

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

### **1.0 Introduction June 2023/2022**

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering June 2023 and benchmarking against June 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](mailto:hugh.sheridan@gcu.ac.uk)).

### **2.0 Executive Summary June 2023**

The Scottish Accommodation Occupancy Survey: June 2023 Hotels report showed an increase in occupancy in the Hotels sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation room occupancy rates for June 2023 experienced a **3.44** percentage point increase when comparing percentage room occupancy rates with June 2022. Occupancy rates within the Hotel sector experienced a **1.78** percentage point increase in June 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales figures increased by 11.3% year-on-year in June. Retail sales in Scotland held steady for June with a growth of 9%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% increase on the May 2023 survey). The survey recorded 46% of respondents (a 3% decrease on the May 2023 Survey) saying they were "...cautious - things are okay but I feel I have to be very careful".

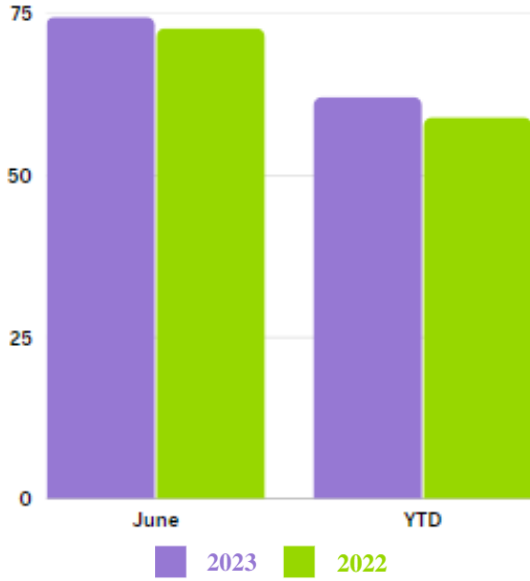
Despite consumer concern about the state of the economy, 11% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months remain the 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.

The recovery in international inbound visitation stalled in June 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 0% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

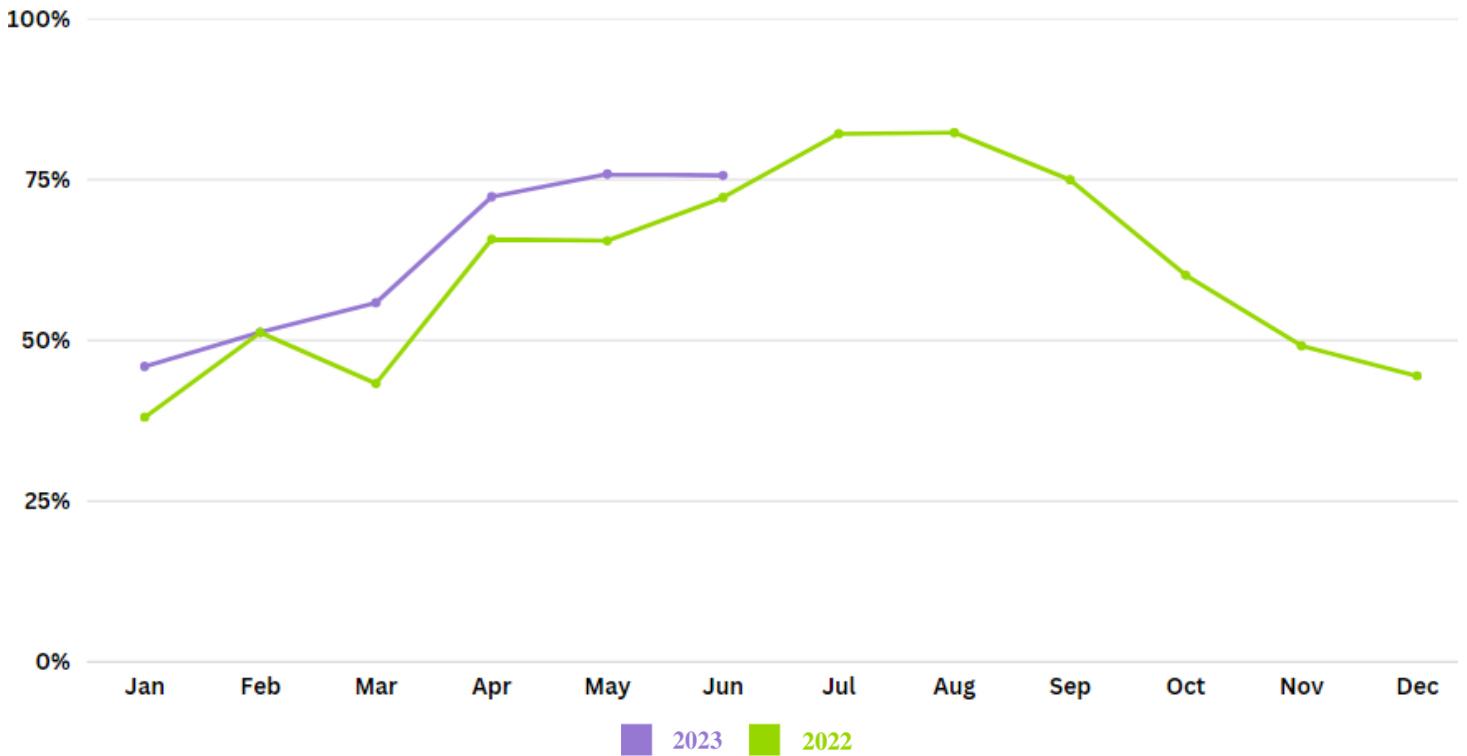
**All Serviced Accommodation**

Room Occupancy – June 2023/2022

Scottish Serviced Accommodation room occupancy was 75.6% in June 2023. This shows a **3.44** percentage point increase when comparing percentage room occupancy rates with June 2022.



Room Occupancy – Year to Date



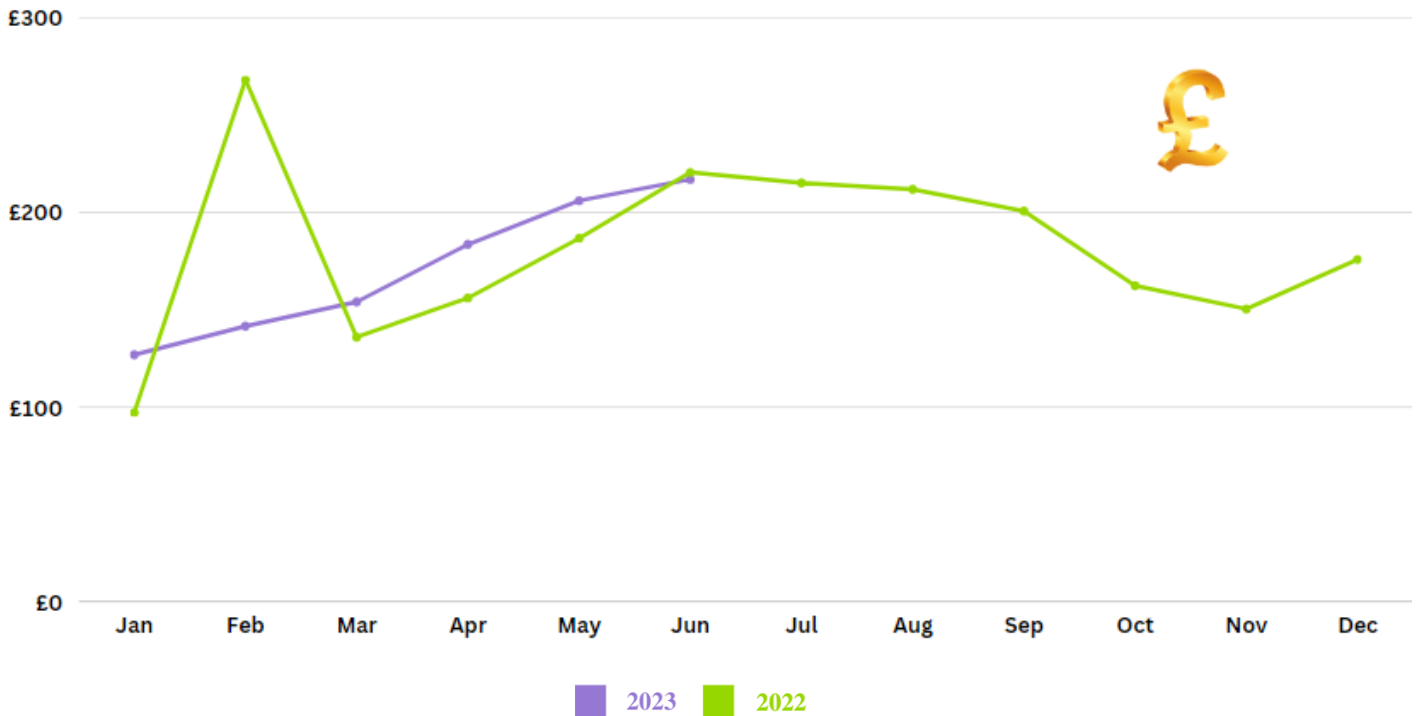
Room Occupancy	June 23	June 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	75.63%	72.19%	3.44	103	64.55%	55.87%	8.68	109

Bed Occupancy	June 23	June 22	23/22 Diff <sup>1</sup>	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	66.19%	59.60%	6.59	107	54.25%	48.29%	5.96	106

### RevPAR

The Revenue per available occupied room for June 2023 was **£217.12** compared with **£220.69** in June 2022. This figure is based solely on accommodation providers who provided financial information for either June 2023 and/or 2022.



### RevPAR – Year to Date 2023/2022

Room – Average RevPAR (£)	June 23	June 22
All Serviced Accommodation	£217.12	£220.69

### RevPAR by Grading- June 2023/21

Grading – Average RevPAR (£)	June 23	June 22
2 Stars	£184.89	£126.64
3 Stars	£199.65	£211.52

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

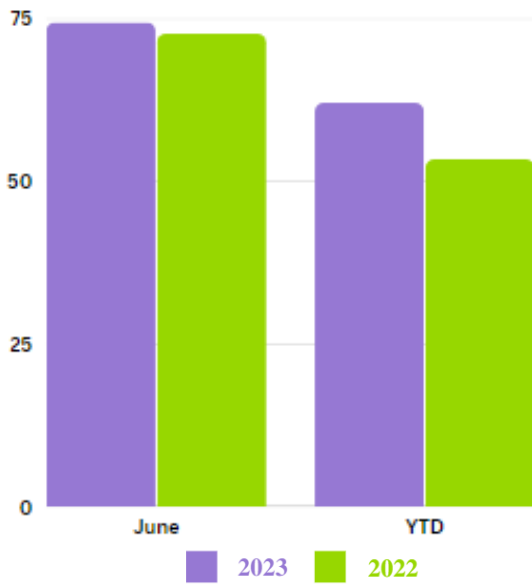
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

4 Stars	£236.69	£277.38
5 Stars	£448.01	£248.04
Unclassified	£139.05	£166.44

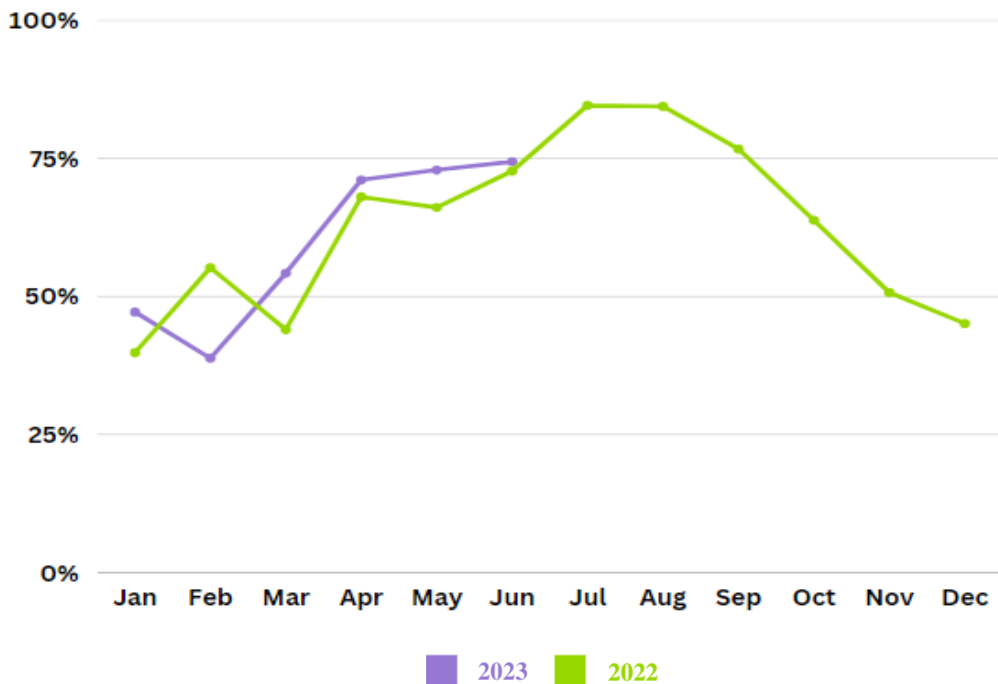
### 3.0 Serviced Accommodation – Hotel Sector

#### 3.1 Performance by Hotel Category

Hotel Room Occupancy – June 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for June 2023 was **74.44%** compared to data from the previous year of **72.66%** occupancy rate; this shows an overall percentage point increase of **1.78**.

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

Room Occupancy June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Hotel</b>	<b>74.44%</b>	<b>72.66%</b>	<b>1.78</b>	<b>102</b>	<b>62.05%</b>	<b>58.91%</b>	<b>3.14</b>

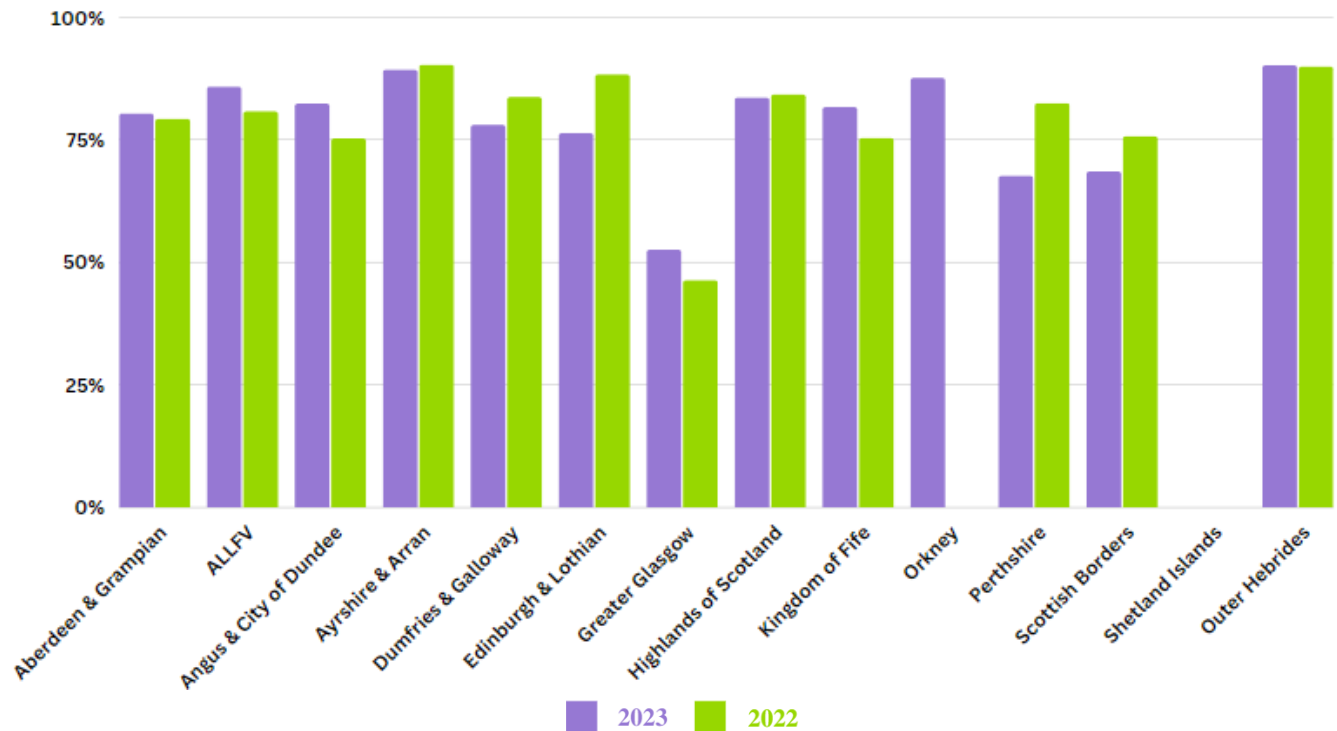
In the **Hotel sector**, the bed occupancy rate for the period June 2023 was **61.86%** when compared to data from the previous year of **59.03%** occupancy rate; this shows an overall percentage point increase of **2.83**.

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

Bed Occupancy	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Hotel</b>	<b>61.86%</b>	<b>59.03%</b>	<b>2.83</b>	<b>103</b>	<b>51.02%</b>	<b>52.46%</b>	<b>-1.44</b>	<b>52</b>

### Room Occupancy by Former VisitScotland Area

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



Percentage room and bed occupancy rates for Hotels in the Outer Hebrides were the highest in June 2023 versus Ayrshire & Arran in June 2022. Operators in Remote Rural Areas and properties charging a £60-£69.99 tariff fared best in room occupancy rates in June 2023.

### Room Occupancy by Former Visit Scotland Area – June 2023/2022

Area	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	80.23%	79.15%	1.08	101	65.00%	63.76%	1.24	101
ALLFV	85.73%	80.73%	5.00	105	67.32%	70.62%	-3.30	97
Angus & City of Dundee	*	*	*	*	59.98%	51.51%	8.47	108
Ayrshire & Arran	*	*	*	*	82.53%	81.42%	1.11	101
Dumfries & Galloway	*	*	*	*	52.34%	76.84%	-24.50	76
Edinburgh & Lothian	*	*	*	*	61.03%	*	-26.90	73
Greater Glasgow	52.52%	46.31%	6.21	106	51.72%	39.77%	11.95	112
Highlands of Scotland	83.55%	84.18%	-0.63	99	69.11%	69.73%	-0.62	99
Kingdom of Fife	*	*	*	*	65.83%	55.26%	10.57	111
Orkney	*	-	*	*	*	-	*	*
Perthshire	67.61%	*	-14.73	85	64.38%	57.24%	7.14	107
Scottish Borders	*	*	*	93	43.13%	48.87%	-5.74	94
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	65.65%	67.09%	-1.44	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Former Visit Scotland Area – June 2023/2022

Area	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	72.83%	52.47%	20.36%	120	53.83%	39.89%	13.94%	114
ALLFV	82.61%	65.84%	16.77%	117	66.10%	51.39%	14.71%	115
Angus & City of Dundee	*	*	*	*	34.52%	32.32%	2.20%	102
Ayrshire & Arran	*	*	*	*	50.76%	51.01%	-0.25%	100
Dumfries & Galloway	*	*	*	*	28.43%		28.43%	128
Edinburgh & Lothian	*	*	*	*	47.77%	*	-40.26%	60
Greater Glasgow	41.95%	42.29%	-0.34%	100	43.80%	53.59%	-9.79%	90
Highlands of Scotland	74.84%	70.96%	3.88%	104	60.29%	58.48%	1.81%	102
Kingdom of Fife	*	*	*	*	52.04%	46.49%	5.55%	106
Orkney	*	-	*	*	*	-	*	*
Perthshire	58.31%	*	-9.11%	91	52.92%	45.58%	7.34%	107
Scottish Borders	*	*	*	*	37.99%	42.98%	-4.99%	95
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	52.75%	54.04%	-1.29%	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	62.15%	56.59%	5.56%	106	54.81%	43.12%	11.69%	112
Other Urban Areas	86.89%	80.86%	6.03%	106	75.25%	68.02%	7.23%	107
Accessible Small Towns	78.11%	84.40%	-6.29%	94	65.47%	72.30%	-6.83%	93
Remote Small Towns	71.91%	68.62%	3.29%	103	50.94%	57.11%	-6.17%	94
Accessible Rural	*	*	*	*	60.81%	55.18%	5.63%	106

Remote Rural	88.26%	85.81%	2.45%	102	63.78%	66.29%	-2.51%	97
- Sample Size = Nil	*Sample Size (between 1 and 4) too small to be included							

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

Location accessibility/density	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	52.43%	51.43%	1.00%	101	44.39%	56.14%	-11.75%	88
Other Urban Areas	74.37%	68.81%	5.56%	106	61.63%	52.72%	8.91%	109
Accessible Small Towns	66.44%	67.44%	-1.00%	99	53.85%	49.41%	4.44%	104
Remote Small Towns	76.88%	58.55%	18.33%	118	50.47%	51.87%	-1.40%	99
Accessible Rural	*	*	*	*	58.41%	47.80%	10.61%	111
Remote Rural	75.14%	64328.00%	-64252.86%	-64153	54.02%	49.33%	4.69%	105
- Sample Size = Nil	*Sample Size (between 1 and 4) too small to be included							

### Room Occupancy by Location (Geographic) – June 2023/2022

Location (Geographic)	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	76.58%	76.18%	0.40%	100	59.51%	58.93%	0.58%	101
Inland	72.53%	69.96%	2.57%	103	63.10%	58.14%	4.96%	105
Island	91.12%	89.86%	1.26%	101	63.24%	68.03%	-4.79%	95
- Sample Size = Nil	*Sample Size (between 1 and 4) too small to be included							

### Bed Occupancy by Location (Geographic) – June 2023/2022

Location (Geographic)	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	66.12%	58.55%	7.57%	108	51.13%	46.19%	4.94%	105
Inland	59.04%	58.01%	1.03%	101	50.34%	54.04%	-3.70%	96
Island	75.45%	77.49%	-2.04%	98	62.50%	65.89%	-3.39%	97
- Sample Size = Nil	*Sample Size (between 1 and 4) too small to be included							

### Room Occupancy by Size– June 2023/2022

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	71.94%	82.09%	-10.15%	90	51.26%	56.65%	-5.39%	95
11 to 25	76.76%	74.78%	1.98%	102	56.31%	59.19%	-2.88%	97
26 to 50	87.81%	84.86%	2.95%	103	73.50%	74.57%	-1.07%	99
51 to 100	86.27%	86.55%	-0.28%	100	74.55%	74.81%	-0.26%	100
Over 100	58.61%	*	22.51%	123	53.49%	30.34%	23.15%	123
- Sample Size = Nil	*Sample Size (between 1 and 4) too small to be included							

### Bed Occupancy by Size – June 2023/2022

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	-	-	-	-	-	-	-	-

4 to 10	47.31%	55.39%	-8.08%	92	35.98%	35.54%	0.44%	100
11 to 25	72.80%	64.51%	8.29%	108	55.39%	50.64%	4.75%	105
26 to 50	78.06%	73.95%	4.11%	104	59.51%	59.56%	-0.05%	100
51 to 100	76.09%	78.03%	-1.94%	98	64.58%	63.05%	1.53%	102
Over 100	40.78%	*	18.49%	118	37.69%	37.00%	0.69%	101
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Room Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 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	*	*	*	*	56.80%	66.95%	-10.15%	90
£60 - £69.99	85.08%	*	9.01%	109	60.54%	62.94%	-2.40%	98
£70 +	73.73%	72.28%	1.45%	101	62.65%	58.38%	4.27%	104
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Bed Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 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	*	*	*	*	56.00%	29.56%	26.44%	126
£60 - £69.99	68.60%	*	5.30%	105	46.72%	51.16%	-4.44%	96
£70 +	61.56%	59.08%	2.48%	102	51.30%	53.05%	-1.75%	98
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Room Occupancy by Grading – June 2023/2022

Grading	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	70.59%	68.54%	2.05%	102
3 Stars	79.42%	85.38%	-5.96%	94	61.45%	67.13%	-5.68%	94
4 Stars	68.59%	58.30%	10.29%	110	59.81%	49.59%	10.22%	110
5 Stars	*	*	*	*	51.47%	49.59%	1.88%	102
Unclassified	82.47%	78.80%	3.67%	104	69.26%	62.11%	7.15%	107
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Bed Occupancy by Grading – June 2023/2022

Grading	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	*	*	*	*	60.75%	50.72%	10.03%	110
3 Stars	68.89%	78.65%	-9.76%	90	52.82%	59.68%	-6.86%	93
4 Stars	56.54%	41.45%	15.09%	115	47.86%	49.38%	-1.52%	98
5 Stars	*	*	*	*	40.84%	41.05%	-0.21%	100
Unclassified	66.41%	56.46%	9.95%	110	57.67%	42.47%	15.20%	115
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						



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