

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

### *December 2023/2022 Report - HOTELS*

#### 1.0 Introduction December 2023/2022

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

#### 2.0 Executive Summary December 2023

The SOAS Report: December 2023/2022 Hotels report shows an increase in occupancy in the Hotels sector in Scotland compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for December 2023 experienced a **0.94** percentage point increase when comparing percentage room occupancy rates with December 2022. Occupancy rates within the Hotel sector experienced a **1.19** percentage point decrease in December 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in December with growth of just 1.9%. Food and drink and health and beauty categories continued to drive sales, however, food sales in December were the weakest monthly performance in 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the December 2023 survey). The survey recorded 47% of respondents (a 5% decrease on the December 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

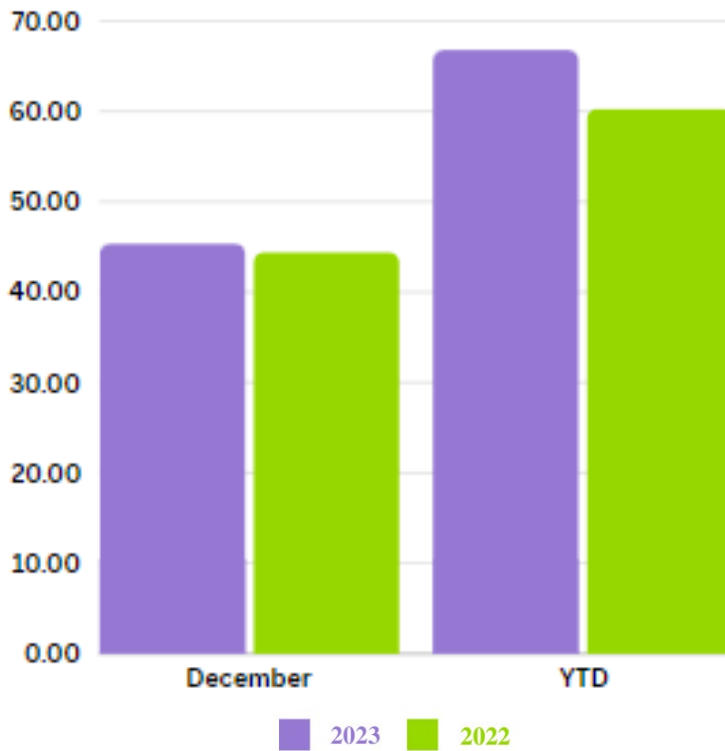
Despite consumer concern about the state of the economy, 28% of UK adults intend to take a domestic overnight trip in the first quarter of 2024, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be the 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 2024) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation continued to stall in December 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 6% decrease in year-to-date flights compared to 2019.

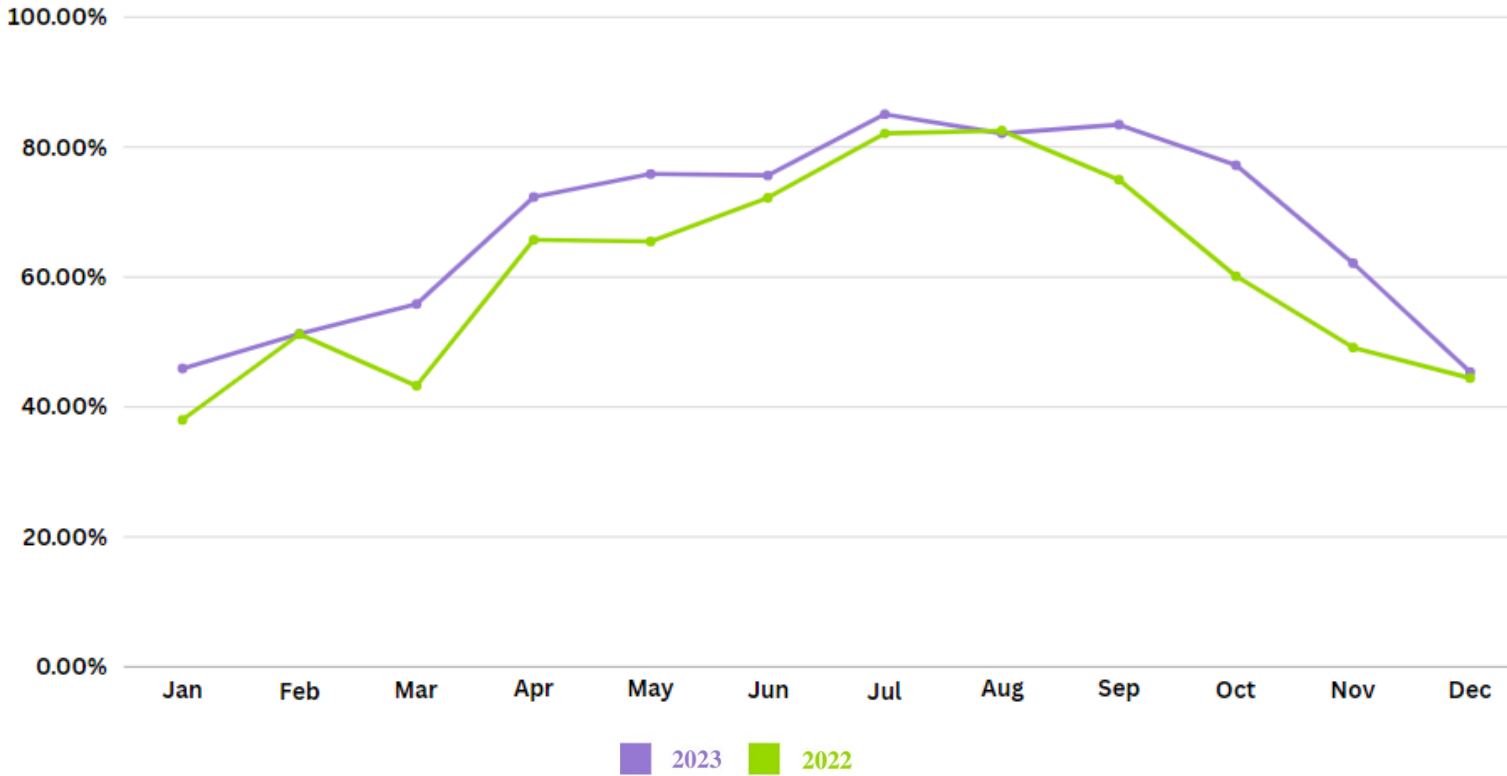
### All Serviced Accommodation

#### Room Occupancy – December 2023/2022

Scottish Serviced Accommodation room occupancy rates for December 2023 experienced a **0.94** percentage point increase when comparing percentage room occupancy rates with December 2022.



#### Room Occupancy – Year-to-Date



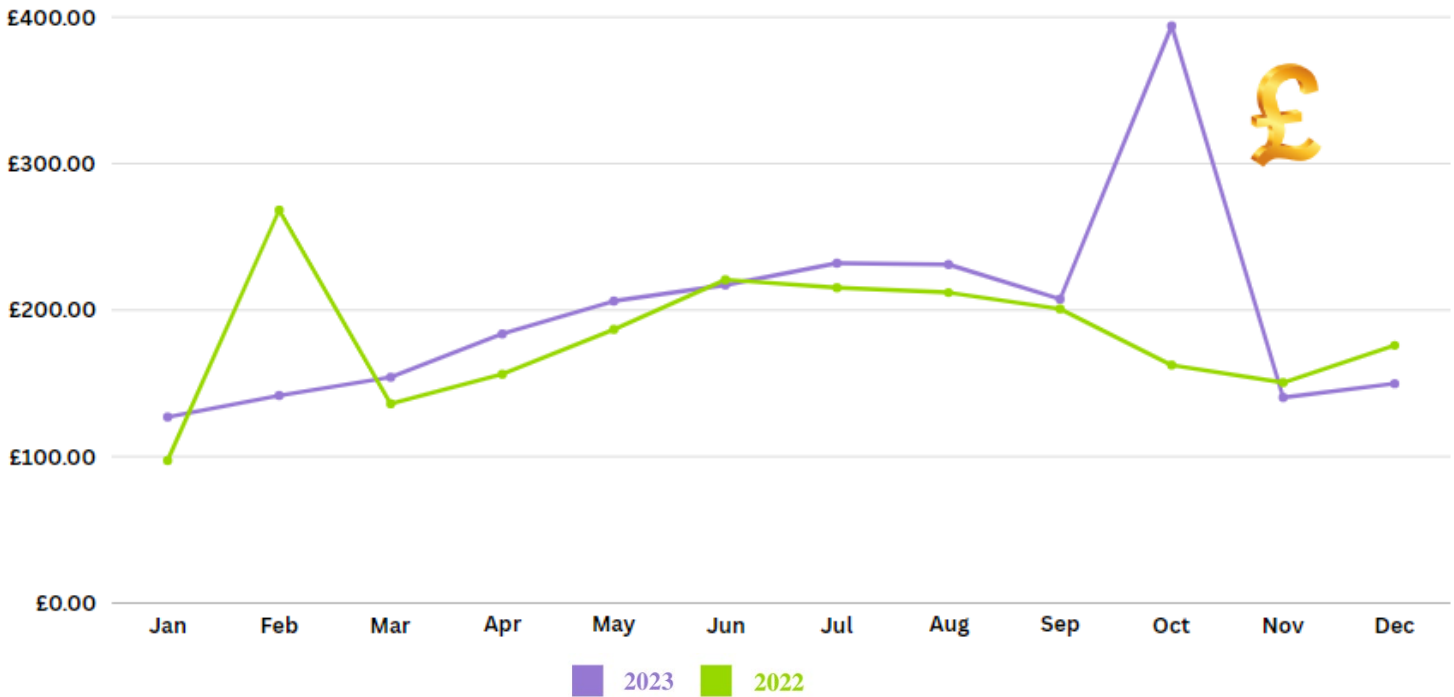
	December 23	December 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
<b>Room Occupancy</b>								
<b>All Serviced Accommodation</b>	45.38%	44.44%	0.94	101	66.80%	60.30%	6.50	107
<b>Bed Occupancy</b>								
<b>All Serviced Accommodation</b>	54.39%	35.15%	19.24	119	58.00%	51.18%	6.82	107

**RevPAR**

The Revenue per available occupied room for December 2023 was **£149.76** compared with **£176.00** in December 2022. This figure is based solely on accommodation providers who provided financial information for either December 2023 and/or 2022.

<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.



**RevPAR - Year to Date 2023/2022**

Room - Average RevPAR (£)	December 23	December 22
All Serviced Accommodation	£149.76	£176.00

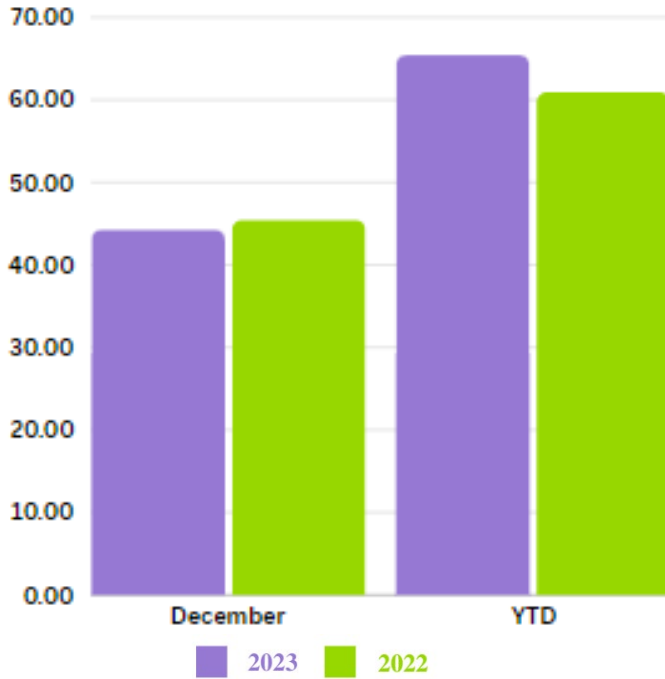
**RevPAR by Grading- December 2023/21**

Grading - Average RevPAR (£)	December 23	December 22
2 Stars	£77.91	£89.85
3 Stars	£126.51	£122.51
4 Stars	£185.91	£241.68
5 Stars	£330.56	£139.68
Unclassified	£0.00	£0.00

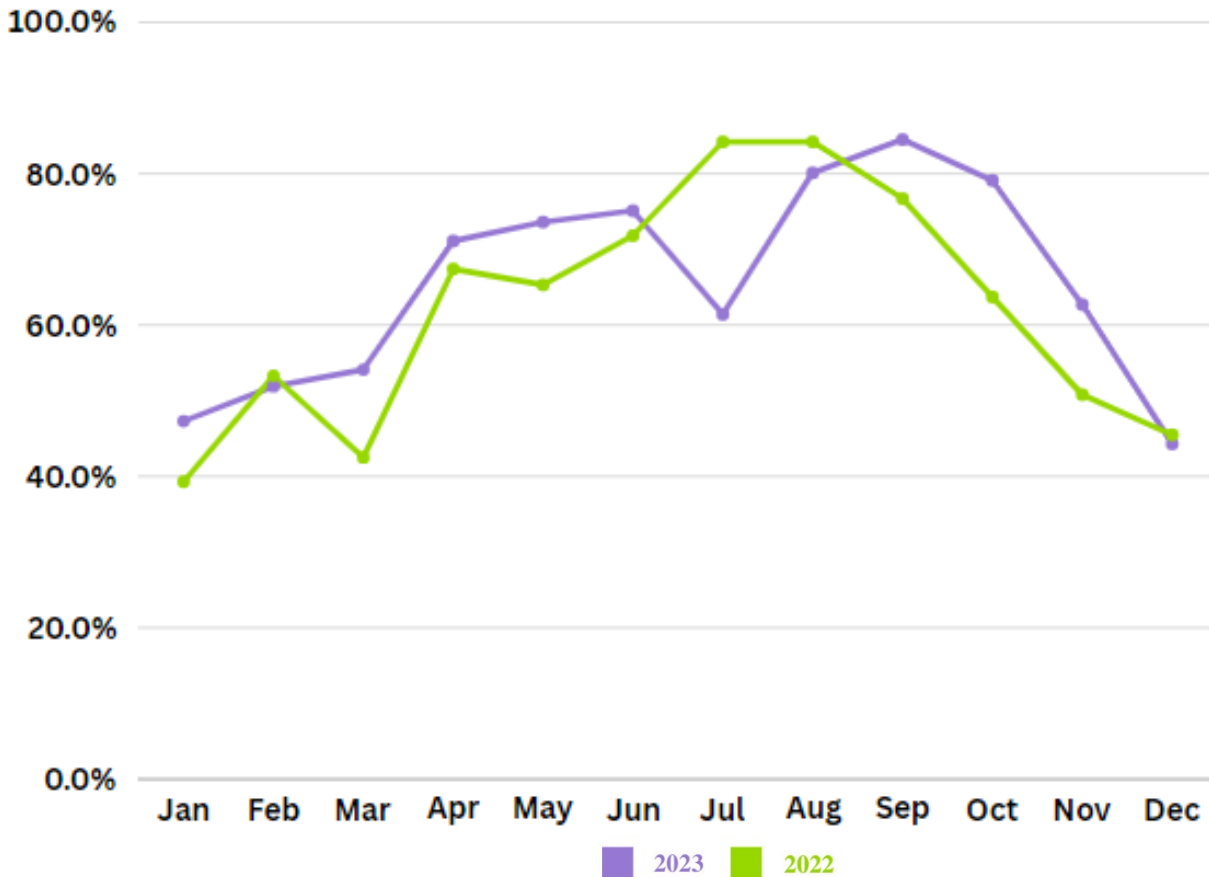
**3.0 Serviced Accommodation – Hotel Sector**

**3.1 Performance by Hotel Category**

**Hotel Room Occupancy – December 2023/2022**



Hotel Room Occupancy – Year to Date



In the **Hotel** sector, the room occupancy rate for December 2023 was **44.29%** compared to data from the previous year of **45.48%** occupancy rate; this shows an overall percentage point decrease of **1.19**.

Percentage room occupancy rates for Hotels (sample size >4) in the Highlands of Scotland with the percentage bed occupancy rates in the Greater Glasgow Region were the highest in December 2023. Operators in Other Urban Areas and properties charging tariff between £70.00 and £69.99 fared best in room occupancy rates in December 2023.

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

Room Occupancy	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Hotel</b>	44.29%	45.48%	-1.19	99	65.44%	60.94%	4.50	105

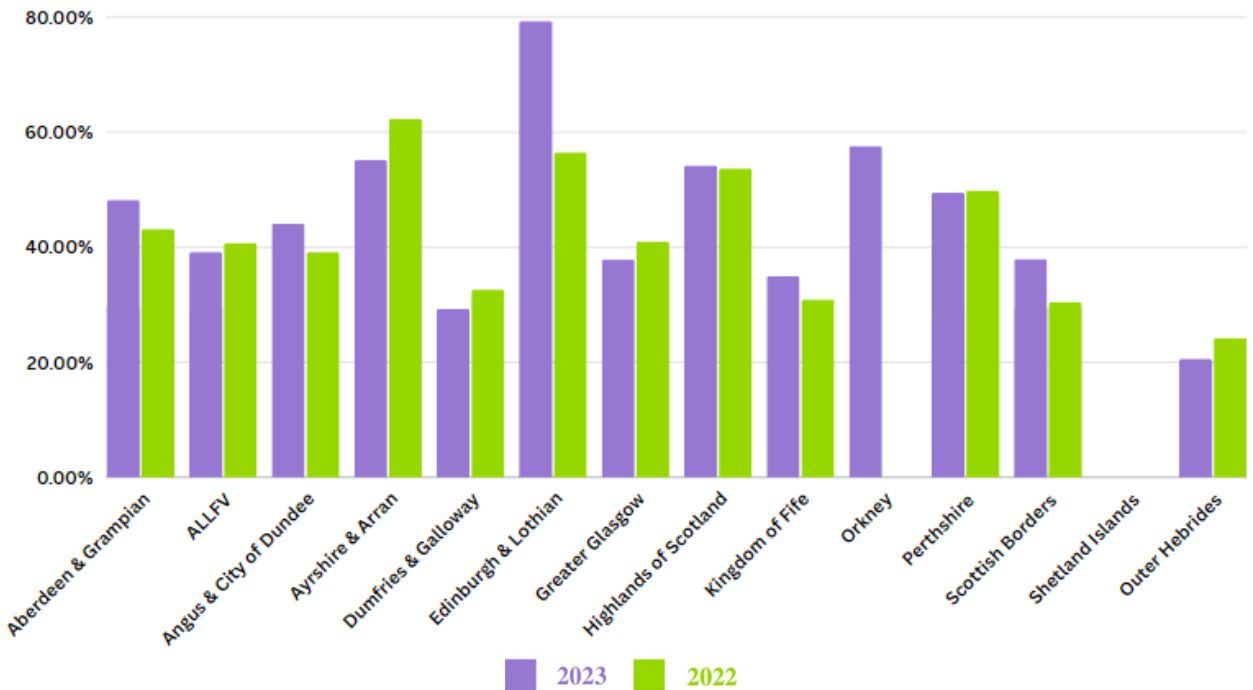
In the **Hotel sector**, the bed occupancy rate for December 2023 was **48.47%** compared to data from the previous year of **39.72%** occupancy rate; this shows an overall percentage point increase of **8.75**.

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

Bed Occupancy	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Hotel</b>	51.37%	35.86%	15.51	116	54.69%	52.32%	2.37	52

### Room Occupancy by Former VisitScotland Area

#### Hotel Room Occupancy by Former VisitScotland Area – December 2023/2022



### Room Occupancy by Former Visit Scotland Area – December 2023/2022

Area	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	48.24%	43.16%	5.08	105	68.41%	61.03%	7.38	107
ALLFV	39.17%	*	-1.57	98	70.19%	68.90%	1.29	101
Angus & City of Dundee	*	*	*	*	65.90%	58.34%	7.56	108
Ayrshire & Arran	*	*	*	*	81.40%	83.02%	-1.62	98
Dumfries & Galloway	*	*	*	*	54.39%	62.70%	-8.31	92
Edinburgh & Lothian	*	*	*	*	74.45%	62.44%	12.01	112
Greater Glasgow	37.92%	40.99%	-3.07	97	57.52%	48.59%	8.93	109
Highlands of Scotland	54.22%	53.69%	0.53	101	72.13%	72.52%	-0.39	100
Kingdom of Fife	*	*	*	*	65.35%	55.83%	9.52	110
Orkney	*	-	*	*	82.87%	-	82.87	183
Perthshire	*	*	*	*	64.53%	62.06%	2.47	102
Scottish Borders	*	*	*	*	51.23%	45.80%	5.4	105
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	67.51%	69.23%	-1.72	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Former Visit Scotland Area – December 2023/2022

Area	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	43.50%	33.10%	10.40	110	60.76%	46.47%	14.29	114
ALLFV	*	*	*	*	66.32%	59.37%	6.95	107
Angus & City of Dundee	*	*	*	*	35.08%	34.97%	0.11	100
Ayrshire & Arran	*	*	*	*	52.63%	53.37%	-0.74	99
Dumfries & Galloway	*	*	*	*	38.27%	32.49%	5.78	106
Edinburgh & Lothian	*	*	*	*	57.73%	39.90%	17.83	118
Greater Glasgow	76.51%	36.91%	39.60	140	49.16%	52.84%	-3.68	96
Highlands of Scotland	46.77%	45.05%	1.72	102	61.18%	61.03%	0.15	100
Kingdom of Fife	*	*	*	*	50.81%	45.11%	5.70	106
Orkney	*	-	*	*	87.79%	-	87.79	188
Perthshire	*	*	*	*	46.33%	45.59%	0.74	101
Scottish Borders	*	*	*	*	43.52%	43.42%	0.10	100
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	54.45%	55.85%	-1.40	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	34.62%	46.23%	-11.61	88	59.83%	50.64%	9.19	109
Other Urban Areas	76.37%	62.01%	14.36	114	78.27%	70.47%	7.80	108
Accessible Small Towns	42.02%	34.45%	7.57	108	67.83%	63.68%	4.15	104
Remote Small Towns	*	34.79%	-5.28	95	55.01%	55.51%	-0.50	100

Accessible Rural	*	*	*	*	41.18%	40.54%	0.64	101
Remote Rural	38.12%	35.48%	2.64	103	67.42%	67.01%	0.41	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	70.03%	32.81%	37.22	137	50.68%	52.27%	-1.59	98
Other Urban Areas	42.91%	53.64%	-10.73	89	64.90%	55.87%	9.03	109
Accessible Small Towns	40.16%	32.23%	7.93	108	56.33%	49.31%	7.02	107
Remote Small Towns	*	47.38%	-34.72	65	54.78%	54.38%	0.40	100
Accessible Rural	*	*	*	*	24.94%	28.51%	-3.57	96
Remote Rural	34.56%	25.36%	9.20	109	59.35%	51.49%	7.86	108
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Location (Geographic) – December 2023/2022

Location (Geographic)	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	58.72%	50.15%	8.57	109	66.54%	61.50%	5.04	105
Inland	42.94%	44.76%	-1.82	98	64.78%	59.66%	5.12	105
Island	35.12%	29.58%	5.54	106	70.94%	71.68%	-0.74	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	49.86%	30.03%	19.83	120	53.73%	46.95%	6.78	107
Inland	52.50%	38.83%	13.67	114	54.21%	53.18%	1.03	101
Island	40.16%	39.64%	0.52	101	68.86%	68.92%	-0.06	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Size– December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	31.45%	*	12.79	113	55.87%	59.51%	-3.64	96
11 to 25	41.42%	38.93%	2.49	102	61.64%	56.91%	4.73	105
26 to 50	61.30%	39.79%	21.51	122	77.64%	69.42%	8.22	108
51 to 100	62.37%	70.36%	-7.99	92	78.58%	77.37%	1.21	101
Over 100	39.15%	44.41%	-5.26	95	57.88%	44.21%	13.67	114
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Size – December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
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5 Stars	*	*	*	*	68.71%	42.85%	25.86	126
Unclassified	*	16.79%	10.55	111	51.29%	39.59%	11.70	112
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						