

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: *July 2023/2022 Report - HOTELS*

1.0 Introduction July 2023/2022

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

2.0 Executive Summary July 2023

The SOAS Report: July 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 July 2023 experienced a **2.95** percentage point increase when comparing percentage room occupancy rates with July 2022. Occupancy rates within the Hotel sector experienced a **0.28** percentage point increase in July 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that total retail sales figures decreased by 3% year-on-year in July. Retail sales in Scotland held steady for July with a growth of 4.6%. Food sales continue to be the biggest growth area, however, many customers were seeking more warming traditional foods instead of the seasonal specials.

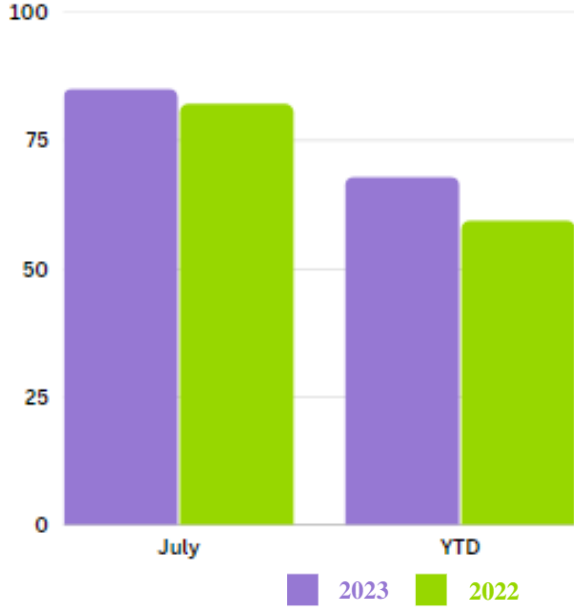
Domestic consumer sentiment provided by the GB National Tourist Boards for July 2023 found that 23% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the July 2023 survey). The survey recorded 45% of respondents (a 1% decrease on the July 2023 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, 50% of UK adults intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 75% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were the rising cost of living, UK weather and Personal finances. The figures above 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 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 stalled in July 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 7% decrease in year-to-date flights compared to 2019.

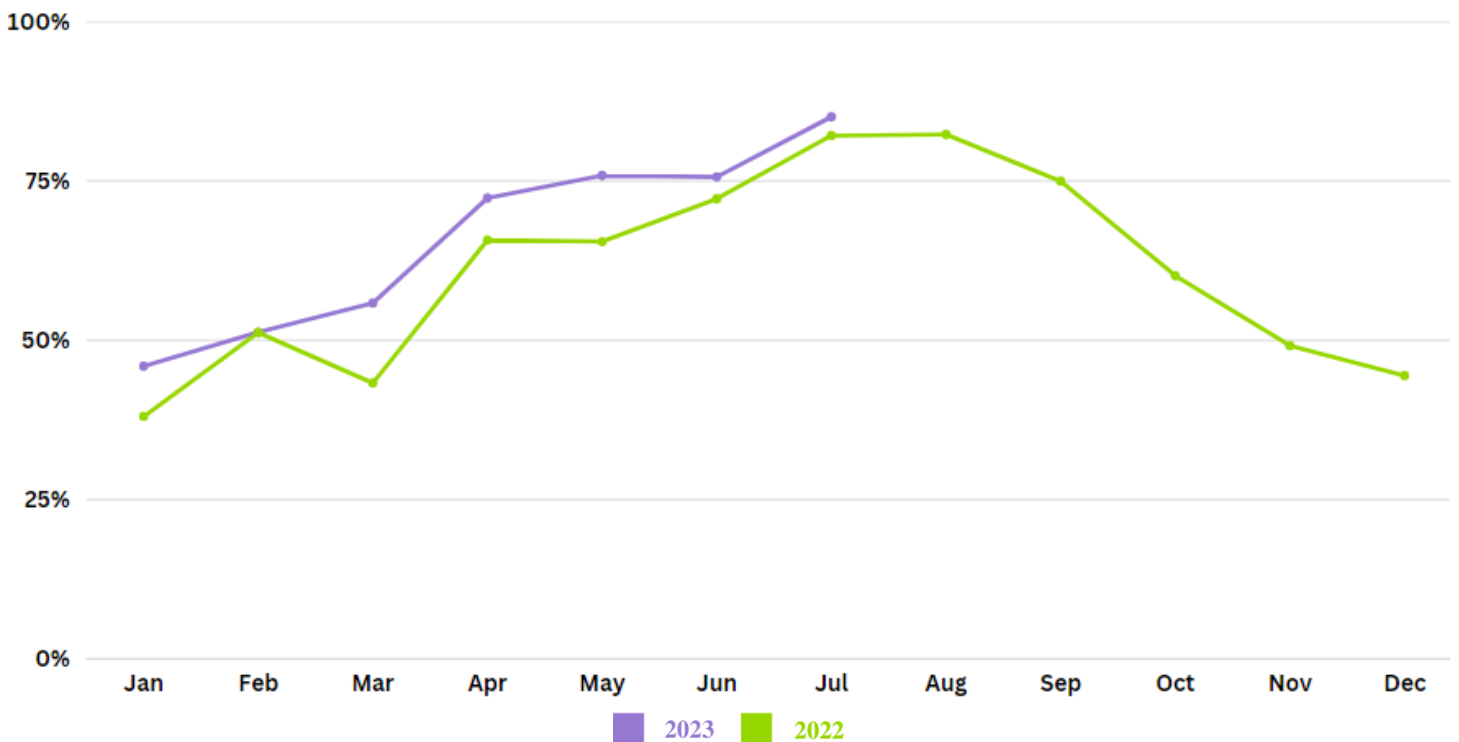
All Serviced Accommodation

Room Occupancy – July 2023/2022

Scottish Serviced Accommodation room occupancy rates for July 2023 experienced a **2.95** percentage point increase when comparing percentage room occupancy rates with July 2022.



Room Occupancy – Year to Date

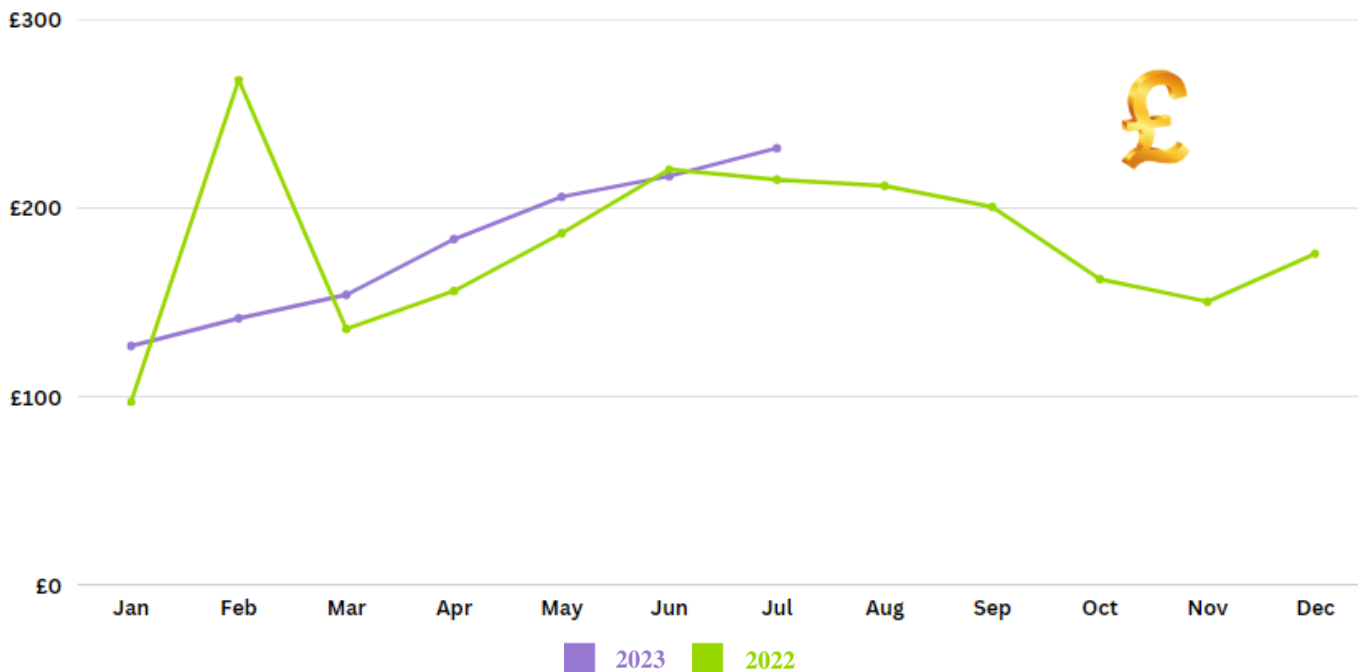


Room Occupancy	July 23	July 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	85.06%	82.11%	2.95	103	67.86%	59.34%	8.52	109

Bed Occupancy	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	77.35%	70.10%	7.25	107	58.09%	51.22%	6.87	107

RevPAR

The Revenue per available occupied room for July 2023 was **£232.01** compared with **£215.27** in July 2022. This figure is based solely on accommodation providers who provided financial information for either July 2023 and/or 2022.



RevPAR – Year to Date 2023/2022

Room – Average RevPAR (£)	July 23	July 22
All Serviced Accommodation	£232.01	£215.27

RevPAR by Grading- July 2023/21

Grading – Average RevPAR (£)	July 23	July 22
2 Stars	£190.46	£129.22
3 Stars	£214.79	£186.82
4 Stars	£254.14	£294.23
5 Stars	£460.96	£344.56

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

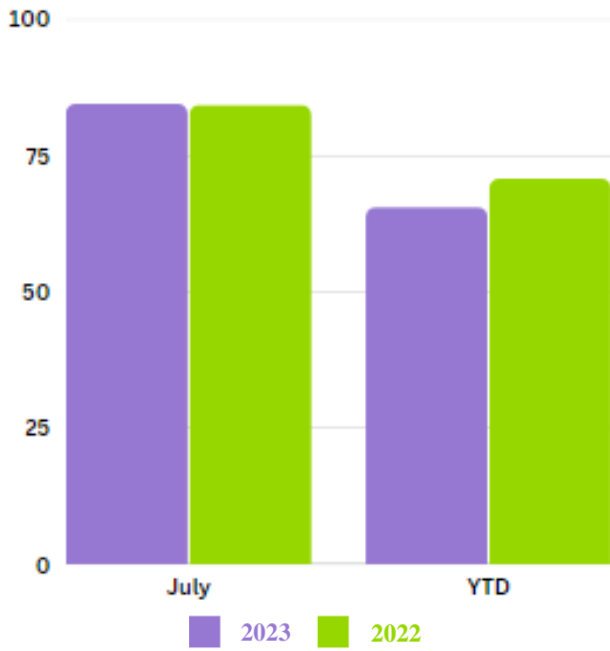
² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

Unclassified £133.25 £155.98

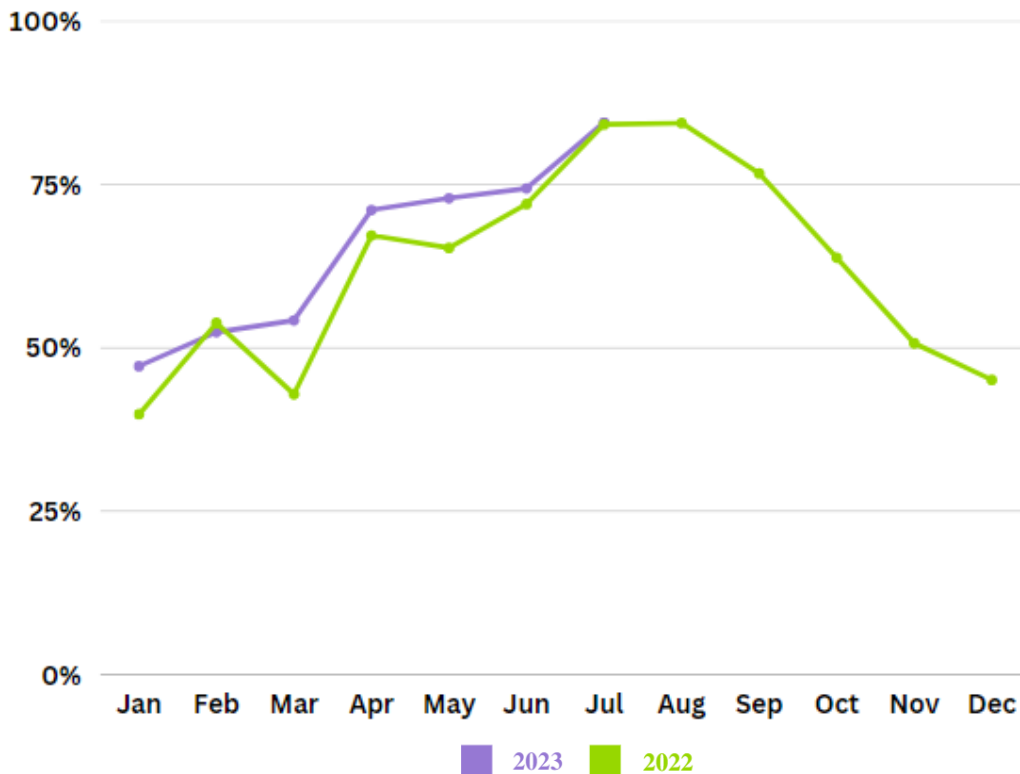
3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – July 2023/2022



Hotel Room Occupancy – Year to Date



Percentage room and bed occupancy rates for Hotels (sample size >4) in the Aberdeen & Grampian Region were the highest in July 2023. Operators in Other Urban Areas and properties charging a £70+ tariff fared best in room occupancy rates in July 2023.

In the **Hotel sector**, the room occupancy rate for July 2023 was **84.45%** compared to data from the previous year of **84.17%** occupancy rate; this shows an overall percentage point increase of **0.28**.

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

Room Occupancy July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
Hotel	84.45%	84.17%	0.28	100	65.40%	70.69%	-5.29	95

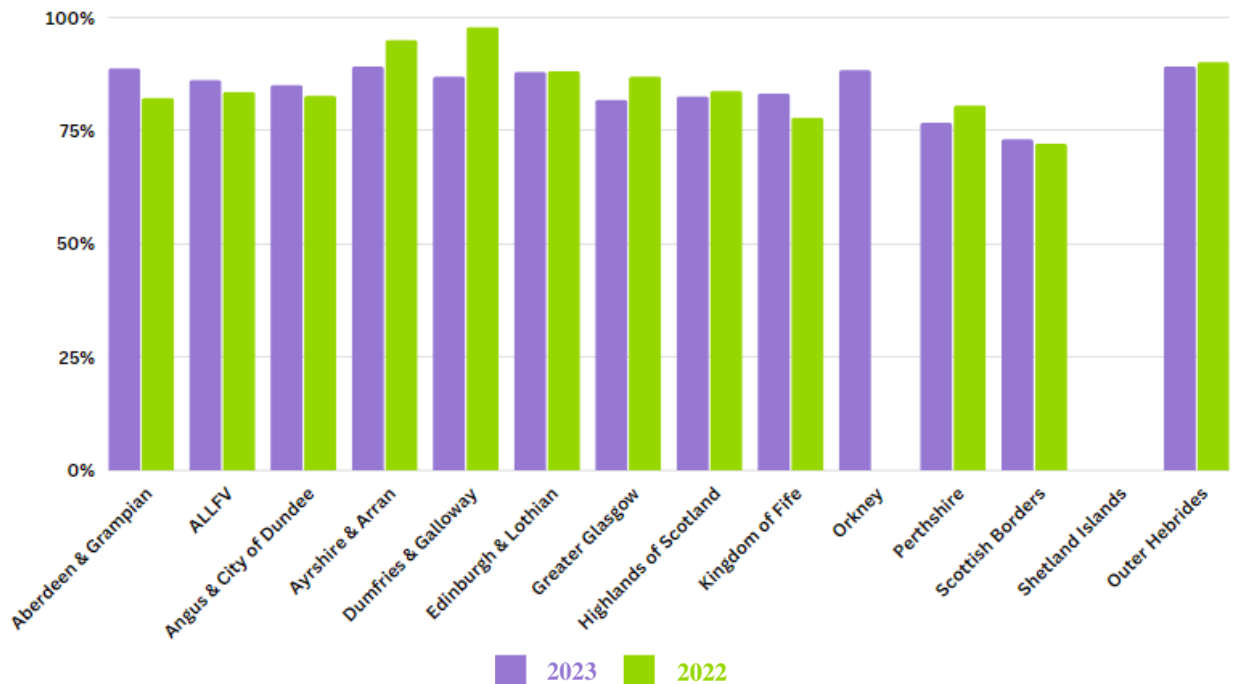
In the **Hotel sector**, the bed occupancy rate for July 2023 was **72.89%** compared to data from the previous year of **72.01%** occupancy rate; this shows an overall percentage point increase of **0.88**.

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

Bed Occupancy	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Hotel	72.89%	72.01%	0.88	101	54.34%	58.56%	-4.22	52

Room Occupancy by Former VisitScotland Area

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



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

Area	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	88.55%	82.08%	6.47	106	69.74%	66.89%	2.85	103
ALLFV	86.03%	83.40%	2.63	103	70.48%	70.25%	0.23	100
Angus & City of Dundee	*	*	*	*	64.59%	56.23%	8.36	108
Ayrshire & Arran	*	*	*	*	83.48%	83.44%	0.04	100
Dumfries & Galloway	*	*	*	*	64.44%	85.46%	-21.02	79
Edinburgh & Lothian	*	*	*	*	64.92%	*	-24.11	76
Greater Glasgow	*	86.80%	-5.12	95	50.38%	76.29%	-25.91	74
Highlands of Scotland	82.48%	83.64%	-1.16	99	72.19%	72.62%	-0.43	100
Kingdom of Fife	*	*	*	*	68.76%	58.88%	9.88	110
Orkney	*	-	*	*	*	-	*	*
Perthshire	76.60%	*	-3.80	96	66.41%	59.29%	7.12	107
Scottish Borders	*	*	*	*	47.69%	51.83%	-4.14	96
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	69.40%	70.96%	-1.56	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Area	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	84.08%	62.04%	22.04	122	57.82%	43.74%	14.08	114
ALLFV	78.77%	68.69%	10.08	110	68.14%	54.21%	13.93	114
Angus & City of Dundee	*	*	*	*	35.93%	34.67%	1.26	101
Ayrshire & Arran	*	*	*	*	52.17%	52.19%	-0.02	100
Dumfries & Galloway	*	*	*	*	81.77%	0.00%	81.77	182
Edinburgh & Lothian	*	*	*	*	51.01%	*	-38.05	62
Greater Glasgow	*	82.99%	-7.71	92	45.53%	72.39%	-26.86	73
Highlands of Scotland	79.35%	71.65%	7.70	108	62.76%	61.26%	1.50	102
Kingdom of Fife	*	*	*	*	53.72%	48.80%	4.92	105
Orkney	*	-	*	*	*	-	*	*
Perthshire	76.60%	*	10.49	110	55.64%	44.78%	10.86	111
Scottish Borders	*	*	*	*	39.14%	46.15%	-7.01	93
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	56.95%	58.64%	-1.69	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	85.57%	88.23%	-2.66	97	58.69%	79.44%	-20.75	79
Other Urban Areas	86.10%	83.26%	2.84	103	75.43%	70.43%	5.00	105
Accessible Small Towns	84.32%	83.21%	1.11	101	68.88%	70.16%	-1.28	99
Remote Small Towns	79.79%	72.56%	7.23	107	58.33%	58.81%	-0.48	100
Accessible Rural	*	*	*	*	54.49%	58.27%	-3.78	96
Remote Rural	84.39%	89.16%	-4.77	95	67.47%	71.07%	-3.60	96

- Sample Size = Nil

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

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

Location accessibility/density	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	67.54%	82.41%	-14.87	85	47.10%	74.25%	-27.15	73
Other Urban Areas	71.89%	73.18%	-1.29	99	62.86%	55.94%	6.92	107
Accessible Small Towns	76.74%	66.12%	10.62	111	57.35%	50.48%	6.87	107
Remote Small Towns	87.07%	58.97%	28.10	128	72.43%	53.40%	19.03	119
Accessible Rural	*	*	*	*	43.21%	50.08%	-6.87	93
Remote Rural	80.13%	71.60%	8.53	109	59.45%	52.48%	6.97	107

- Sample Size = Nil

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

Room Occupancy by Location (Geographic) – July 2023/2022

Location (Geographic)	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	80.56%	78.41%	2.15	102	62.08%	62.01%	0.07	100
Inland	85.67%	85.84%	-0.17	100	66.61%	74.14%	-7.53	92
Island	92.00%	92.04%	-0.04	100	68.61%	72.63%	-4.02	96

- Sample Size = Nil

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

Bed Occupancy by Location (Geographic) – July 2023/2022

Location (Geographic)	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	64.59%	60.83%	3.76	104	61.31%	48.23%	13.08	113
Inland	76.54%	76.68%	-0.14	100	54.81%	62.46%	-7.65	92
Island	84.35%	84.34%	0.01	100	68.61%	69.15%	-0.54	99

- Sample Size = Nil

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

Room Occupancy by Size– July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	70.77%	83.01%	-12.24	88	57.49%	62.26%	-4.77	95
11 to 25	53.53%	78.44%	-24.91	75	60.45%	61.51%	-1.06	99
26 to 50	89.28%	86.35%	2.93	103	76.11%	75.17%	0.94	101
51 to 100	86.15%	88.36%	-2.21	98	77.63%	76.35%	1.28	101
Over 100	85.02%	*	1.39	101	54.50%	73.99%	-19.49	81

- Sample Size = Nil

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

Bed Occupancy by Size – July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	58.46%	60.51%	-2.05	98	45.06%	40.16%	4.90	105
11 to 25	80.94%	65.89%	15.05	115	58.32%	52.04%	6.28	106

26 to 50	80.08%	74.45%	5.63	106	63.29%	62.37%	0.92	101
51 to 100	75.41%	77.74%	-2.33	98	66.89%	64.18%	2.71	103
Over 100	60.31%	*	-18.76	81	39.19%	65.82%	-26.63	73
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 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	*	*	*	*	63.27%	70.38%	-7.11	93
£60 – £69.00	*	*	*	*	67.16%	64.77%	2.39	102
£70+	84.62%	84.16%	0.46	100	65.37%	71.43%	-6.06	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 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	*	*	*	*	64.80%	29.78%	35.02	135
£60 – £69.00	*	*	*	*	53.92%	53.43%	0.49	100
£70+	72.80%	72.73%	0.07	100	53.88%	59.68%	-5.80	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Grading – July 2023/2022

Grading	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	72.90%	70.35%	2.55	103
3 Stars	81.56%	86.64%	-5.08	95	64.88%	69.90%	-5.02	95
4 Stars	86.21%	85.24%	0.97	101	63.37%	76.44%	-13.07	87
5 Stars	*	*	*	*	54.70%	53.93%	0.77	101
Unclassified	87.90%	81.46%	6.44	106	72.47%	65.07%	7.40	107
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Grading – July 2023/2022

Grading	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	63.24%	53.56%	9.68	110
3 Stars	75.80%	78.49%	-2.69	97	59.56%	62.36%	-2.80	97
4 Stars	70.90%	69.80%	1.10	101	50.68%	63.02%	-12.34	88
5 Stars	*	*	*	*	43.82%	44.90%	-1.08	99
Unclassified	75.11%	63.48%	11.63	112	47.38%	45.87%	1.51	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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