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# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## *December 2024/2023 Report - HOTELS*

### 1.0 Introduction December 2024/2023

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering December 2024 and benchmarking against December 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](mailto:hugh.sheridan@gcu.ac.uk)).

### 2.0 Executive Summary December 2024

The SOAS Report: December 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 December 2024 experienced an **12.83** percentage point increase when comparing percentage room occupancy rates with December 2023. Occupancy rates within the Hotel sector experienced a **19.71** percentage point increase in December 2024 compared to last year.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to December 2024 is 2.5%, up from 2.6% in November. The CPI 12-month rate (%) for December 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.4% down from 3.6% in November. Inflation rates for restaurants and cafes were 3.4% down from 4.0% in November.

Data from the Scottish Retail Consortium showed that total sales in Scotland increased by 0.8% in December compared to the same period in 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering December 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (no change on the November 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the November 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, 26% of UK adults intended to take a domestic overnight trip in the first quarter of 2025 and 80% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (78%). However, the three key barriers to taking an overnight UK trip in the next six months continue to be the UK weather, rising cost of living, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

Eurocontrol (European Air Traffic Agency) indicated in December 2024 that UK air connectivity saw a 1% decrease when compared to the same period in 2023, also, UK air connectivity saw a 9% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for December 2024 global air passenger demand, measured by revenue per kilometer, was up 8.6% compared to December 2023. International demand rose 10.6% over the same period with domestic demand increasing 5.5%. Asia-Pacific region was the biggest global air passenger growth driver in December 2024 at 16.9% when compared to Europe at 8.7%.



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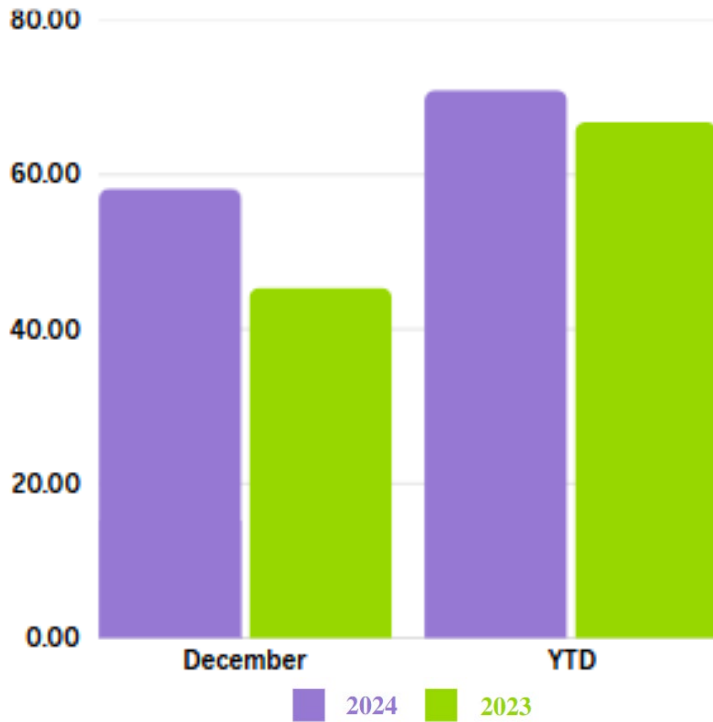


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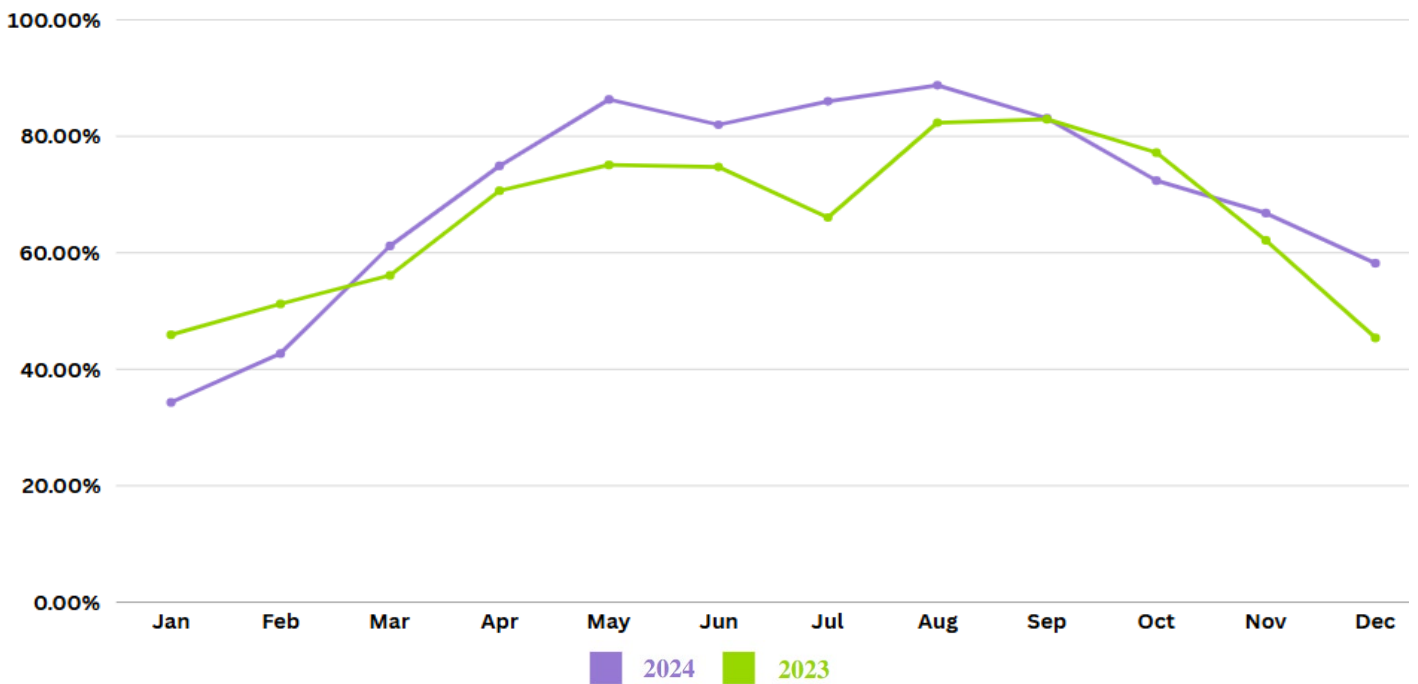
### All Serviced Accommodation

#### Room Occupancy – December 2024/2023

Scottish Serviced Accommodation room occupancy for December 2024 experienced a **12.83** percentage point increase when comparing percentage room occupancy rates with December 2023.



#### Room Occupancy – Year-to-Date





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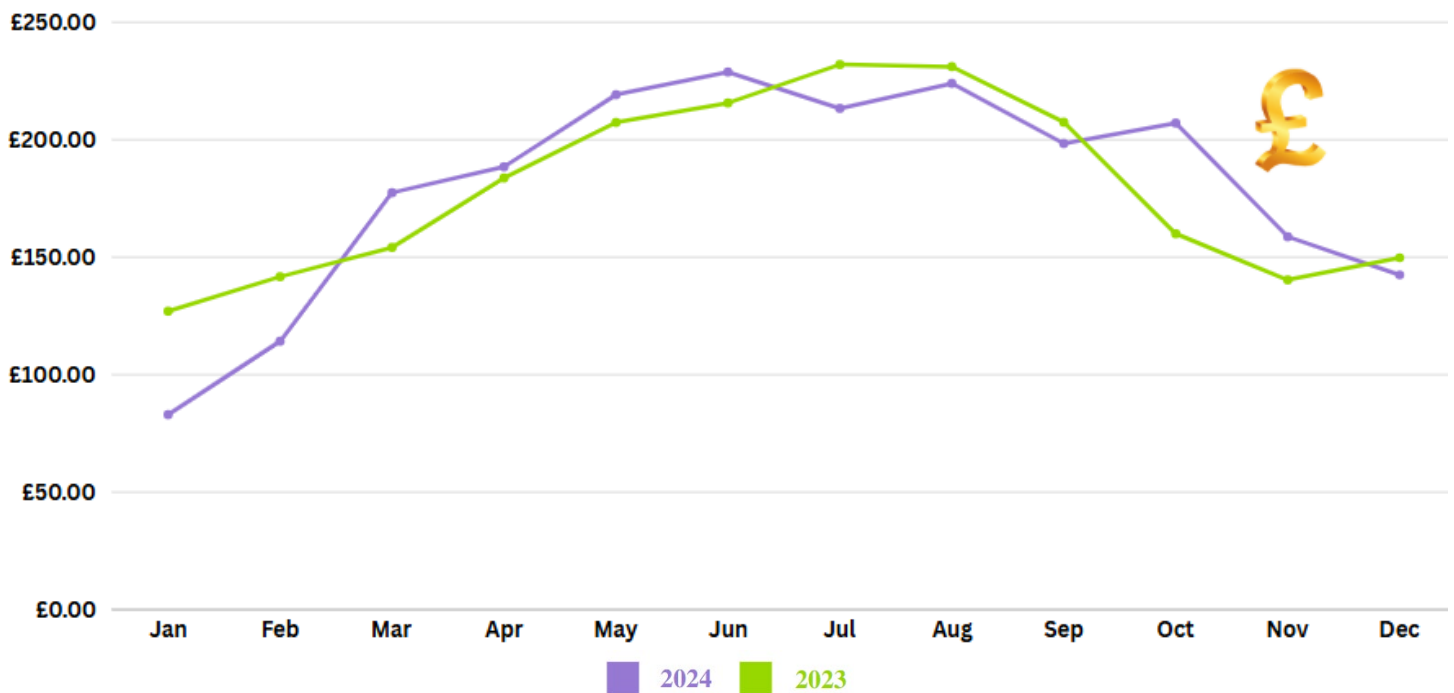
Room Occupancy	December 24	December 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	58.21%	45.38%	12.83	113	70.96%	66.80%	4.16	104

Bed Occupancy	December 24	December 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	35.74%	54.39%	-18.65	81	63.20%	58.00%	5.20	105

### RevPAR

The Revenue per available occupied room for December 2024 was **£142.43** compared with **£149.76** in December 2023. This figure is based solely on accommodation providers who provided financial information for December 2024 and/or 2023.



<sup>1</sup> 24/23 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.



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### RevPAR – Year to Date 2024/2023

Room – Average RevPAR (£)	December 24	December 23
All Serviced Accommodation	£142.43	£149.76

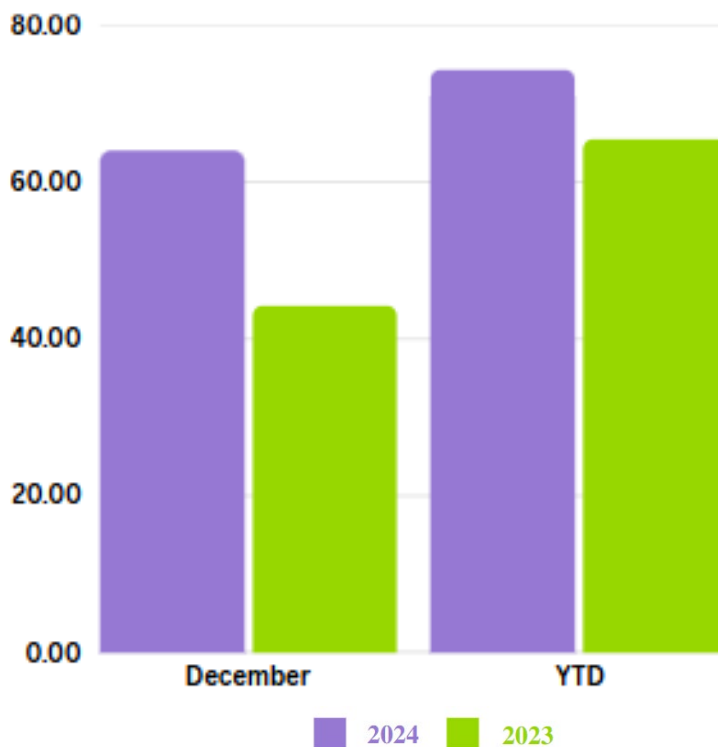
### RevPAR by Grading- December 2024/21

Grading – Average RevPAR (£)	December 24	December 23
2 Stars	£87.98	£77.91
3 Stars	£223.24	£126.51
4 Stars	£88.37	£185.91
5 Stars	£319.82	£330.56
Unclassified	£	£

## 3.0 Serviced Accommodation – Hotel Sector

### 3.1 Performance by Hotel Category

#### Hotel Room Occupancy – December 2024/2023



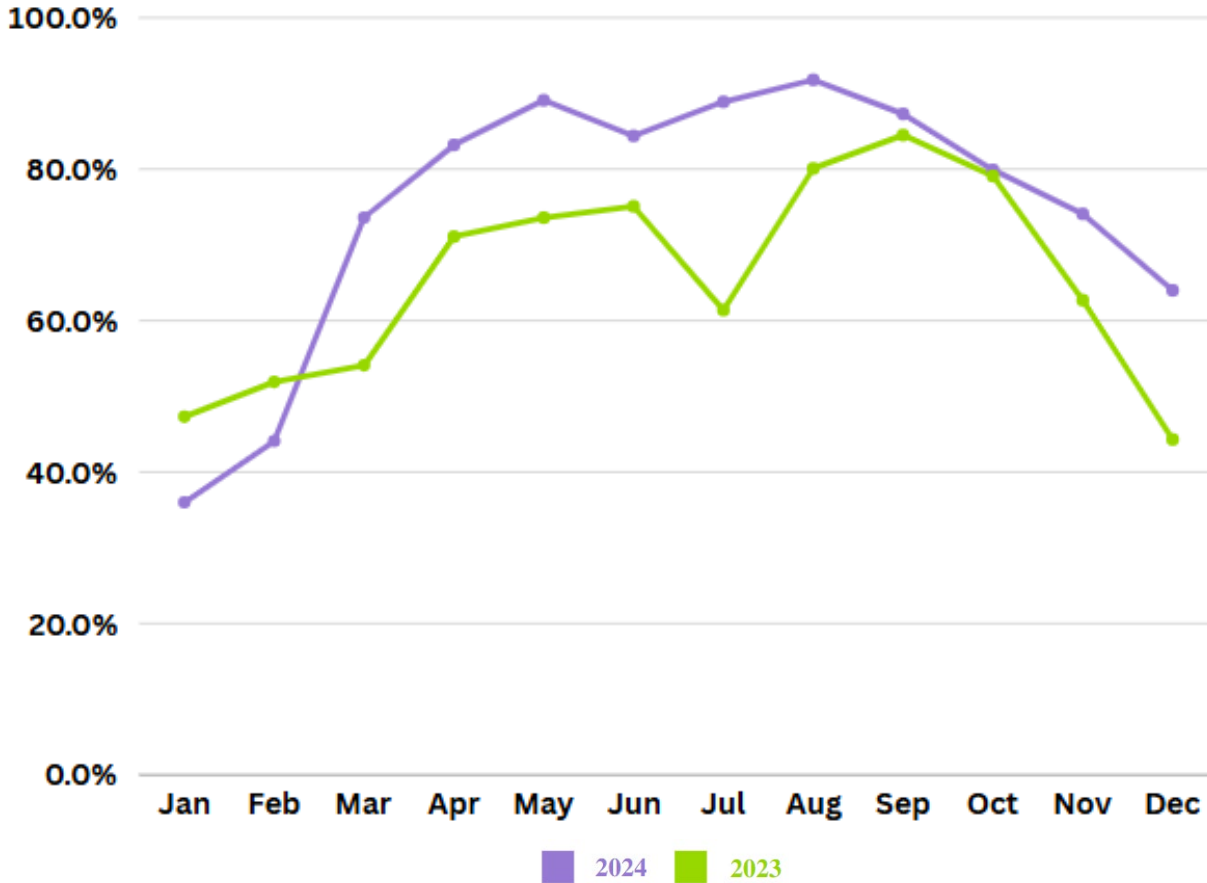


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### Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for December 2024 was **64.00%** compared to data from the previous year of **44.29%** occupancy rate; this shows an overall percentage point increase of **19.71**.

Percentage room and bed occupancy rates for Hotels (sample size >4) in Edinburgh & Lothian Region were the highest in December 2024. Operators in Large Urban Areas and properties charging tariff over £70.00 fared best in room occupancy rates in December 2024.

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

Room Occupancy	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Hotel</b>	64.00%	44.29%	19.71	120	74.36%	65.51%	8.85	109

In the **Hotel sector**, the bed occupancy rate for December 2024 was **49.93%** compared to data from the previous year of **51.37%** occupancy rate; this shows an overall percentage point decrease of **1.44**.

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

Bed Occupancy	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Hotel</b>	49.93%	51.37%	-1.44	99	64.16%	54.72%	9.44	109



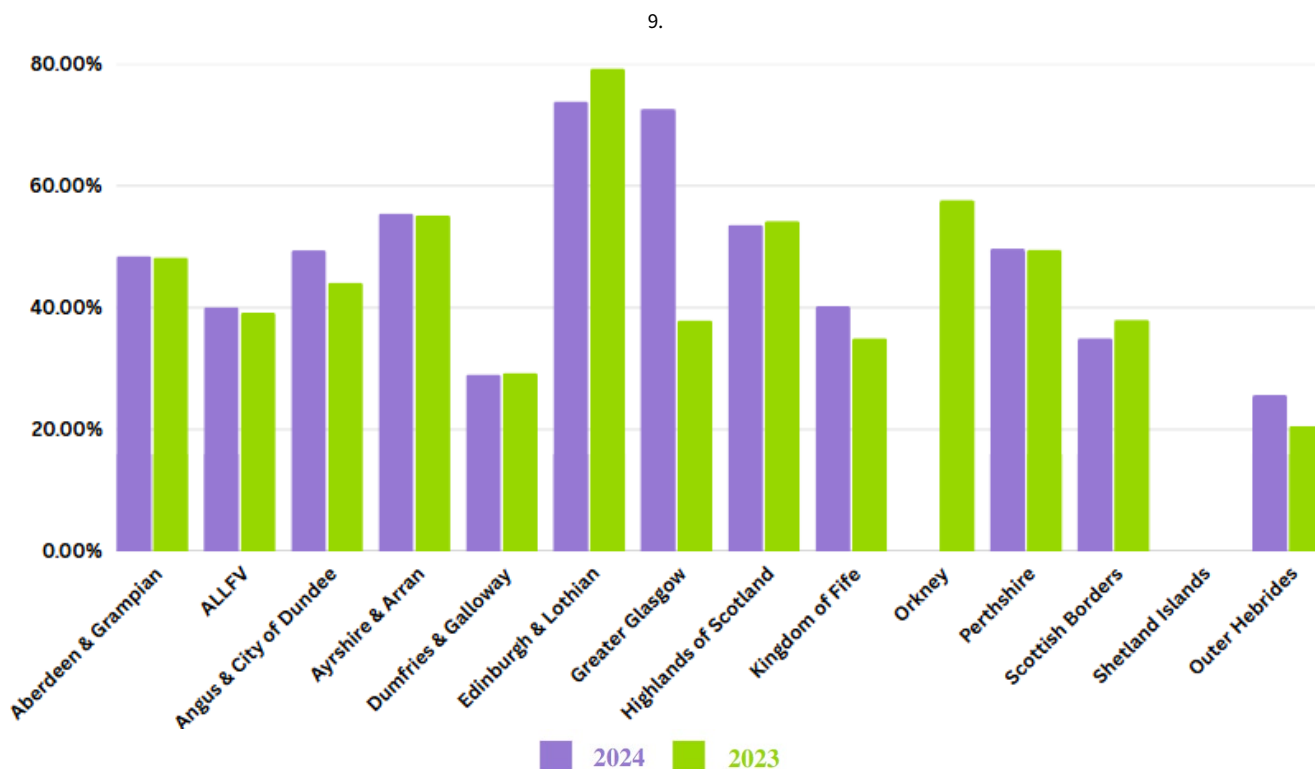
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## Room Occupancy by Former VisitScotland Area

### Hotel Room Occupancy by Former VisitScotland Area – December 2024/2023



### Room Occupancy by Former Visit Scotland Area – December 2024/2023

Area	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	48.47%	48.24%	0.23	100	69.77%	69.01%	0.76	101
ALLFV	40.08%	39.17%	0.91	101	69.92%	70.19%	-0.27	100
Angus & City of Dundee	*	*	*	*	66.50%	65.90%	0.60	101
Ayrshire & Arran	*	*	*	*	78.13%	81.40%	-3.27	97
Dumfries & Galloway	*	*	*	*	55.87%	54.39%	1.48	101
Edinburgh & Lothian	73.85%	*	-5.42	95	84.51%	74.45%	10.06	110
Greater Glasgow	72.59%	37.92%	34.67	135	76.36%	57.52%	18.84	119
Highlands of Scotland	53.59%	54.22%	-0.63	99	75.82%	72.13%	3.69	104
Kingdom of Fife	*	*	*	*	60.40%	65.35%	-4.95	95
Orkney	-	*	*	*	-	82.87%	-82.87	17
Perthshire	*	*	*	*	70.70%	64.53%	6.17	106
Scottish Borders	35.01%	*	-2.95	97	57.39%	51.23%	6.16	106
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	69.12%	67.51%	1.61	102

- Sample Size = Nil

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





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### Room Occupancy by Location (Geographic) – December 2024/2023

Location (Geographic)	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	43.71%	58.72%	-15.01	85	65.99%	66.54%	-0.55	99
Inland	66.57%	42.94%	23.63	124	75.68%	64.88%	10.80	111
Island	36.32%	35.12%	1.20	101	73.03%	70.94%	2.09	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Location (Geographic) – December 2024/2023

Location (Geographic)	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	28.77%	49.86%	-21.09	79	58.51%	53.73%	4.78	105
Inland	52.50%	52.50%	0.00	100	65.17%	54.26%	10.91	111
Island	50.42%	40.16%	10.26	110	68.57%	68.86%	-0.29	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Size– December 2024/2023

Size	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	*	31.45%	-0.23	100	49.28%	55.87%	-6.59	93
11 to 25	39.86%	41.42%	-1.56	98	62.77%	61.64%	1.13	101
26 to 50	65.54%	61.30%	4.24	104	80.78%	77.73%	3.05	103
51 to 100	63.90%	62.37%	1.53	102	75.52%	78.58%	-3.06	97
Over 100	71.87%	39.15%	32.72	133	77.87%	57.88%	19.99	120
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Size – December 2024/2023

Size	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	*	44.87%	-44.87	55	42.85%	36.98%	5.87	106
11 to 25	27.16%	40.11%	-12.95	87	56.57%	58.59%	-2.02	98
26 to 50	40.18%	52.26%	-12.08	88	70.32%	68.31%	2.01	102
51 to 100	54.65%	57.04%	-2.39	98	60.78%	68.69%	-7.91	92
Over 100	69.74%	65.45%	4.29	104	76.63%	39.57%	37.06	137
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



