

## **SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:** **May 2023/2022 Report – HOTELS - Revised**

### **1.0 Introduction May 2023/2022**

Welcome to the VisitScotland, Scottish Accommodation Occupancy Survey Report covering May 2023 and benchmarking against May 2022. The report reviews Accommodation performance throughout Scotland, highlighting trends across various sectors and categories of the industry. 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)).

Please note that this report was revised from a previous version published earlier in the year and therefore any previous versions should be discarded.

### **2.0 Executive Summary May 2023**

The SOAS Report: May 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 May 2023 experienced a **10.14** percentage point increase when comparing percentage room occupancy rates with May 2022. Occupancy rates within the Hotel sector experienced a **7.11** percentage point increase in May 2023 when comparing the same period last year.

Data from the Scottish Retail Consortium showed that the additional Bank Holiday, the King's Coronation and dry, warm weather saw total retail sales figures increase by 10.9% year-on-year in May. Retail sales in Scotland held steady for May with a growth of 7.7%. Food sales continue to be the biggest growth area.

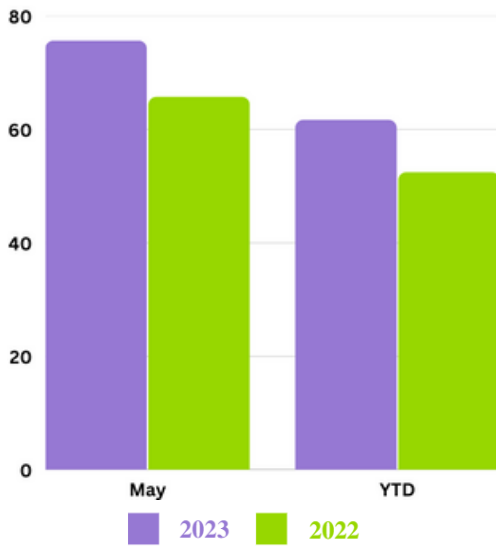
Domestic consumer sentiment provided by the GB National Tourist Boards for May 2023 found that 49% of respondents were cautious about demand and were concerned with cost escalation. The survey recorded 18% of respondents (a 3% decrease on the April 2023 Survey) saying they were "...been hit hard - no option but to cut back on spending". Despite consumer concern about the state of the economy, 20% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 76% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were; 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 continues in May 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2022, however, UK air connectivity had seen a 10% decrease in year-to-date flights compared to 2019.

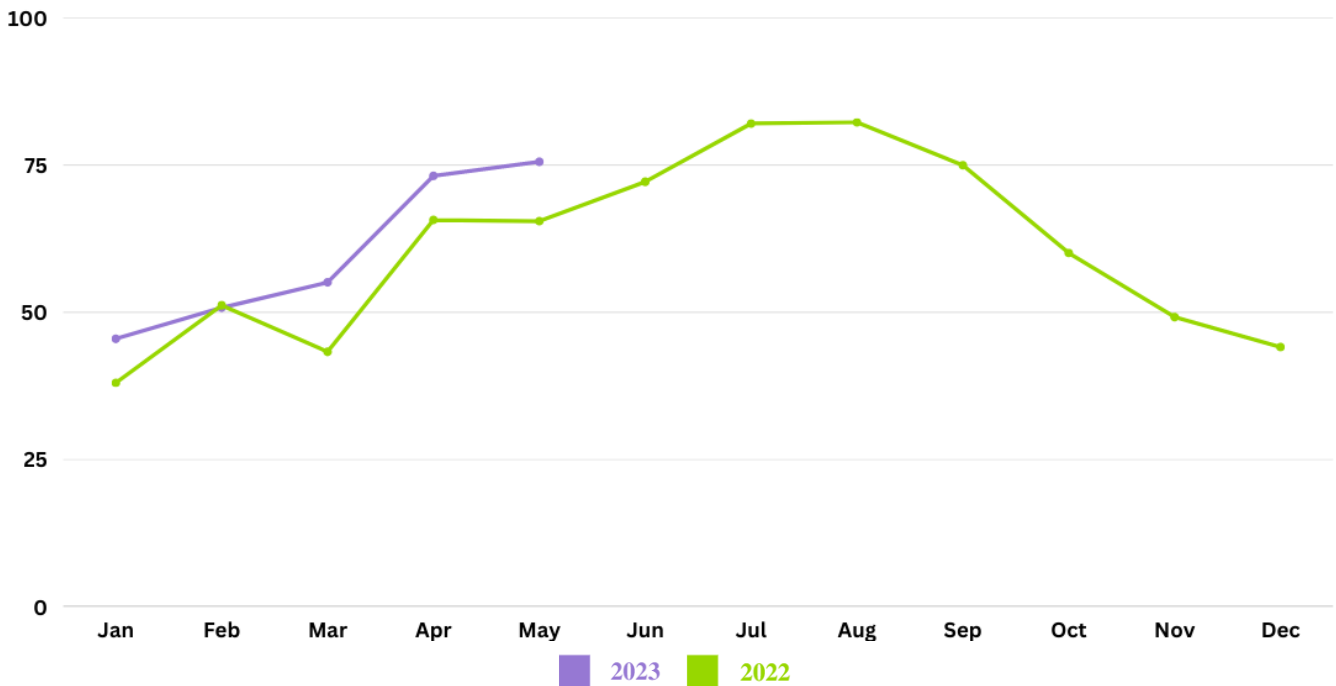
## All Serviced Accommodation

### Room Occupancy – May 2023/2022

Scottish Serviced Accommodation room occupancy rates for May 2023 experienced a **10.38** percentage point increase when comparing percentage room occupancy rates with May 2022.



### Room Occupancy – Year to Date



In 2022, serviced room occupancy reached a peak in August at 83.70%.

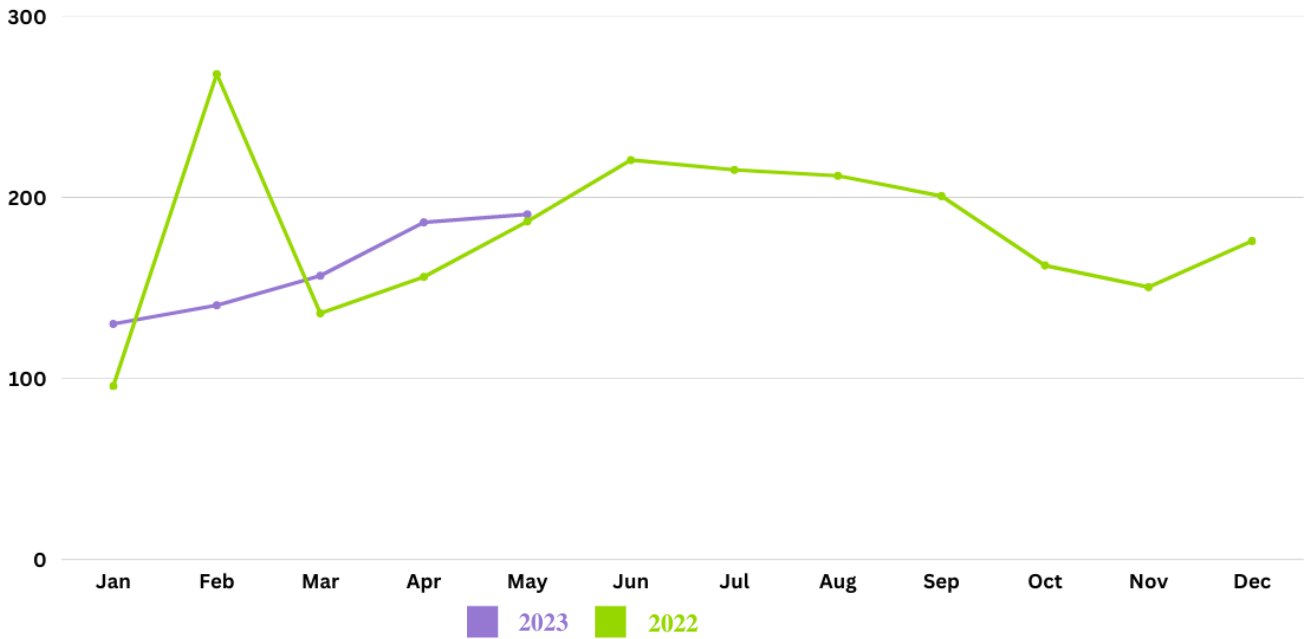
| Room Occupancy             | May 23 | May 22 | 23/22 Diff <sup>1</sup> | Change <sup>2</sup> | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--------|-------------------------|---------------------|--------|--------|------------|--------|
| All Serviced Accommodation | 75.85% | 65.47% | 10.38%                  | 110                 | 61.88% | 52.42% | 9.46%      | 109    |

| Bed Occupancy              | May 23 | May 22 | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| All Serviced Accommodation | 62.04% | 52.91% | 9.13%      | 109    | 51.38% | 45.65% | 5.73%      | 106    |

### RevPAR

The Revenue per available occupied room for May 2023 was **£206.17** compared with **£186.80** in May 2022. This figure is based solely on accommodation providers who provided financial information for either May 2023 and/or 2022.



### RevPAR – Year to Date 2023/2022

| Room – Average RevPAR (£)  | May 23  | May 22  |
|----------------------------|---------|---------|
| All Serviced Accommodation | £206.17 | £186.80 |

### RevPAR by Grading- May 2023/21

| Grading – Average RevPAR (£) | May 23  | May 22  |
|------------------------------|---------|---------|
| 2 Stars                      | £139.09 | £103.83 |
| 3 Stars                      | £176.92 | £178.79 |

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

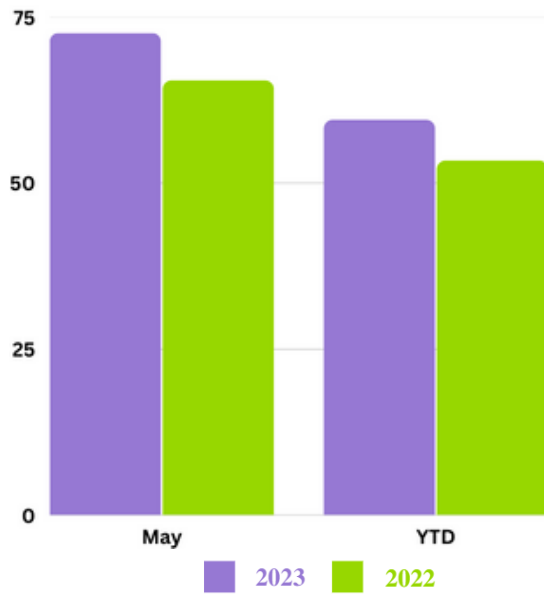
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

|              |         |         |
|--------------|---------|---------|
| 4 Stars      | £236.76 | £241.06 |
| 5 Stars      | £407.04 | £152.95 |
| Unclassified | £147.21 | £123.16 |

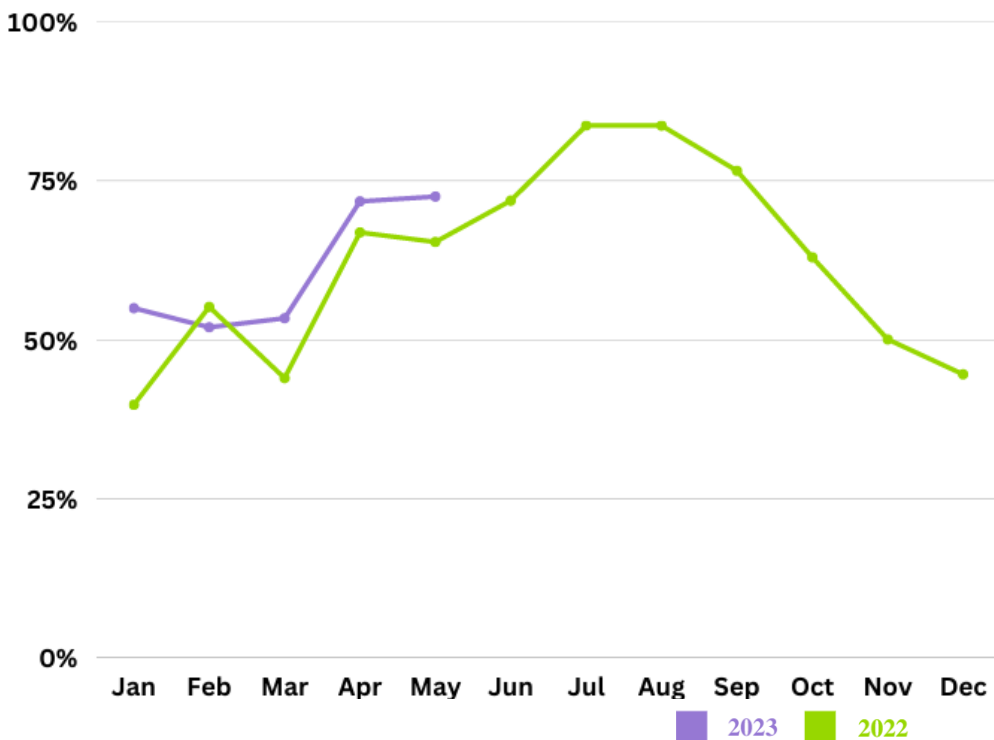
### 3.0 Serviced Accommodation – Hotel Sector

#### 3.1 Performance by Hotel Category

Hotel Room Occupancy – May 2023/2022



Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for the period May 2023 was **72.86%** when compared to data from the previous year of **66.07%** occupancy rate; this shows an overall percentage Point increase of **6.79**.

The table below shows the **Room Occupancy** rate recorded for May 2023/2022 as well as the 23/22 Diff calculation for the **Hotel Sector**.

| Room Occupancy May 23 | May 22 | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |     |
|-----------------------|--------|------------|--------|--------|--------|------------|--------|-----|
| Hotel                 | 72.86% | 66.07%     | 6.79   | 107    | 59.1%  | 53.92%     | 5.18%  | 105 |

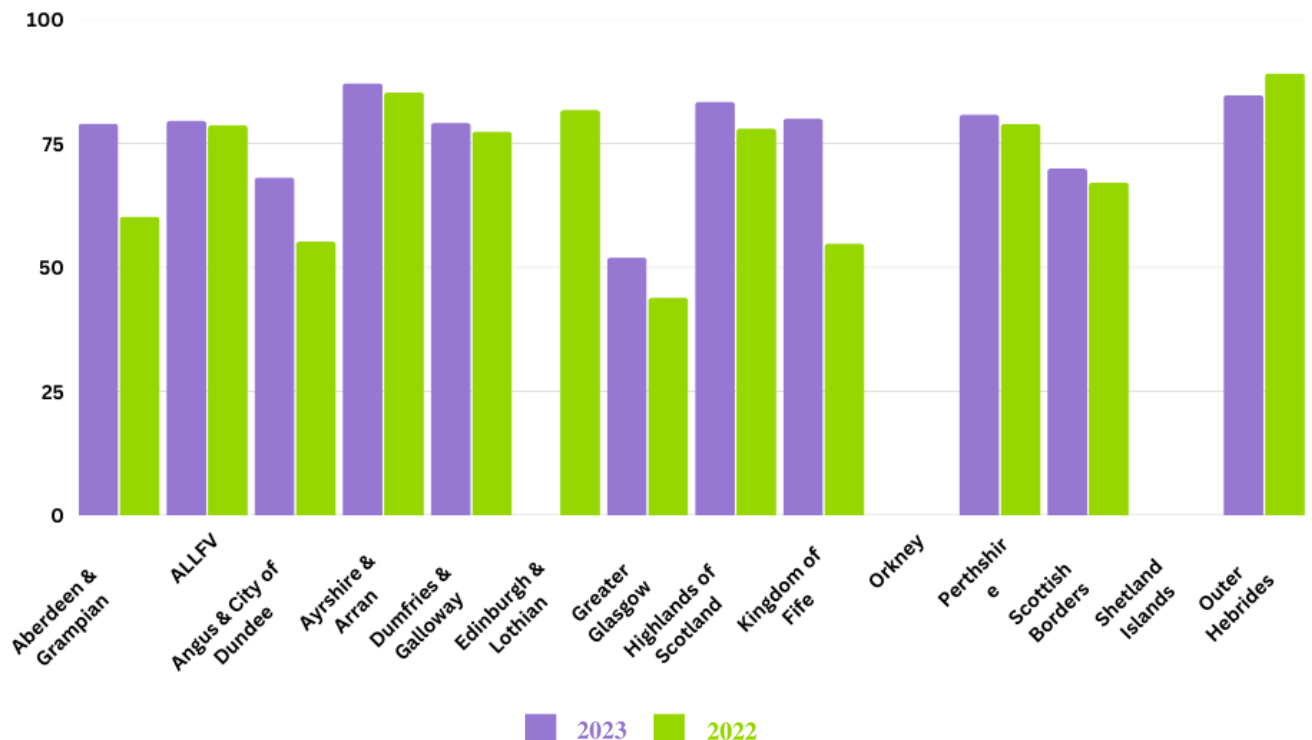
In the **Hotel sector**, the bed occupancy rate for the period May 2023 was **58.89%** when compared to data from the previous year of **52.25%** occupancy rate; this shows an overall percentage point increase of **6.64**.

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

| Bed Occupancy | May 23 | May 22 | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|---------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Hotel         | 58.89% | 52.25% | 6.64       | 107    | 47.76% | 49.38% | -1.62      | 52     |

### Room Occupancy by Former VisitScotland Area

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



Percentage room occupancy rates for Hotels in Ayrshire & Arran were the highest in May 2023 compared to the same period last year when the Outer Hebrides had the highest occupancy. Operators in Other Urban Areas on Islands and properties charging a tariff of £50-

£59.99 fared best in room occupancy rates in May 2023.

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

| Area                       | May 23 | May 22   | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--|------------|--------|--------|--------|------------|--------|
| Aberdeen & Grampian        | 78.92% | 60.20%   | 18.72      | 119    | 61.55% | 50.37% | 11.18      | 111    |
| ALLFV                      | 76.93% | 78.59%   | -1.66      | 98     | 62.81% | 68.22% | -5.41      | 95     |
| Angus & City of Dundee     | *      | *  | *          | *      | 53.72% | 46.51% | 7.21       | 107    |
| Ayrshire & Arran           | *      | *  | *          | *      | 81.21% | 79.59% | 1.62       | 102    |
| Dumfries & Galloway        | *      | *  | *          | *      | 48.03% | 57.10% | -9.07      | 91     |
| Edinburgh & Lothian        | *      | *  | *          | *      | 56.33% | 72.32% | -15.99     | 84     |
| Greater Glasgow            | 51.89% | 43.76%   | 8.13       | 108    | 51.52% | 38.42% | 13.10      | 113    |
| Highlands of Scotland      | 83.32% | 77.90%   | 5.42       | 105    | 66.12% | 65.25% | 0.87       | 101    |
| Kingdom of Fife            | *      | *  | *          | *      | 61.93% | 50.38% | 11.55      | 112    |
| Orkney                     | -      | -  | -          | -      | -      | -      | -          | -      |
| Perthshire                 | *      | *  | *          | *      | 63.46% | 51.08% | 12.38      | 112    |
| Scottish Borders           | *      | *  | *          | *      | 42.23% | 44.95% | -2.72      | 97     |
| Shetland Islands           | -      | -  | -          | -      | -      | -      | -          | -      |
| Outer Hebrides             | *      | *  | *          | *      | 60.11% | 61.52% | -1.41      | 99     |
| <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |            |        |        |        |            |        |

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

| Area                       | May 23 | May 22   | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--|------------|--------|--------|--------|------------|--------|
| Aberdeen & Grampian        | 60.15% | 48.58%   | 11.57      | 112    | 41.97% | 39.03% | 2.94       | 103    |
| ALLFV                      | 80.84% | 60.28%   | 20.56      | 121    | 62.35% | 48.10% | 14.25      | 114    |
| Angus & City of Dundee     | *      | *  | *          | *      | 31.80% | 29.40% | 2.40       | 102    |
| Ayrshire & Arran           | *      | *  | *          | *      | 49.71% | 50.32% | -0.61      | 99     |
| Dumfries & Galloway        | *      | *  | *          | *      | 26.36% | 22.84% | 3.52       | 104    |
| Edinburgh & Lothian        | *      | *  | *          | *      | 43.05% | 86.48% | -43.43     | 57     |
| Greater Glasgow            | 41.06% | 40.78%   | 0.28       | 100    | 44.23% | 55.41% | -11.18     | 89     |
| Highlands of Scotland      | 73.74% | 65.88%   | 7.86       | 108    | 57.75% | 55.51% | 2.24       | 102    |
| Kingdom of Fife            | *      | *  | *          | *      | 48.63% | 43.95% | 4.68       | 105    |
| Orkney                     | -      | -  | -          | -      | -      | -      | -          | -      |
| Perthshire                 | *      | *  | *          | *      | 51.38% | 40.21% | 11.17      | 111    |
| Scottish Borders           | *      | *  | *          | *      | 38.86% | 38.47% | 0.39       | 100    |
| Shetland Islands           | -      | -  | -          | -      | -      | -      | -          | -      |
| Outer Hebrides             | *      | *  | *          | *      | 46.94% | 47.11% | -0.17      | 100    |
| <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |            |        |        |        |            |        |

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

| Location accessibility/density | May 23 | May 22 | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|--------------------------------|--------|--------|------------|--------|--------|--------|------------|--------|
| Large Urban Areas              | 60.05% | 47.71% | 12.34      | 112    | 52.41% | 41.15% | 11.26      | 111    |

|                            |        |  |       |     |        |        |       |     |
|----------------------------|--------|--|-------|-----|--------|--------|-------|-----|
| Other Urban Areas          | 85.85% | 74.41%   | 11.44 | 111 | 72.62% | 65.21% | 7.41  | 107 |
| Accessible Small Towns     | 77.36% | 71.24%   | 6.12  | 106 | 61.94% | 66.65% | -4.71 | 95  |
| Remote Small Towns         | 67.29% | 64.60%   | 2.69  | 103 | 47.22% | 48.04% | -0.82 | 99  |
| Accessible Rural           | *      | *  | *     | *   | 60.17% | 47.58% | 12.59 | 113 |
| Remote Rural               | 83.08% | 83.94%   | -0.86 | 99  | 58.69% | 56.11% | 2.58  | 103 |
| <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |       |     |        |        |       |     |

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

| Location accessibility/density | May 23 | May 22   | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|--------------------------------|--------|--|------------|--------|--------|--------|------------|--------|
| Large Urban Areas              | 48.48% | 42.00%   | 6.48       | 106    | 41.96% | 58.26% | -16.30     | 84     |
| Other Urban Areas              | 70.73% | 59.25%   | 11.48      | 111    | 59.13% | 49.28% | 9.85       | 110    |
| Accessible Small Towns         | 68.26% | 54.65%   | 13.61      | 114    | 51.00% | 45.68% | 5.32       | 105    |
| Remote Small Towns             | 67.94% | 59.61%   | 8.33       | 108    | 45.35% | 43.14% | 2.21       | 102    |
| Accessible Rural               | *      | *  | *          | *      | 58.86% | 39.88% | 18.98      | 119    |
| Remote Rural                   | 65.16% | 60.85%   | 4.31       | 104    | 45.23% | 46.05% | -0.82      | 99     |
| <b>- Sample Size = Nil</b>     |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |            |        |        |        |            |        |

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

| Location (Geographic)      | May 23 | May 22   | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--|------------|--------|--------|--------|------------|--------|
| Coastal                    | 74.97% | 67.62%   | 7.35       | 107    | 55.01% | 54.06% | 0.95       | 101    |
| Inland                     | 70.78% | 63.78%   | 7.00       | 107    | 61.01% | 53.27% | 7.74       | 108    |
| Island                     | 82.88% | 89.49%   | -6.61      | 93     | 60.51% | 62.38% | -1.87      | 98     |
| <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |            |        |        |        |            |        |

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

| Location (Geographic)      | May 23 | May 22   | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--|------------|--------|--------|--------|------------|--------|
| Coastal                    | 63.50% | 52.94%   | 10.56      | 111    | 44.70% | 42.96% | 1.74       | 102    |
| Inland                     | 54.77% | 50.51%   | 4.26       | 104    | 48.50% | 50.94% | -2.44      | 98     |
| Island                     | 77.03% | 77.99%   | -0.96      | 99     | 62.60% | 62.73% | -0.13      | 100    |
| <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |            |        |        |        |            |        |

### Room Occupancy by size – May 2023/2022

| Size                       | May 23 | May 22   | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|----------------------------|--------|--|------------|--------|--------|--------|------------|--------|
| 1 to 3                     | -      | -  | -          | -      | -      | -      | -          | -      |
| 4 to 10                    | 72.74% | 65.09%   | 7.65       | 108    | 46.88% | 44.72% | 2.16       | 102    |
| 11 to 25                   | 71.74% | 68.07%   | 3.67       | 104    | 52.49% | 50.91% | 1.58       | 102    |
| 26 to 50                   | 85.66% | 82.81%   | 2.85       | 103    | 70.81% | 70.97% | -0.16      | 100    |
| 51 to 100                  | 86.47% | 80.63%   | 5.84       | 106    | 73.54% | 71.59% | 1.95       | 102    |
| Over 100                   | 60.76% | *  | 33.00      | 133    | 52.16% | 29.15% | 23.01      | 123    |
| <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |            |        |        |        |            |        |

### Bed Occupancy by size – May 2023/2022

| Size                | May 23 | May 22  | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|---------------------|--------|---|------------|--------|--------|--------|------------|--------|
| 1 to 3              | -      | -   | -          | -      | -      | -      | -          | -      |
| 4 to 10             | 47.08% | 37.25%  | 9.83       | 110    | 31.50% | 27.84% | 3.66       | 104    |
| 11 to 25            | 69.87% | 59.58%  | 10.29      | 110    | 52.64% | 47.83% | 4.81       | 105    |
| 26 to 50            | 71.59% | 73.78%  | -2.19      | 98     | 54.39% | 55.50% | -1.11      | 99     |
| 51 to 100           | 73.46% | 66.26%  | 7.20       | 107    | 63.05% | 58.94% | 4.11       | 104    |
| Over 100            | 43.26% | *   | 19.44      | 119    | 36.93% | 43.78% | -6.85      | 93     |
| - Sample Size = Nil |        | *Sample Size (between 1 and 4) too small to be included |            |        |        |        |            |        |

### Room Occupancy by tariff – May 2023/2022

| Tariff              | May 23 | May 22  | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|---------------------|--------|---|------------|--------|--------|--------|------------|--------|
| £20 - £29.99        | -      | -   | -          | -      | -      | -      | -          | -      |
| £30 - £39.99        | -      | -   | -          | -      | -      | -      | -          | -      |
| £40 - £49.99        | -      | -   | -          | -      | *      | 28.60% | -8.28      | 92     |
| £50 - £59.99        | *      | *   | *          | *      | 58.44% | 63.51% | -5.07      | 95     |
| £60 - £69.99        | 75.20% | *   | 8.76       | 109    | 53.19% | 61.73% | -8.54      | 91     |
| £70 +               | 72.00% | 65.23%  | 6.77       | 107    | 59.80% | 53.52% | 6.28       | 106    |
| - Sample Size = Nil |        | *Sample Size (between 1 and 4) too small to be included |            |        |        |        |            |        |

### Bed Occupancy by tariff – May 2023/2022

| Tariff              | May 23 | May 22  | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|---------------------|--------|---|------------|--------|--------|--------|------------|--------|
| £20 - £29.99        | -      | -   | -          | -      | -      | -      | -          | -      |
| £30 - £39.99        | -      | -   | -          | -      | -      | -      | -          | -      |
| £40 - £49.99        | -      | -   | -          | -      | *      | 17.92% | -7.97      | 92     |
| £50 - £59.99        | *      | *   | *          | *      | 60.17% | 29.69% | 30.48      | 130    |
| £60 - £69.99        | 63.69% | *   | 7.16       | 107    | 43.19% | 49.60% | -6.41      | 94     |
| £70 +               | 56.56% | 52.19%  | 4.37       | 104    | 47.84% | 50.81% | -2.97      | 97     |
| - Sample Size = Nil |        | *Sample Size (between 1 and 4) too small to be included |            |        |        |        |            |        |

### Room Occupancy by grading – May 2023/2022

| Grading             | May 23 | May 22  | 23/22 Diff | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|---------------------|--------|---|------------|--------|--------|--------|------------|--------|
| 2 Stars             | *      | *   | *          | *      | 67.35% | 66.87% | 0.48       | 100    |
| 3 Stars             | 78.55% | 80.61%  | -2.06      | 98     | 58.35% | 55.24% | 3.11       | 103    |
| 4 Stars             | 65.97% | 53.40%  | 12.57      | 113    | 57.14% | 48.47% | 8.67       | 109    |
| 5 Stars             | *      | *   | *          | *      | 46.97% | 44.86% | 2.11       | 102    |
| Unclassified        | 81.39% | 66.87%  | 14.52      | 115    | 64.05% | 58.42% | 5.63       | 106    |
| - Sample Size = Nil |        | *Sample Size (between 1 and 4) too small to be included |            |        |        |        |            |        |



### Bed Occupancy by grading – May 2023/2022

| Grading      | May 23                     | May 22 | 23/22 Diff   | Change | YTD 23 | YTD 22 | 23/22 Diff | Change |
|--------------|----------------------------|--------|--|--------|--------|--------|------------|--------|
| 2 Stars      | *                          | *      | *  | *      | 57.40% | 47.72% | 9.68       | 110    |
| 3 Stars      | 68.98%                     | 70.25% | -1.27  | 99     | 50.55% | 49.59% | 0.96       | 101    |
| 4 Stars      | 53.06%                     | 39.20% | 13.86  | 114    | 45.39% | 52.13% | -6.74      | 93     |
| 5 Stars      | *                          | *      | *  | *      | 37.35% | 37.46% | -0.11      | 100    |
| Unclassified | 56.29%                     | 48.00% | 8.29   | 108    | 42.64% | 39.46% | 3.18       | 103    |
|              | <b>- Sample Size = Nil</b> |        | <b>*Sample Size (between 1 and 4) too small to be included</b> |        |        |        |            |        |

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