

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2023/2022 Report - HOTELS

1.0 Introduction November 2023/2022

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering November 2023 and benchmarking against November 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 November 2023

The SOAS Report: November 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 November 2023 experienced a **13.11** percentage point increase when comparing percentage room occupancy rates with November 2022. Occupancy rates within the Hotel sector experienced an **11.97** percentage point increase in November 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in November with growth of just 3.1% despite the Black Friday deals. Food and drink and health and beauty categories continued to drive sales. November's food and drink sales rose by 5.8%, which was still below the 3-month average.

Domestic consumer sentiment provided by the GB National Tourist Boards for November 2023 found that 20% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2023 survey). The survey recorded 52% of respondents (a 7% increase on the September 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

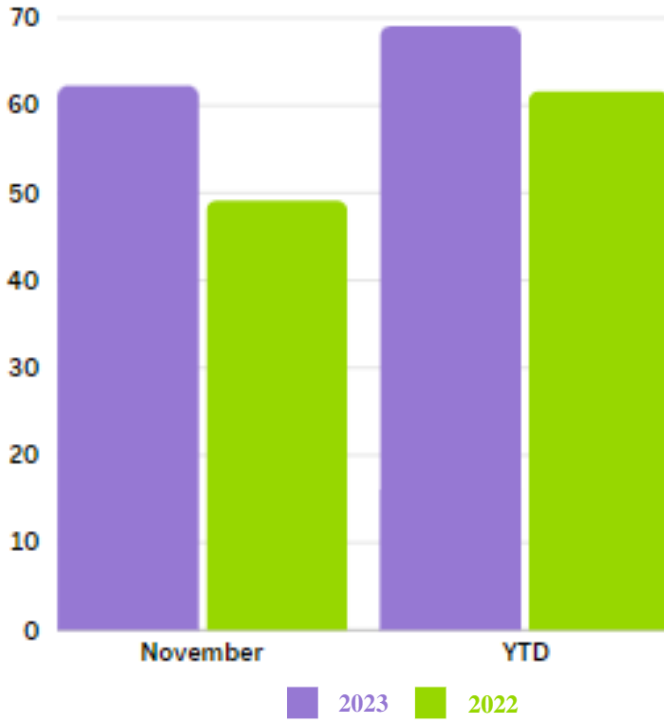
Despite consumer concern about the state of the economy, 14% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 77% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be the 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 continued to stall in November 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 8% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

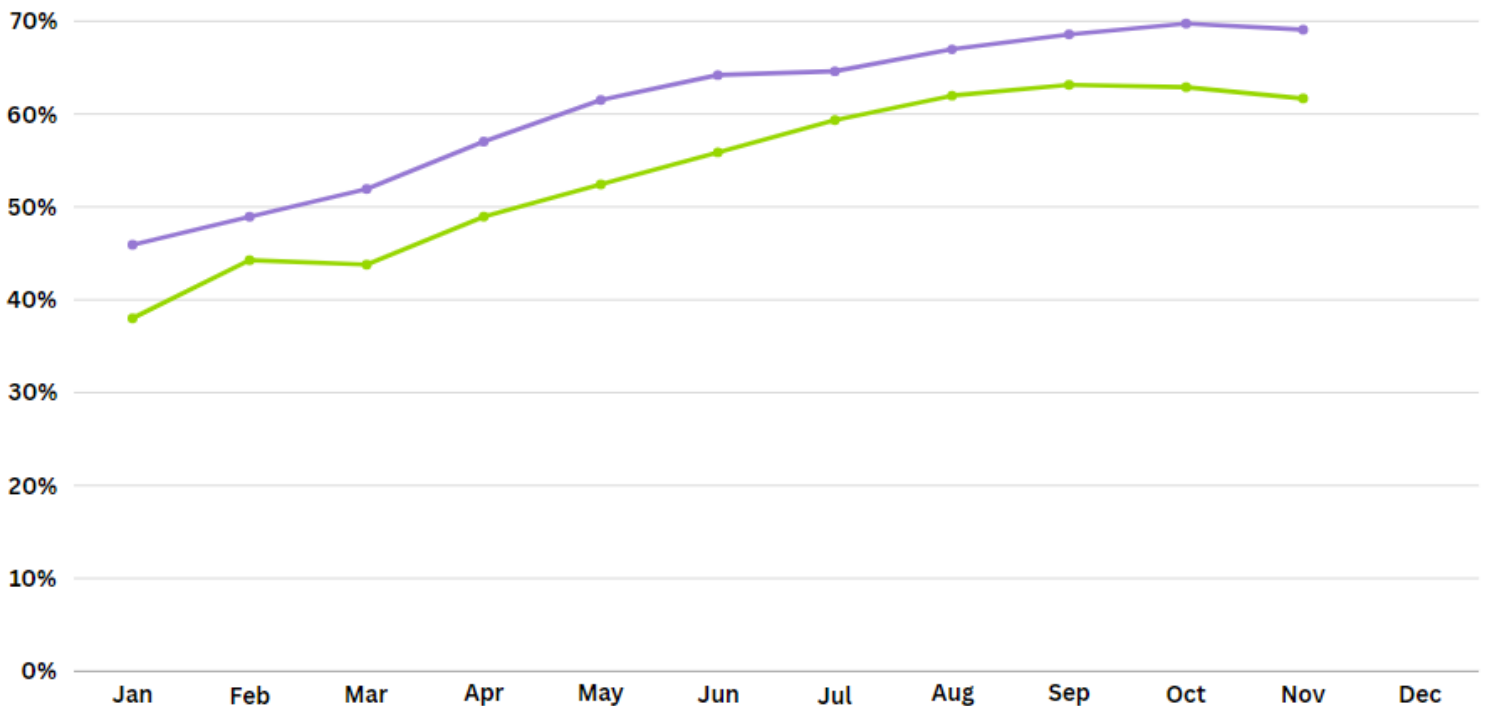
All Serviced Accommodation

Room Occupancy – November 2023/2022

Scottish Serviced Accommodation room occupancy rates for November 2023 experienced a **13.11** percentage point increase when comparing percentage room occupancy rates with November 2022.



Room Occupancy – Year-to-Date



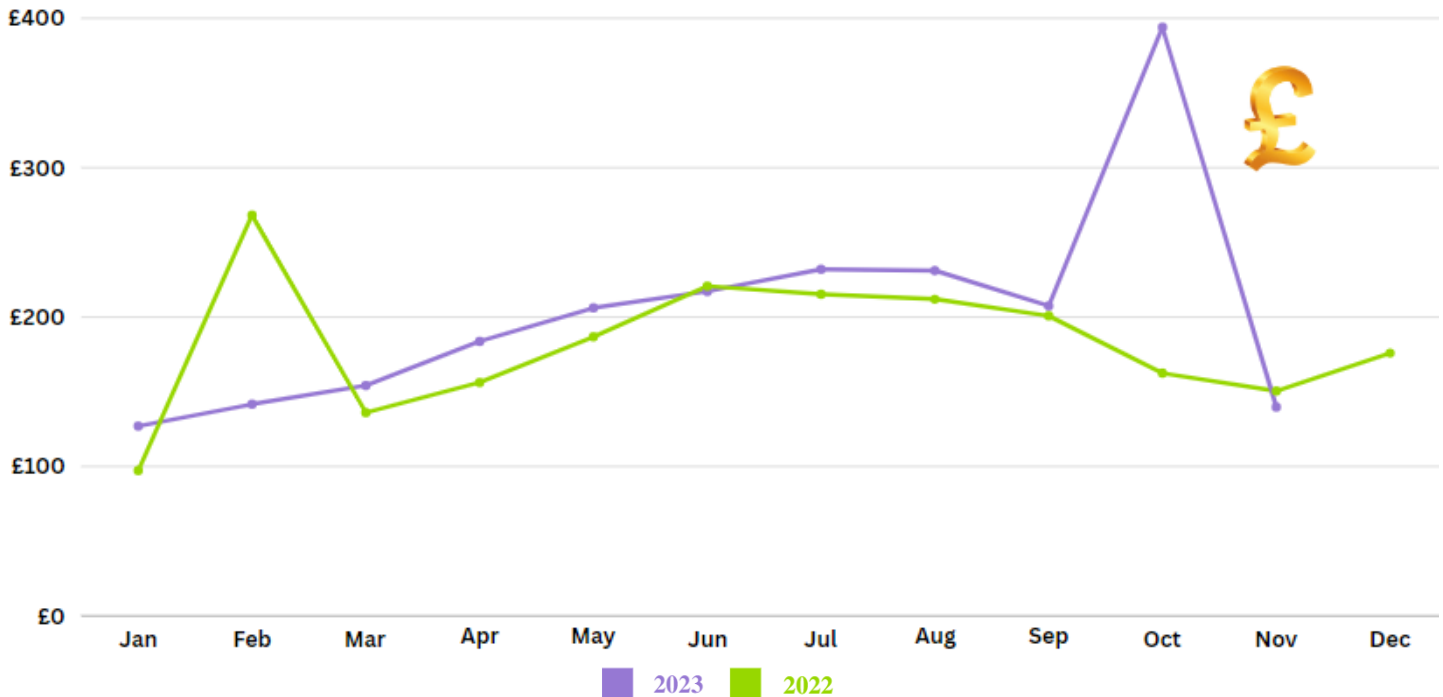
■ 2023 ■ 2022

Room Occupancy	November 23	November 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	62.26%	49.15%	13.11	113	69.08%	61.68%	7.40	107

Bed Occupancy	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	50.34%	38.14%	12.20	112	58.25%	52.73%	5.52	106

RevPAR

The Revenue per available occupied room for November 2023 was **£139.75** compared with **£150.53** in November 2022. This figure is based solely on accommodation providers who provided financial information for either November 2023 and/or 2022.



RevPAR - Year to Date 2023/2022

Room - Average RevPAR (£)	November 23	November 22
All Serviced Accommodation	£139.75	£150.53

RevPAR by Grading- November 2023/21

Grading - Average RevPAR (£)	November 23	November 22
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¹ 23/22 Diff throughout this report is expressed by % Point Change

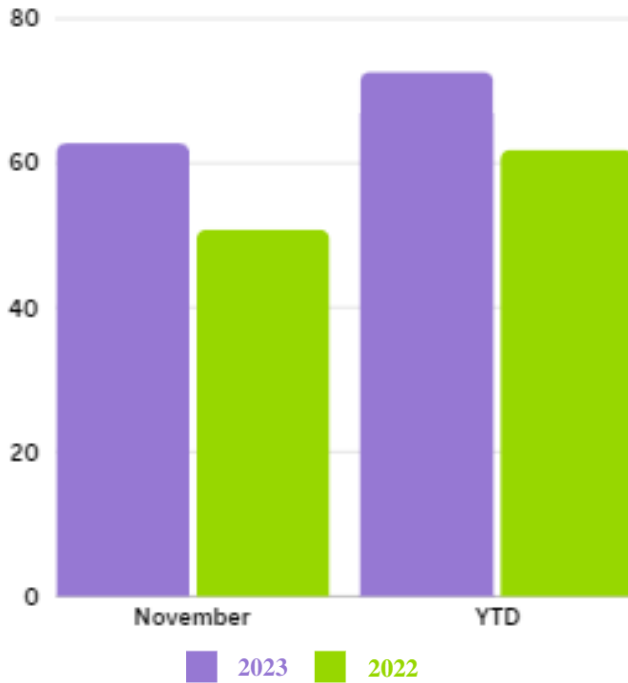
² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

2 Stars	£84.53	£78.23
3 Stars	£126.37	£125.42
4 Stars	£172.25	£221.32
5 Stars	£309.20	£135.17
Unclassified	£0.00	£86.96

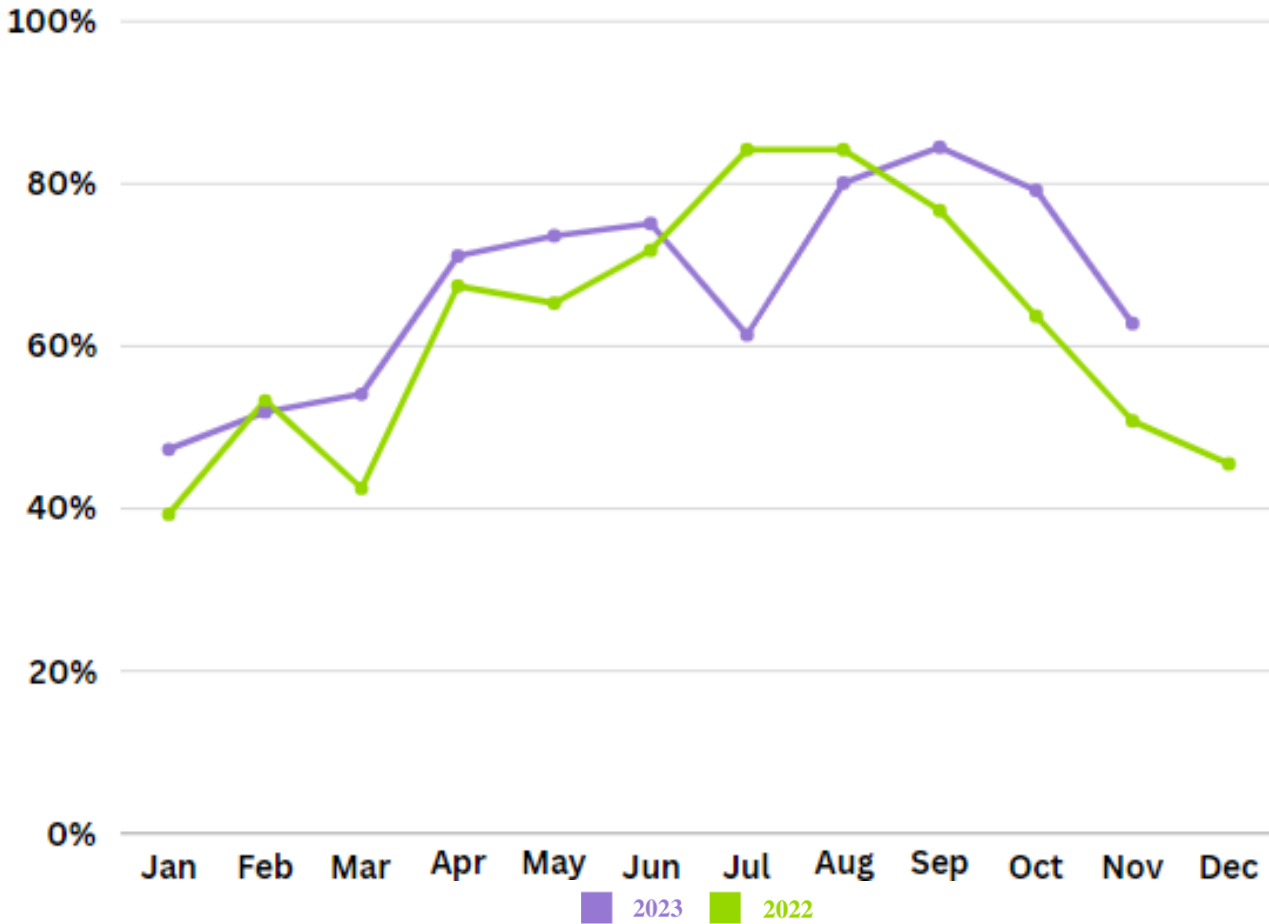
3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – November 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for November 2023 was **62.78%** compared to data from the previous year of **50.81%** occupancy rate; this shows an overall percentage point increase of **11.97**.

Percentage room and bed occupancy rates for Hotels (sample size >4) in the Greater Glasgow Region were the highest in November 2023. Operators in Large Urban Areas and properties charging tariff £70.00 and over fared best in room occupancy rates in November 2023.

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

Room Occupancy	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	62.78%	50.81%	11.97	112	72.66%	61.88%	10.78	111

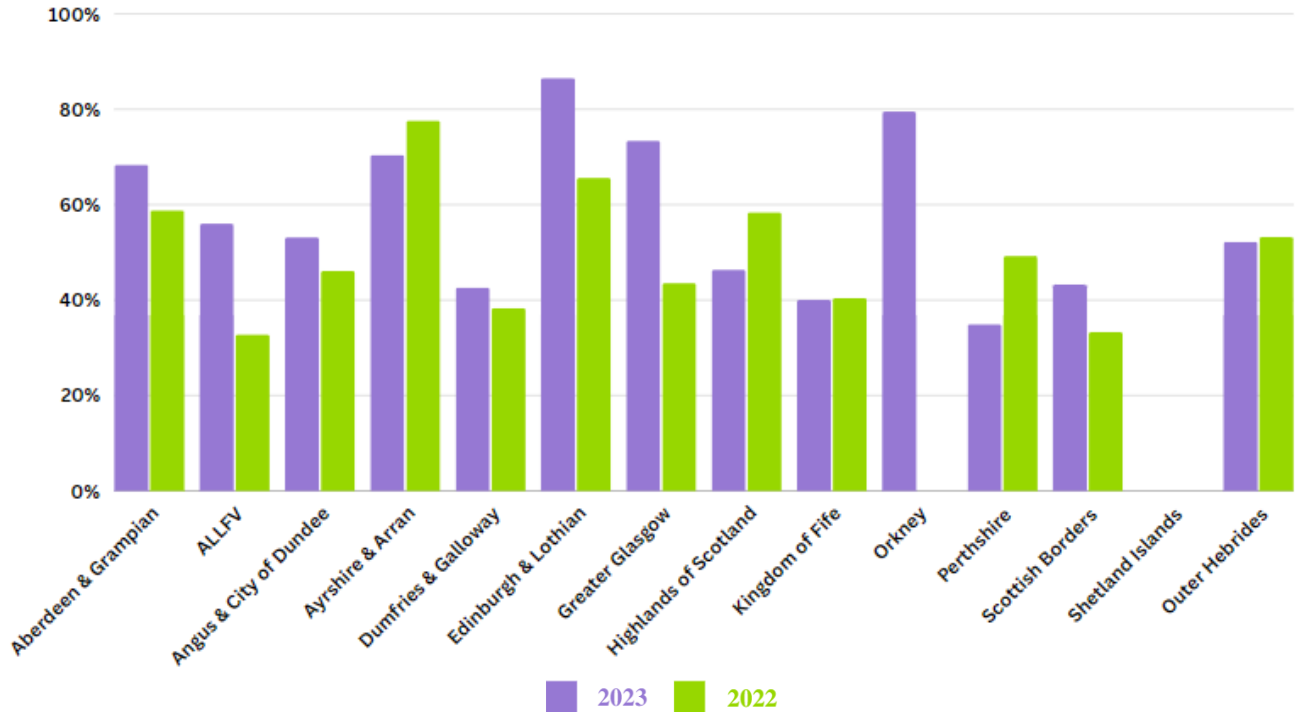
In the **Hotel sector**, the bed occupancy rate for November 2023 was **48.47%** compared to data from the previous year of **39.72%** occupancy rate; this shows an overall percentage point increase of **8.75**.

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

Bed Occupancy	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	48.47%	39.72%	8.75	109	62.40%	53.63%	8.77	52

Room Occupancy by Former VisitScotland Area

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



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

Area	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	68.39%	58.82%	9.57	110	71.77%	67.50%	4.27	104
ALLFV	56.04%	*	23.23	123	71.05%	68.20%	2.85	103
Angus & City of Dundee	*	*	*	*	69.12%	59.64%	9.48	109
Ayrshire & Arran	*	*	*	*	83.83%	85.30%	-1.47	99
Dumfries & Galloway	*	*	*	*	56.86%	60.71%	-3.85	96
Edinburgh & Lothian	*	*	*	*	72.79%	66.70%	6.09	106
Greater Glasgow	73.43%	43.57%	29.86	130	81.90%	49.39%	32.51	133
Highlands of Scotland	46.39%	58.42%	-12.03	88	73.14%	73.53%	-0.39	100
Kingdom of Fife	*	*	*	*	68.46%	58.25%	10.21	110
Orkney	*	-	*	*	*	-	*	*
Perthshire	*	*	*	*	60.73%	63.36%	-2.63	97
Scottish Borders	*	*	*	*	52.11%	47.40%	4.71	105
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	71.03%	72.68%	-1.65	98

- Sample Size = Nil

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

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

Area	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	58.03%	33.79%	24.24	124	62.71%	46.79%	15.92	116
ALLFV	51.12%	*	1.44	101	69.83%	60.97%	8.86	109
Angus & City of Dundee	*	*	*	*	36.41%	36.75%	-0.34	100
Ayrshire & Arran	*	*	*	*	53.77%	55.05%	-1.28	99
Dumfries & Galloway	*	*	*	*	39.20%	28.00%	11.20	111
Edinburgh & Lothian	*	*	*	*	55.76%	85.80%	-30.04	70
Greater Glasgow	75.67%	38.42%	37.25	137	78.47%	54.97%	23.50	124
Highlands of Scotland	28.10%	46.49%	-18.39	82	61.97%	62.14%	-0.17	100
Kingdom of Fife	*	*	*	*	53.36%	46.98%	6.38	106
Orkney	*	-	*	*	*	-	*	*
Perthshire	*	*	*	*	44.10%	46.33%	-2.23	98
Scottish Borders	*	*	*	*	43.84%	45.34%	-1.50	99
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	57.50%	58.92%	-1.42	99

- Sample Size = Nil

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

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

Location accessibility/density	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	81.44%	49.54%	31.90	132	78.69%	51.03%	27.66	128
Other Urban Areas	67.91%	72.20%	-4.29	96	78.52%	70.07%	8.45	108
Accessible Small Towns	52.67%	42.71%	9.96	110	67.22%	66.12%	1.10	101
Remote Small Towns	39.50%	47.66%	-8.16	92	55.88%	55.89%	-0.01	100
Accessible Rural	*	*	*	*	43.10%	41.42%	1.68	102
Remote Rural	43.65%	43.76%	-0.11	100	69.39%	70.83%	-1.44	99

- Sample Size = Nil

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

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

Location accessibility/density	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	65.67%	33.92%	31.75	132	66.72%	56.22%	10.50	111
Other Urban Areas	53.21%	56.60%	-3.39	97	66.54%	54.80%	11.74	112
Accessible Small Towns	36.65%	38.14%	-1.49	99	55.94%	51.32%	4.62	105
Remote Small Towns	38.18%	58.25%	-20.07	80	55.12%	54.97%	0.15	100
Accessible Rural	*	*	*	*	25.73%	29.13%	-3.40	97
Remote Rural	34.86%	31.33%	3.53	104	61.11%	52.46%	8.65	109

- Sample Size = Nil

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

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

Location (Geographic)	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	65.15%	53.44%	11.71	112	67.00%	62.67%	4.33	104

Inland	62.35%	49.23%	13.12	113	75.11%	60.06%	15.05	115
Island	53.23%	51.88%	1.35	101	73.50%	74.95%	-1.45	99
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	48.01%	40.76%	7.25	107	54.05%	49.16%	4.89	105
Inland	48.53%	38.46%	10.07	110	65.80%	53.95%	11.85	112
Island	51.75%	56.56%	-4.81	95	70.90%	71.11%	-0.21	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Size– November 2023/2022

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	31.41%	*	-11.55	88	52.37%	62.58%	-10.21	90
11 to 25	44.36%	40.89%	3.47	103	63.62%	59.74%	3.88	104
26 to 50	63.54%	50.16%	13.38	113	78.43%	71.71%	6.72	107
51 to 100	72.02%	80.60%	-8.58	91	80.17%	81.00%	-0.83	99
Over 100	76.59%	49.40%	27.19	127	76.87%	44.18%	32.69	133
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Size – November 2023/2022

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	17.45%	*	-11.74	88	34.30%	40.82%	-6.52	93
11 to 25	38.21%	42.07%	-3.86	96	60.89%	52.67%	8.22	108
26 to 50	58.91%	36.97%	21.94	122	69.57%	58.56%	11.01	111
51 to 100	62.99%	69.36%	-6.37	94	69.74%	70.63%	-0.89	99
Over 100	53.22%	27.02%	26.20	126	58.37%	40.79%	17.58	118
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Tariff – November 2023/2022

Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	-	*	*	41.43%	27.46%	13.97	114
£50 – 59.99	*	*	*	*	56.61%	72.27%	-15.66	84
£60 – £69.00	57.05%	*	1.31	101	66.49%	65.83%	0.66	101
£70+	63.85%	50.44%	13.41	113	73.80%	61.49%	12.31	112
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Tariff – November 2023/2022

Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	-	*	*	8.44%	24.89%	-16.45	84
£50 – 59.99	*	*	*	*	48.80%	33.19%	15.61	116
£60 – £69.00	59.90%	*	12.74	113	56.32%	54.66%	1.66	102
£70+	47.50%	39.33%	8.17	108	63.25%	54.29%	8.96	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Grading – November 2023/2022

Grading	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	74.48%	70.24%	4.24	104
3 Stars	52.83%	51.33%	1.50	102	67.49%	66.83%	0.66	101
4 Stars	75.33%	51.79%	23.54	124	76.19%	55.20%	20.99	121
5 Stars	*	*	*	*	59.41%	55.56%	3.85	104
Unclassified	*	59.49%	12.92	113	74.40%	67.48%	6.92	107
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Grading – November 2023/2022

Grading	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	62.93%	56.95%	5.98	106
3 Stars	37.50%	47.63%	-10.13	90	58.98%	55.86%	3.12	103
4 Stars	58.83%	38.38%	20.45	120	62.95%	53.86%	9.09	109
5 Stars	*	*	*	*	47.42%	44.37%	3.05	103
Unclassified	*	27.04%	6.95	107	52.33%	41.80%	10.53	111
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						