

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

### **1.0 Introduction April 2023/2022**

Welcome to the Visit Scotland Scottish Accommodation Occupancy Survey Report covering April 2023 and benchmarking against April 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 April 2023**

The SOAS Report: April 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 April 2023 experienced a **6.59** percentage point increase when comparing percentage room occupancy rates with April 2022. Occupancy rates within the Hotel sector experienced a **3.11** percentage point increase in April 2023 compared to last year.

Data from the Scottish Retail Consortium showed that Easter provided a slender but nonetheless welcome uplift to retail sales in Scotland last month. The real terms value of retail sales edged back into positive territory after the decline witnessed in March. Retail sales in Scotland held steady in April with decent growth of 9.1%. Food sales are the biggest growth area, aided by the Easter weekend and family gatherings. From the Visitor Attraction Barometer, Scottish Retail Attractions footfall increased by 2% in April 2023 compared to April 2022. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the broader cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

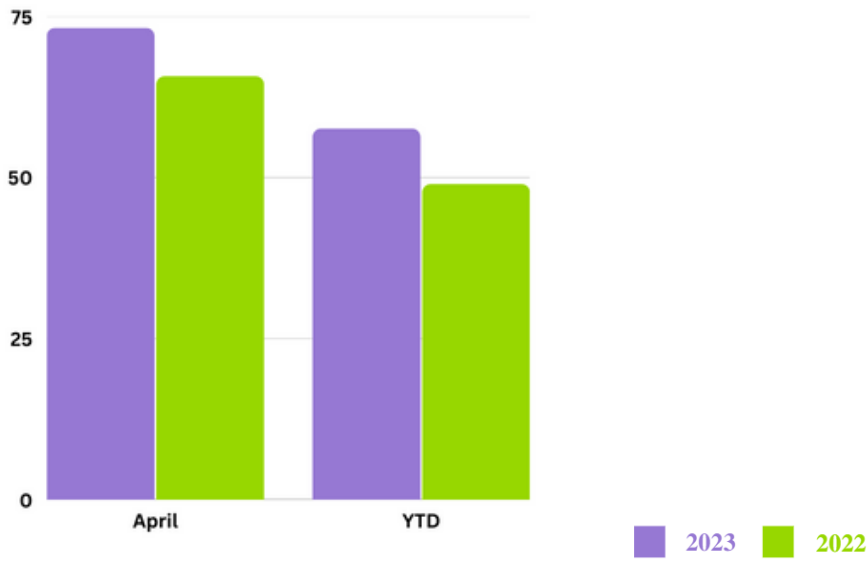
Notably, some 21% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 34% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 77% in the following 12 months. These figures have 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 restrain growth. A highlight in air transport was from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 16% 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 -12% decrease in year-to-date flights compared to 2019.

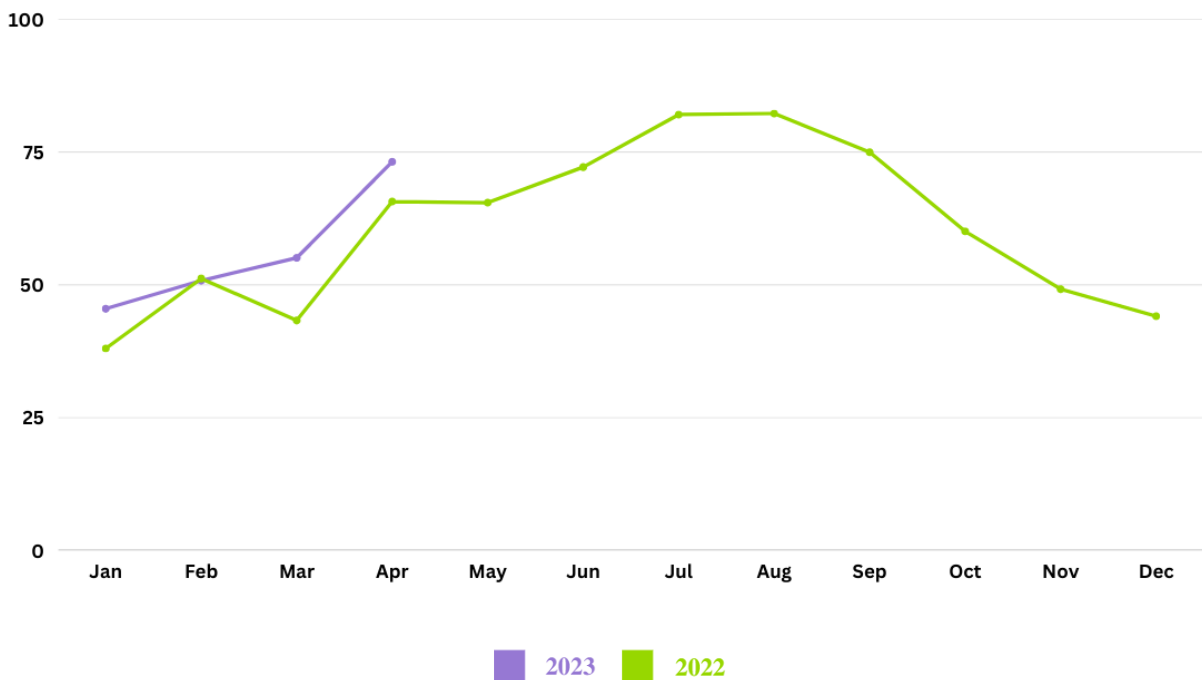
## All Serviced Accommodation

### Room Occupancy – April 2023/2022

Scottish Serviced Accommodation room occupancy rates for April 2023 experienced a **6.59** percentage point increase when comparing percentage room occupancy rates with April 2022.



### Room Occupancy – Year to Date



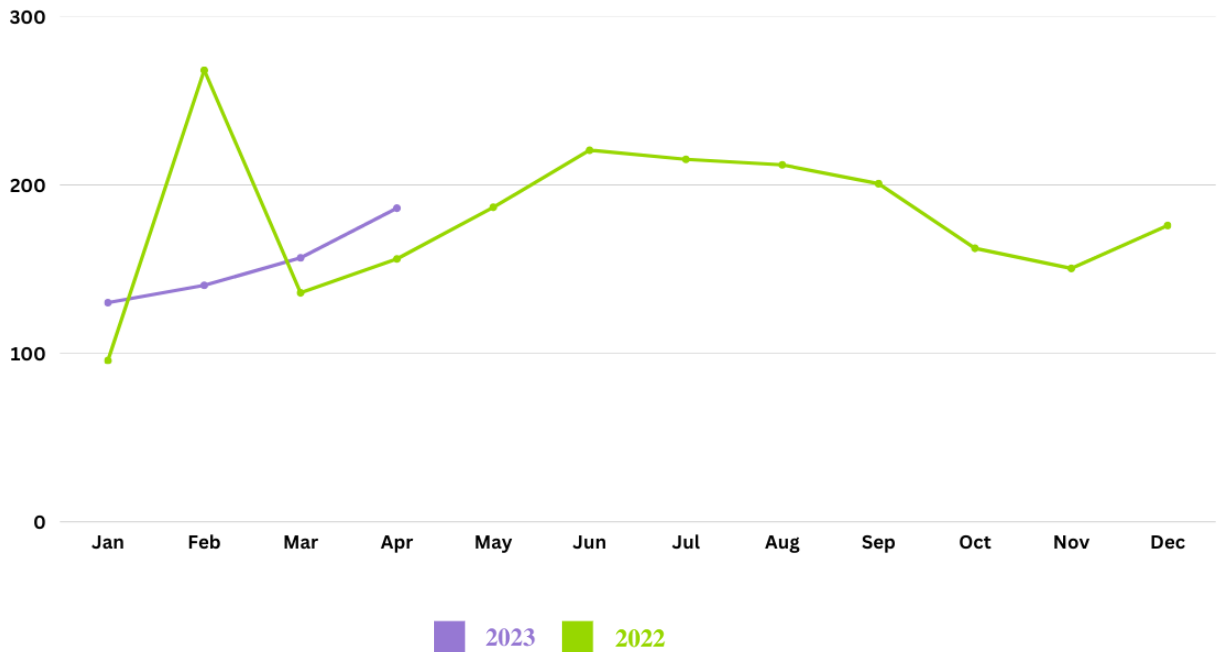
In 2022, serviced room occupancy reached a peak in August at 83.70%.

Room Occupancy	April 23	April 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	72.30%	65.71%	6.59	107	57.38%	48.95%	8.43	108

Bed Occupancy	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	66.23%	53.93%	12.30	112	48.07%	43.48%	4.59	105

### RevPAR

The Revenue per available occupied room for April 2023 was **£183.71** compared with **£156.19** in April 2022. This figure is based solely on accommodation providers who provided financial information for either April 2023 and/or 2022.



### RevPAR – Year to Date 2023/2022

Room – Average RevPAR (£)	April 23	April 22
All Serviced Accommodation	£183.71	£156.19

### RevPAR by Grading- April 2023/21

Grading – Average RevPAR (£)	April 23	April 22
2 Stars	£114.72	£79.77
3 Stars	£161.20	£131.16

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

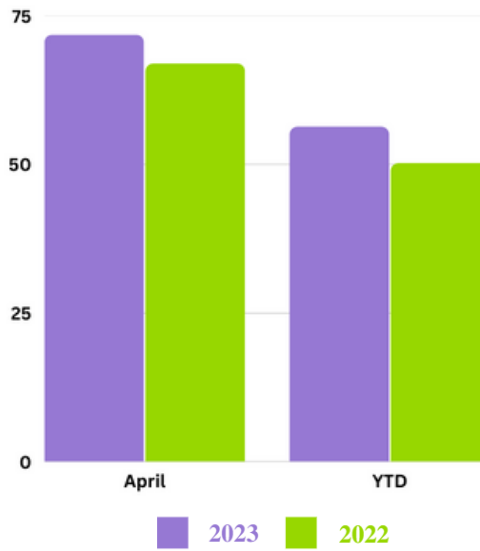
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

4 Stars	£221.13	£224.53
5 Stars	£311.22	£195.00
Unclassified	£0.00	£104.17

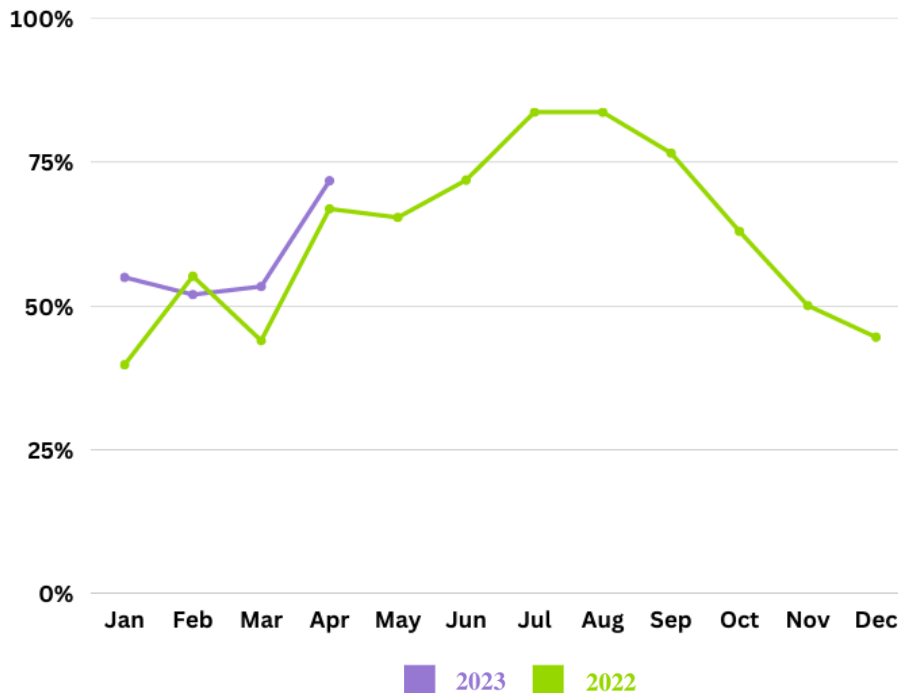
### 3.0 Serviced Accommodation – Hotel Sector

#### 3.1 Performance by Hotel Category

Hotel Room Occupancy – April 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for the period April 2023 was **71.13%** when compared to data from the previous year of **68.02%** occupancy rate; this shows an overall % Point increase of **3.11**.

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

Room Occupancy April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	71.13%	68.02%	3.11	103	59.14%	58.64%	0.50

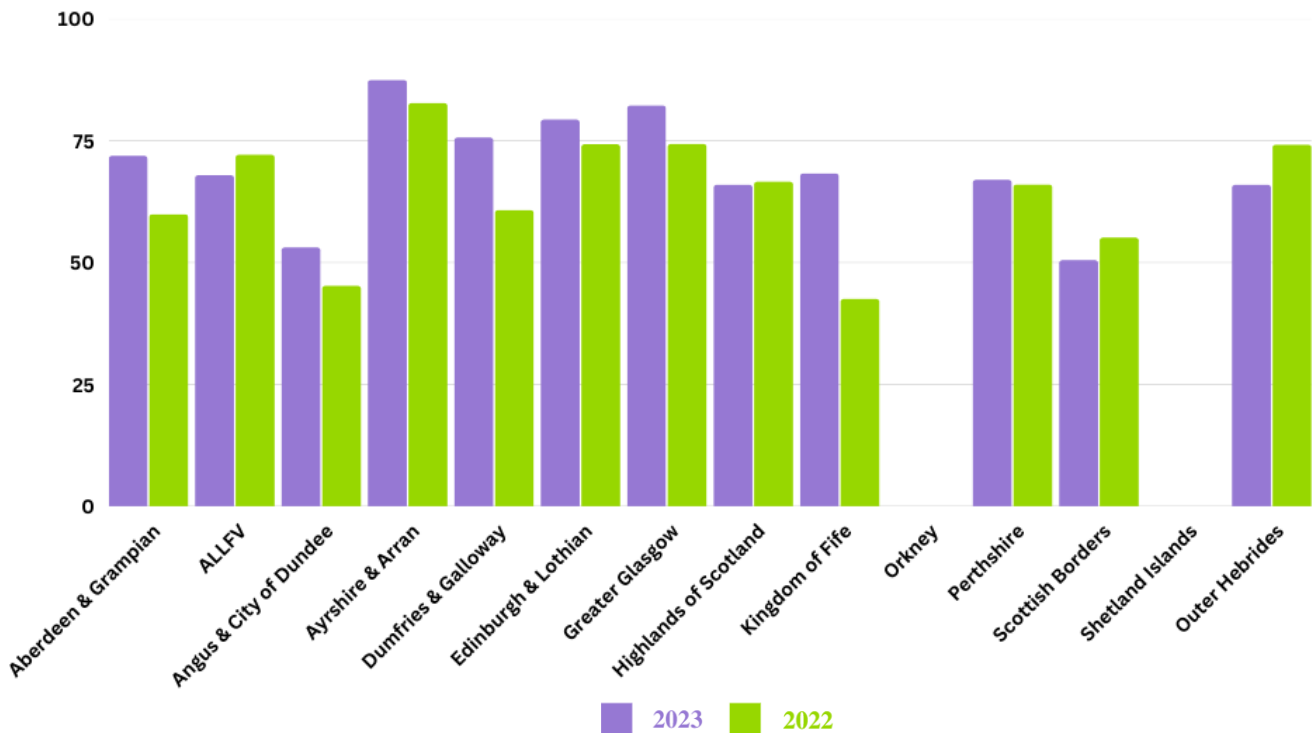
In the **Hotel sector**, the bed occupancy rate for the period April 2023 was **65.92%** when compared to data from the previous year of **55.36%** occupancy rate; this shows an overall percentage point increase of **10.56**.

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

Bed Occupancy	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	65.92%	55.36%	10.56	111	50.50%	47.66%	2.84	52

### Room Occupancy by Former VisitScotland Area

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



Percentage room and bed occupancy rates for Hotels in Ayrshire & Arran were the highest in April 2023 and in April 2022. Operators in Large Urban Areas and properties charging a tariff of £70 and over fared best in room occupancy rates in April 2023.

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

Area	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	71.83%	59.85%	11.98	112	57.33%	48.08%	9.25	109
ALLFV	67.87%	72.04%	-4.17	96	59.26%	64.94%	-5.68	94
Angus & City of Dundee	*	*	*	*	49.78%	44.12%	5.66	106
Ayrshire & Arran	*	*	*	*	79.70%	77.84%	1.86	102
Dumfries & Galloway	*	60.68%	1.24	101	40.46%	49.43%	-8.97	91
Edinburgh & Lothian	*	*	*	*	55.53%	*	-12.00	88
Greater Glasgow	*	74.27%	7.89	108	72.57%	65.23%	7.34	107
Highlands of Scotland	65.30%	66.58%	-1.28	99	60.29%	61.62%	-1.33	99
Kingdom of Fife	*	*	*	*	55.76%	46.07%	9.69	110
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	58.99%	45.76%	13.23	113
Scottish Borders	*	*	*	*	38.61%	39.30%	-0.69	99
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	52.57%	54.77%	-2.20	98
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Area	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	52.20%	38.42%	13.78	114	38.29%	34.56%	3.73	104
ALLFV	71.22%	52.72%	18.50	119	59.09%	44.28%	14.81	115
Angus & City of Dundee	*	*	*	*	28.97%	28.84%	0.13	100
Ayrshire & Arran	*	*	*	*	49.01%	48.98%	0.03	100
Dumfries & Galloway	*	37.90%	-5.57	94	21.33%	29.62%	-8.29	92
Edinburgh & Lothian	*	*	*	*	44.55%	*	44.55	145
Greater Glasgow	*	69.29%	10.07	110	70.11%	61.16%	8.95	109
Highlands of Scotland	65.41%	58.90%	6.51	107	53.03%	52.20%	0.83	101
Kingdom of Fife	*	*	*	*	45.30%	39.76%	5.54	106
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	47.43%	37.76%	9.67	110
Scottish Borders	*	*	*	*	35.93%	33.15%	2.78	103
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	37.15%	39.56%	-2.41	98
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Location accessibility/density	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	81.62%	79.09%	2.53%	103	64.71%	72.30%	-7.59%	92
Other Urban Areas	78.45%	67.82%	10.63%	111	67.69%	63.05%	4.64%	105
Accessible Small Towns	66.54%	71.64%	-5.10%	95	57.52%	64.61%	-7.09%	93

Remote Small Towns	50.48%	55.87%	-5.39%	95	40.58%	44.45%	-3.87%	96
Accessible Rural	*	*	*	*	56.41%	45.18%	11.23%	111
Remote Rural	65.19%	66.35%	-1.16%	99	51.47%	48.44%	3.03%	103
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Location accessibility/density	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	78.07%	73.23%	4.84%	105	56.38%	66.50%	-10.12%	90
Other Urban Areas	66.27%	53.21%	13.06%	113	55.69%	46.36%	9.33%	109
Accessible Small Towns	56.78%	53.05%	3.73%	104	46.64%	41.98%	4.66%	105
Remote Small Towns	57.31%	50.23%	7.08%	107	38.65%	36.33%	2.32%	102
Accessible Rural	*	*	*	*	57.40%	37.71%	19.69%	120
Remote Rural	52.60%	50.89%	1.71%	102	39.97%	43.05%	-3.08%	97
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Location (Geographic)	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	58.46%	56.79%	1.67%	102	48.25%	49.31%	-1.06%	99
Inland	76.39%	71.50%	4.89%	105	64.70%	61.97%	2.73%	103
Island	64.36%	77.22%	-12.86%	87	54.56%	54.16%	0.40%	100
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Location (Geographic)	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	56.92%	47.00%	9.92%	110	39.11%	40.17%	-1.06%	99
Inland	69.01%	58.29%	10.72%	111	56.41%	50.12%	6.29%	106
Island	68.36%	70.82%	-2.46%	98	57.75%	57.47%	0.28%	100
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Size	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	51.88%	50.47%	1.41%	101	39.97%	37.38%	2.59%	103
11 to 25	58.13%	60.12%	-1.99%	98	46.43%	45.18%	1.25%	101
26 to 50	75.41%	75.90%	-0.49%	100	68.70%	67.17%	1.53%	102
51 to 100	80.98%	72.45%	8.53%	109	70.75%	69.14%	1.61%	102
Over 100	*	*	*	*	60.21%	66.52%	-6.31%	94
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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

Size	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	43.18%	30.99%	12.19%	112	28.09%	24.66%	3.43%	103
11 to 25	62.78%	52.81%	9.97%	110	47.59%	43.47%	4.12%	104
26 to 50	65.30%	61.09%	4.21%	104	57.27%	49.28%	7.99%	108
51 to 100	69.73%	61.77%	7.96%	108	60.76%	56.79%	3.97%	104
Over 100	*	*	*	*	48.27%	56.56%	-8.29%	92
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	-	-	-	-	-	-	-
£30 - £39.99	-	-	-	-	-	-	-	-
£40 - £49.99	-	*	*	*	*	28.60%	-8.28%	92
£50 - £59.99	*	*	*	*	54.40%	58.87%	-4.47%	96
£60 - £69.99	68.23%	*	3.74%	104	46.74%	61.13%	-14.39%	86
£70 +	72.10%	68.25%	3.85%	104	60.66%	59.51%	1.15%	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	-	-	-	-	-	-	-
£30 - £39.99	-	-	-	-	-	-	-	-
£40 - £49.99	-	*	*	*	*	17.92%	-7.97%	92
£50 - £59.99	*	*	*	*	56.76%	27.82%	28.94%	129
£60 - £69.99	56.04%	*	-1.71%	98	38.50%	48.31%	-9.81%	90
£70 +	67.46%	56.01%	11.45%	111	51.53%	49.49%	2.04%	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Grading	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	64.55%	64.58%	-0.03%	100
3 Stars	62.27%	66.22%	-3.95%	96	49.67%	48.02%	1.65%	102
4 Stars	72.96%	73.42%	-0.46%	100	61.60%	69.83%	-8.23%	92
5 Stars	*	*	*	*	73.91%	42.43%	31.48%	131
Unclassified	74.57%	62.51%	12.06%	112	60.25%	56.81%	3.44%	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



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

Grading	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	54.78%	45.55%	9.23%	109
3 Stars	59.62%	57.69%	1.93%	102	43.74%	43.00%	0.74%	101
4 Stars	64.23%	61.48%	2.75%	103	49.82%	57.69%	-7.87%	92
5 Stars	*	*	*	*	73.78%	36.14%	37.64%	138
Unclassified	53.59%	36.81%	16.78%	117	40.01%	36.94%	3.07%	103
	<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>					

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