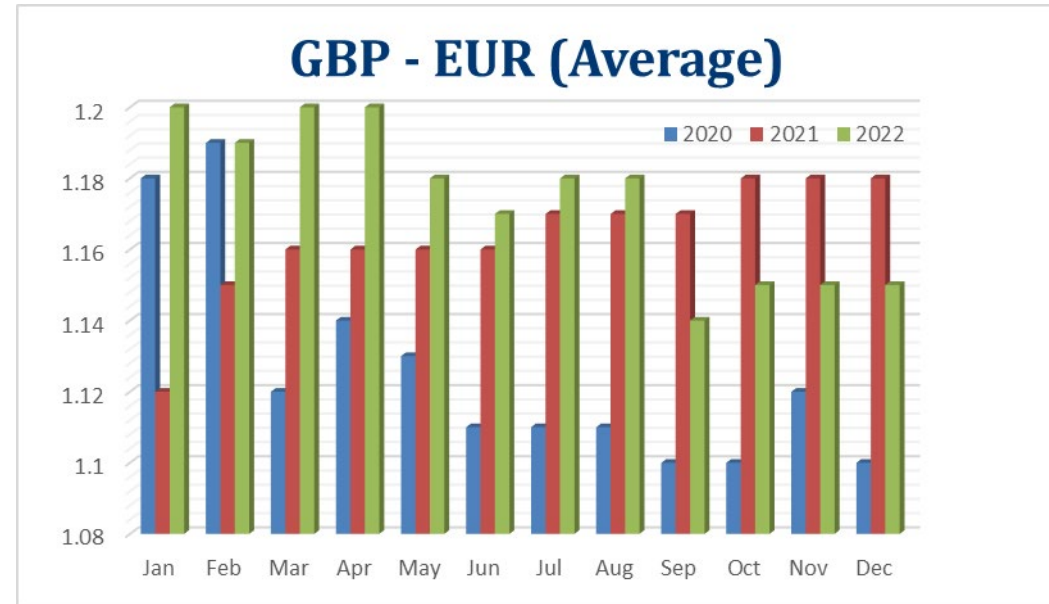
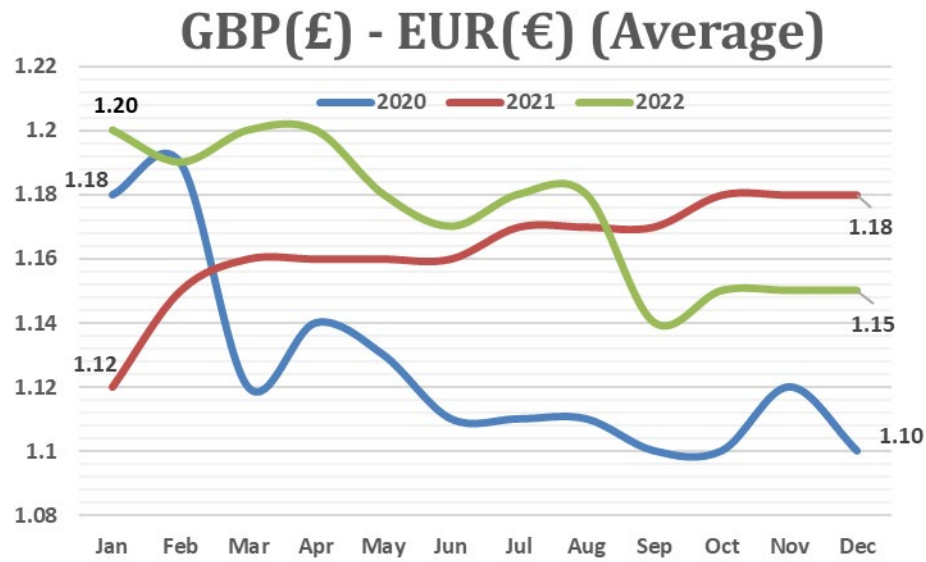
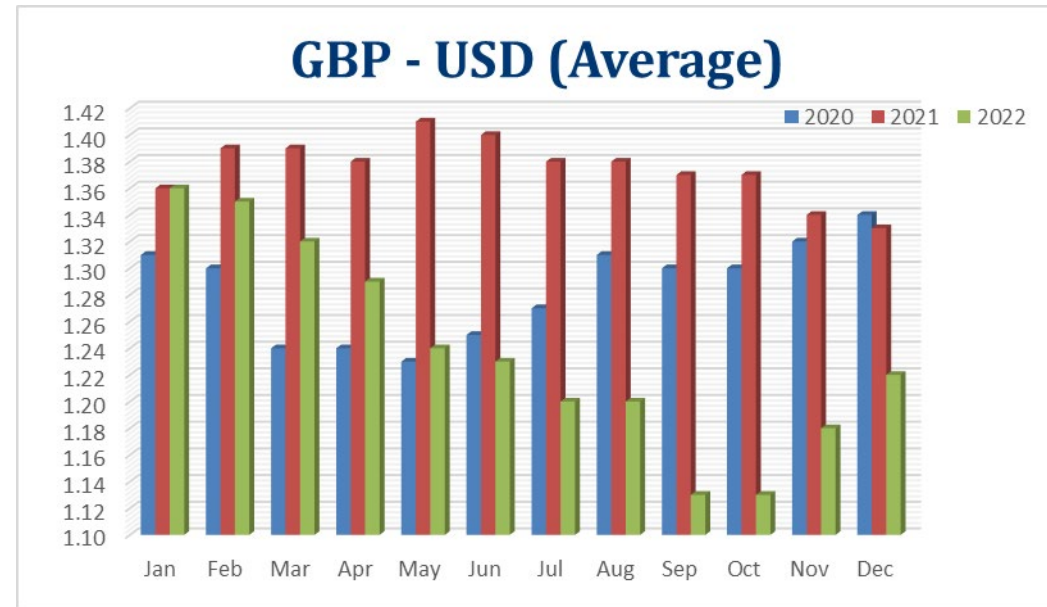
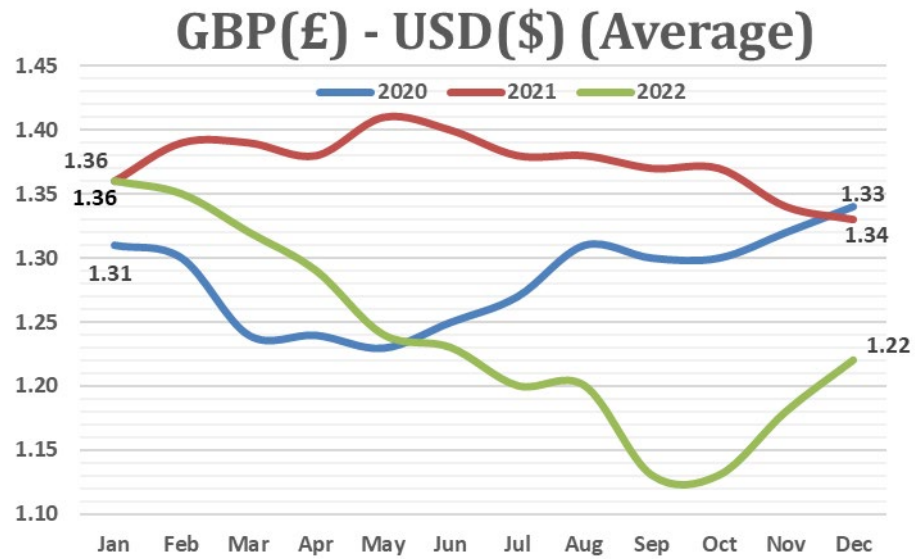


Figure 26 GBP - US Dollar Average Exchange rates



Changes in Geographic Location Analysis

Up to 2010, the accommodation sector was analysed according to whether they were Urban/Rural/Seaside. This classification was problematic as some properties could be located in both a Seaside area and an Urban area for example (e.g accommodation in Aberdeen)

Two new sets of variables were introduced in 2010 to improve analysis:

- **Geographic Location**, dividing attractions into three categories:
 - o Island based accommodation
 - o Coastal accommodation (located within approximately one mile of the coast)
 - o Inland accommodation (encompassing the remainder of attractions).

- Location according to the Scottish Government's 2013-2014 **Urban Rural Classification**, dividing attractions into the six categories shown in the following table.

Table 22 Urban Rural Classification

Category	Description
Large Urban Areas	Settlements of over 125,000 people.
Other Urban Areas	Settlements of 10,000 to 124,999 people.
Accessible Small Towns	Settlements of 3,000 and 9,999 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Small Towns	Settlements of 3,000 and 9,999 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.
Accessible Rural	Settlements of less than 3,000 people and within 30 minutes drive of a settlement of 10,000 or more.
Remote Rural	Settlements of less than 3,000 people and with a drive time of over 30 minutes to a settlement of 10,000 or more.

For more information, consult the Scottish Government's website at:

www.gov.scot/Topics/Statistics/About/Methodology/UrbanRuralClassification

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