

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2023/2022 Report - HOTELS

1.0 Introduction August 2023/2022

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering August 2023 and benchmarking against August 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).

2.0 Executive Summary August 2023

The SOAS Report: August 2023/2022 Hotels report shows an increase in occupancy in the Hotels sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for August 2023 experienced a **0.42** percentage point decrease when comparing percentage room occupancy rates with August 2022. Occupancy rates within the Hotel sector experienced a **4.82** percentage point decrease in August 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that the retail sales figures in Scotland improved by 5.6% year-on-year in August, however, this is well below the three-month average of 7.5%. Food sales continue to be the biggest growth area.

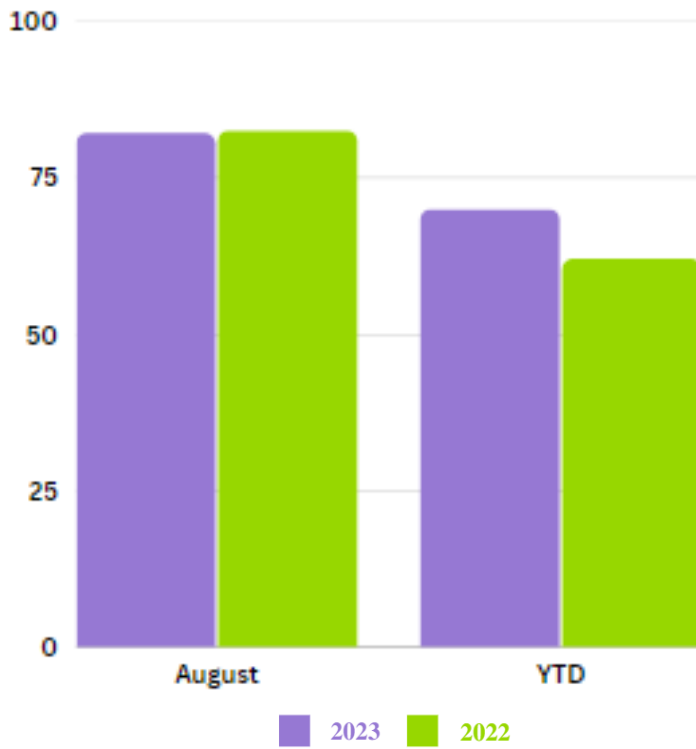
Domestic consumer sentiment provided by the GB National Tourist Boards for August 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the August 2023 survey). The survey recorded 45% of respondents (No change on the August 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful". Despite consumer concern about the state of the economy, 33% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be the rising cost of living, UK weather and Personal finances. The figures above have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in August 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 8% decrease in year-to-date flights compared to 2019.

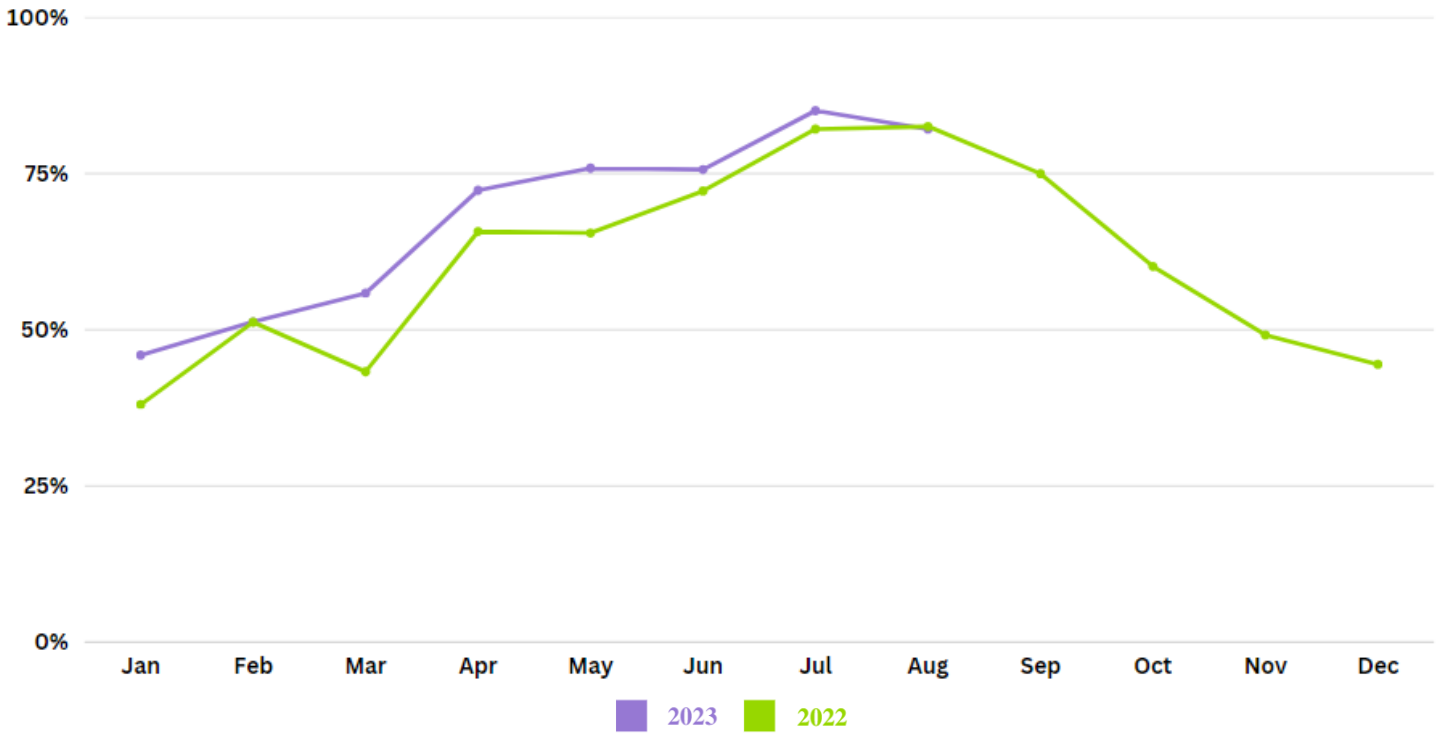
All Serviced Accommodation

Room Occupancy – August 2023/2022

Scottish Serviced Accommodation room occupancy rates for August 2023 experienced a **0.42** percentage point decrease when comparing percentage room occupancy rates with August 2022.



Room Occupancy – Year-to-Date



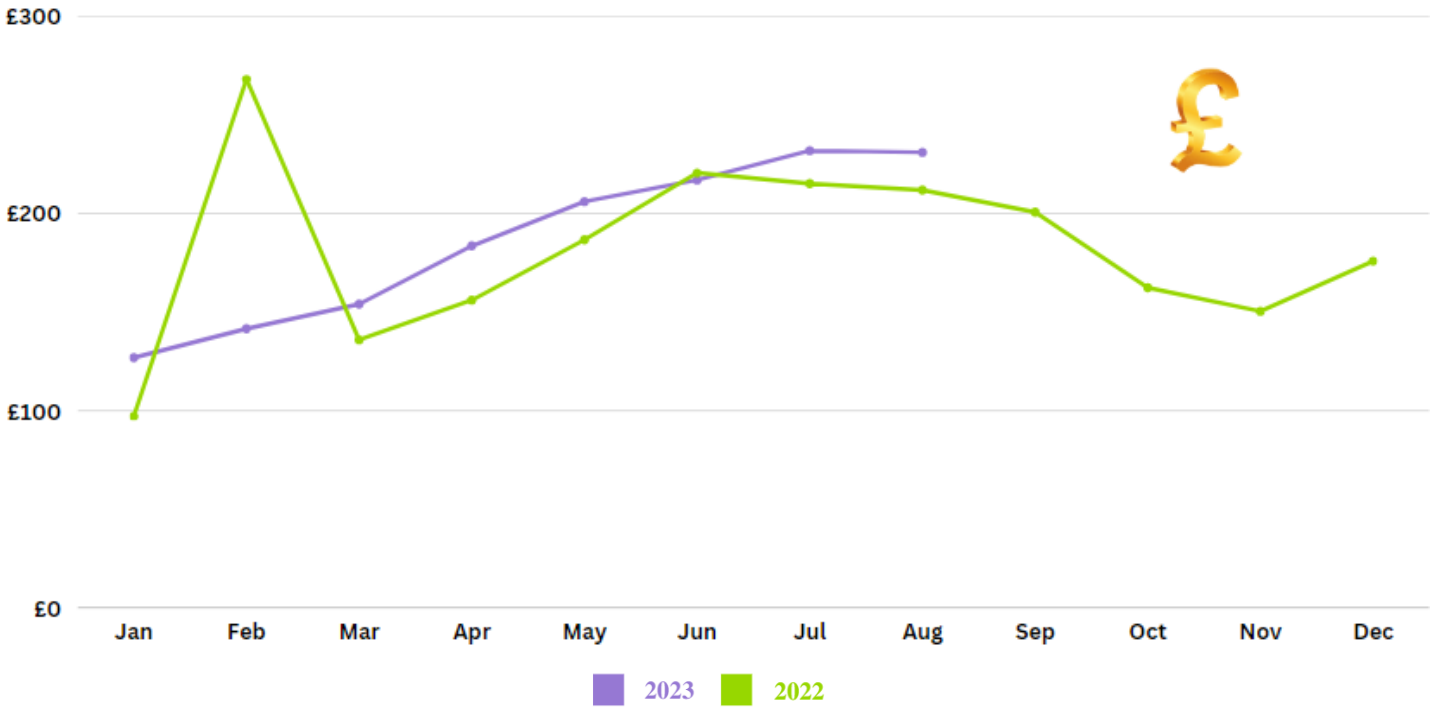
	August 23	August 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Room Occupancy								
All Serviced Accommodation	82.11%	82.53%	-0.42	100	69.90%	61.98%	7.92	108
Bed Occupancy								
All Serviced Accommodation	75.59%	69.53%	6.06	106	60.78%	53.28%	7.50	108

RevPAR

The Revenue per available occupied room for August 2023 was **£231.12** compared with **£212.01** in August 2022. This figure is based solely on accommodation providers who provided financial information for either August 2023 and/or 2022.

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

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



RevPAR – Year to Date 2023/2022

Room – Average RevPAR (£)	August 23	August 22
All Serviced Accommodation	£231.12	£212.01

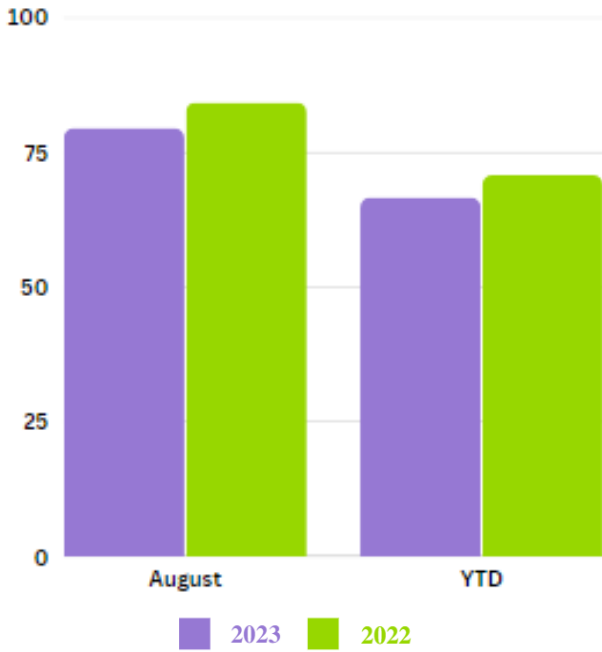
RevPAR by Grading- August 2023/21

Grading – Average RevPAR (£)	August 23	August 22
2 Stars	£200.84	£138.54
3 Stars	£211.64	£170.11
4 Stars	£253.71	£304.09
5 Stars	£467.76	£290.68
Unclassified	£142.03	£0.00

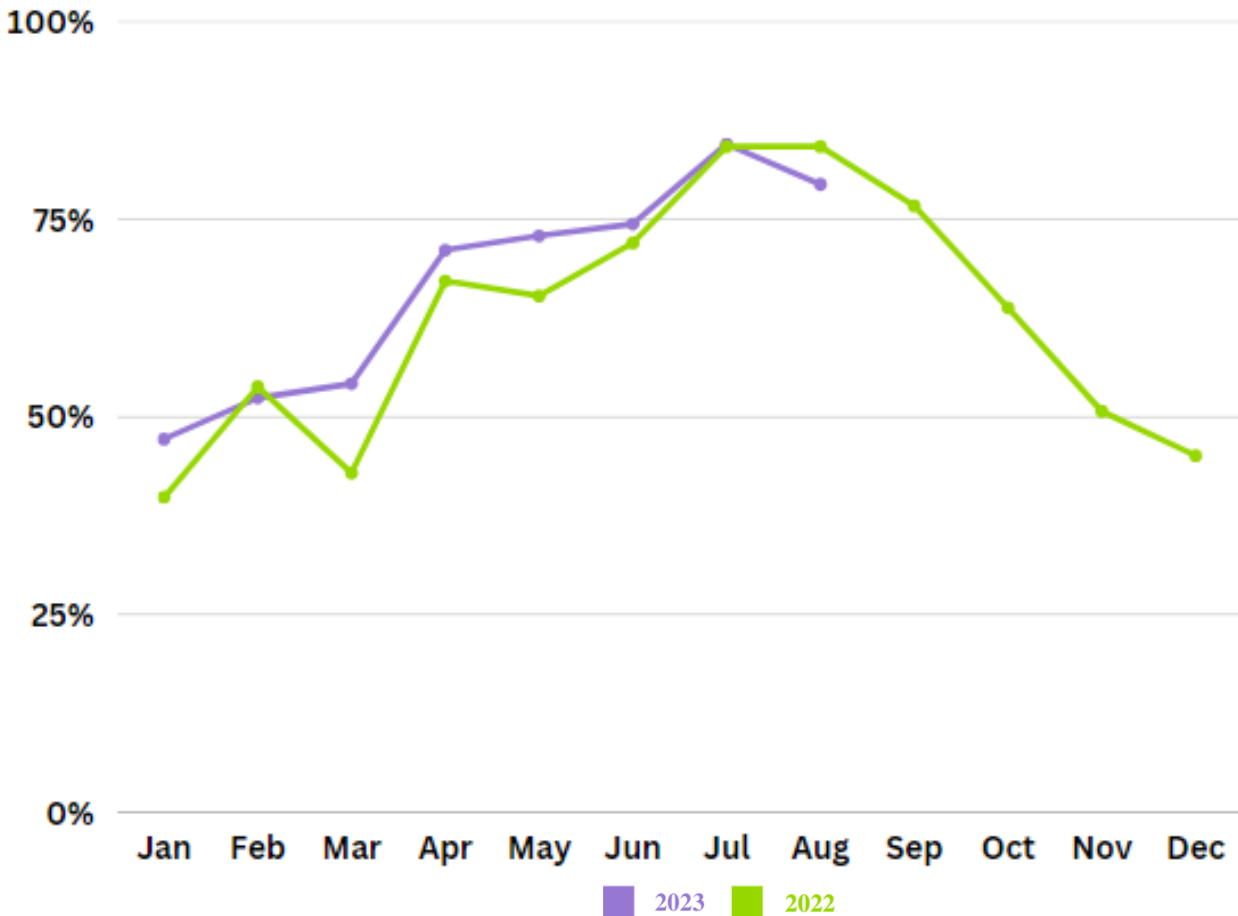
3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – August 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel** sector, the room occupancy rate for August 2023 was **79.40%** compared to data from the previous year of **84.22%** occupancy rate; this shows an overall percentage point decrease of **4.82**.

Percentage room and bed occupancy rates for Hotels (sample size >4) in the Argyll, Loch Lomond & Forth Valley Region were the highest in August 2023. Operators in Remote Small Towns and properties charging a £70+ tariff fared best in room occupancy rates in August 2023.

The table below shows the **Room Occupancy** rate recorded for August 2023/2022 as well as the Change calculation for the **Hotel Sector**.

Room Occupancy August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
Hotel	79.40%	84.22%	-4.82	95	66.53%	72.13%	-5.60	94

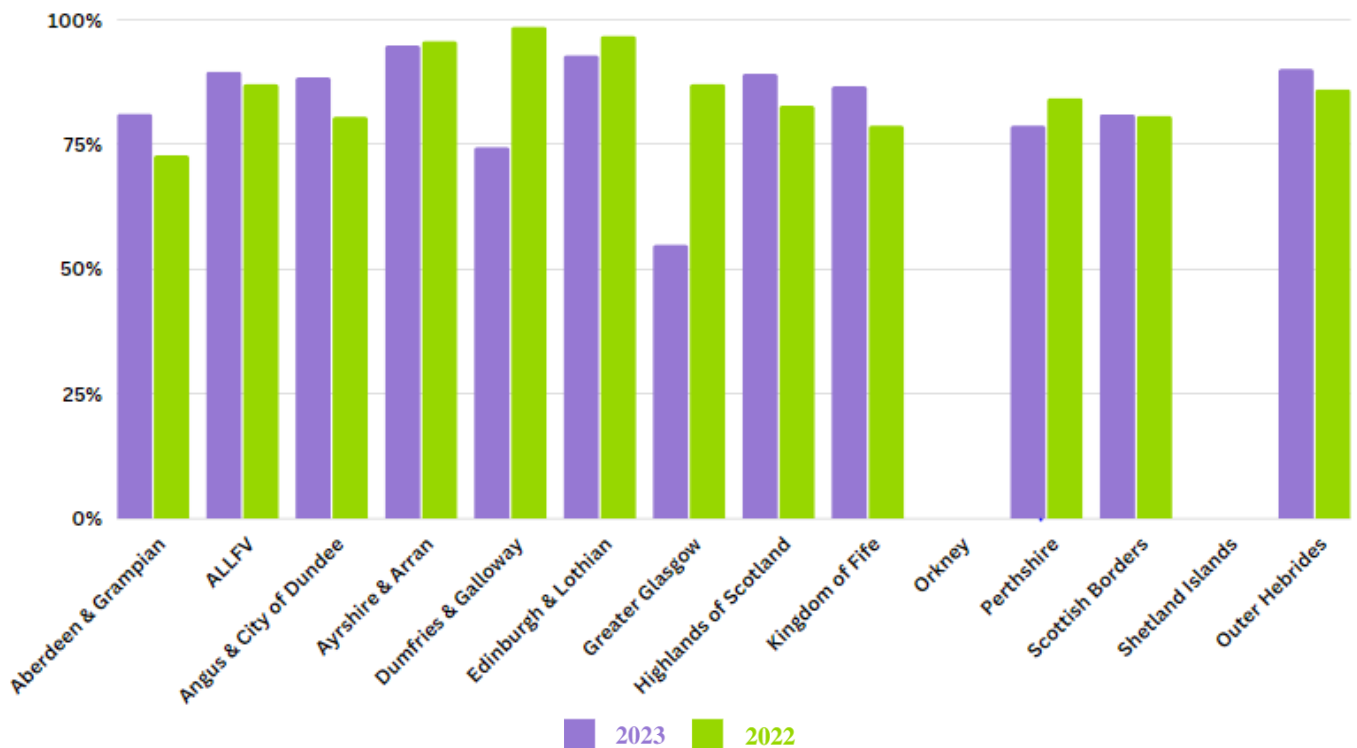
In the **Hotel sector**, the bed occupancy rate for August 2023 was **70.16%** compared to data from the previous year of **71.02%** occupancy rate; this shows an overall percentage point decrease of **0.86**.

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

Bed Occupancy	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	70.16%	71.02%	-0.86	99	55.54%	59.59%	-4.05	52

Room Occupancy by Former VisitScotland Area

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



Room Occupancy by Former Visit Scotland Area – August 2023/2022

Area	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
Aberdeen & Grampian	81.02%	72.75%	8.27	108	64.67%	67.91%	-3.24	97	
ALLFV	89.45%	86.96%	2.49	102	72.92%	72.83%	0.09	100	
Angus & City of Dundee	*	*	*	*	68.29%	59.43%	8.86	109	
Ayrshire & Arran	*	*	*	*	84.91%	85.04%	-0.13	100	
Dumfries & Galloway	*	*	*	*	58.00%	69.27%	-11.27	89	
Edinburgh & Lothian	*	*	*	*	67.83%	*	-23.38	77	
Greater Glasgow	54.84%	86.97%	-32.13	68	54.38%	77.74%	-23.36	77	
Highlands of Scotland	89.03%	82.64%	6.39	106	74.96%	74.08%	0.88	101	
Kingdom of Fife	*	*	*	*	71.35%	61.75%	9.60	110	
Orkney	-	-	-	-	-	-	-	-	
Perthshire	*	*	*	*	66.00%	63.48%	2.52	103	
Scottish Borders	*	*	*	*	52.09%	52.79%	-0.70	99	
Shetland Islands	-	-	-	-	-	-	-	-	
Outer Hebrides	*	*	*	*	72.25%	73.13%	-0.88	99	
- Sample Size = Nil			* Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Former Visit Scotland Area – August 2023/2022

Area	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
Aberdeen & Grampian	78.29%	54.71%	23.58	124	60.29%	45.85%	14.44	114	
ALLFV	84.04%	71.74%	12.30	112	70.50%	56.65%	13.85	114	
Angus & City of Dundee	*	*	*	*	37.49%	36.68%	0.81	101	
Ayrshire & Arran	*	*	*	*	53.43%	54.49%	-1.06	99	
Dumfries & Galloway	*	*	*	*	38.65%	22.84%	15.81	116	
Edinburgh & Lothian	*	*	*	*	54.26%	*	-36.99	63	
Greater Glasgow	50.26%	82.95%	-32.69	67	47.20%	73.82%	-26.62	73	
Highlands of Scotland	82.88%	69.53%	13.35	113	66.03%	61.34%	4.69	105	
Kingdom of Fife	*	*	*	*	57.02%	50.66%	6.36	106	
Orkney	-	-	-	-	-	-	-	-	
Perthshire	*	*	*	*	49.46%	48.05%	1.41	101	
Scottish Borders	*	*	*	*	40.71%	49.33%	-8.62	91	
Shetland Islands	-	-	-	-	-	-	-	-	
Outer Hebrides	*	*	*	*	60.23%	61.07%	-0.84	99	
- Sample Size = Nil			* Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Location (Accessibility & Density) – August 2023/2022

Location accessibility/density	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	68.34%	83.33%	-14.99	85	59.44%	80.11%	-20.67	79
Other Urban Areas	91.30%	83.46%	7.84	108	78.28%	72.20%	6.08	106
Accessible Small Towns	86.27%	82.13%	4.14	104	70.75%	70.83%	-0.08	100
Remote Small Towns	76.81%	79.68%	-2.87	97	56.33%	60.50%	-4.17	96

Accessible Rural	*	*	*	*	56.89%	41.66%	15.23	115
Remote Rural	86.54%	89.79%	-3.25	97	70.77%	73.69%	-2.92	97
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Location (Accessibility & Density) – August 2023/2022

Location accessibility/density	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	60.29%	77.98%	-17.69	82	48.64%	74.89%	-26.25	74
Other Urban Areas	79.39%	71.83%	7.56	108	65.66%	58.10%	7.56	108
Accessible Small Towns	80.64%	64.75%	15.89	116	58.52%	52.54%	5.98	106
Remote Small Towns	82.41%	61.55%	20.86	121	54.92%	50.52%	4.40	104
Accessible Rural	*	*	*	*	41.76%	30.14%	11.62	112
Remote Rural	78.02%	71.67%	6.35	106	62.99%	55.55%	7.44	107
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Location (Geographic) – August 2023/2022

Location (Geographic)	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	87.45%	78.05%	9.40	109	65.80%	64.37%	1.43	101
Inland	74.76%	85.22%	-10.46	90	66.29%	74.63%	-8.34	92
Island	93.27%	93.91%	-0.64	99	73.33%	76.87%	-3.54	96
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Location (Geographic) – August 2023/2022

Location (Geographic)	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	77.49%	59.49%	18.00	118	55.53%	48.74%	6.79	107
Inland	66.23%	75.00%	-8.77	91	54.43%	63.37%	-8.94	91
Island	83.17%	85.00%	-1.83	98	71.45%	71.74%	-0.29	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Size– August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	77.82%	82.27%	-4.45	96	58.35%	63.42%	-5.07	95
11 to 25	86.18%	82.53%	3.65	104	64.37%	64.10%	0.27	100
26 to 50	89.98%	87.49%	2.49	102	77.67%	76.75%	0.92	101
51 to 100	89.68%	84.84%	4.84	105	78.11%	77.61%	0.50	101
Over 100	63.11%	*	-17.25	83	54.98%	74.85%	-19.87	80
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Size – August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
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1 to 3	-	-	-	-	-	-	-	-
4 to 10	65.97%	57.10%	8.87	109	41.52%	40.30%	1.22	101
11 to 25	81.33%	67.14%	14.19	114	62.48%	52.97%	9.51	110
26 to 50	79.97%	75.83%	4.14	104	62.62%	64.50%	-1.88	98
51 to 100	79.36%	74.96%	4.40	104	67.98%	65.78%	2.20	102
Over 100	54.78%	69.96%	-15.18	85	42.65%	66.35%	-23.70	76
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Tariff – August 2023/2022

Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	-	*	*	*	*	*	*
£50 – 59.99	*	*	*	*	49.32%	69.58%	-20.26	80
£60 – £69.00	*	*	*	*	63.18%	66.24%	-3.06	97
£70+	79.72%	85.89%	-6.17	94	67.43%	73.15%	-5.72	94
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Tariff – August 2023/2022

Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	-	*	*	*	*	*	*
£50 – 59.99	*	*	*	*	44.03%	33.39%	10.64	111
£60 – £69.00	*	*	*	*	50.17%	55.28%	-5.11	95
£70+	70.40%	72.78%	-2.38	98	56.34%	61.04%	-4.70	95
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Grading – August 2023/2022

Grading	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	74.40%	72.46%	1.94	102
3 Stars	83.64%	84.85%	-1.21	99	67.22%	71.57%	-4.35	96
4 Stars	73.69%	86.38%	-12.69	87	64.24%	76.72%	-12.48	88
5 Stars	*	*	*	*	57.69%	57.15%	0.54	101
Unclassified	*	*	*	*	63.85%	66.33%	-2.48	98
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading – August 2023/2022

Grading	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	65.67%	56.49%	9.18	109
3 Stars	75.55%	74.48%	1.07	101	59.33%	62.02%	-2.69	97
4 Stars	65.33%	70.03%	-4.70	95	51.70%	64.13%	-12.43	88

5 Stars	*	*	*	*	46.44%	47.79%	-1.35	99
Unclassified	*	*	*	*	52.77%	42.30%	10.47	110
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						