

Scottish Accommodation Occupancy Survey 2024



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1 Methodology

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

For the 2024 survey, initial emails were circulated to all accommodation providers in February 2024 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 two 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.

2 Highlights

Serviced Accommodation

The Serviced sector in Scotland experienced a 4.13 percentage point increase when comparing the percentage room occupancy 2024 with 2023. Occupancy rates within the Hotel sector experienced a 9.05 percentage point increase when comparing 2024 with 2023. In 2024, the average peak tariff amongst Serviced accommodation was £135.33 whilst the off-peak average tariff was £130.81. In 2023, the average peak tariff was £139.05, whilst the off-peak average tariff was £128.74.

In 2024, the average peak tariff amongst Hotel accommodation was £160.19, whilst the off-peak average tariff was £156.43. In 2023, the average peak tariff was £155.08, whilst the off-peak average tariff was £148.12. In 2024, some 92.8% of all participating Hotels had their own website, with over half also listing on Tripadvisor (84.3%).

Room Occupancy rates within the Guest House/B&B experienced 20.13 percentage point decrease when comparing 2024 with 2023. In 2024, Guest House/B&B room occupancy peaked in August at 79.9%, whilst in 2023 room occupancy peaked in August at 89.1%.

In 2024, the average peak tariff amongst participating Guest House/B&B accommodation was £110.69 per person per night, whilst the off-peak average tariff was £113.22 per person per night. In 2023, the average peak tariff was £100.33 per person per night, with the off-peak average tariff was £79.55 per person per night.

Self-Catering Accommodation

Self-Catering unit occupancy experienced a 2.06 percentage point decrease when comparing 2024 with 2023. In 2024, Self-Catering unit occupancy peaked in August at 57.4%, whilst in 2023; unit occupancy peaked at 58.4% in August.

In 2024, some 98.7% of all participating Self-Catering accommodation providers had their own website. Just over half of businesses had a Facebook page and/or were listed on Tripadvisor.

Touring Accommodation

Touring Accommodation experienced a Net Pitch Occupancy of 1.74 percentage point decrease when comparing 2024 with 2023.

In 2024, Direct booking methods were cited as the most popular by 95.8% of Touring accommodation providers. 'Other' booking methods (45.2%) and 'Walk in' (37.8%) were less popular when booking touring pitches in 2024.

In 2024, 95.4% of all participating Touring accommodation providers had their own website and 43.8% of businesses had a Facebook page.

Hostel Accommodation

Bed Occupancy within the Hostel accommodation experienced a 1.57 percentage point increase when comparing 2024 with 2023. In 2024, Hostel occupancy peaked in August at 78.4%, 2023 Hostel occupancy peaked in August at 74.7%.

Some 94.4% of all participating Hostel accommodation providers had their own website. Just under a fifth of Hostel accommodation providers also utilised Tripadvisor (21.9%) with just 7.5% using X (formerly Twitter) to promote their accommodation.

3 Serviced Accommodation



3.1. Hotels

3.1.1. % Room Occupancy

Table 1 Hotel % Room Occupancy Analysis 2024/2023

Room Occupancy	2024	2023	24/23 Diff ¹	Change ²
Former VisitScotland Area				
Aberdeen & Grampian	69.90%	69.01%	0.89	101
ALLFV	69.92%	70.19%	-0.27	100
Angus & City of Dundee	65.74%	65.90%	-0.16	100
Ayrshire & Arran	78.13%	81.40%	-3.27	97
Dumfries & Galloway	55.87%	54.39%	1.48	101
Edinburgh & Lothian	84.51%	74.45%	10.06	110
Greater Glasgow	76.36%	57.52%	18.84	119
Highlands of Scotland	75.89%	72.13%	3.76	104
Kingdom of Fife	60.40%	65.35%	-4.95	95
Orkney	-	82.87%	-82.87	17
Perthshire	70.70%	64.53%	6.17	106
Scottish Borders	57.15%	51.23%	5.92	106
Shetland Islands	-	-	-	-
Outer Hebrides	68.86%	67.51%	1.35	101
Location				
Coastal	66.38%	66.54%	-0.16	100
Inland	75.65%	64.88%	10.77	111
Island	73.01%	70.94%	2.07	102
Tariff				
£20 - £29.99	-	-	-	-
£30 - £39.99	-	-	-	-
£40 - £49.99	38.22%	36.65%	1.57	102
£50 - £59.99	74.52%	56.54%	17.98	118

Room Occupancy	2024	2023	24/23 Diff ¹	Change ²
£60 - £69.99	71.79%	65.20%	6.59	107
£70 +	75.37%	65.93%	9.44	109
Size				
1 to 3	-	-	-	-
4 to 10	51.29%	55.87%	-4.58	95
11 to 25	62.70%	61.64%	1.06	101
26 to 50	80.80%	77.73%	3.07	103
51 to 100	75.52%	78.58%	-3.06	97
Over 100	77.87%	57.88%	19.99	120
Urban/Rural				
Large Urban Areas	75.59%	60.05%	15.54	116
Other Urban Areas	82.57%	78.27%	4.30	104
Accessible Small Towns	67.33%	67.83%	-0.50	100
Remote Small Towns	59.65%	55.01%	4.64	105
Accessible Rural	64.72%	41.18%	23.54	124
Remote Rural	69.50%	67.42%	2.08	102
Grading				
1 Star	-	-	-	-
2 Stars	77.29%	72.51%	4.78	105
3 Stars	75.97%	68.24%	7.73	108
4 Stars	72.11%	60.15%	11.96	112
5 Stars	74.57%	75.66%	-1.09	99
Unclassified	79.06%	72.98%	6.08	106

- Sample Size = Nil

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

¹ 24/23 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.



Serviced Accommodation

3.1.2. % Bed Occupancy

Table 2 Hotel % Bed Occupancy Analysis 2024/2023

Bed Occupancy	2024	2023	24/23 Diff	Change
Former VisitScotland Area				
Aberdeen & Grampian	57.51%	60.73%	-3.22	97
ALLFV	66.00%	66.32%	-0.32	100
Angus & City of Dundee	37.15%	35.08%	2.07	102
Ayrshire & Arran	55.54%	52.63%	2.91	103
Dumfries & Galloway	35.00%	38.27%	-3.27	97
Edinburgh & Lothian	80.46%	57.73%	22.73	123
Greater Glasgow	72.97%	49.16%	23.81	124
Highlands of Scotland	67.60%	61.18%	6.42	106
Kingdom of Fife	46.87%	50.81%	-3.94	96
Orkney	-	87.79%	-87.79	12
Perthshire	49.88%	46.33%	3.55	104
Scottish Borders	44.15%	43.52%	0.63	101
Shetland Islands	-	-	-	-
Outer Hebrides	52.38%	54.45%	-2.07	98
Location				
Coastal	58.83%	53.73%	5.10	105
Inland	65.02%	54.26%	10.76	111
Island	68.56%	68.86%	-0.30	100
Tariff				
£20 - £29.99	-	-	-	-
£30 - £39.99	-	-	-	-
£40 - £49.99	0.00%	8.44%	-8.44	92
£50 - £59.99	38.29%	48.20%	-9.91	90
£60 - £69.99	66.71%	56.38%	10.33	110
£70 +	63.94%	54.82%	9.12	109

Bed Occupancy	2024	2023	24/23 Diff	Change
Size				
1 to 3	-	-	-	-
4 to 10	42.85%	36.98%	5.87	106
11 to 25	56.53%	58.59%	-2.06	98
26 to 50	70.32%	68.31%	2.01	102
51 to 100	60.78%	68.69%	-7.91	92
Over 100	76.63%	39.57%	37.06	137
Urban/Rural				
Large Urban Areas	74.29%	50.79%	23.50	124
Other Urban Areas	61.08%	64.90%	-3.82	96
Accessible Small Towns	54.44%	56.33%	-1.89	98
Remote Small Towns	68.18%	54.78%	13.40	113
Accessible Rural	47.08%	24.94%	22.14	122
Remote Rural	60.23%	59.35%	0.88	101
Grading				
1 Star				
2 Stars	70.03%	61.65%	8.38	108
3 Stars	60.84%	59.21%	1.63	102
4 Stars	66.49%	48.71%	17.78	118
5 Stars	56.43%	68.71%	-12.28	88
Unclassified	47.16%	51.29%	-4.13	96

- Sample Size = Nil

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



Serviced Accommodation

3.1.3. Hotel Monthly Distribution by % Occupancy 2024/2023

Table 3 Monthly Distribution by % Room Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	36.0	44.1	73.2	83.3	89.0	74.3	88.7	90.9	86.9	90.0	74.0	64.1
2023	47.3	51.9	54.1	71.1	73.6	75.2	61.4	80.1	84.5	79.1	62.7	44.3

Table 4 Monthly Distribution by % Bed Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	44.2	52.4	62.8	63.9	77.3	78.2	78.8	79.1	74.4	65.4	52.3	49.9
2023	37.7	38.9	45.8	65.0	59.9	63.2	45.5	71.2	70.9	62.7	48.2	51.4

Figure 1 Hotel Monthly Distribution by % Room Occupancy 2024/2023

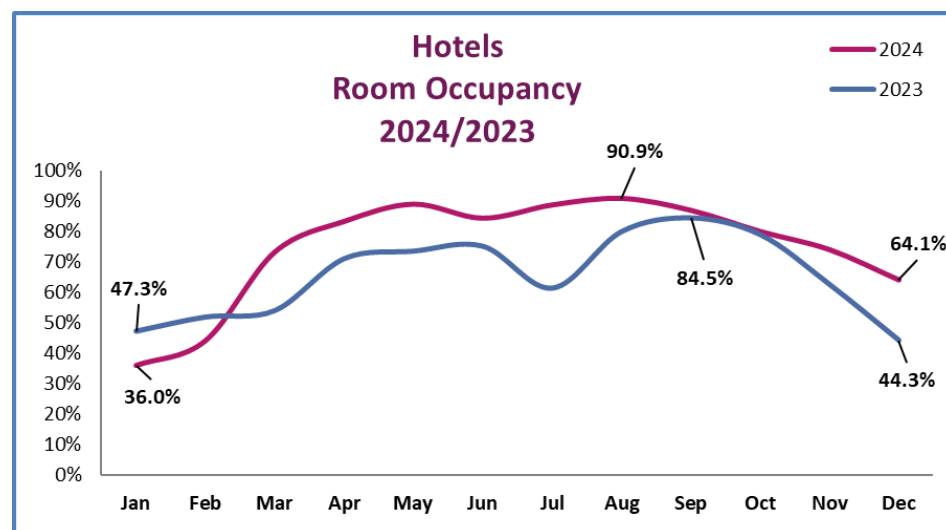
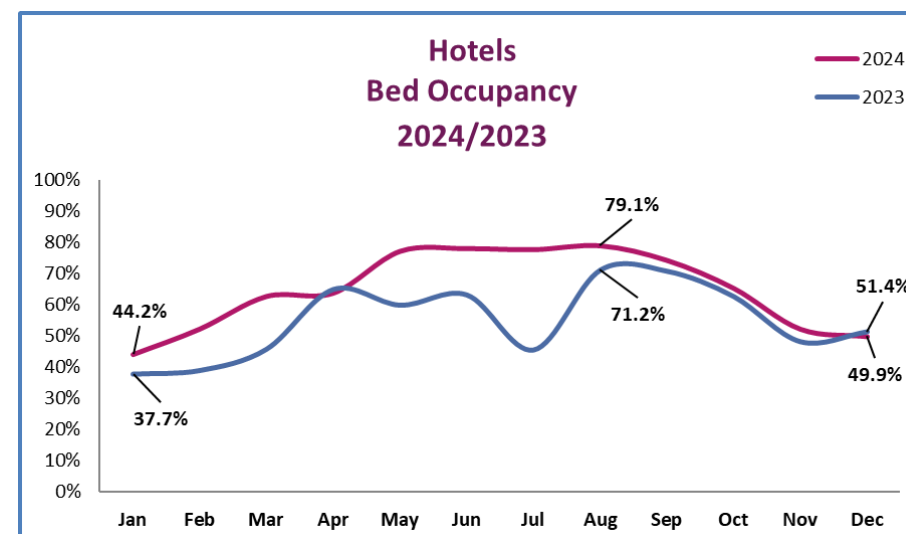


Figure 2 Hotel Monthly Distribution by % Bed Occupancy 2024/2023



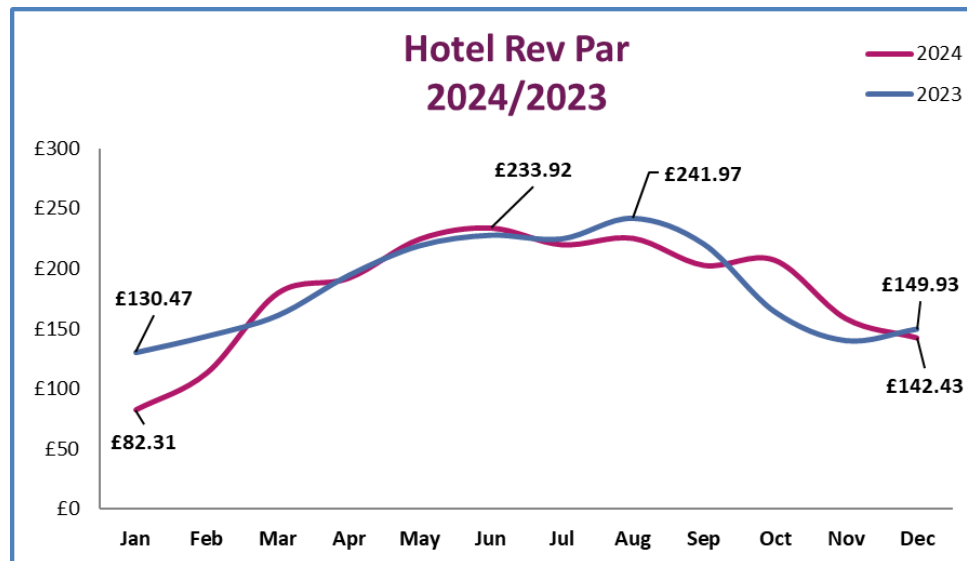
In 2024, Hotel room occupancy reached a peak in August at 90.9%.

In 2023, Hotel room occupancy reached a peak in September at 84.5%%.

Serviced Accommodation

3.1.4. Hotel Rev Par 2024/2023

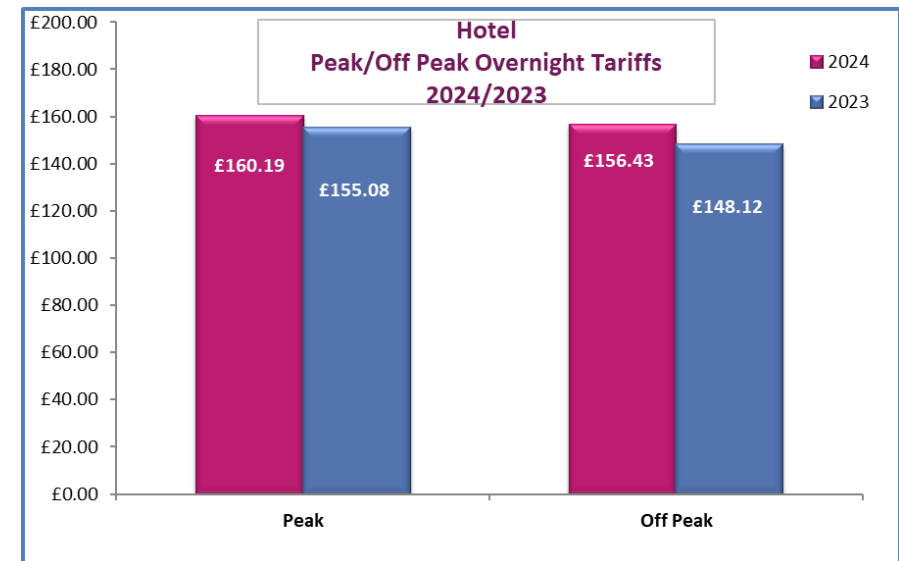
Figure 3 Hotel Rev Par 2024/2023



In 2024, the average peak Rev Par was £233.92, which was achieved in June.

In 2023, the average peak Rev Par was £241.97 which was achieved in August.

Figure 4 Hotel Peak/Off-Peak Tariffs 2024/2023



In 2024, the average peak tariff amongst participating hotels was £160.19, whilst the off-peak average tariff was £156.43.

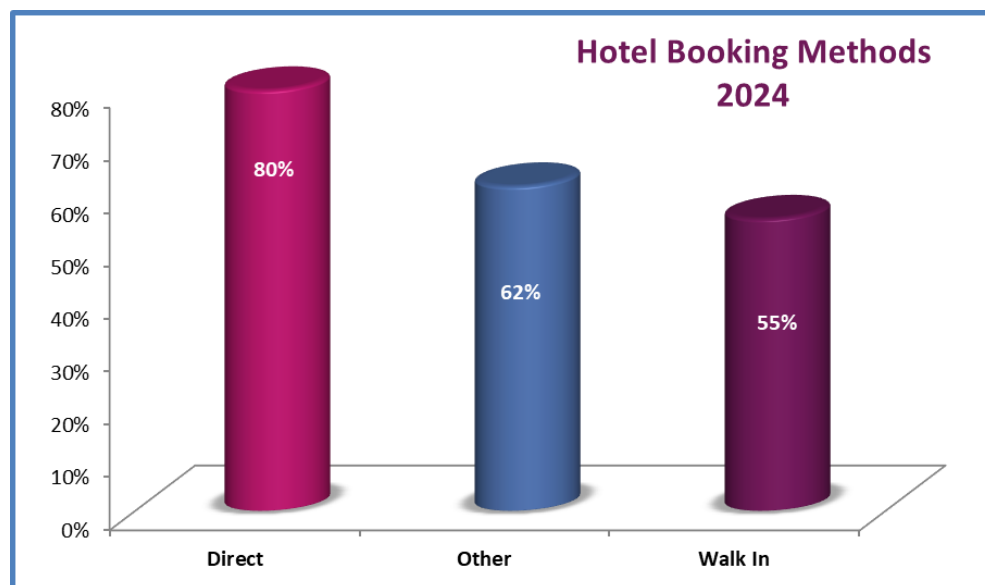
In 2023, the average peak tariff amongst participating hotels was £155.08, whilst the off-peak average tariff was £148.12.

Serviced Accommodation



3.1.5. Hotel Booking Methods 2024

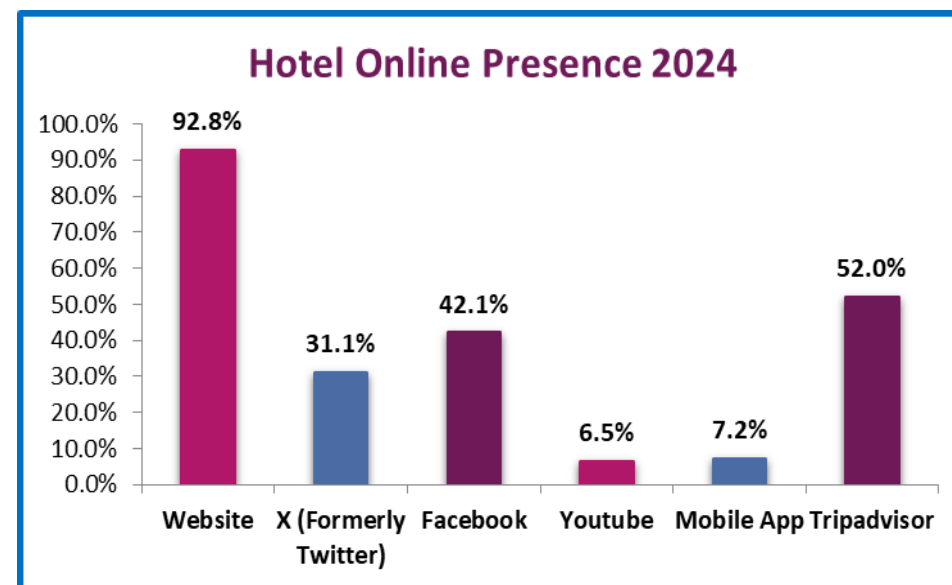
Figure 5 Booking Methods 2024



In 2024, the most popular booking method was 'directly' with the Hotel accommodation, followed by 'Other', which includes booking sites, such as Booking.com; Expedia, laterooms.com and agents. 55% of all participating hotels welcomed 'walk-in' guests.

3.1.6. Hotel Online Presence 2024

Figure 6 Online Presence 2024



In 2024, 92.8% of all participating Hotels had their own website, with the over half also listed on Tripadvisor (52.0%). Facebook continued to be popular in 2024 with 42.1% having their page to promote their accommodation. YouTube was only used by 6.5% of Hotels in 2024.

Serviced Accommodation

3.2. Guest House, B&B

3.2.1. % Room Occupancy



Table 5 Guest House, B&B % Room Occupancy Analysis 2024/2023

Room Occupancy	2024	2023	24/23 Diff	Change
Guest House / B&B				
Former VisitScotland Area				
Aberdeen & Grampian	61.35%	66.76%	-5.41	95
ALLFV	54.65%	86.36%	-31.71	68
Angus & City of Dundee	14.48%	13.24%	1.24	101
Ayrshire & Arran	68.95%	-	68.95	169
Dumfries & Galloway	46.28%	74.98%	-28.70	71
Edinburgh & Lothian	84.42%	97.33%	-12.91	87
Greater Glasgow	-	-	-	-
Highlands of Scotland	53.51%	87.84%	-34.33	66
Kingdom of Fife	43.72%	-	43.72	144
Orkney	48.53%	38.81%	9.72	110
Perthshire	52.40%	-	52.40	152
Scottish Borders	27.31%	42.21%	-14.90	85
Shetland Islands	-	-	-	-
Outer Hebrides	62.72%	76.58%	-13.86	86
Location				
Coastal	45.06%	66.76%	-21.70	78
Inland	57.55%	79.27%	-21.72	78
Island	66.30%	72.64%	-6.34	94
Tariff				
£20 - £29.99	*	-	*	*
£30 - £39.99	61.38%	-	61.38	161
£40 - £49.99	47.98%	13.24%	34.74	135
£50 - £59.99	52.32%	-	52.32	152

Room Occupancy	2024	2023	24/23 Diff	Change
Tariff (Cont)				
£60 - £69.99	52.30%	88.40%	-36.10	64
£70 +	57.82%	78.20%	-20.38	80
Size				
1 to 3	46.94%	65.64%	-18.70	81
4 to 10	64.61%	82.81%	-18.20	82
11 to 25	61.78%	-	61.78	162
26 to 50	-	-	-	-
51 to 100	-	-	-	-
Over 100	-	-	-	-
Urban/Rural				
Large Urban Areas	81.79%	95.66%	-13.87	86
Other Urban Areas	65.16%	77.75%	-12.59	87
Accessible Small Towns	48.89%	58.05%	-9.16	91
Remote Small Towns	63.27%	75.23%	-11.96	88
Accessible Rural	45.44%	82.16%	-36.72	63
Remote Rural	58.00%	72.64%	-14.64	85
Grading				
1 Star	-	-	-	-
2 Stars	-	-	-	-
3 Stars	56.43%	77.61%	-21.18	79
4 Stars	54.38%	36.54%	17.84	118
5 Stars	35.07%	-	35.07	135
Unclassified	53.31%	71.14%	-17.83	82

- Sample Size = Nil

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



Serviced Accommodation

3.2.2. Bed Occupancy

Table 6 Guest House, B&B % Bed Occupancy Analysis 2024/2023

Bed Occupancy	2024	2023	24/23 Diff	Change
Guest House / B&B				
Former VisitScotland Area				
Aberdeen & Grampian	59.94%	75.11%	-15.17	85
ALLFV	57.72%	87.78%	-30.06	70
Angus & City of Dundee	0.00%	10.65%	-10.65	89
Ayrshire & Arran	27.92%	-	27.92	128
Dumfries & Galloway	30.55%	67.81%	-37.26	63
Edinburgh & Lothian	88.12%	91.65%	-3.53	96
Greater Glasgow	-	-	-	-
Highlands of Scotland	58.82%	87.84%	-29.02	71
Kingdom of Fife	38.71%	-	38.71	139
Orkney	48.41%	31.45%	16.96	117
Perthshire	45.18%	-	45.18	145
Scottish Borders	21.10%	40.50%	-19.40	81
Shetland Islands	-	-	-	-
Outer Hebrides	88.31%	52.38%	35.93	136
Location				
Coastal	46.14%	75.11%	-28.97	71
Inland	58.65%	78.46%	-19.81	80
Island	71.16%	68.01%	3.15	103
Tariff				
£20 - £29.99	*	-	*	*
£30 - £39.99	67.39%	-	67.39	167
£40 - £49.99	41.88%	10.65%	31.23	131
£50 - £59.99	36.62%	-	36.62	137
£60 - £69.99	58.13%	80.55%	-22.42	78
£70 +	60.11%	77.49%	-17.38	83

Bed Occupancy	2024	2023	24/23 Diff	Change
Size				
1 to 3	47.73%	68.14%	-20.41	80
4 to 10	65.47%	81.80%	-16.33	84
11 to 25	0.00%	-	0.00	100
26 to 50	-	-	-	-
51 to 100	-	-	-	-
Over 100	-	-	-	-
Urban/Rural				
Large Urban Areas	88.25%	90.02%	-1.77	98
Other Urban Areas	14.13%	78.05%	-63.92	36
Accessible Small Towns	48.56%	66.26%	-17.70	82
Remote Small Towns	72.30%	66.97%	5.33	105
Accessible Rural	44.60%	90.47%	-45.87	54
Remote Rural	59.73%	68.01%	-8.28	92
Grading				
1 Star	-	-	-	-
2 Stars	-	-	-	-
3 Stars	57.41%	69.90%	-12.49	88
4 Stars	59.53%	38.24%	21.29	121
5 Stars	32.63%	-	32.63	133
Unclassified	51.18%	75.15%	-23.97	76

- Sample Size = Nil

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

Serviced Accommodation

3.2.3. Guest House, B&B Monthly Distribution by % Occupancy 2024/23

Table 7 Guest House, B&B Monthly Distribution by % Room Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	28.3	36.9	37.9	52.3	75.9	76.9	75.7	79.9	72.5	56.3	33.4	27.0
2023	40.8	23.1	76.1	70.4	79.5	73.8	83.9	89.1	78.5	65.8	58.2	60.9

Figure 7 Guest House, B&B Monthly Distribution by % Room Occupancy 2024/2023

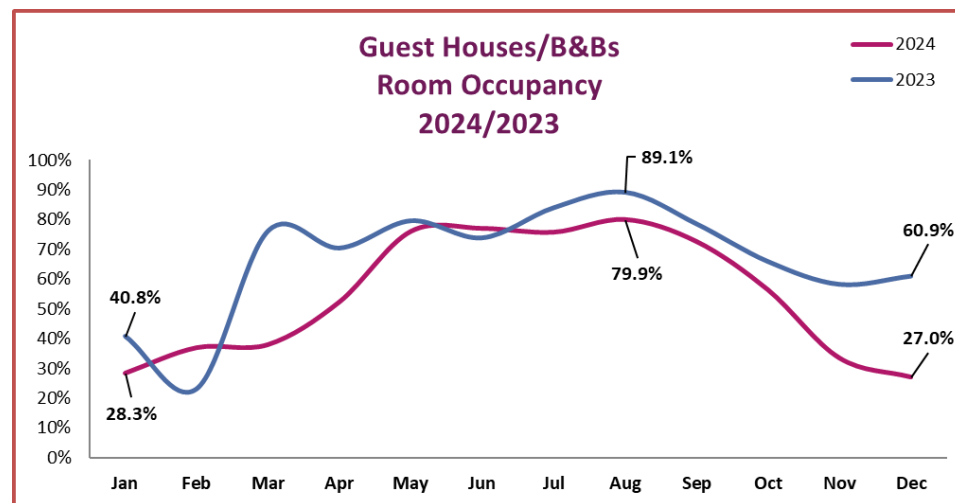
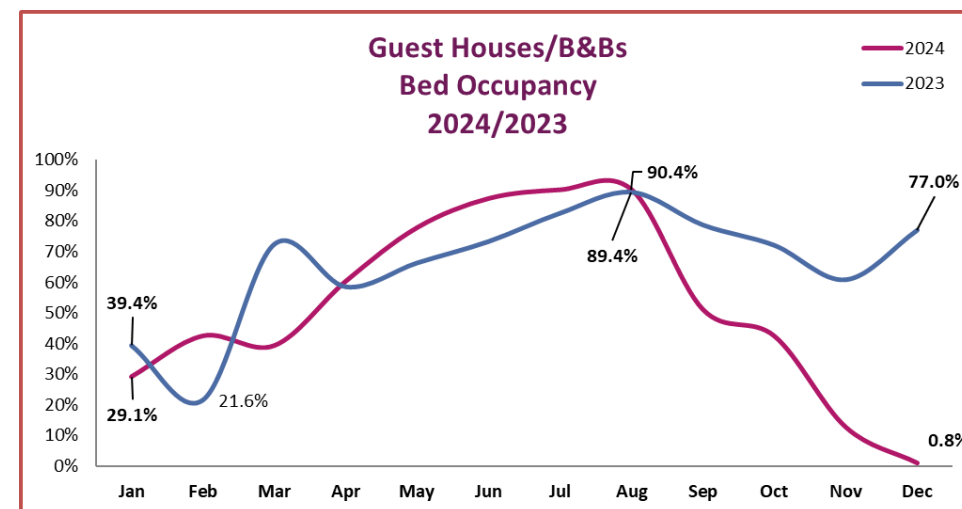


Table 8 Guest House, B&B Monthly Distribution by % Bed Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	29.1	42.4	39.3	60.3	77.9	87.4	90.3	90.4	51.1	42.4	12.5	0.8
2023	39.4	21.6	72.4	58.6	66.4	73.3	82.6	89.4	78.7	72.1	60.9	77.0

Figure 8 Guest House, B&B Monthly Distribution by % Bed Occupancy 2024/2023



In 2024, Guest Houses/B&Bs room occupancy reached a peak in August at 79.9% whilst maintaining a room occupancy rate of over 70% between March and September before reducing sharply in October.

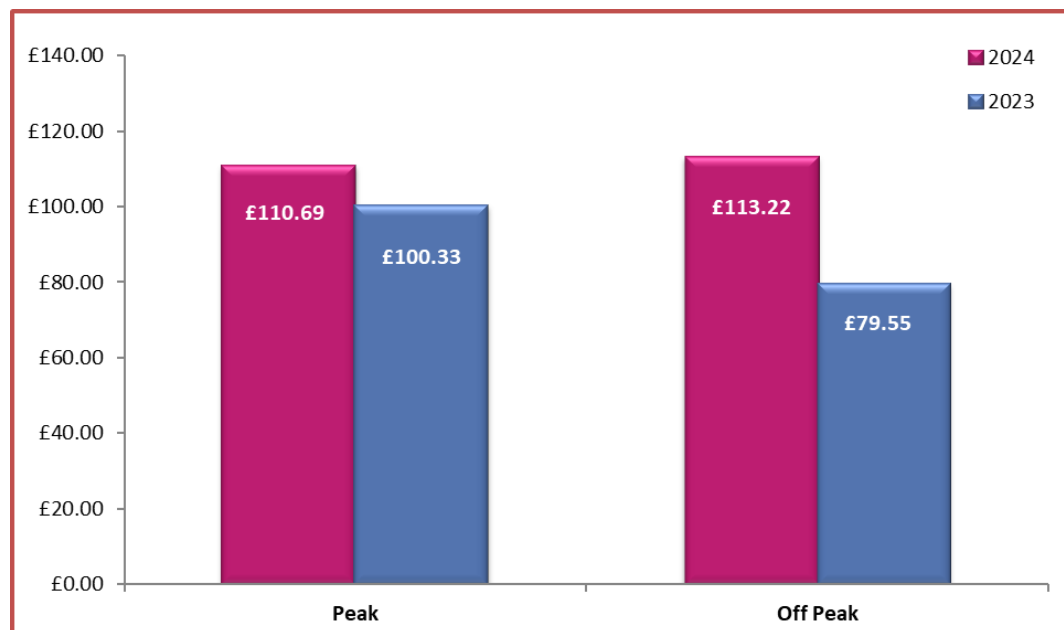
In 2023, Hotel room occupancy reached a peak in August at 89.1%, whilst maintaining a room occupancy rate of over 70% between in March and September.

Serviced Accommodation



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

Figure 9 Guest House, B&B Peak/Off-Peak Tariffs 2024/2023



In 2024, the average peak tariff amongst participating Guest House/B&B accommodation was £110.69 per person per night, whilst the off-peak average tariff was £113.22.

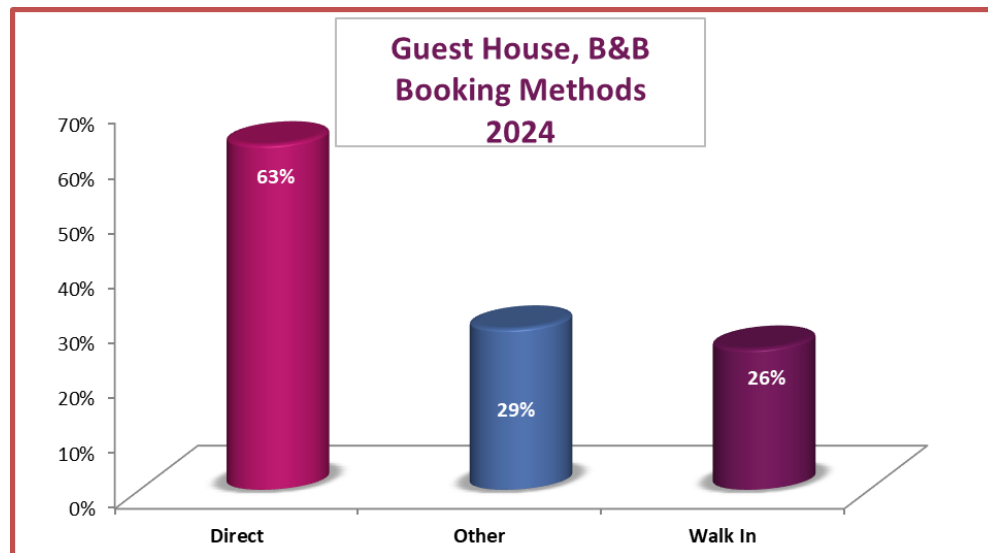
In 2023, the average peak tariff amongst participating Guest House/B&B accommodation was £100.33 per person per night, whilst the off-peak average tariff was £79.55.



Serviced Accommodation

3.2.5. Guest House, B&B Booking Methods 2024

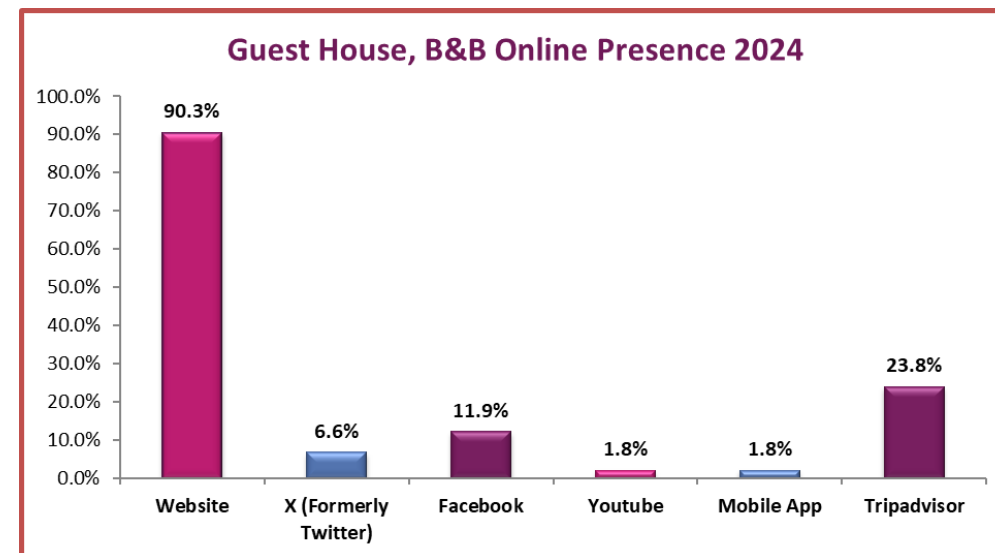
Figure 10 Booking Methods 2024



In 2024, Guest House/B&B accommodation providers noted the most popular booking method was 'direct' booking. 'Walk-in' and 'Other' booking channels such as booking sites, proved less popular in 2024.

3.2.6. Guest House, B&B Online Presence 2024

Figure 11 Online Presence 2024



In 2024, just over 90% of participating Guest House/B&B providers had their own website, with just under a quarter also being listed on Tripadvisor (23.8%). X (formerly Twitter) was used by just under 7% of Guest House/B&B providers in 2024.

4 Self-Catering Accommodation



4.1. % Unit Occupancy

Table 9 Self-Catering % Unit Occupancy Analysis 2024/2023

Unit Occupancy	2024	2023	24/23 Diff ³	Change ⁴
Former VisitScotland Area				
Aberdeen & Grampian	24.90%	36.53%	-11.63	88
ALLFV	44.89%	44.73%	0.16	100
Angus & City of Dundee	54.12%	56.87%	-2.75	97
Ayrshire & Arran	63.07%	61.34%	1.73	102
Dumfries & Galloway	27.48%	27.80%	-0.32	100
Edinburgh & Lothian	35.42%	47.51%	-12.09	88
Greater Glasgow	22.00%	27.04%	-5.04	95
Highlands of Scotland	47.63%	47.81%	-0.18	100
Kingdom of Fife	32.14%	40.01%	-7.87	92
Orkney	58.73%	66.94%	-8.21	92
Perthshire	45.97%	47.17%	-1.20	99
Scottish Borders	33.43%	30.56%	2.87	103
Shetland Islands	82.51%	64.67%	17.84	118
Outer Hebrides	65.33%	44.73%	20.60	121
Property Type				
Bungalow	48.07%	46.88%	1.19	101
Cottage	37.46%	36.98%	0.48	100
Flat	29.08%	23.60%	5.48	105
Glamping	22.74%	21.93%	0.81	101
House	32.55%	38.91%	-6.36	94
Lodge/Chalet	58.94%	62.83%	-3.89	96
Other Property	12.84%	21.03%	-8.19	92
Static Caravan	12.34%	35.09%	-22.75	77

Unit Occupancy	2024	2023	24/23 Diff ³	Change ⁴
Tariff				
Unknown	20.49%	9.38%	11.11	111
Up to £299	18.48%	26.57%	-8.09	92
£300 to £499	29.50%	26.59%	2.91	103
£500 to £799	34.37%	36.25%	-1.88	98
£800 or more	48.33%	54.15%	-5.82	94
Location				
Coastal	33.06%	34.49%	-1.43	99
Inland	42.14%	44.35%	-2.21	98
Island	63.61%	62.11%	1.50	102
Urban/Rural				
Large Urban Areas	35.43%	18.59%	16.84	117
Other Urban Areas	42.51%	45.52%	-3.01	97
Accessible Small Towns	37.18%	29.07%	8.11	108
Remote Small Towns	29.41%	37.61%	-8.20	92
Accessible Rural	41.87%	50.16%	-8.29	92
Remote Rural	42.44%	42.74%	-0.30	100
Grading				
1 Star	0.00%	0.00%	0.00	100
2 Stars	19.95%	30.64%	-10.69	89
3 Stars	50.98%	44.84%	6.14	106
4 Stars	46.59%	48.20%	-1.61	98
5 Stars	58.78%	52.12%	6.66	107
Unclassified	35.66%	38.77%	-3.11	97

- Sample Size = Nil

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

³ 24/23 Diff throughout this report is expressed by % Point Change

⁴ 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.



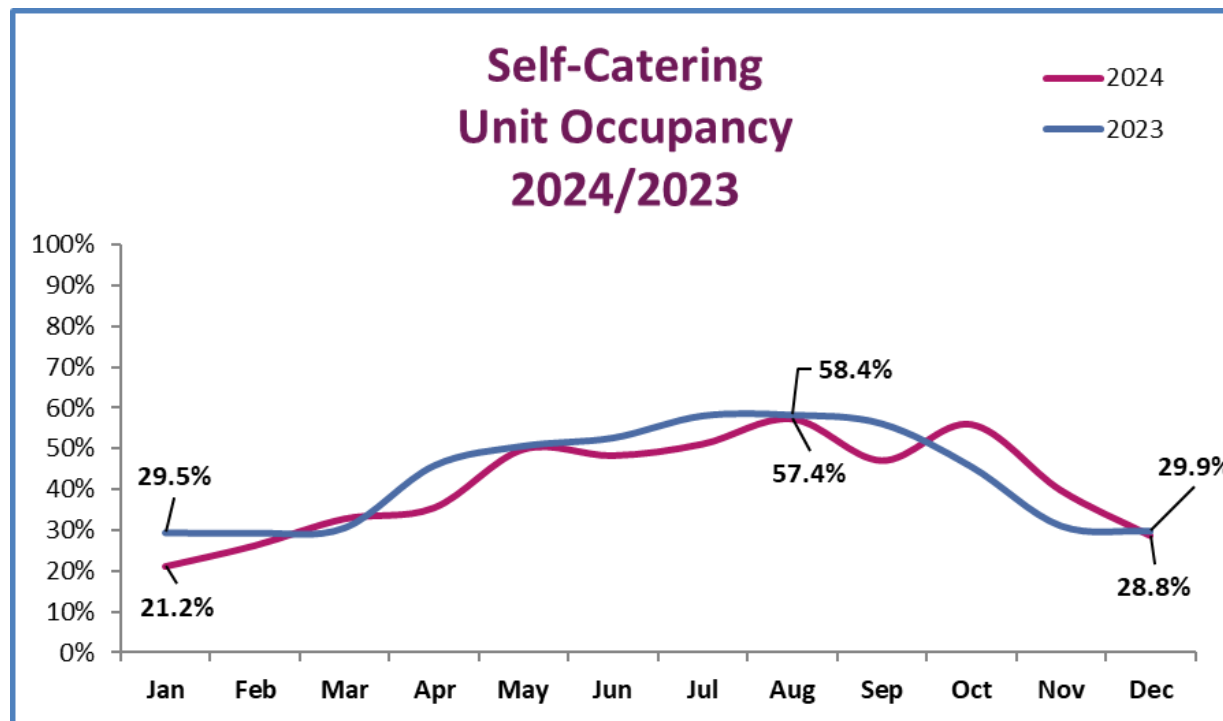
Self-Catering Accommodation

4.2. Self-Catering Monthly Distribution by % Unit Occupancy 2024/2023

Table 10 Self-Catering Monthly Distribution by % Unit Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	21.2	26.4	32.9	35.6	50.0	48.4	51.3	57.4	47.2	56.1	40.0	28.8
2023	29.5	29.4	30.7	46.0	50.8	52.8	58.2	58.4	56.3	45.8	31.2	29.9

Figure 12 Self-Catering Monthly Distribution by % Room Occupancy 2024/2023



In 2024, Self-Catering Unit occupancy reached a peak in August at 57.4% whilst maintaining a unit occupancy rate of over 50% between May and September before reducing in October.

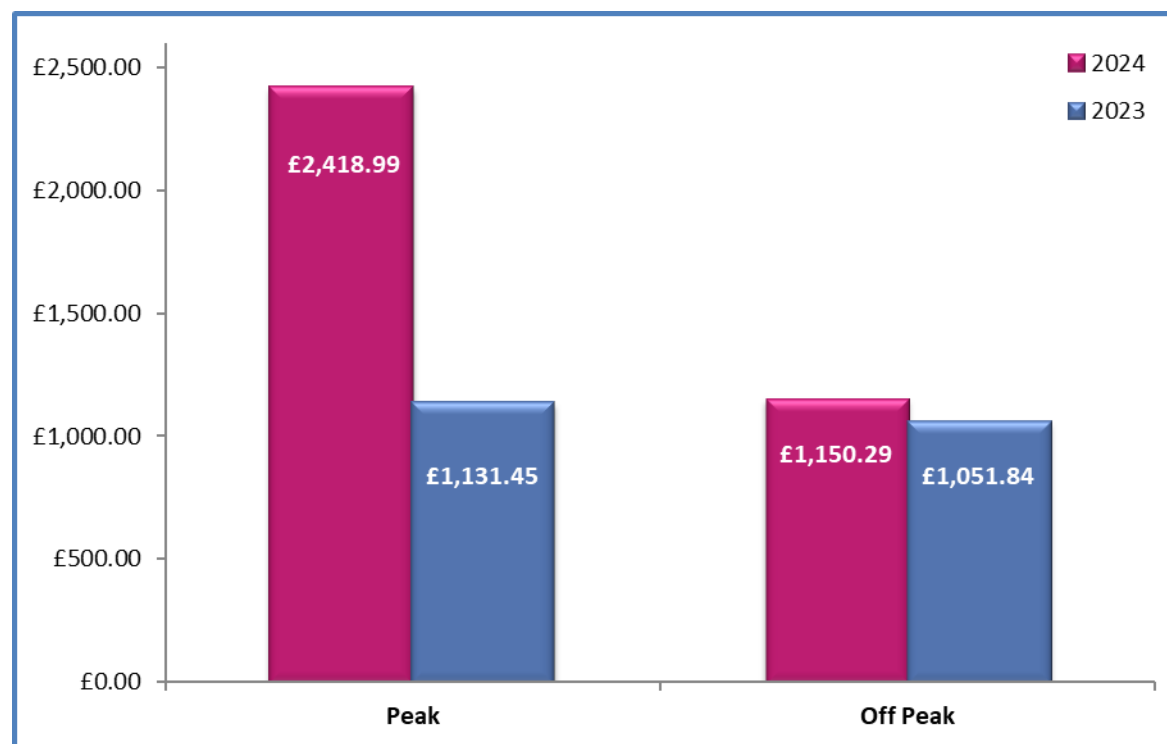
In 2023, Self-Catering Unit occupancy reached a peak in August at 58.4%.

Self-Catering Accommodation



4.3. Self-Catering Peak/Off-Peak Tariffs

Figure 13 Self-Catering Peak/Off-Peak Tariffs 2024/2023



In 2024, the average peak tariff amongst participating Self-Catering accommodation was £2,418.99 per week, whilst the off-peak average tariff was £1,150.29 per week.

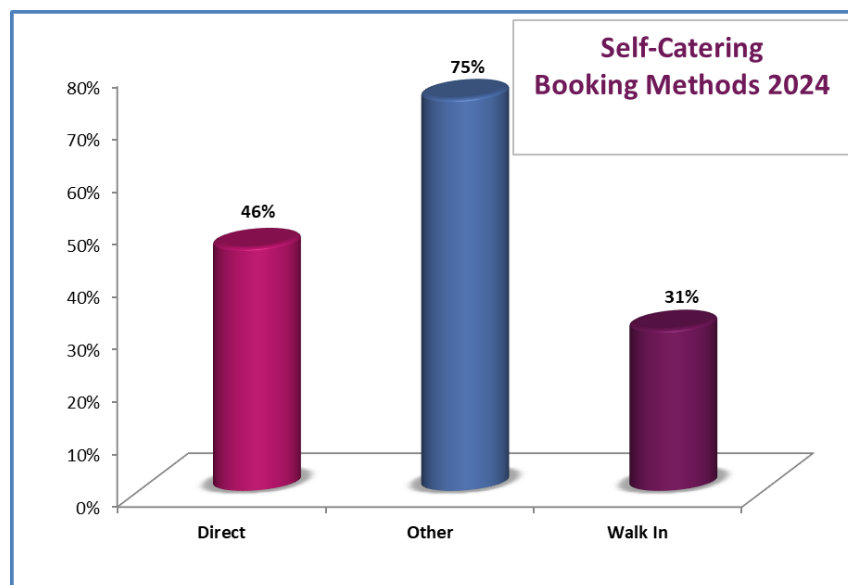
In 2023, the average peak tariff amongst participating Self-Catering accommodation was £1,131.45 per week, whilst the off-peak average tariff was £1,051.84 per week.



Self-Catering Accommodation

4.4. Self-Catering Booking Methods 2024

Figure 14 Self-Catering Booking Methods 2024

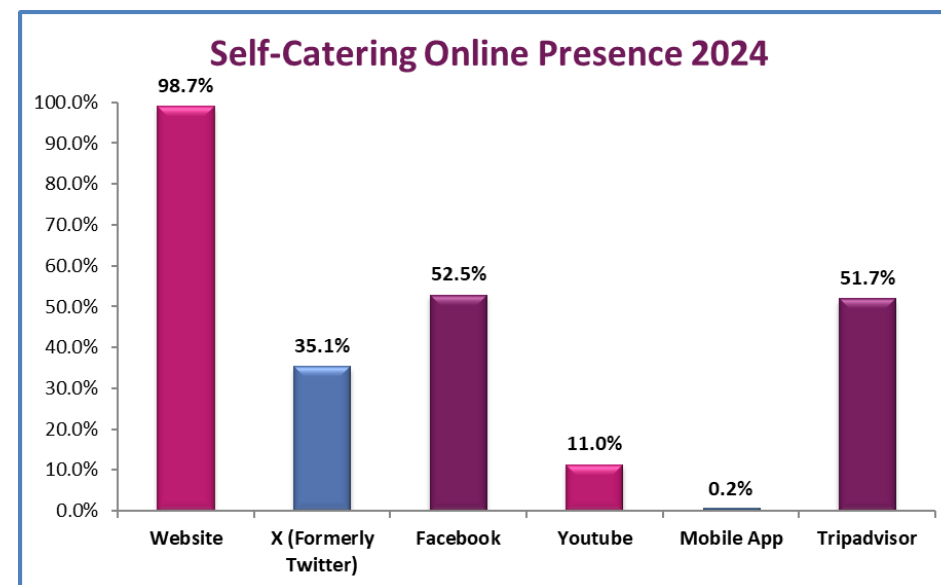


In 2024, 'Other' booking methods were cited as the most popular by 75% of Self-Catering accommodation providers. These include booking agents and channels such as SuperControl and Discover Scotland.

4.5. Self-Catering Online Presence 2024



Figure 15 Self-Catering Online Presence 2024



In 2024, 98.7% of all participating Self-Catering accommodation providers had their own website. Just over half had a Facebook page, with over 51% of participants used Tripadvisor. X (formerly Twitter) was used by just over a third of participants, however under a tenth used YouTube (11%) in 2024.

5 Touring Accommodation



5.1. % Pitch Occupancy

Table 11 % Pitch Occupancy Analysis 2024/2023

Pitch Occupancy	2024	2023	24/23 Diff ⁵	Change ⁶
Net Pitch	35.98%	37.72%	-1.74	98
Whole Park	35.15%	37.24%	-2.09	98
Caravan	44.81%	46.94%	-2.13	98
Tent	24.22%	21.73%	2.49	102
Former VisitScotland Area				
Aberdeen & Grampian	37.66%	35.34%	2.32	102
ALLFV	33.49%	41.18%	-7.69	92
Angus & City of Dundee	39.86%	-	39.86	140
Ayrshire & Arran	35.97%	49.67%	-13.70	86
Dumfries & Galloway	43.31%	45.30%	-1.99	98
Edinburgh & Lothian	40.15%	36.34%	3.81	104
Greater Glasgow	-	-	-	-
Highlands of Scotland	34.85%	36.08%	-1.23	99
Kingdom of Fife	49.44%	62.52%	-13.08	87
Orkney	18.25%	-	18.25	118
Perthshire	30.10%	28.55%	1.55	102
Scottish Borders	32.20%	42.78%	-10.58	89
Shetland Islands	-	-	-	-
Outer Hebrides	58.42%	*	43.42	143
Tariff				
Under £10	29.35%	*	12.15	112
£10-£14.99	46.24%	19.84%	26.40	126
£15- £17.99	18.88%	26.49%	-7.61	92
£18- £19.99	38.49%	22.48%	16.01	116
£20 +	36.05%	38.14%	-2.09	98

Pitch Occupancy	2024	2023	24/23 Diff ⁵	Change ⁶
Location				
Coastal	32.71%	41.37%	-8.66	91
Inland	38.43%	35.55%	2.88	103
Island	44.54%	45.31%	-0.77	99
Urban/Rural				
Large Urban Areas	-	-	-	-
Other Urban Areas	29.83%	19.18%	10.65	111
Accessible Small Towns	33.59%	35.32%	-1.73	98
Remote Small Towns	33.69%	45.60%	-11.91	88
Accessible Rural	35.89%	35.31%	0.58	101
Remote Rural	39.32%	45.83%	-6.51	93
Grading				
1 Star	-	-	-	-
2 Stars	30.99%	54.03%	-23.04	77
3 Stars	30.84%	28.43%	2.41	102
4 Stars	34.64%	38.47%	-3.83	96
5 Stars	36.38%	35.38%	1.00	101
Unclassified	46.10%	40.46%	5.64	106

- Sample Size = Nil

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

⁵ 24/23 Diff throughout this report is expressed by % Point Change

⁶ 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.

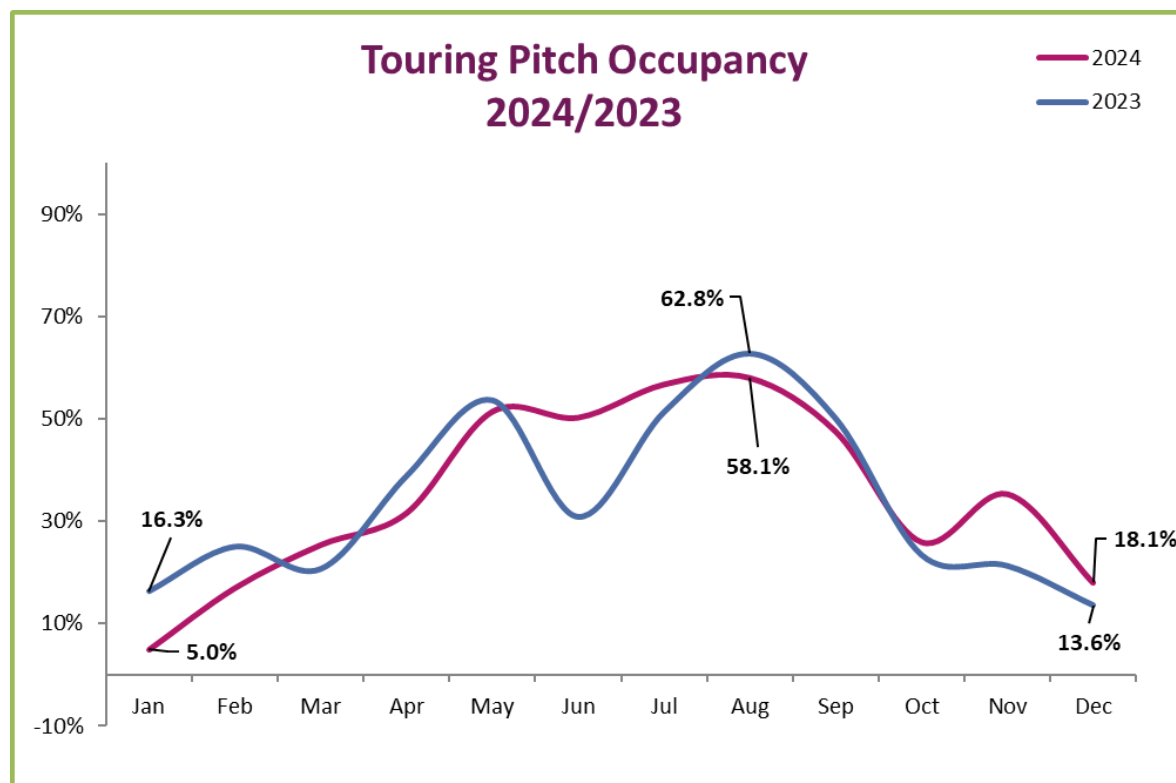
Touring Accommodation

5.2. Touring Monthly Distribution by % Pitch Occupancy 2024/2023

Table 12 Touring Monthly Distribution by % Pitch Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	5.0	17.1	25.5	31.7	51.5	50.3	56.8	58.1	47.6	26.0	35.4	18.1
2023	16.3	25.0	20.7	38.9	53.7	30.8	51.3	62.8	50.1	23.4	21.3	13.6

Figure 16 Touring Monthly Distribution by % Pitch Occupancy 2024/2023



In 2024, Touring Pitch occupancy reached a peak in August at 58.1%.

In 2023, Touring Pitch occupancy reached a peak in August at 62.8%.

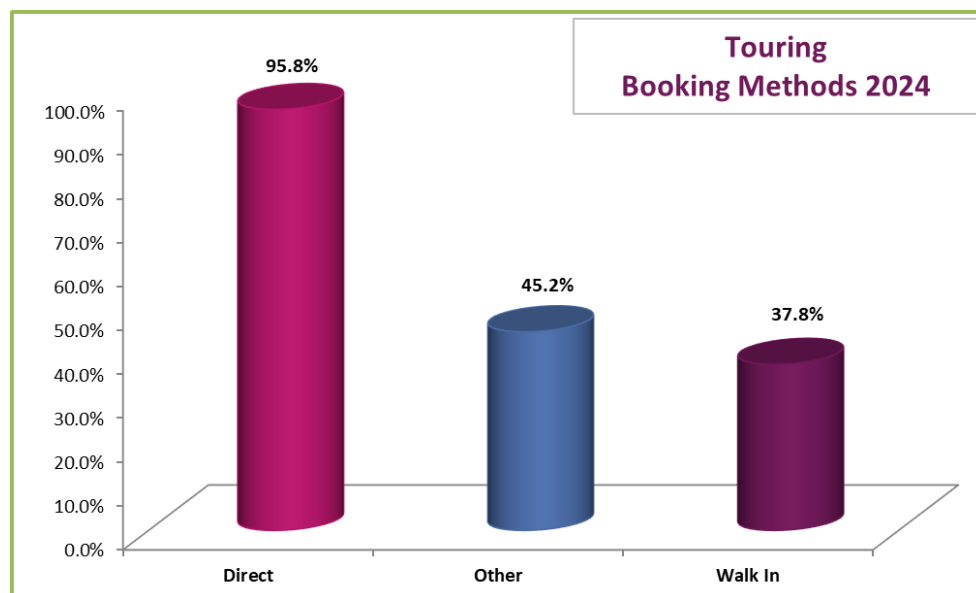


Touring Accommodation



5.3. Touring Booking Methods 2024

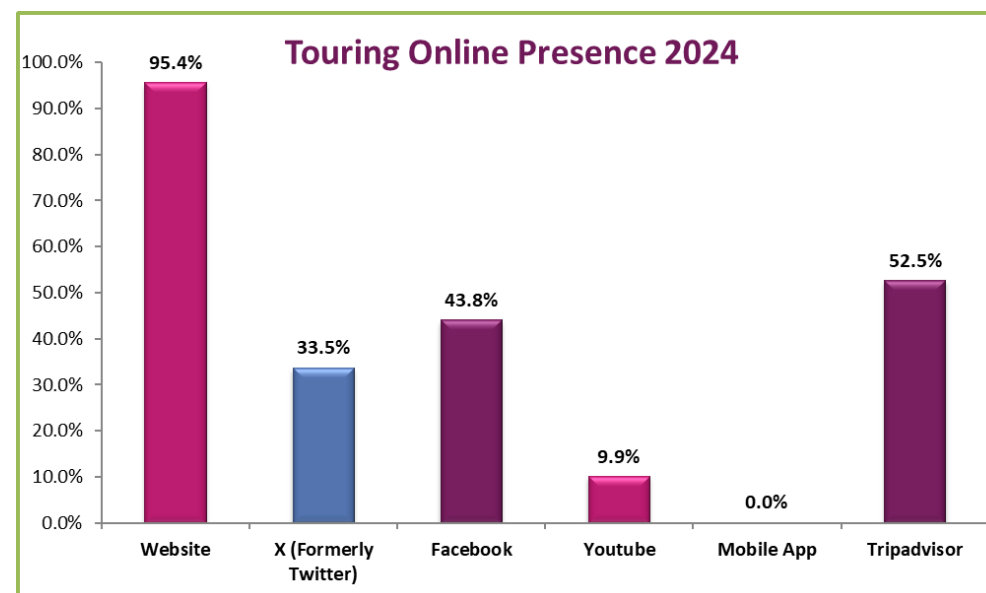
Figure 17 Touring Booking Methods 2024



In 2024, 'Direct' booking methods were cited as most popular by 96% Touring accommodation providers. 'Other' booking methods (45%) and Walk-in (38%) were less popular when booking touring pitches in 2024.

5.4. Touring Online Presence 2024

Figure 18 Touring Online Presence 2024



In 2024, 95% of all participating Touring accommodation providers had their own website. Just under 45% of providers had a Facebook page. Over half were listed on Tripadvisor, while just under 34% had a presence on X (formerly Twitter) in 2024.



6 Hostel Accommodation

6.1. % Bed Occupancy

Table 13 % Bed Occupancy Analysis 2024/2023

Bed Occupancy	2024	2023	24/23 Diff ⁷	Change ⁸
Type				
SYHA	62.27%	59.63%	2.64	103
Independent	54.75%	49.81%	4.94	105
Former VisitScotland Area				
Aberdeen & Grampian	43.32%	45.30%	-1.98	98
ALLFV	63.80%	*	31.35	131
Angus & City of Dundee	38.90%	64.40%	-25.50	75
Ayrshire & Arran	53.83%	59.09%	-5.26	95
Dumfries & Galloway	*	-	*	*
Edinburgh & Lothian	56.31%	55.58%	0.73	101
Greater Glasgow	65.08%	56.90%	8.18	108
Highlands of Scotland	63.36%	59.57%	3.79	104
Kingdom of Fife	-	-	-	-
Orkney	54.79%	49.28%	5.51	106
Perthshire	63.44%	63.18%	0.26	100
Scottish Borders	-	-	-	-
Shetland Islands	-	-	-	-
Outer Hebrides	-	-	-	-
Grading				
1 Star	48.32%	52.76%	-4.44	96
2 Stars	57.89%	54.14%	3.75	104
3 Stars	65.89%	61.23%	4.66	105
4 Stars	62.74%	60.63%	2.11	102
5 Stars	57.35%	55.72%	1.63	102
Unclassified	0.00%	0.00%	0.00	100

Bed Occupancy	2024	2023	24/23 Diff ⁷	Change ⁸
Location				
Coastal	55.77%	53.55%	2.22	102
Inland	60.60%	59.58%	1.02	101
Island	67.98%	63.93%	4.05	104
Urban/Rural				
Large Urban Areas	57.87%	57.69%	0.18	100
Other Urban Areas	57.04%	53.42%	3.62	104
Accessible Small Towns	57.28%	58.58%	-1.30	99
Remote Small Towns	51.60%	51.60%	0.00	100
Accessible Rural	59.84%	57.96%	1.88	102
Remote Rural	67.60%	62.93%	4.67	105

- Sample Size = Nil

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

⁷ 24/23 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.

Hostel Accommodation

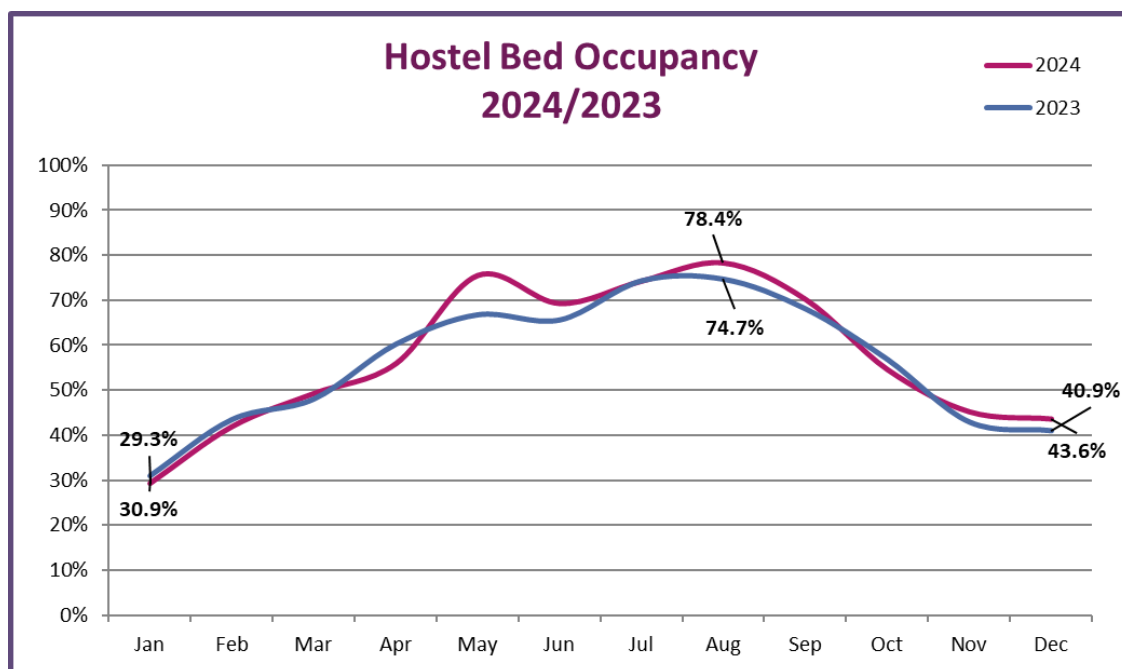


6.2. Hostel Monthly Distribution by % Bed Occupancy 2024/2023

Table 14 Hostel Monthly Distribution by % Bed Occupancy 2024/2023

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	29.3	41.9	49.3	55.9	75.65	69.4	74.3	78.4	70.3	54.6	45.2	43.6
2023	30.9	43.4	48.0	60.2	66.7	65.6	74.3	74.7	68.1	56.8	42.9	40.9

Figure 19 Hostel Monthly Distribution by % Bed Occupancy 2024/2023



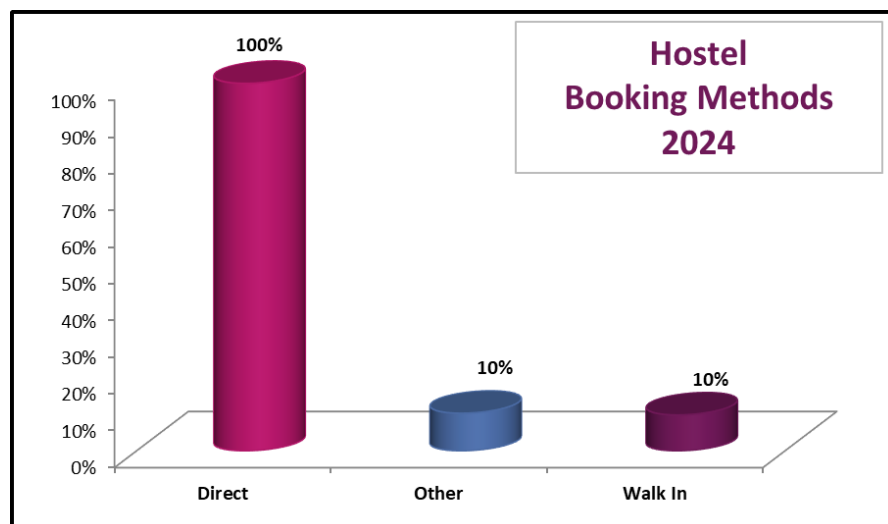
In 2024, Hostel Bed occupancy reached a peak in August at 78.4%, whilst maintaining a bed occupancy rate of over 60% between May and September before reducing in October.

In 2023, Hostel Bed occupancy reached a peak in August at 74.7%.



6.3. Hostel Booking Methods 2024

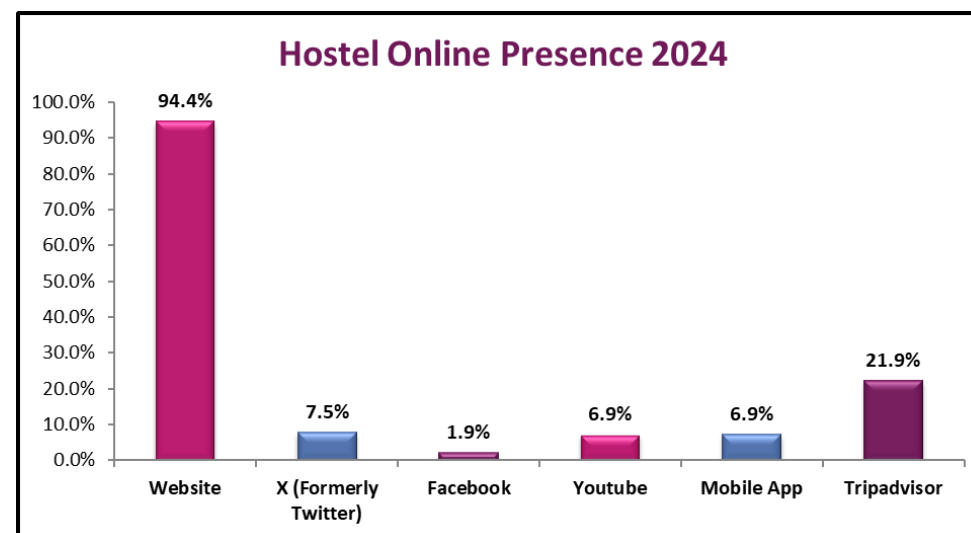
Figure 20 Hostel Booking Methods 2024



In 2024, 'direct' booking methods were cited as most popular by 100% of Hostel accommodation providers.

6.4. Hostel Online Presence 2024

Figure 21 Hostel Online Presence 2024



In 2024, the majority of participating Hostel accommodation providers had their website (94.4%). Just over a fifth of Hostel accommodation providers also used Tripadvisor (21.9%), with just over 7% using X (Formerly Twitter) to promote their accommodation.

7 Weather 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

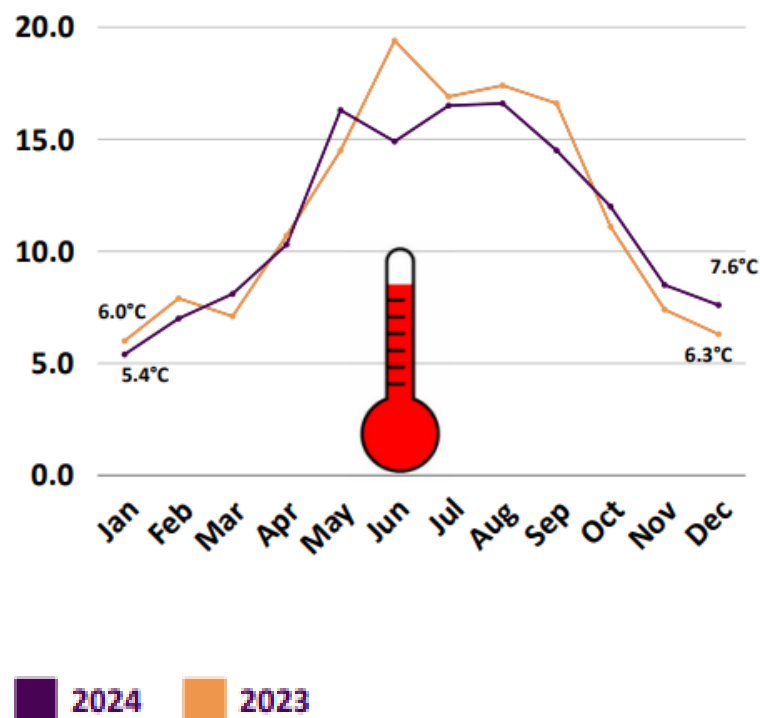


Figure 23 Average Rainfall

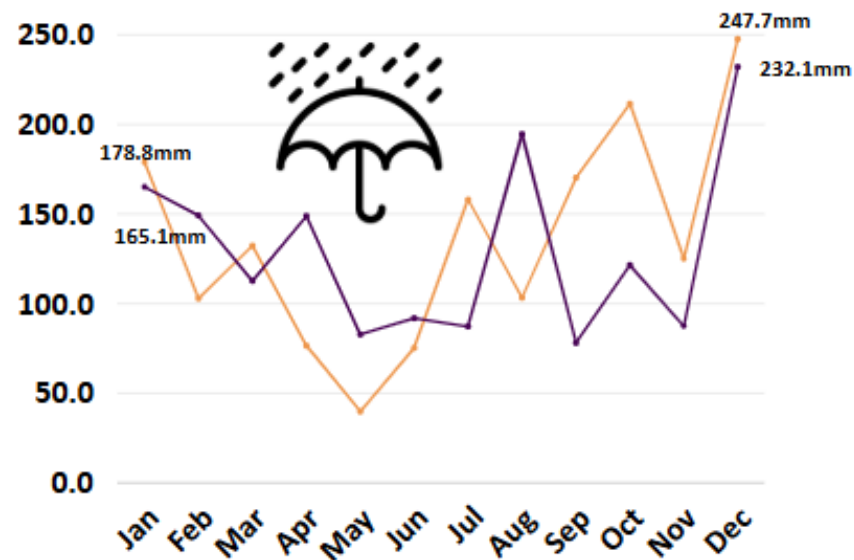
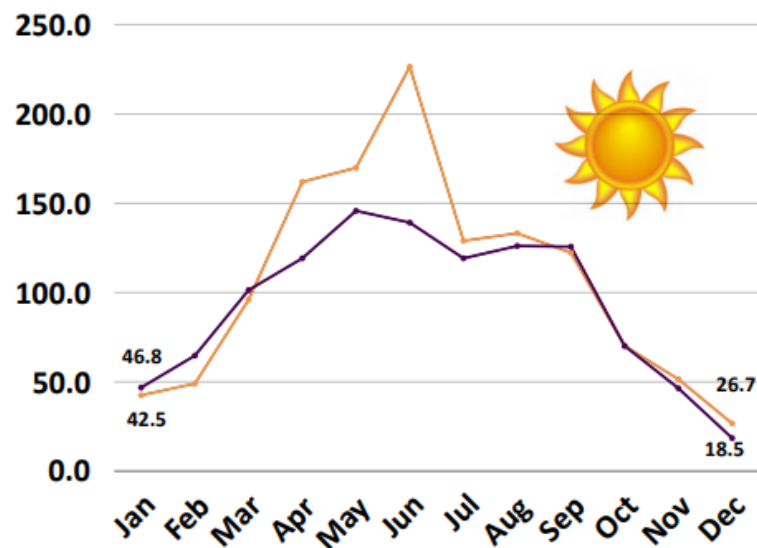


Figure 24 Average Hours of Sunshine



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 15 Geographical Location

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