

## **SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: February 2023/2022 Report – HOTELS - Revised**

### **1.0 Introduction February 2023/2022**

Welcome to the Visit Scotland Scottish Accommodation Occupancy Survey Report covering February 2023 and benchmarking against February 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 (Shug) Sheridan (E-mail: [hugh.sheridan@gcu.ac.uk](mailto: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 February 2023**

The SOAS Report: February 2023/2022 Hotels report shows a marginal decline in the Hotels sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for February 2023 experienced a **0.05** percentage point increase when comparing percentage room occupancy rates with February 2022. Occupancy rates within the Hotels sector experienced an **2.80** percentage point decrease in February 2023 compared to last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 14.5% footfall increase in visitors for February 2023 compared to February 2022, with both Edinburgh and Glasgow seeing significant increases (27.8% and 16.7% respectively). However, when comparing footfall in February 2023 with February 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the wider cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for February 2023 evidenced similar findings with 47% of respondents Undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

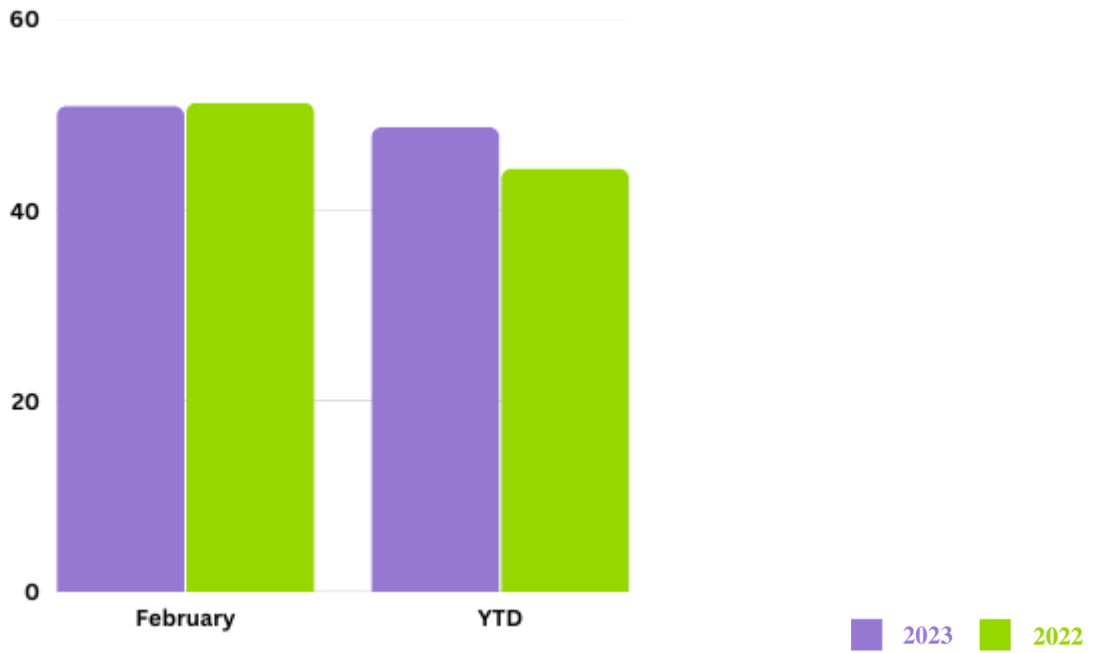
Notably, some 25% of respondents Recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 11% of UK adults intended to take a domestic overnight trip in the first quarter of 2023 although that figure rose to 72% in the following 12 months. These figures have 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 2023; however, the reduced availability of flights and routes when compared with 2019 continues to be restrain growth. A highlight in air transport was from Scotland's Regional Carrier, Loganair which saw a year-to-date growth of 17% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a 15% decrease in year-to-date flights when compared to in 2019.

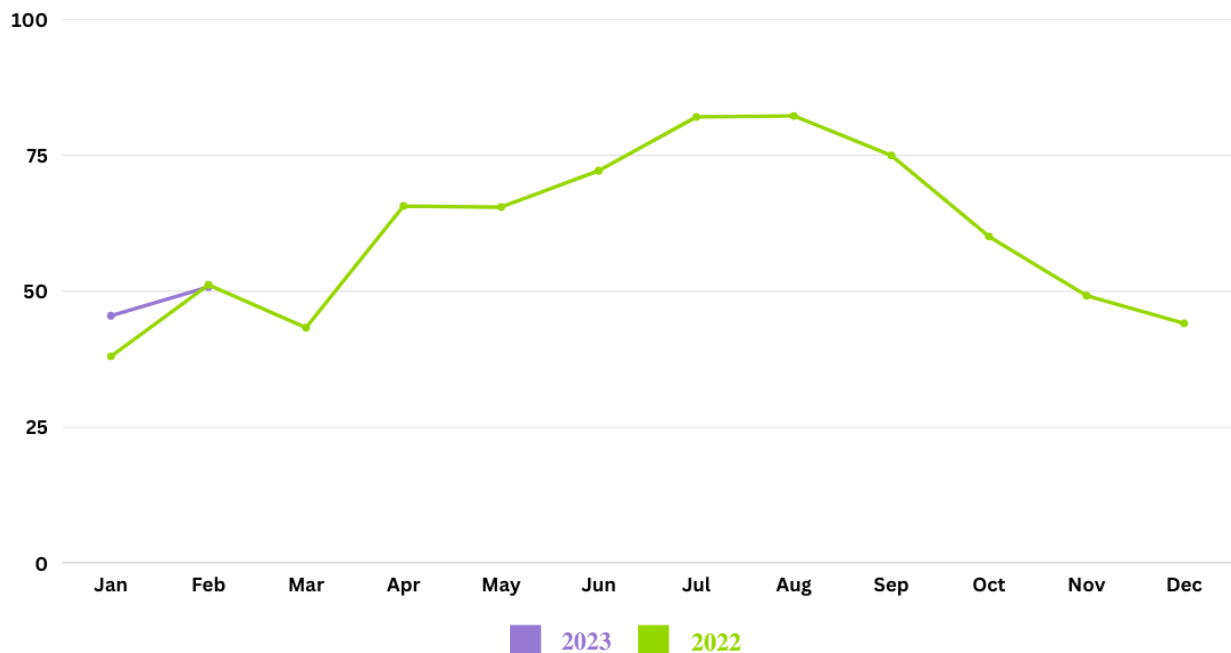
**All Serviced Accommodation**

Room Occupancy – February 2023/2022

Scottish Serviced Accommodation room occupancy rates for February 2023 experienced a 0.05 percentage point increase when comparing percentage room occupancy rates with February 2022.



Room Occupancy – Year to Date



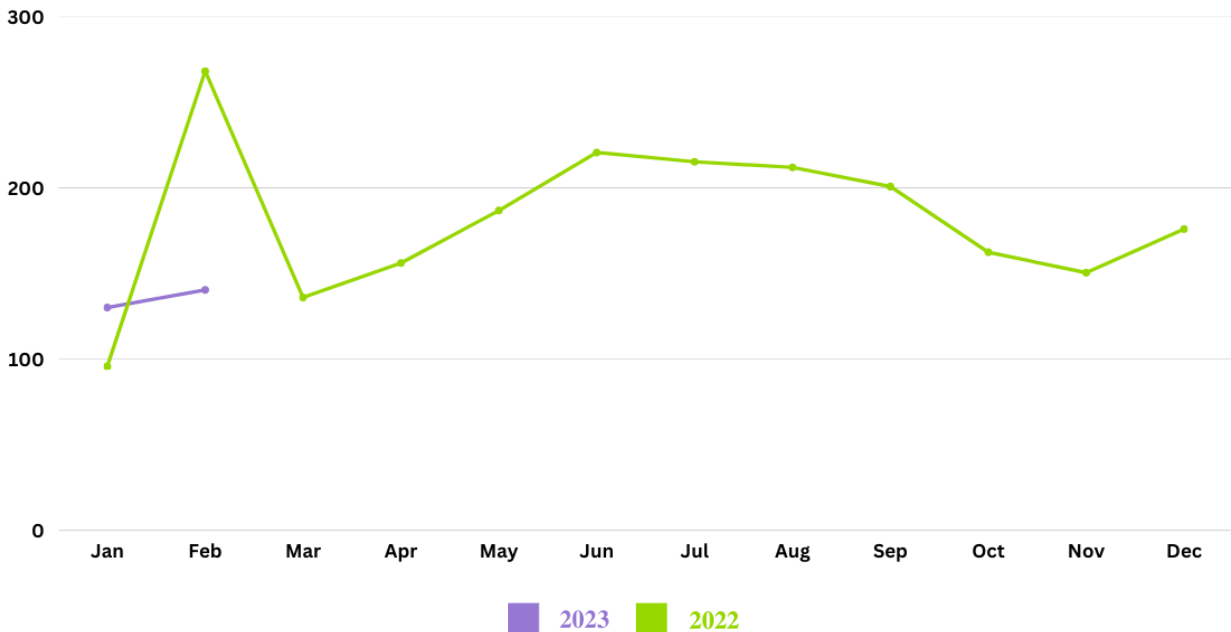
In 2022, serviced room occupancy reached at peak in August at 83.70%.

Room Occupancy	February 23	February 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	51.23%	51.18%	0.05	100	48.94%	44.26%	4.68	105

Bed Occupancy	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	38.79%	40.51%	1.72	98	37.97%	35.33%	2.64	103

### RevPAR

The Revenue per available occupied room for February 2023 was **£141.70** compared with **£268.20** in February 2022. This figure is based solely on accommodation providers who provided financial information for either February 2023 and/or 2022.



### RevPAR – Year to Date 2023/2022

Room – Average RevPAR (£)	February 23	February 22
All Serviced Accommodation	£141.70	£268.20

### RevPAR by Grading- February 2023/21

<sup>1</sup> 23/22 Diff throughout this report is expressed by % Point Change

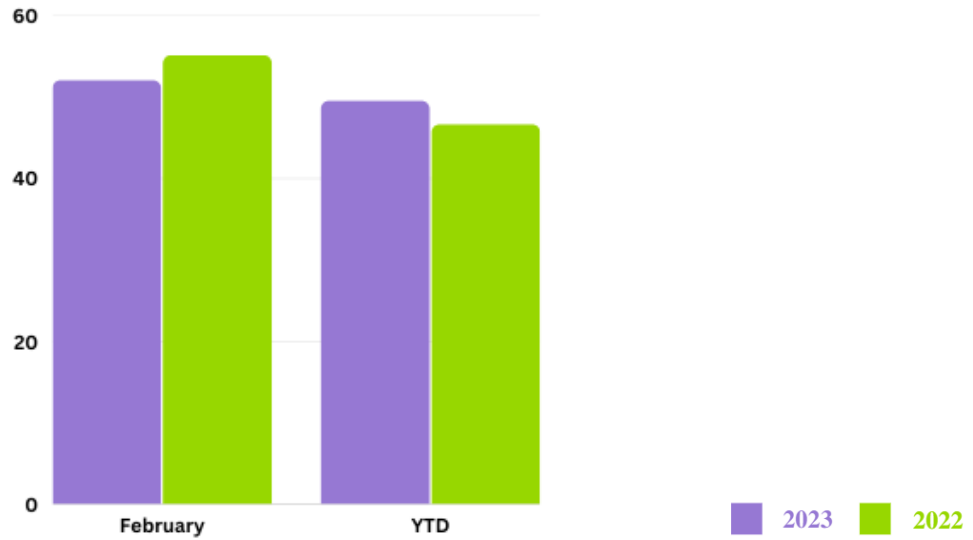
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

Grading – Average RevPAR (£)	February 23	February 22
2 Stars	£98.07	£84.12
3 Stars	£99.90	£108.55
4 Stars	£188.35	£225.63
5 Stars	£138.08	£3571.76
Unclassified	£139.59	£155.12

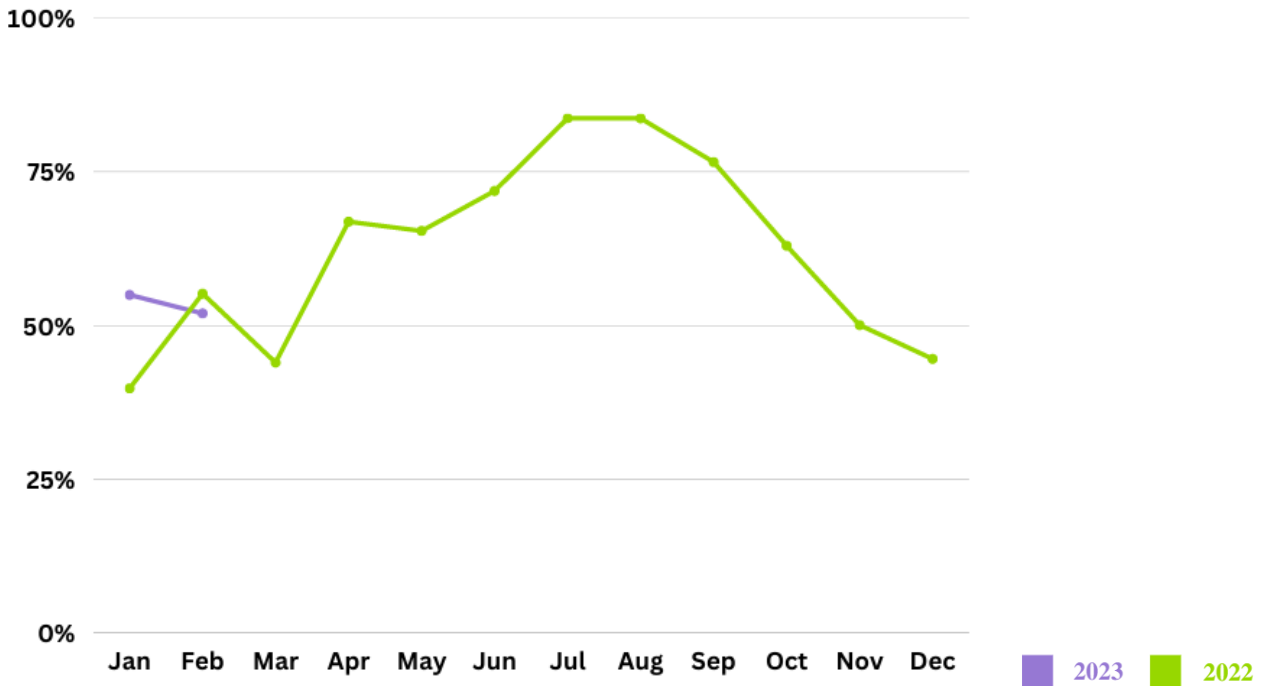
### 3.0 Serviced Accommodation – Hotel Sector

#### 3.1 Performance by Hotel Category

Hotel Room Occupancy – February 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the **room** occupancy rate for the period February 2023 was **52.38%** when compared to data from the previous year of **55.18%** occupancy rate; this shows an overall % Point decrease of **2.80**.

The table below shows the **Room Occupancy** rate recorded for February 2023/2022 as well as the 23/22 Diff calculation for the **Hotel Sector**.

Room Occupancy	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	52.38%	55.18%	-2.80	97	50.15%	48.14%	2.01	102

In the **Hotel sector**, the **bed** occupancy rate for the period February 2023 was **39.79%** when compared to data from the previous year of **45.31%** occupancy rate; this shows an overall percentage point decrease of **5.52**.

The table below shows the **Bed Occupancy** rate recorded for February 2023/2022 as well as the 23/22 Diff calculation for the **Hotel sector**

Bed Occupancy	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	39.79%	45.31%	-5.52	94	38.73%	40.03%	-1.30	52

### Room Occupancy by Former VisitScotland Area

Hotel Room Occupancy by Former VisitScotland Area – February 2023/2022





Coastal	44.08%	46.36%	-2.28%	98	40.23%	44.78%	-4.55%	95
Inland	55.24%	60.04%	-4.80%	95	54.02%	49.87%	4.15%	104
Island	57.96%	35.66%	22.30%	122	54.09%	37.92%	16.17%	116
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Location (Geographic) – February 2023/2022

Location (Geographic)	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	29.88%	39.11%	-9.23%	91	25.45%	36.89%	-11.44%	89
Inland	43.90%	48.12%	-4.22%	96	44.86%	40.69%	4.17%	104
Island	53.47%	49.02%	4.45%	104	50.81%	47.43%	3.38%	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by size– February 2023/2022

Size	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	45.43%	26.62%	18.81%	119	39.56%	23.22%	16.34%	116
11 to 25	40.00%	34.81%	5.19%	105	38.95%	31.55%	7.40%	107
26 to 50	67.47%	42.75%	24.72%	125	63.76%	57.15%	6.61%	107
51 to 100	71.03%	59.80%	11.23%	111	66.00%	61.94%	4.06%	104
Over 100	41.91%	*	-13.14%	87	41.21%	57.97%	-16.76%	83
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by size – February 2023/2022

Size	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	26.67%	26.62%	0.05%	100	24.44%	18.96%	5.48%	105
11 to 25	42.62%	34.81%	7.81%	108	38.74%	33.43%	5.31%	105
26 to 50	55.15%	42.75%	12.40%	112	53.11%	38.33%	14.78%	115
51 to 100	60.72%	59.80%	0.92%	101	56.62%	50.83%	5.79%	106
Over 100	24.47%	*	-30.58%	69	23.37%	47.26%	-23.89%	76
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by tariff – February 2023/2022

Tariff	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	-	-	-	-	-	-	-
£30 - £39.99	-	-	-	-	-	-	-	-
£40 - £49.99	-	*	*	*	*	14.01%	6.31%	106
£50 - £59.99	*	49.68%	3.80%	104	50.55%	40.61%	9.94%	110
£60 - £69.99	*	61.01%	-17.64%	82	41.66%	54.74%	-13.08%	87
£70 +	52.95%	55.84%	-2.89%	97	51.02%	49.53%	1.49%	101



- Sample Size = Nil

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

### Bed Occupancy by tariff – February 2023/2022

Tariff	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	-	-	-	-	-	-	-
£30 - £39.99	-	-	-	-	-	-	-	-
£40 - £49.99	-	*	*	*	*	8.91%	1.04%	101
£50 - £59.99	*	38.55%	25.14%	125	59.95%	33.12%	26.83%	127
£60 - £69.99	*	43.80%	-8.51%	91	34.63%	37.72%	-3.09%	97
£70 +	39.32%	47.20%	-7.88%	92	38.66%	43.30%	-4.64%	95
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

### Room Occupancy by grading – February 2023/2022

Grading	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	*	59.61%	-4.27%	96
3 Stars	49.91%	37.91%	12.00%	112	46.05%	32.13%	13.92%	114
4 Stars	48.96%	71.66%	-22.70%	77	48.73%	65.14%	-16.41%	84
5 Stars	*	*	*	*	*	33.63%	7.31%	107
Unclassified	58.21%	57.62%	0.59%	101	53.12%	52.06%	1.06%	101
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

### Bed Occupancy by grading – February 2023/2022

Grading	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	*	39.87%	6.28%	106
3 Stars	42.62%	36.77%	5.85%	106	37.50%	29.92%	7.58%	108
4 Stars	33.07%	58.10%	-25.03%	75	34.62%	54.83%	-20.21%	80
5 Stars	*	*	*	*	*	31.50%	1.69%	102
Unclassified	38.01%	38.47%	-0.46%	100	36.79%	37.16%	-0.37%	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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