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SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

April 2024/2023 Report - HOTELS

1.0 Introduction April 2024/2023

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering April 2024 and benchmarking against April 2023. 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 April 2024

The SOAS Report: April 2024/2023 Hotels report shows an increase in occupancy in the Serviced sector in Scotland compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for April 2024 experienced a **4.56** percentage point increase when comparing percentage room occupancy rates with April 2023. Occupancy rates within the Hotel sector experienced a **12.22** percentage point increase in April 2024 compared to the same period last year.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to April 2024 is 2.3%, down from 3.2% in April. The inflation rate for April 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.6%. Inflation rates for restaurants and cafes were 6.1% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in April showed a 4% year-on-year decrease. It should be noted that with Easter falling in April the year-on-year figures will be distorted, therefore, by adjusting the April and April together this now shows a 0.2% decrease. After a strong start in the first quarter, total food sales dropped by 3.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the April 2024 survey). The survey recorded 48% of respondents (a 4% increase on the April 2024 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 intended to take a domestic overnight trip in the second quarter of 2024, this is a slight decrease compared with April 2023, with 78% of UK adults intending to take a domestic overnight trip in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather and Personal finances.

The recovery in international inbound visitation continued to grow in April 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2023, however, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019.



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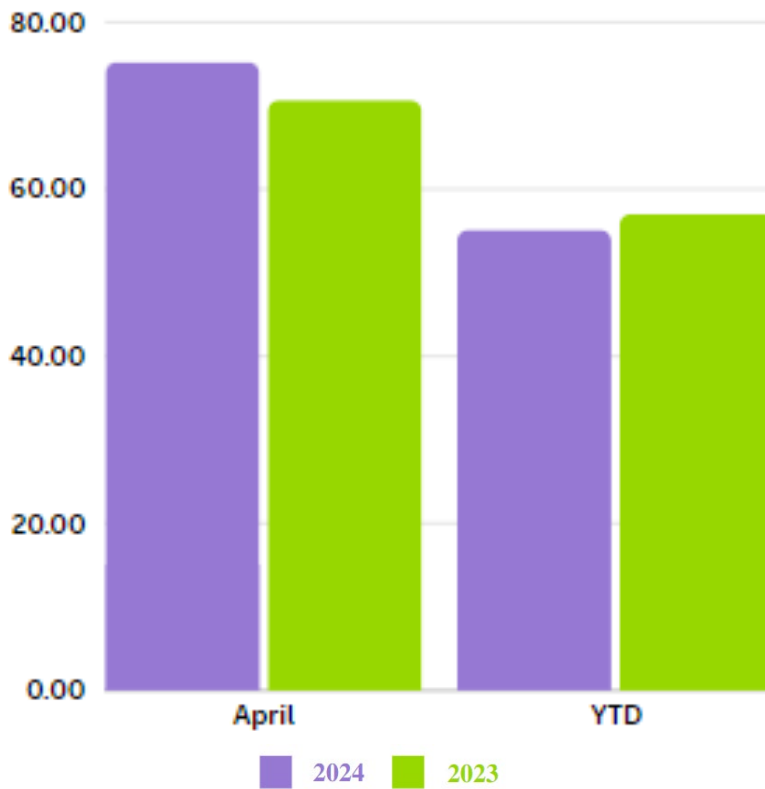
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All Serviced Accommodation

Room Occupancy – April 2024/2023

48

Scottish Serviced Accommodation room occupancy rates for April 2024 experienced a **4.56** percentage point increase when comparing percentage room occupancy rates with April 2023.



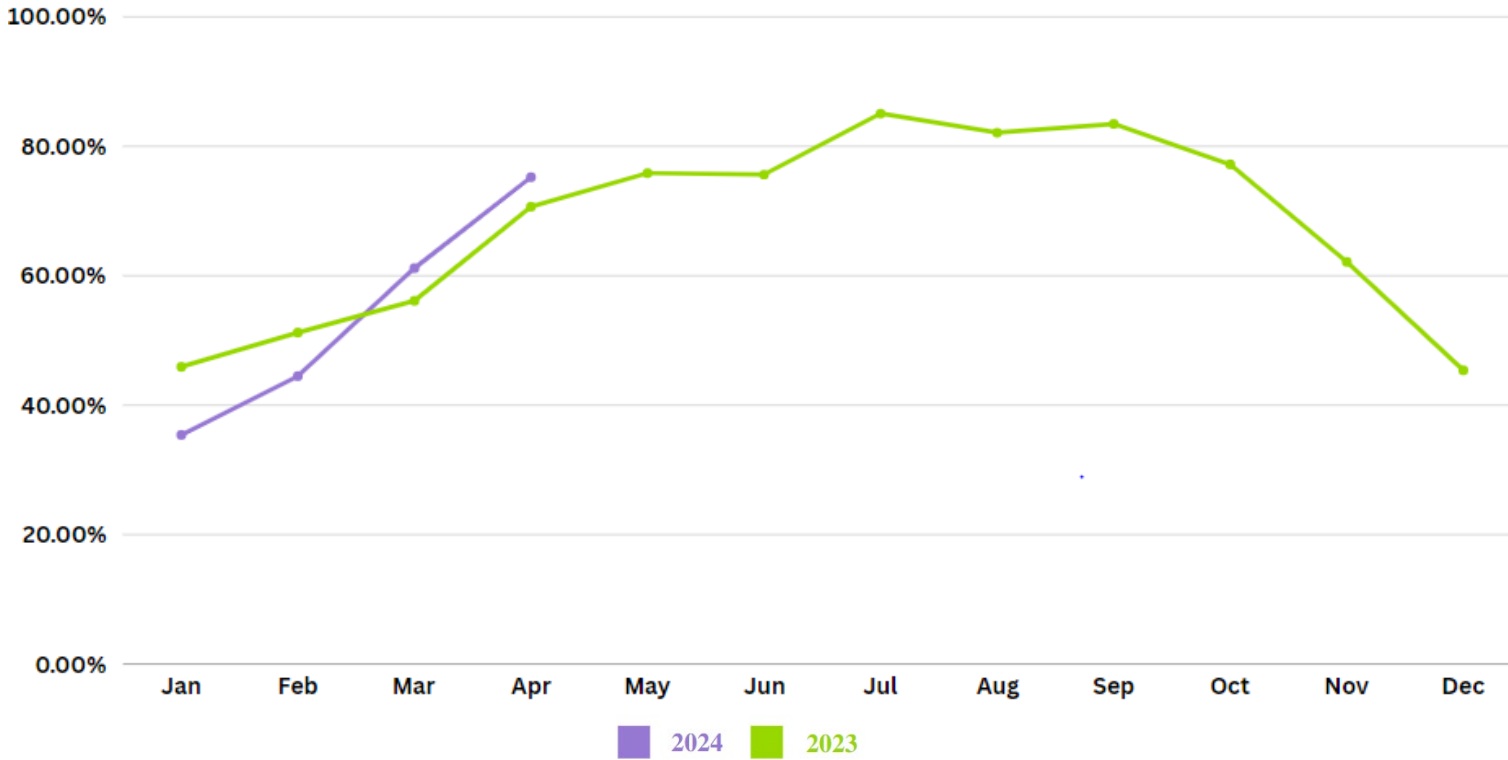


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Room Occupancy – Year-to-Date



Room Occupancy	April 24	April 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	75.22%	70.66%	4.56	105	55.16%	57.04%	-1.88	98
Bed Occupancy	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	62.81%	64.00%	-1.19	99	53.67%	47.50%	6.17	106

¹ 24/23 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.



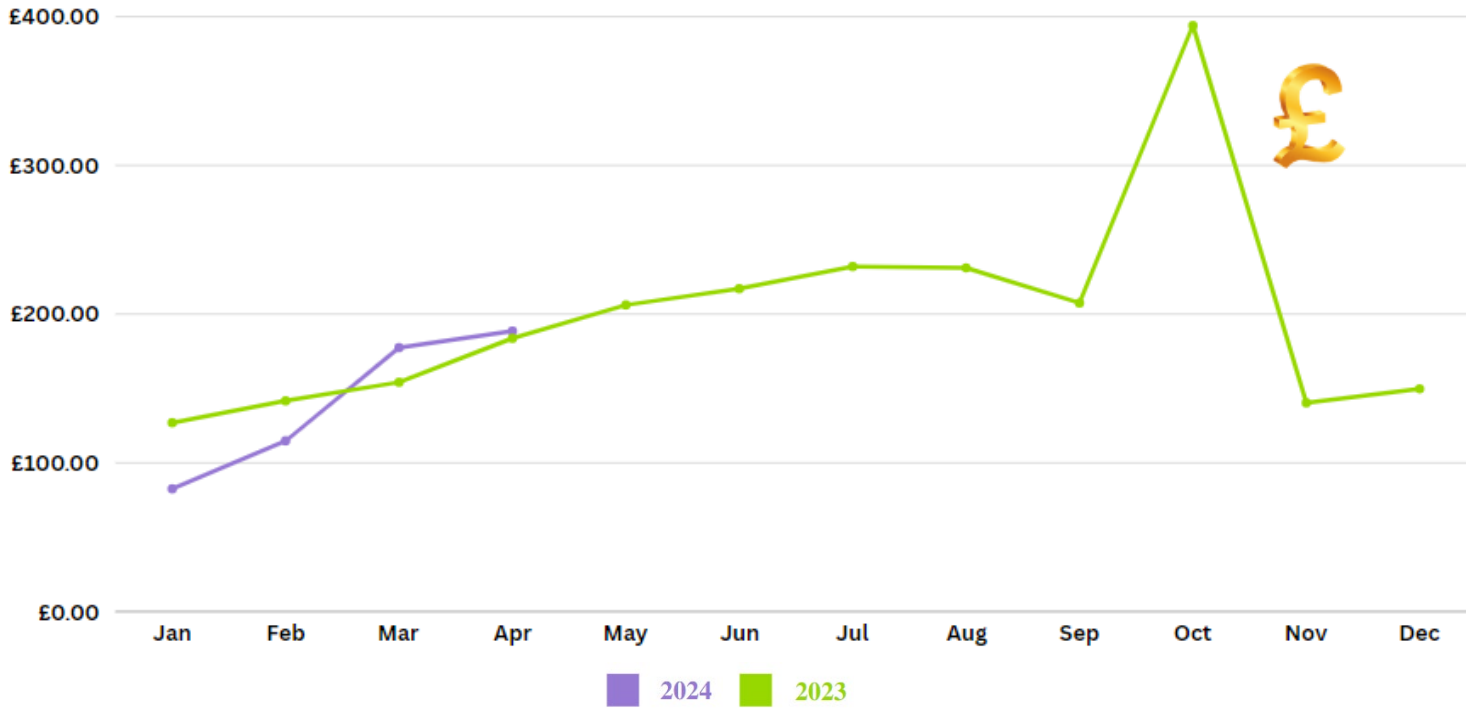
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RevPAR

The Revenue per available occupied room for April 2024 was **£188.59** compared with **£183.71** in April 2023. This figure is based solely on accommodation providers who provided financial information for April 2024 and/or 2023.



RevPAR - Year to Date 2024/2023

Room - Average RevPAR (£)	April 24	April 23
All Serviced Accommodation	£188.59	£183.71

RevPAR by Grading- April 2024/21

Grading - Average RevPAR (£)	April 24	April 23
2 Stars	£185.37	£114.72
3 Stars	£166.98	£161.20
4 Stars	£214.80	£221.13
5 Stars	£243.50	£311.22
Unclassified	£57.04	£-



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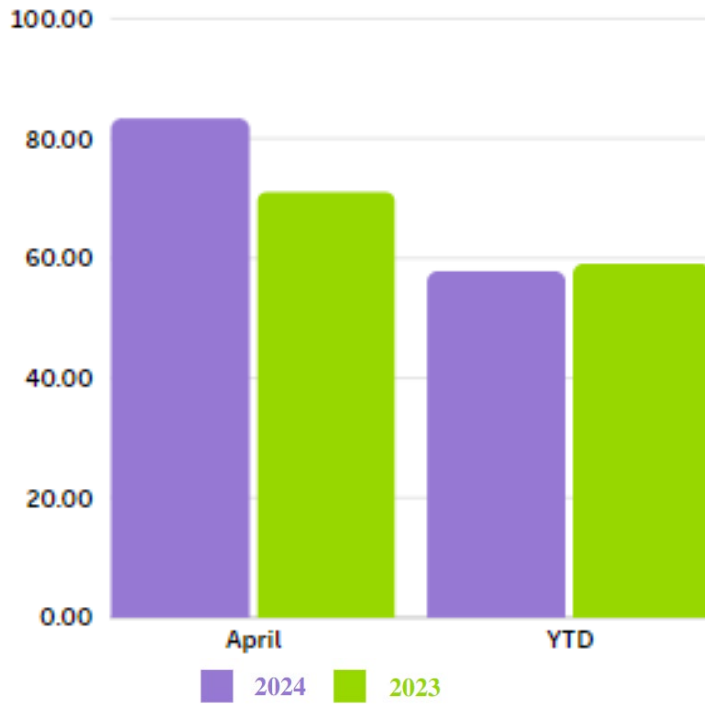


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3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – April 2024/2023



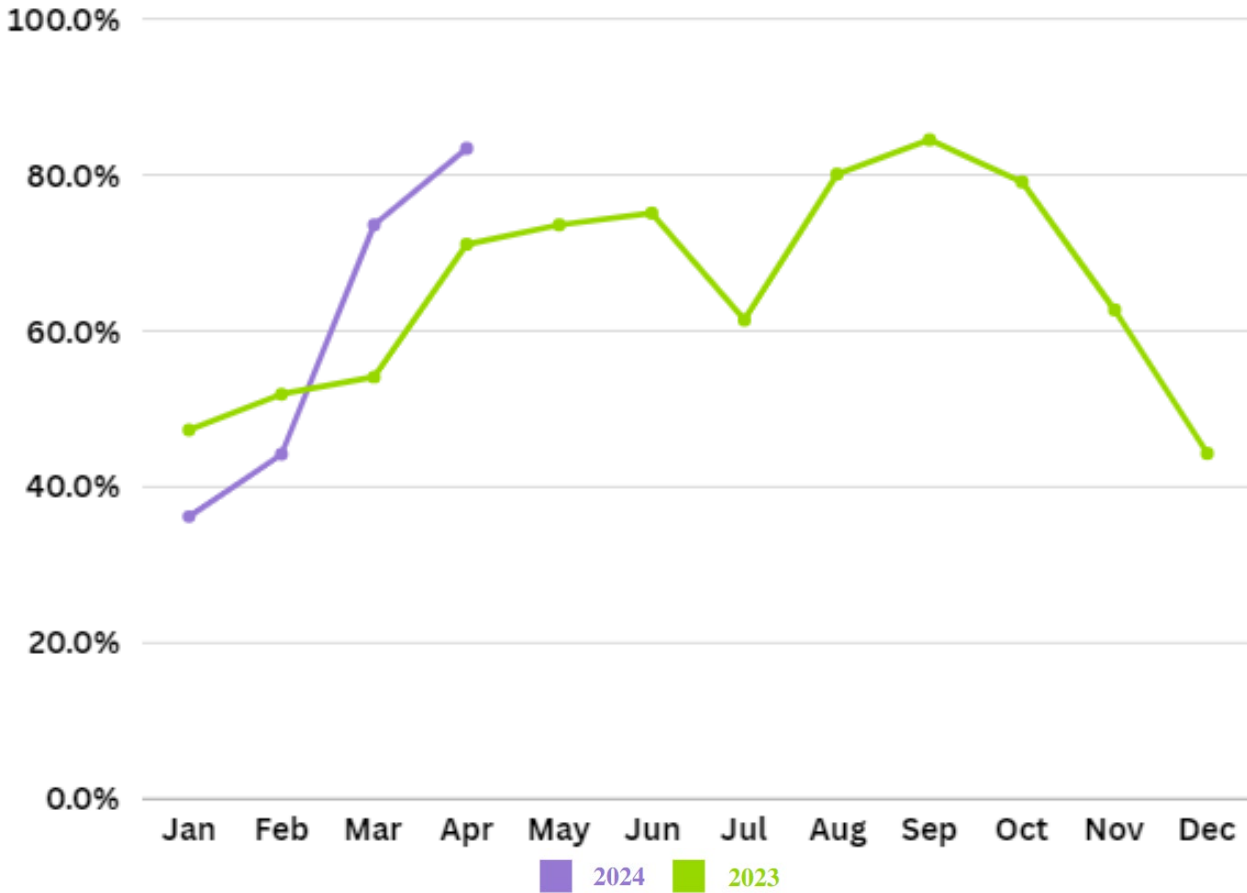


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Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for April 2024 was **83.35%** compared to data from the previous year of **71.13%** occupancy rate; this shows an overall percentage point increase of **12.22**.

Percentage room occupancy rates for Hotels (sample size >4) in Greater Glasgow with the percentage bed occupancy rates in the Argyll, Loch Lomond & Forth Valley Region were the highest in April 2024. Operators in Large Urban Areas and properties charging tariff over £70.00 fared best in room occupancy rates in April 2024.

The table below shows the **Room Occupancy** rate recorded for April 2024/2023 as well as the Change calculation for the **Hotel Sector**.

Room Occupancy	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	83.35%	71.13%	12.22	112	57.85%	59.12%	-1.27	99

In the **Hotel sector**, the bed occupancy rate for April 2024 was **63.99%** compared to data from the previous year of **65.01%** occupancy rate; this shows an overall percentage point decrease of **1.02**.

The table below shows the **Bed Occupancy** rate recorded for April 2024/2023 as well as the 24/23 Diff calculation for the **Hotel sector**

Bed Occupancy	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	63.99%	65.01%	-1.02	99	55.61%	49.93%	5.68	106



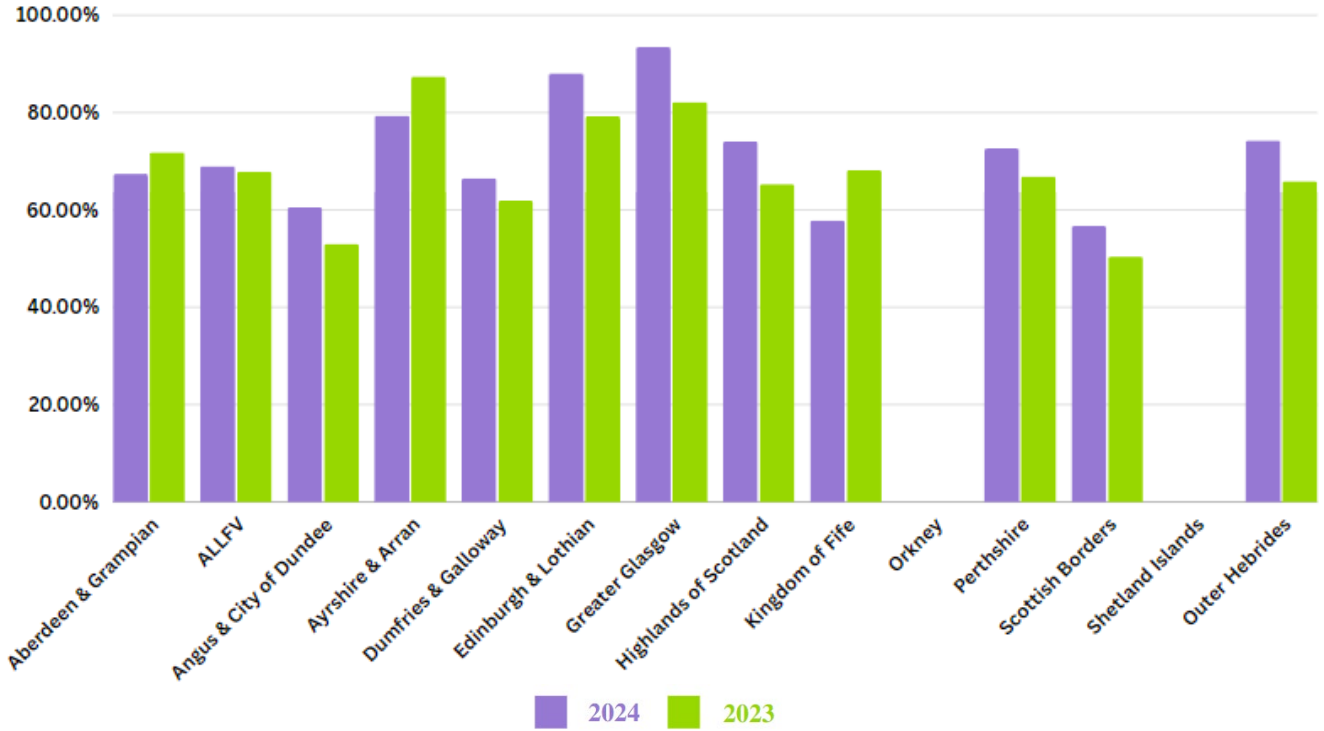
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Room Occupancy by Former VisitScotland Area

Hotel Room Occupancy by Former VisitScotland Area – April 2024/2023



Room Occupancy by Former Visit Scotland Area – April 2024/2023

Area	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	67.42%	71.83%	-4.41	96	58.90%	57.33%	1.57	102
ALLFV	68.98%	67.87%	1.11	101	61.57%	59.75%	1.82	102
Angus & City of Dundee	*	*	*	*	53.69%	49.78%	3.91	104
Ayrshire & Arran	*	*	*	*	73.04%	79.70%	-6.66	93
Dumfries & Galloway	*	*	*	*	41.19%	40.46%	0.73	101
Edinburgh & Lothian	*	*	*	*	73.10%	55.53%	17.57	118
Greater Glasgow	93.49%	*	11.33	111	54.47%	72.57%	-18.10	82
Highlands of Scotland	74.09%	65.30%	8.79	109	67.26%	59.59%	7.67	108
Kingdom of Fife	*	*	*	*	48.36%	55.76%	-7.40	93
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	58.41%	58.99%	-0.58	99
Scottish Borders	*	*	*	*	47.17%	38.61%	8.56	109
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	59.03%	52.57%	6.46	106

- Sample Size = Nil

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



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Room Occupancy by Tariff – April 2024/2023

Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	-	*	*	40.63%	*	20.31	120
£50 – 59.99	*	*	*	*	59.26%	54.40%	4.86	105
£60 - £69.00	69.97%	68.23%	1.74	102	58.95%	46.74%	12.21	112
£70+	85.68%	72.10%	13.58	114	58.08%	60.67%	-2.59	97

- Sample Size = Nil

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

Bed Occupancy by Tariff – April 2024/2023

Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	-	*	*	0.00%	*	-9.95	90
£50 – 59.99	*	*	*	*	33.17%	56.76%	-23.59	76
£60 - £69.00	65.79%	56.04%	9.75	110	62.09%	38.50%	23.59	124
£70+	65.15%	66.46%	-1.31	99	54.99%	50.91%	4.08	104

- Sample Size = Nil

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

Room Occupancy by Grading – April 2024/2023

Grading	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	70.62%	64.55%	6.07	106
3 Stars	76.88%	62.27%	14.61	115	63.41%	49.89%	13.52	114
4 Stars	88.26%	72.96%	15.30	115	51.73%	61.60%	-9.87	90
5 Stars	*	*	*	*	*	73.91%	-37.04	63
Unclassified	*	74.57%	10.05	110	74.61%	59.24%	15.37	115

- Sample Size = Nil

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

Bed Occupancy by Grading – April 2024/2023

Grading	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	66.83%	54.78%	12.05	112
3 Stars	55.16%	59.62%	-4.46	96	46.06%	43.74%	2.32	102
4 Stars	66.91%	64.23%	2.68	103	58.04%	49.82%	8.22	108
5 Stars	*	*	*	*	*	73.78%	-45.05	55
Unclassified	*	41.50%	0.96	101	41.12%	28.80%	12.32	112

- Sample Size = Nil

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