

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

January 2023/2022 Report – HOTELS - Revised

1.0 Introduction January 2023/2022

Welcome to the Visit Scotland Scottish Accommodation Occupancy Survey Report covering January 2023 and benchmarking against January 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).

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 January 2023

The SOAS Report: January 2023/2022 Hotels report continued to show growth in the Hotels sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation room occupancy rates for January 2023 experienced a **7.92** percentage point increase when comparing percentage room occupancy rates with January 2022. Occupancy rates within the Hotels sector experienced a **7.43** percentage point increase in January 2023 when compared to last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 12.2% footfall increase in visitors for January 2023 compared to the same period in 2022

Domestic consumer sentiment provided by the GB National Tourist Boards for January 2023 found that 52% of respondents stated (a 5% increase on the December 2022 Survey) saying they were “cautious - things are OK but I feel I have to be very careful”.

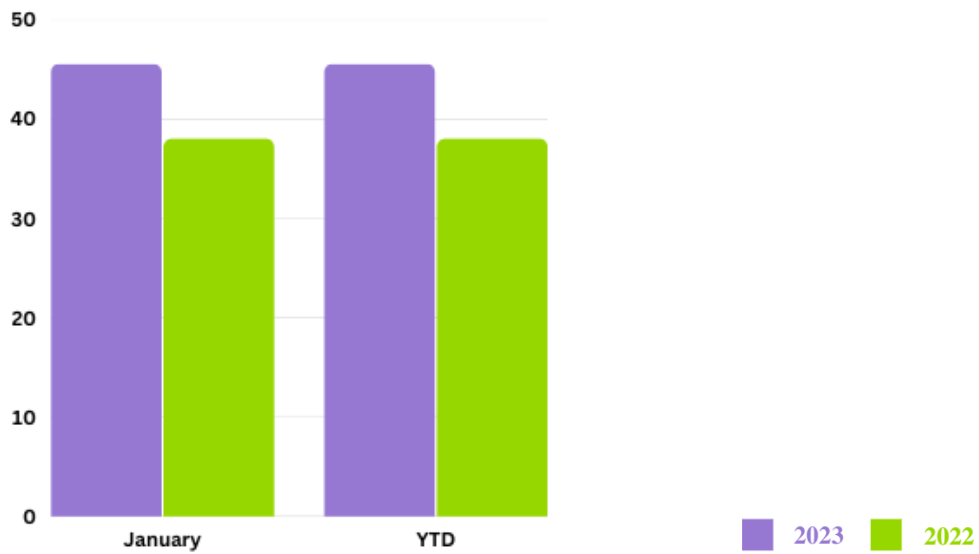
The survey also recorded 21% of respondents (a 1% decrease on the December 2022 Survey) saying they are “...been hit hard - no option but to cut back on spending”. Despite consumer concern about the state of the economy, 16% of UK adults intend to take a domestic overnight trip in the first quarter of 2023 and 70% in the next 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023).

The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 remained the major barrier to growth. One highlight in air transport is from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 42% in daily flights compared to 2019. Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a 17% decrease in year-to-date flights when compared to the same time in 2019, however, the UK was the busiest state within the network in 2023, with an average of 4,044 flights per day this is a 69% increase compared to the same time in 2022 (Eurocontrol, 2023), however, the start of 2023 saw Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.

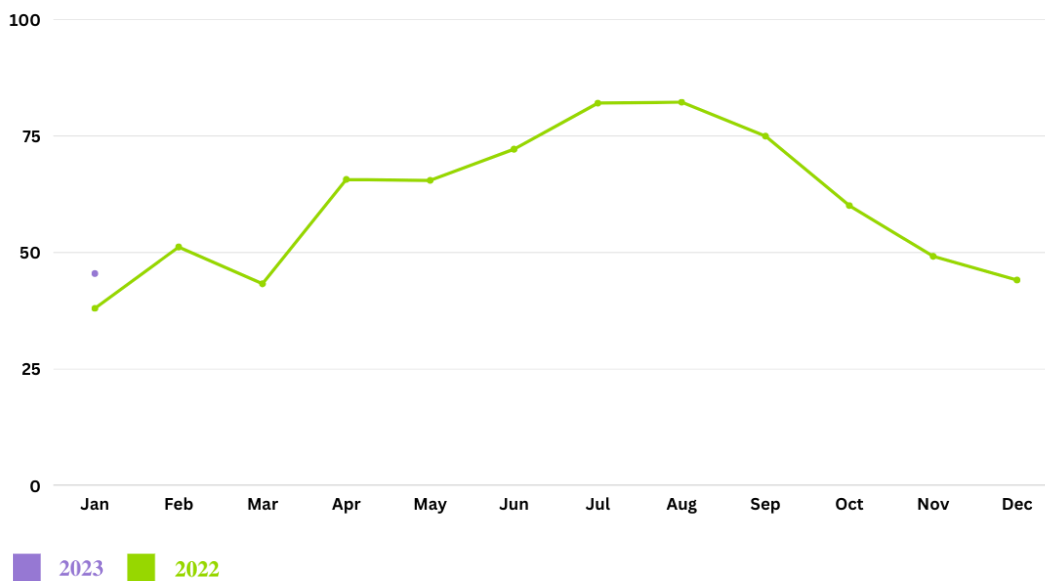
All Serviced Accommodation

Room Occupancy – January 2023/2022

Room occupancy rates for all Scottish Serviced Accommodation was 45.92% in January 2023 compared to 38.0% in January 2022. This is a 7.92 percentage point increase.



Room Occupancy – Year to Date



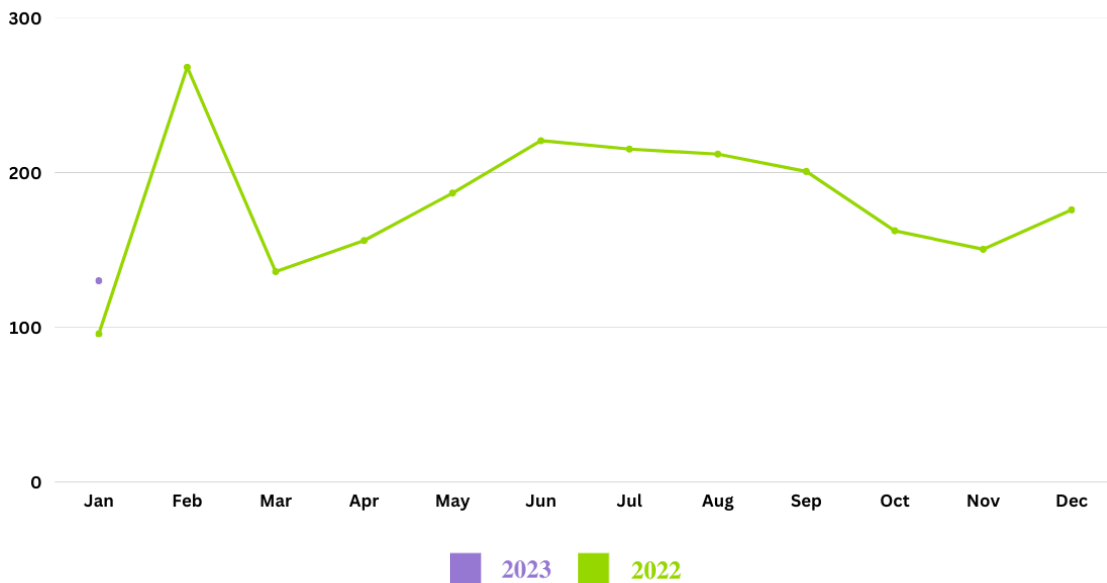
In 2022, serviced room occupancy reached at peak in August at 82.29%.

Room Occupancy	January 23	January 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	45.9%	38.0%	7.92	108	45.9%	38.0%	7.92	108

Bed Occupancy	January 23	January 22	23/22 Diff ¹	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	37.0%	31.3%	5.66	106	37.0%	31.3%	5.66	106

RevPAR

The Revenue per available occupied room for January 2023 was **£127.00** compared with **£97.31** in January 2022. This figure is based solely on accommodation providers who provided financial information for either January 2023 and/or 2022.



RevPAR – Year to Date 2023/2022

Room – Average RevPAR (£)	January 23	January 22
All Serviced Accommodation	£127.00	£97.31

RevPAR by Grading- January 2023/21

Grading – Average RevPAR (£)	January 23	January 22
2 Stars	£70.85	£33.25
3 Stars	£92.63	£67.20
4 Stars	£160.39	£163.17
5 Stars	£184.60	£72.03
Unclassified	£92.48	£114.21

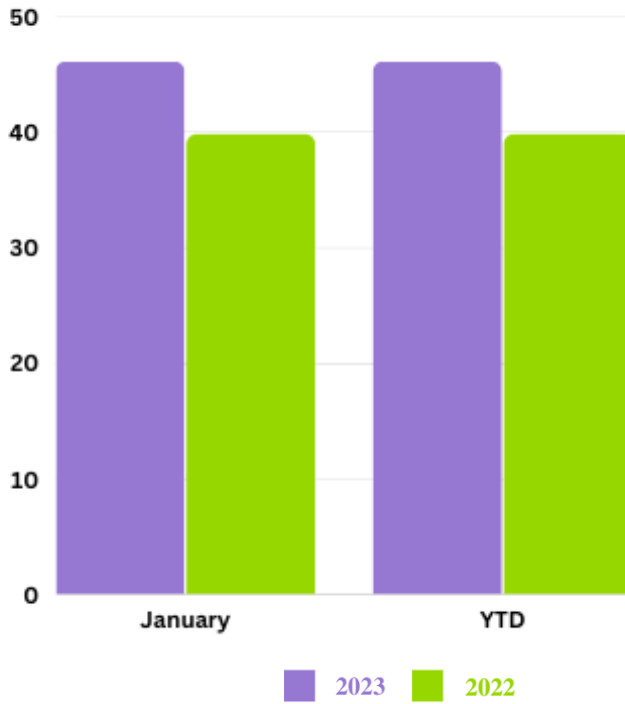
¹ 23/22 Diff throughout this report is expressed by % Point Change

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.

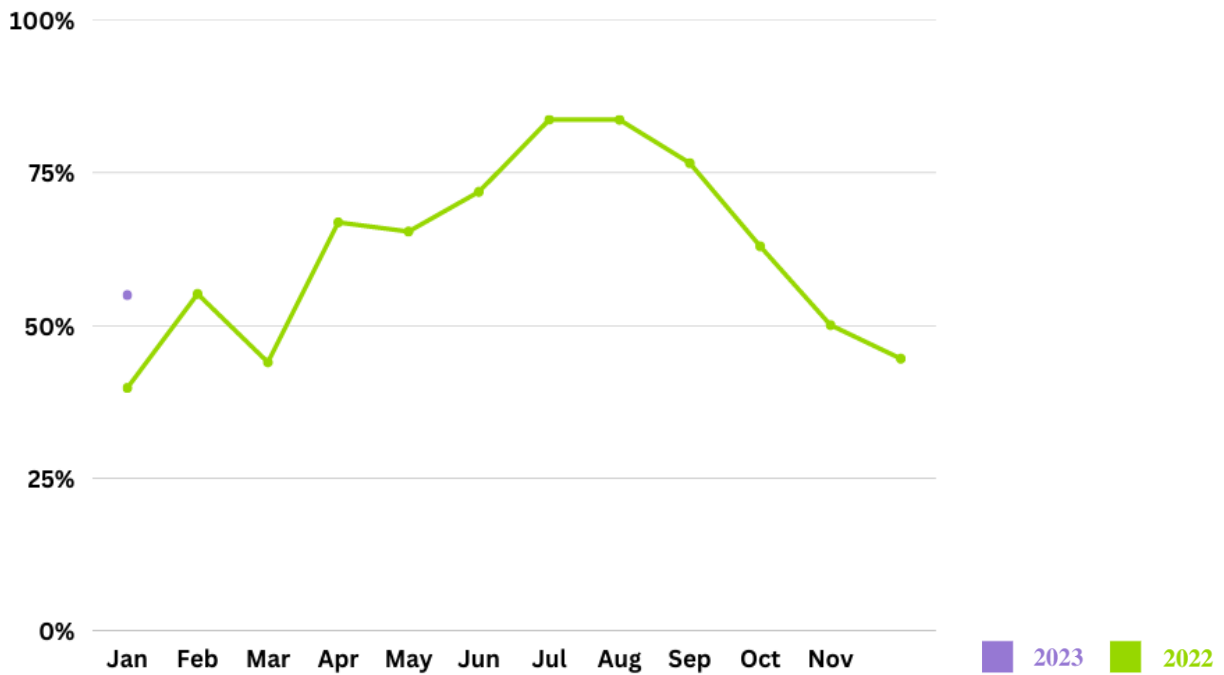
3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – January 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the **room occupancy** rate for the period January 2023 was **47.23%** when compared to data from the previous year of **39.80%** occupancy rate; this shows an overall percentage point increase of **7.43**.

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

Room Occupancy Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	47.23%	39.80%	7.43	107	47.23%	39.80%	7.43

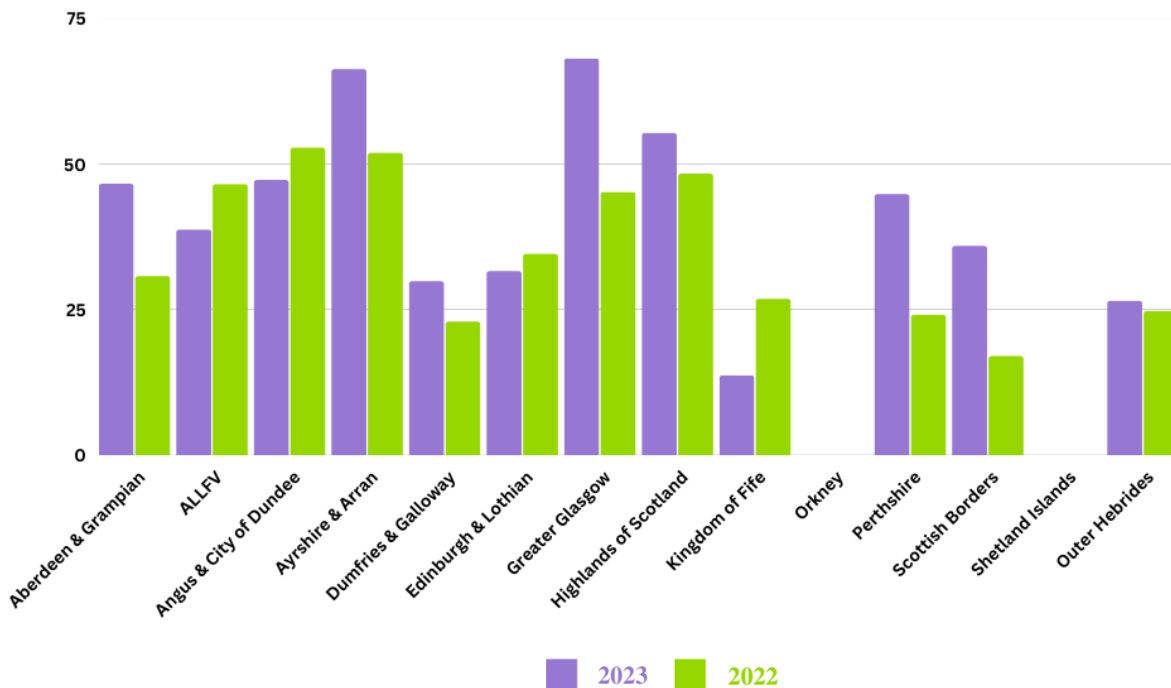
In the **Hotel sector**, the **bed occupancy** rate for the period January 2023 was **38.03%** when compared to data from the previous year of **33.43%** occupancy rate; this shows an overall percentage point increase of **4.60**.

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

Bed Occupancy	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	38.03%	33.43%	4.60	105	38.03%	33.43%	4.60	105

Room Occupancy by Former VisitScotland Area

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



Percentage room and bed occupancy rates for Hotels in Greater Glasgow were the highest in January 2023. Operators in Other Urban Areas and properties charging a tariff of £70 and over fared best in occupancy rates in January 2023.

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

Area	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	46.53%	30.69%	15.84	116	46.53%	30.69%	15.84	116
ALLFV	*	46.48%	-7.27	93	*	46.48%	-7.27	93
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	*	22.88%	6.89	107	*	22.88%	6.89	107
Edinburgh & Lothian	*	*	*	*	*	*	*	*
Greater Glasgow	*	45.13%	22.92	123	*	45.13%	22.92	123
Highlands of Scotland	52.82%	48.29%	4.53	105	52.82%	48.29%	4.53	105
Kingdom of Fife	*	*	*	*	*	*	*	*
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	*	*	*	*	*	*	*	*
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Area	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	36.29%	34.98%	1.31	101	36.29%	34.98%	1.31	101
ALLFV	*	33.33%	3.51	104	*	33.33%	3.51	104
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	*	9.46%	0.49	100	*	9.46%	0.49	100
Edinburgh & Lothian	*	*	*	*	*	*	*	*
Greater Glasgow	*	38.16%	27.46	127	*	38.16%	27.46	127
Highlands of Scotland	43.01%	38.54%	4.47	104	43.01%	38.54%	4.47	104
Kingdom of Fife	*	*	*	*	*	*	*	*
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	*	*	*	*	*	*	*	*
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	50.81%	44.21%	6.60	107	50.81%	44.21%	6.60	107
Other Urban Areas	53.36%	47.30%	6.06	106	53.36%	47.30%	6.06	106
Accessible Small Towns	41.22%	25.59%	15.63	116	41.22%	25.59%	15.63	116
Remote Small Towns	*	26.92%	7.40	107	*	26.92%	7.40	107

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	21.13%	11.27%	9.86%	110	21.13%	11.27%	9.86%	110
11 to 25	34.71%	31.57%	3.14%	103	34.71%	31.57%	3.14%	103
26 to 50	50.68%	31.88%	18.80%	119	50.68%	31.88%	18.80%	119
51 to 100	52.96%	42.58%	10.38%	110	52.96%	42.58%	10.38%	110
Over 100	*	33.37%	-11.97%	88	*	33.37%	-11.97%	88
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by tariff – January 2023/2022

Tariff	Jan 23	Jan 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	45.40%	33.11%	12.29%	112	45.40%	33.11%	12.29%	112
£60 - £69.99	*	49.42%	-11.54%	88	*	49.42%	-11.54%	88
£70 +	48.71%	40.61%	8.10%	108	48.71%	40.61%	8.10%	108
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by tariff – January 2023/2022

Tariff	Jan 23	Jan 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	49.22%	27.73%	21.49%	121	49.22%	27.73%	21.49%	121
£60 - £69.99	*	32.83%	0.41%	100	*	32.83%	0.41%	100
£70 +	38.70%	35.61%	3.09%	103	38.70%	35.61%	3.09%	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by grading – January 2023/2022

Grading	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	*	*	*	*
3 Stars	39.00%	32.91%	6.09	106	39.00%	32.91%	6.09	106
4 Stars	49.33%	46.00%	3.33	103	49.33%	46.00%	3.33	103
5 Stars	*	*	*	*	*	*	*	*
Unclassified	47.73%	46.27%	1.46	101	47.73%	46.27%	1.46	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by grading – January 2023/2022

Grading	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	*	*	*	*
3 Stars	30.01%	37.37%	-7.36	93	30.01%	37.37%	-7.36	93
4 Stars	38.30%	40.75%	-2.45	98	38.30%	40.75%	-2.45	98
5 Stars	*	*	*	*	*	*	*	*
Unclassified	35.22%	35.32%	-0.10	100	35.22%	35.32%	-0.10	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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