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SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

June 2024/2023 Report - HOTELS

1.0 Introduction June 2024/2023

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

The SOAS Report: June 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 June 2024 experienced an **6.39** percentage point increase when comparing percentage room occupancy rates with June 2023. Occupancy rates within the Hotel sector experienced a **8.93** percentage point increase in June 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 June 2024 is 2.0%. The inflation rate for June 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.9%. Inflation rates for restaurants and cafes were 6.2% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.6% in June, however, compared to the 8.8% increase in June 2023 this was disappointing growth in total sales. Total food sales decreased by 1.1% compared to the monthly performance of June 2023, when they had increased by 15.8%.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the May 2024 survey). The survey recorded 44% of respondents (a 2% decrease on the May 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, 55% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% 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 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 figures above have been consistent across the last five waves of the GB National Tourist Survey (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment waves of the GB National Tourist Survey (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in June 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw no increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.



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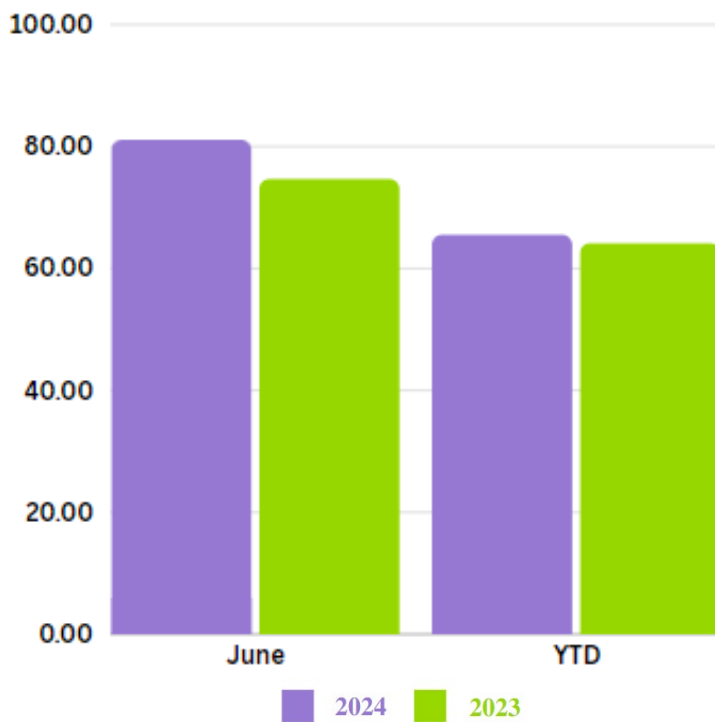
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All Serviced Accommodation

Room Occupancy – June 2024/2023

48

Scottish Serviced Accommodation room occupancy rates for June 2024 experienced a **6.39** percentage point increase when comparing percentage room occupancy rates with June 2023.



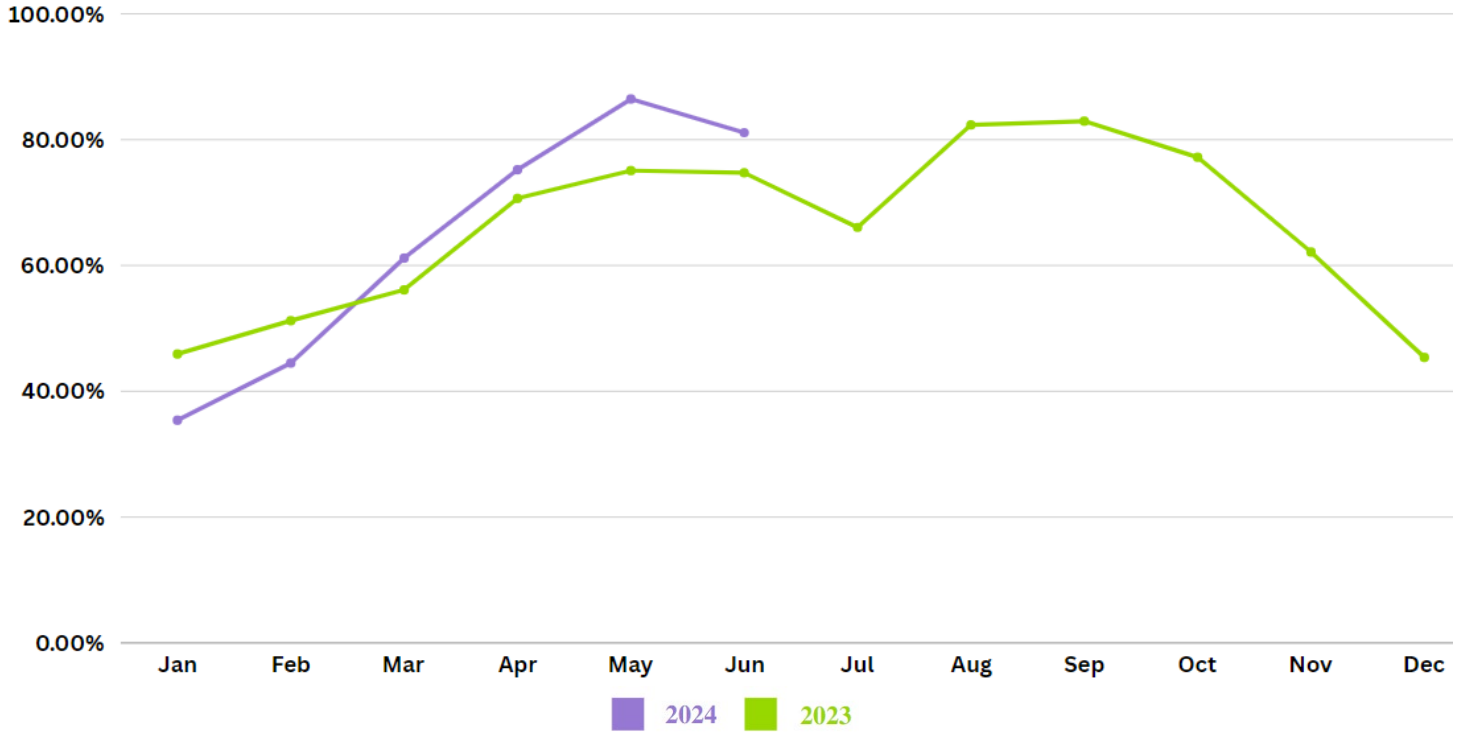
Room Occupancy – Year-to-Date



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Room Occupancy	June 24	June 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	81.12%	74.73%	6.39	106	65.60%	64.20%	1.40	101

Bed Occupancy	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	81.61%	65.84%	15.77	116	62.49%	53.94%	8.55	109

RevPAR

The Revenue per available occupied room for June 2024 was **£239.20** compared with **£215.66** in June 2023. This figure is based solely on accommodation providers who provided financial information for June 2024 and/or 2023.

¹ 24/23 Diff throughout this report is expressed by % Point Change

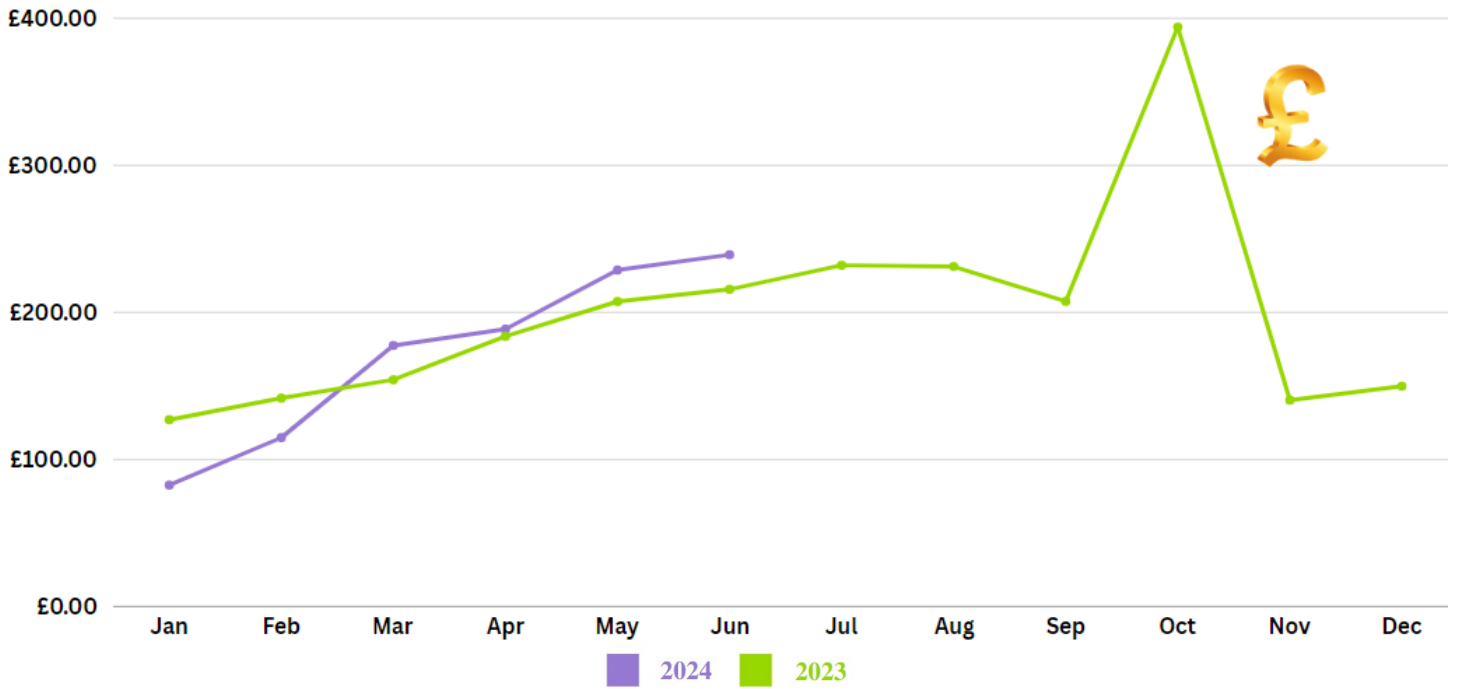
² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.



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RevPAR – Year to Date 2024/2023

Room – Average RevPAR (£)	June 24	June 23
All Serviced Accommodation	£239.20	£215.66

RevPAR by Grading- June 2024/21

Grading – Average RevPAR (£)	June 24	June 23
2 Stars	£158.23	£119.61
3 Stars	£161.10	£143.28
4 Stars	£180.36	£209.31
5 Stars	£251.96	£214.88
Unclassified	£57.04	£103.54

3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

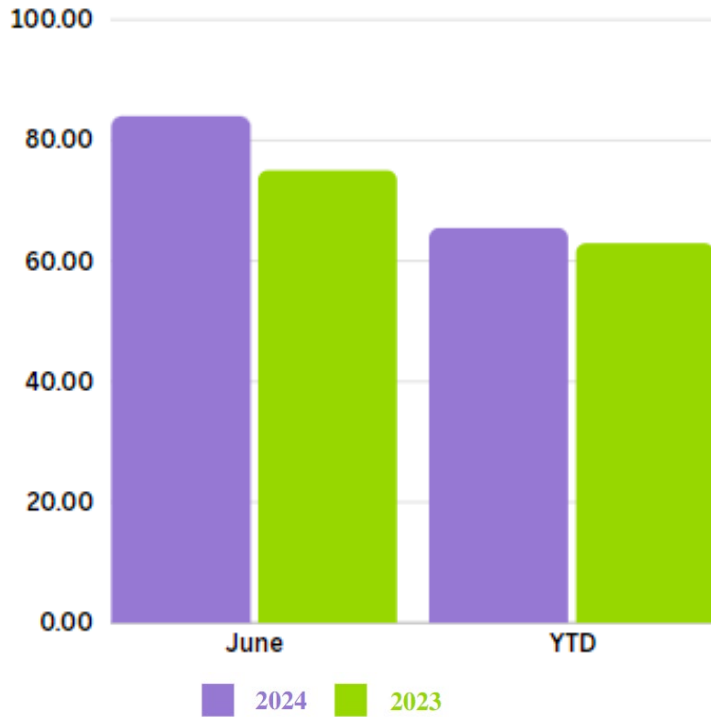
Hotel Room Occupancy – June 2024/2023



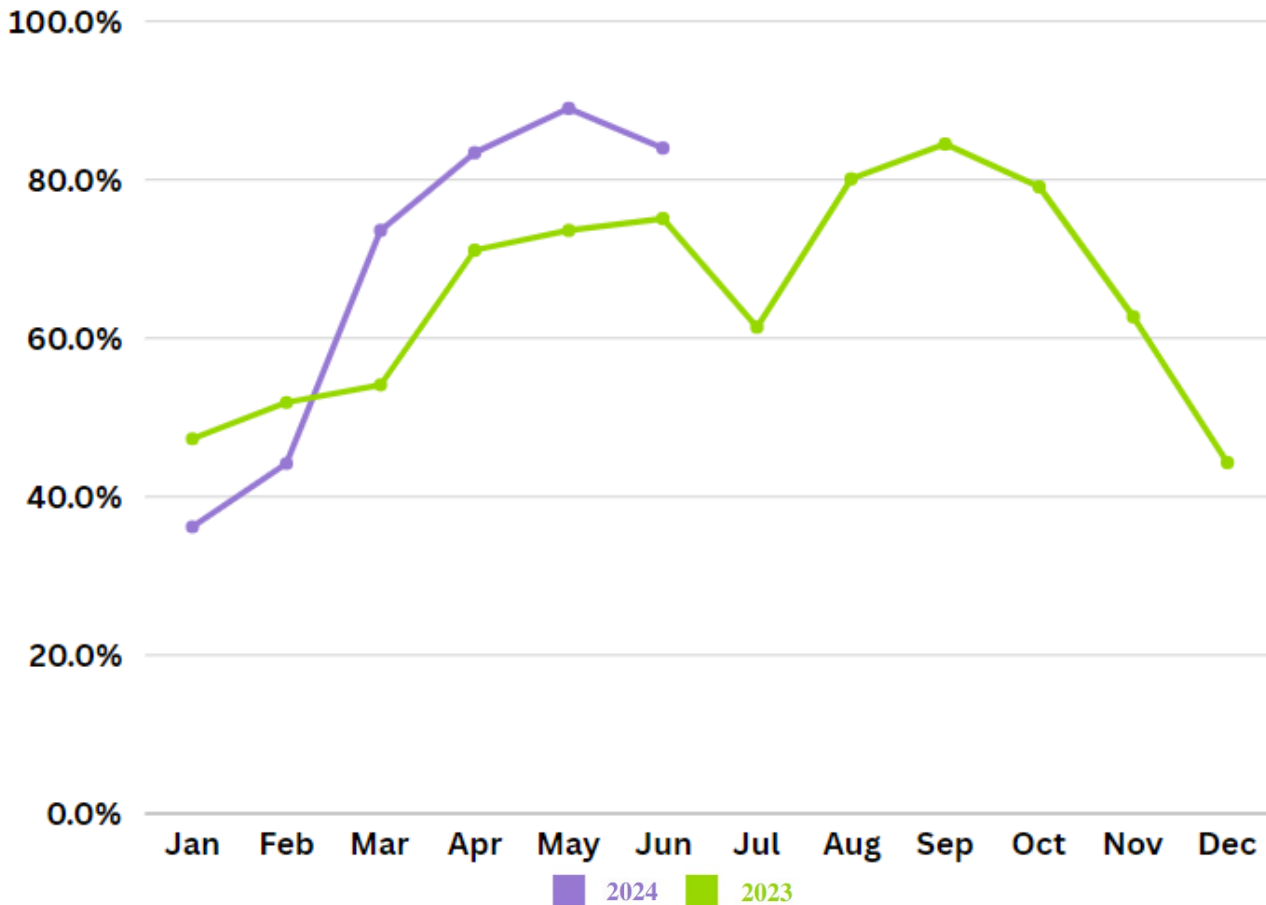
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Hotel Room Occupancy – Year to Date



In the Hotel sector, the room occupancy rate for June 2024 was **84.03%** compared to data from the previous year of **75.10%** occupancy rate; this shows an overall percentage point increase of **8.93**.



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

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

Room Occupancy	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	84.03%	75.10%	8.93	109	65.52%	62.97%	2.55	103

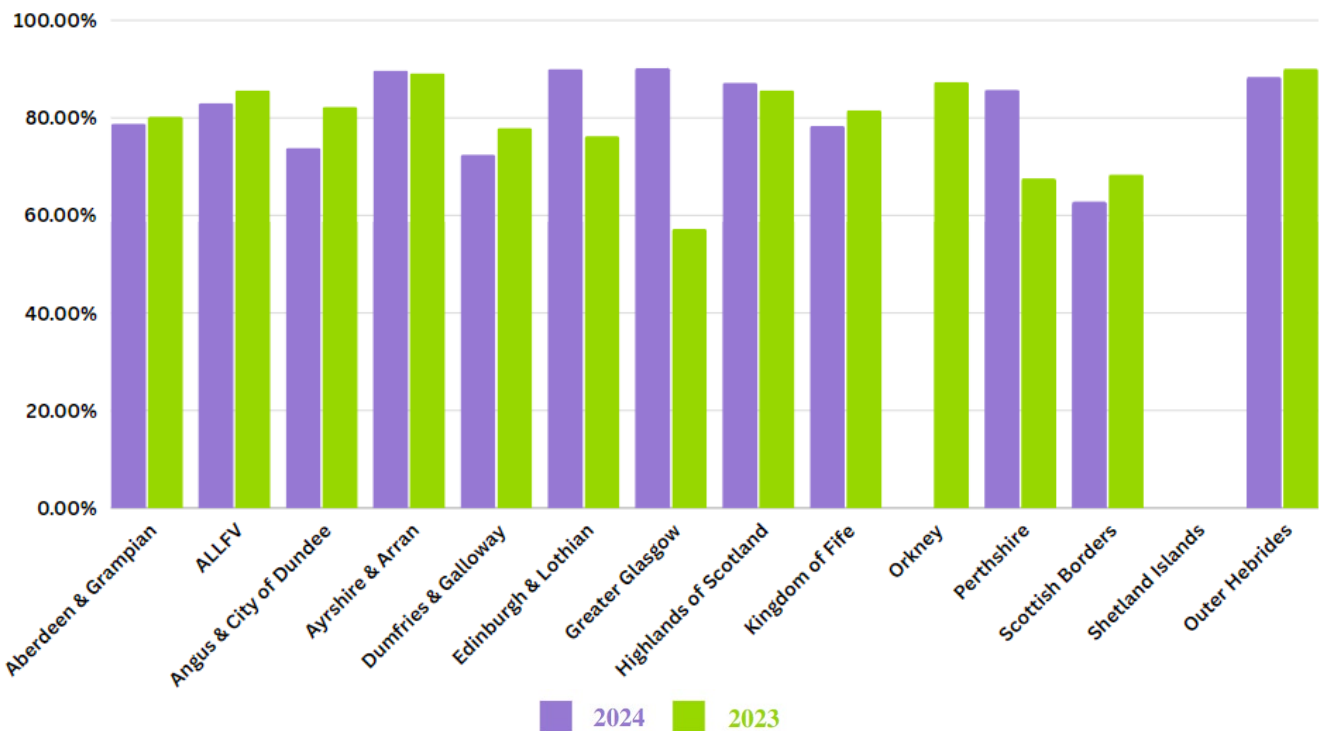
In the **Hotel sector**, the bed occupancy rate for June 2024 was **79.13%** compared to data from the previous year of **63.18%** occupancy rate; this shows an overall percentage point increase of **15.95**.

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

Bed Occupancy	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	79.13%	63.18%	15.95	116	64.65%	52.28%	12.37	112

Room Occupancy by Former VisitScotland Area

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





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

Area	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	78.83%	80.23%	-1.40	99	66.97%	65.00%	1.97	102
ALLFV	83.05%	85.64%	-2.59	97	69.75%	67.81%	1.94	102
Angus & City of Dundee	*	*	*	*	62.73%	59.98%	2.75	103
Ayrshire & Arran	*	*	*	*	76.00%	82.53%	-6.53	93
Dumfries & Galloway	*	*	*	*	53.28%	52.34%	0.94	101
Edinburgh & Lothian	90.04%	*	13.77	114	85.16%	61.03%	24.13	124
Greater Glasgow	90.20%	57.25%	32.95	133	59.43%	56.59%	2.84	103
Highlands of Scotland	87.22%	85.66%	1.56	102	76.06%	70.02%	6.04	106
Kingdom of Fife	*	*	*	*	58.83%	65.83%	-7.00	93
Orkney	-	*	*	*	-	*	*	*
Perthshire	*	67.61%	18.17	118	67.74%	64.38%	3.36	103
Scottish Borders	62.84%	*	-5.57	94	57.02%	43.13%	13.89	114
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	69.71%	65.65%	4.06	104

- Sample Size = Nil

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

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

Area	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	74.70%	72.83%	1.87	102	55.77%	53.83%	1.94	102
ALLFV	79.00%	82.61%	-3.61	96	65.62%	66.10%	-0.48	100
Angus & City of Dundee	*	*	*	*	33.75%	34.52%	-0.77	99
Ayrshire & Arran	*	*	*	*	53.52%	50.76%	2.76	103
Dumfries & Galloway	*	*	*	*	35.00%	28.43%	6.57	107
Edinburgh & Lothian	93.99%	*	29.21	129	86.68%	47.77%	38.91	139
Greater Glasgow	87.23%	48.72%	38.51	139	74.35%	50.18%	24.17	124
Highlands of Scotland	83.75%	77.35%	6.40	106	66.70%	59.50%	7.20	107
Kingdom of Fife	*	*	*	*	47.29%	52.04%	-4.75	95
Orkney	-	*	*	*	-	*	*	*
Perthshire	*	58.31%	2.93	103	46.49%	52.92%	-6.43	94
Scottish Borders	56.67%	*	-5.51	94	48.15%	37.99%	10.16	110
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	49.28%	52.75%	-3.47	97

- Sample Size = Nil

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



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

Location accessibility/density	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	90.01%	64.34%	25.67	126	63.61%	57.56%	6.05	106
Other Urban Areas	83.28%	86.89%	-3.61	96	73.87%	75.25%	-1.38	99
Accessible Small Towns	78.91%	77.99%	0.92	101	64.17%	65.67%	-1.50	99
Remote Small Towns	72.46%	71.91%	0.55	101	59.95%	50.94%	9.01	109
Accessible Rural	*	*	*	*	67.01%	48.82%	18.19	118
Remote Rural	89.25%	88.81%	0.44	100	68.10%	64.80%	3.30	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	89.02%	55.43%	33.59	134	75.87%	48.35%	27.52	128
Other Urban Areas	70.65%	74.37%	-3.72	96	60.39%	61.63%	-1.24	99
Accessible Small Towns	71.84%	66.44%	5.40	105	54.09%	53.85%	0.24	100
Remote Small Towns	86.39%	76.88%	9.51	110	68.58%	50.47%	18.11	118
Accessible Rural	*	*	*	*	76.64%	36.95%	39.69	140
Remote Rural	75.56%	77.17%	-1.61	98	57.38%	55.38%	2.00	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	76.55%	76.82%	-0.27	100	64.29%	58.95%	5.34	105
Inland	85.00%	73.24%	11.76	112	65.21%	64.27%	0.94	101
Island	95.00%	92.92%	2.08	102	75.80%	66.91%	8.89	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	74.58%	65.96%	8.62	109	56.04%	49.39%	6.65	107
Inland	79.88%	60.83%	19.05	119	66.19%	52.64%	13.55	114
Island	83.84%	80.73%	3.11	103	69.43%	66.38%	3.05	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



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Room Occupancy by Size- June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	71.74%	71.37%	0.37	100	53.98%	52.57%	1.41	101
11 to 25	77.60%	77.96%	-0.36	100	59.27%	55.95%	3.32	103
26 to 50	89.07%	88.54%	0.53	101	79.71%	75.32%	4.39	104
51 to 100	86.16%	86.27%	-0.11	100	74.95%	74.55%	0.40	100
Over 100	90.07%	58.61%	31.46	131	58.84%	53.49%	5.35	105
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Size - June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	99.00%	47.31%	51.69	152	64.38%	35.98%	28.40	128
11 to 25	73.03%	74.91%	-1.88	98	53.64%	54.13%	-0.49	100
26 to 50	85.86%	80.65%	5.21	105	73.17%	65.07%	8.10	108
51 to 100	76.25%	76.09%	0.16	100	63.98%	64.58%	-0.60	99
Over 100	86.72%	40.78%	45.94	146	75.25%	37.69%	37.56	138
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Tariff - June 2024/2023

Tariff	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 - 29.99	-	-	-	-	-	-	-	-
£30 - 39.99	-	-	-	-	-	-	-	-
£40 - 49.99	*	-	*	*	35.21%	*	14.89	115
£50 - 59.99	*	*	*	*	70.56%	56.80%	13.76	114
£60 - £69.00	84.66%	85.08%	-0.42	100	66.94%	60.54%	6.40	106
£70+	85.04%	74.49%	10.55	111	65.86%	63.69%	2.17	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Tariff - June 2024/2023

Tariff	June 24	June 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	*	*	*	*	38.09%	56.00%	-17.91	82
£60 - £69.00	79.48%	68.60%	10.88	111	67.14%	46.72%	20.42	120
£70+	79.07%	63.01%	16.06	116	64.48%	52.72%	11.76	112
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



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Room Occupancy by Grading – June 2024/2023

Grading	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	76.03%	70.42%	5.61	106
3 Stars	82.58%	79.86%	2.72	103	65.14%	61.98%	3.16	103
4 Stars	85.17%	68.59%	16.58	117	62.37%	59.81%	2.56	103
5 Stars	*	*	*	*	46.95%	51.47%	-4.52	95
Unclassified	*	*	*	*	78.98%	69.87%	9.11	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Grading – June 2024/2023

Grading	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	2.47%	60.55%	-58.08	42
3 Stars	75.81%	70.04%	5.77	106	57.54%	63.51%	-5.97	94
4 Stars	80.89%	56.54%	24.35	124	67.44%	47.86%	19.58	120
5 Stars	*	*	*	*	37.08%	40.84%	-3.76	96
Unclassified	*	*	*	*	46.06%	40.95%	5.11	105
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						