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SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2024/2023 Report - HOTELS

1.0 Introduction August 2024/2023

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering August 2024 and benchmarking against August 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 August 2024

The SOAS Report: August 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 August 2024 experienced a **6.43** percentage point increase when comparing percentage room occupancy rates with August 2023. Occupancy rates within the Hotel sector experienced a **11.69** percentage point increase in August 2024 compared to last year.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to August 2024 is 2.2%, unchanged from July. The inflation 12-month rate (%) for August 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.0%. Inflation rates for restaurants and cafes were 4.3% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in August, however, compared to the 5.6% increase in August 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of August 2023, when they had increased by 8.6%.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the July 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the July 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 August to September sector of 2024 and 79% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, the three key barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather, 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.

The recovery in international inbound visitation grew in August 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 1% increase when compared to the same period in 2023, however, UK air connectivity saw a 5% decrease in year-to-date flights compared to 2019.



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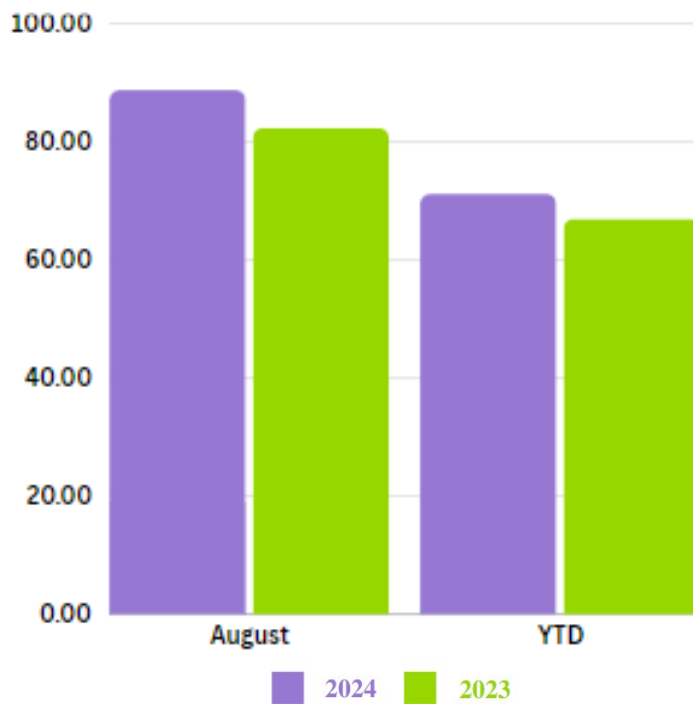
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All Serviced Accommodation

Room Occupancy – August 2024/2023

48

Scottish Serviced Accommodation room occupancy rates for August 2024 experienced a **6.43** percentage point increase when comparing percentage room occupancy rates with August 2023.



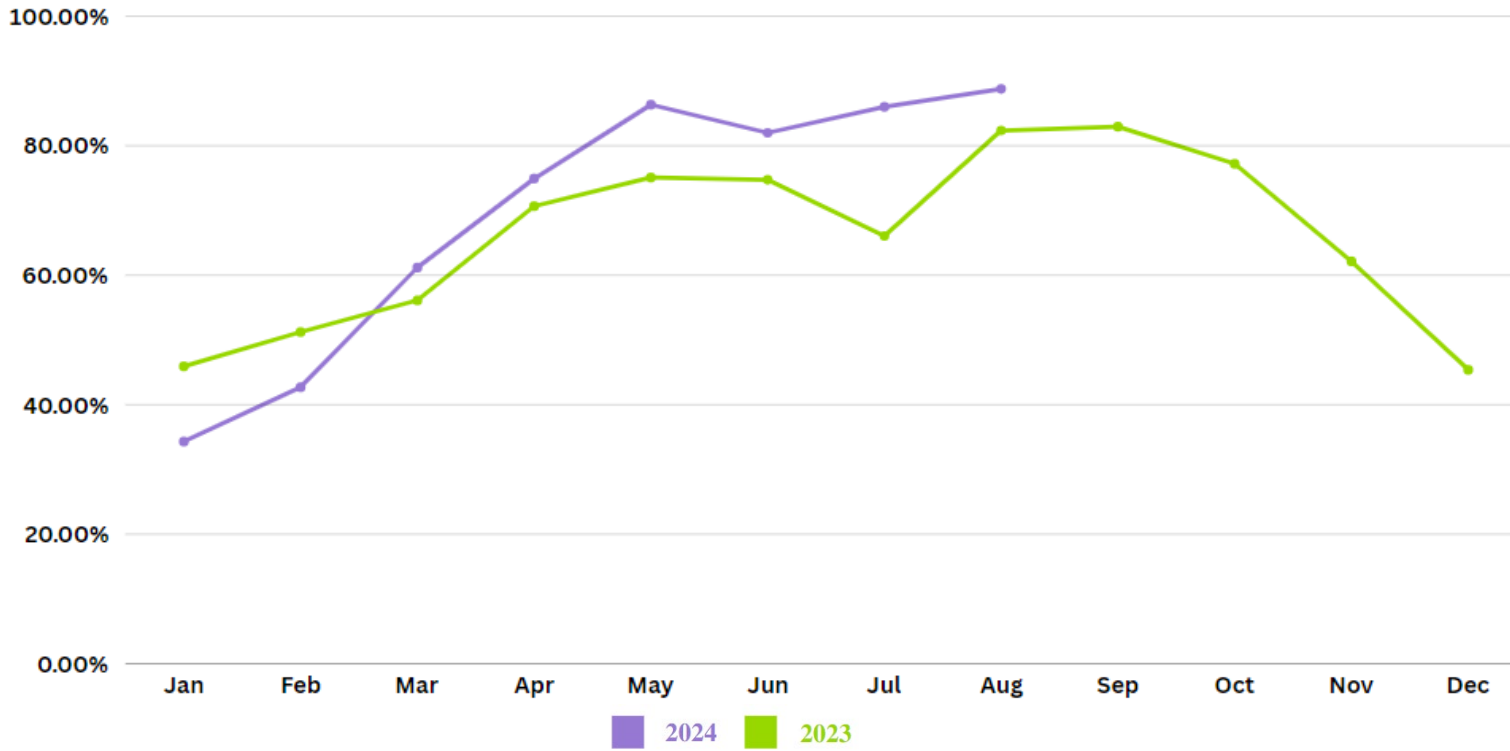
Room Occupancy – Year-to-Date



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Room Occupancy	August 24	August 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	88.77%	82.34%	6.43	106	71.19%	66.97%	4.22	104

Bed Occupancy	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	81.72%	75.94%	5.78	106	64.93%	56.82%	8.11	108

RevPAR

The Revenue per available occupied room for August 2024 was **£223.99** compared with **£231.12** in August 2023. This figure is based solely on accommodation providers who provided financial information for August 2024 and/or 2023.

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.

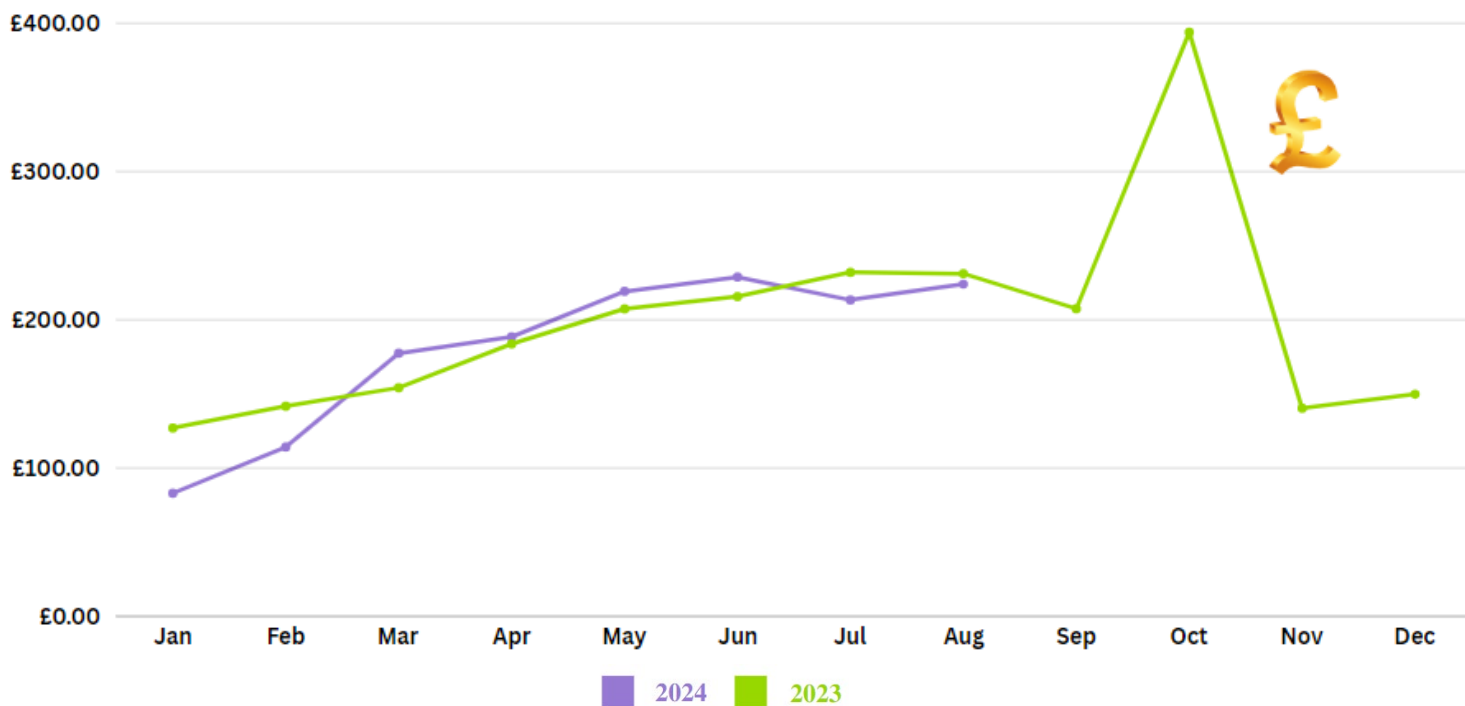


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RevPAR – Year to Date 2024/2023

Room – Average RevPAR (£)	August 24	August 23
All Serviced Accommodation	£223.99	£231.12

RevPAR by Grading- August 2024/21

Grading – Average RevPAR (£)	August 24	August 23
2 Stars	£179.31	£200.84
3 Stars	£262.09	£211.64
4 Stars	£176.13	£253.71
5 Stars	£528.99	£467.76
Unclassified	£	£142.03

3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

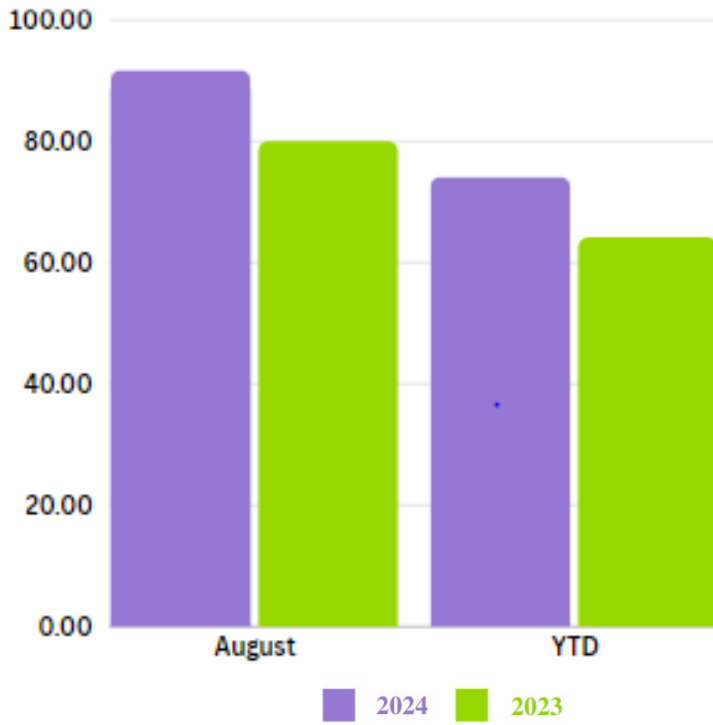
Hotel Room Occupancy – August 2024/2023



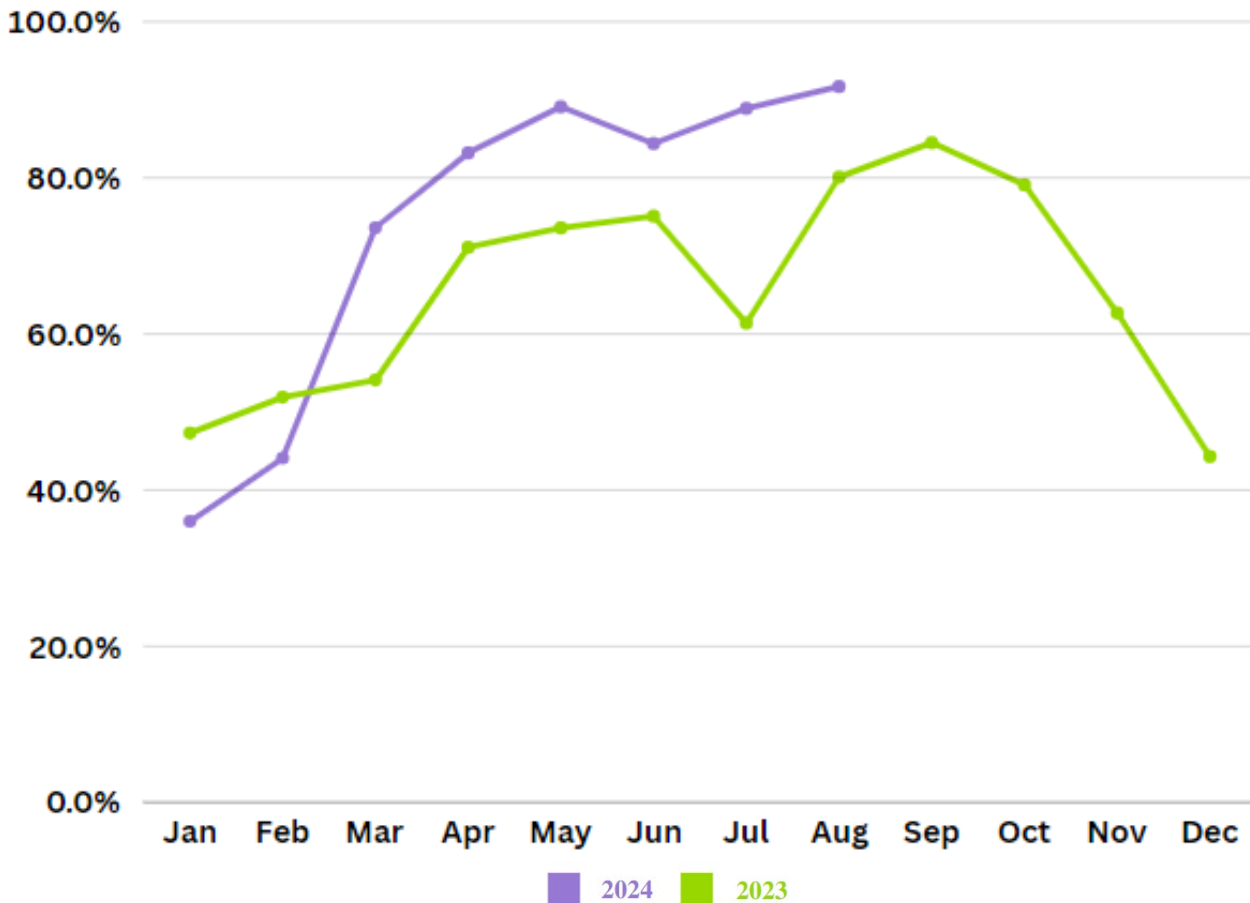
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Hotel Room Occupancy – Year to Date



In the Hotel sector, the room occupancy rate for August 2024 was **91.74%** compared to data from the previous year of **80.05%** occupancy rate; this shows an overall percentage point increase of **11.69**.



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

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

Room Occupancy	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	91.74%	80.05%	11.69	112	74.15%	64.18%	9.97	110

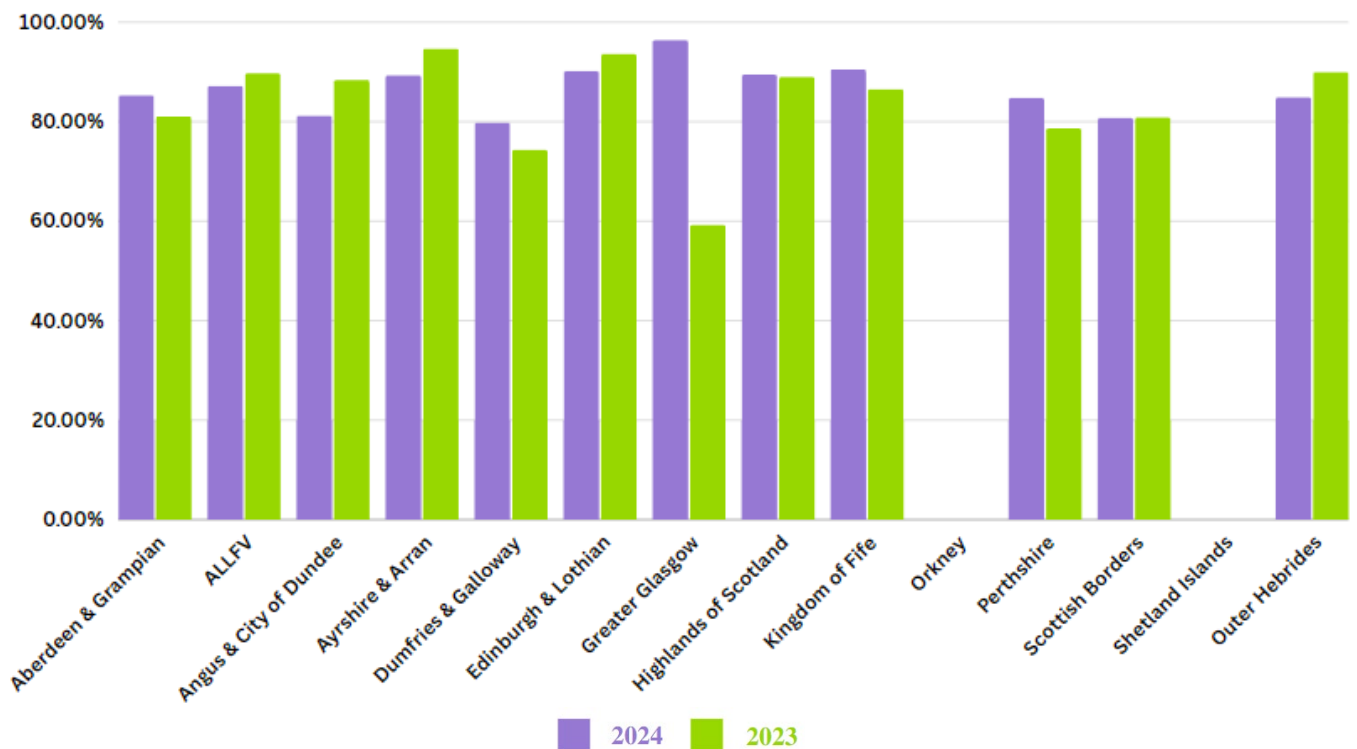
In the **Hotel sector**, the bed occupancy rate for August 2024 was **79.57%** compared to data from the previous year of **71.23%** occupancy rate; this shows an overall percentage point increase of **8.34**.

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

Bed Occupancy	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	79.57%	71.23%	8.34	108	64.97%	52.73%	12.24	112

Room Occupancy by Former VisitScotland Area

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





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

Area	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	85.31%	81.02%	4.29	104	70.34%	64.67%	5.67	106
ALLFV	87.21%	89.75%	-2.54	97	74.97%	73.08%	1.89	102
Angus & City of Dundee	*	*	*	*	67.71%	68.29%	-0.58	99
Ayrshire & Arran	*	*	*	*	79.94%	84.91%	-4.97	95
Dumfries & Galloway	*	*	*	*	59.79%	58.00%	1.79	102
Edinburgh & Lothian	90.21%	*	-3.46	97	85.05%	68.82%	16.23	116
Greater Glasgow	96.37%	59.28%	37.09	137	73.69%	50.50%	23.19	123
Highlands of Scotland	89.50%	89.03%	0.47	100	77.43%	74.60%	2.83	103
Kingdom of Fife	*	*	*	*	63.11%	71.35%	-8.24	92
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	72.92%	66.00%	6.92	107
Scottish Borders	80.81%	*	-0.09	100	62.12%	53.08%	9.04	109
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	73.23%	72.25%	0.98	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Former Visit Scotland Area – August 2024/2023

Area	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	82.94%	78.29%	4.65	105	58.11%	60.29%	-2.18	98
ALLFV	83.41%	84.04%	-0.63	99	70.01%	70.50%	-0.49	100
Angus & City of Dundee	*	*	*	*	36.00%	37.49%	-1.49	99
Ayrshire & Arran	*	*	*	*	55.74%	53.43%	2.31	102
Dumfries & Galloway	*	*	*	*	35.00%	38.65%	-3.65	96
Edinburgh & Lothian	91.45%	*	9.16	109	69.66%	55.85%	13.81	114
Greater Glasgow	84.60%	55.41%	29.19	129	72.94%	42.76%	30.18	130
Highlands of Scotland	82.89%	82.88%	0.01	100	68.25%	66.03%	2.22	102
Kingdom of Fife	*	*	*	*	0.00%	57.02%	-57.02	43
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	51.38%	49.46%	1.92	102
Scottish Borders	60.29%	*	-7.46	93	47.58%	42.54%	5.04	105
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	57.77%	60.23%	-2.46	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Location (Accessibility & Density) – August 2024/2023

Location accessibility/density	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	94.63%	70.42%	24.21	124	72.66%	54.40%	18.26	118
Other Urban Areas	93.35%	91.30%	2.05	102	82.79%	79.38%	3.41	103
Accessible Small Towns	85.06%	86.65%	-1.59	98	70.53%	70.99%	-0.46	100
Remote Small Towns	82.14%	76.81%	5.33	105	63.73%	56.33%	7.40	107



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Accessible Rural	*	*	*	*	66.44%	58.00%	8.44	108
Remote Rural	90.04%	86.52%	3.52	104	73.30%	70.72%	2.58	103

- Sample Size = Nil

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

Bed Occupancy by Location (Accessibility & Density) – August 2024/2023

Location accessibility/density	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	85.03%	63.16%	21.87	122	71.61%	44.23%	27.38	127
Other Urban Areas	75.58%	79.39%	-3.81	96	64.96%	67.18%	-2.22	98
Accessible Small Towns	83.19%	80.64%	2.55	103	56.31%	58.52%	-2.21	98
Remote Small Towns	85.18%	82.41%	2.77	103	70.39%	54.92%	15.47	115
Accessible Rural	*	*	*	*	50.37%	43.35%	7.02	107
Remote Rural	77.05%	78.02%	-0.97	99	61.87%	62.99%	-1.12	99

- Sample Size = Nil

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

Room Occupancy by Location (Geographic) – August 2024/2023

Location (Geographic)	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	83.85%	87.45%	-3.60	96	69.61%	65.80%	3.81	104
Inland	92.80%	76.01%	16.79	117	74.55%	62.91%	11.64	112
Island	95.46%	93.68%	1.78	102	77.97%	73.20%	4.77	105

- Sample Size = Nil

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

Bed Occupancy by Location (Geographic) – August 2024/2023

Location (Geographic)	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	77.00%	77.49%	-0.49	100	60.86%	55.53%	5.33	105
Inland	80.01%	67.99%	12.02	112	65.70%	50.72%	14.98	115
Island	82.16%	83.17%	-1.01	99	68.49%	71.45%	-2.96	97

- Sample Size = Nil

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

Room Occupancy by Size – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	79.37%	78.62%	0.75	101	60.62%	58.90%	1.72	102
11 to 25	83.86%	86.18%	-2.32	98	65.18%	64.40%	0.78	101
26 to 50	90.62%	91.48%	-0.86	99	81.74%	79.78%	1.96	102
51 to 100	87.02%	89.68%	-2.66	97	76.25%	78.11%	-1.86	98
Over 100	97.09%	63.11%	33.98	134	75.24%	48.11%	27.13	127

- Sample Size = Nil

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

Bed Occupancy by Size – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
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1 to 3	-	-	-	-	-	-	-	-
4 to 10	0.00%	65.97%	-65.97	34	62.61%	41.52%	21.09	121
11 to 25	78.85%	81.33%	-2.48	98	57.78%	62.53%	-4.75	95
26 to 50	85.18%	83.81%	1.37	101	73.49%	69.60%	3.89	104
51 to 100	75.21%	79.36%	-4.15	96	61.98%	67.98%	-6.00	94
Over 100	85.14%	54.78%	30.36	130	77.93%	36.18%	41.75	142
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Tariff – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	*	*	*	41.86%	*	2.96	103
£50 – 59.99	*	*	*	*	67.04%	49.32%	17.72	118
£60 – £69.00	86.44%	*	0.09	100	72.01%	63.30%	8.71	109
£70+	92.66%	80.41%	12.25	112	74.93%	64.73%	10.20	110
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Tariff – August 2024/2023

Tariff	August 24	August 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	*	*	*	*	33.13%	44.03%	-10.90	89
£60 – £69.00	40.26%	*	-30.83	69	68.27%	50.48%	17.79	118
£70+	80.98%	71.53%	9.45	109	64.74%	53.16%	11.58	112
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Grading – August 2024/2023

Grading	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	78.88%	75.40%	3.48	103
3 Stars	90.32%	83.59%	6.73	107	76.65%	68.38%	8.27	108
4 Stars	93.67%	73.88%	19.79	120	70.32%	57.67%	12.65	113
5 Stars	*	*	*	*	56.69%	57.69%	-1.00	99
Unclassified	88.81%	*	2.16	102	80.77%	63.85%	16.92	117
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading – August 2024/2023

Grading	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	74.19%	65.67%	8.52	109
3 Stars	77.21%	75.55%	1.66	102	60.96%	60.80%	0.16	100
4 Stars	84.52%	65.64%	18.88	119	64.45%	44.47%	19.98	120



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5 Stars	*	*	*	*	45.75%	46.44%	-0.69	99
Unclassified	68.13%	*	-12.67	87	49.82%	52.77%	-2.95	97

- Sample Size = Nil

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