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SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2024/2023 Report - HOTELS

1.0 Introduction November 2024/2023

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

The SOAS Report: November 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 November 2024 experienced an **4.68** percentage point increase when comparing percentage room occupancy rates with November 2023. Occupancy rates within the Hotel sector experienced a **11.40** percentage point increase in November 2024 compared to last year.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to November 2024 is 2.6%, up from 2.3% in October. The CPI 12-month rate (%) for November 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.6% up from 3.0% in October. Inflation rates for restaurants and cafes were 4.0% down from 4.3% in October.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.3% in November. However, this was disappointing growth compared to the 2.6% increase in November 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering November 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the October 2024 survey). The survey recorded 47% of respondents (a 2% increase on the October 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, 19% of UK adults intended to take a domestic overnight trip in the two months of 2024 and 78% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (77%). 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.

Eurocontrol (European Air Traffic Agency) indicated in November 2024 that UK air connectivity saw a 3% decrease when compared to the same period in 2023, also, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for November 2024 global air passenger demand, measured by revenue per kilometer, was up 8.1% compared to November 2023. International demand rose 11.6% over the same period with domestic demand increasing 3.1%. Asia-Pacific region was the biggest global air passenger growth driver in November 2024 at 19.9% when compared to Europe at 9.4%.



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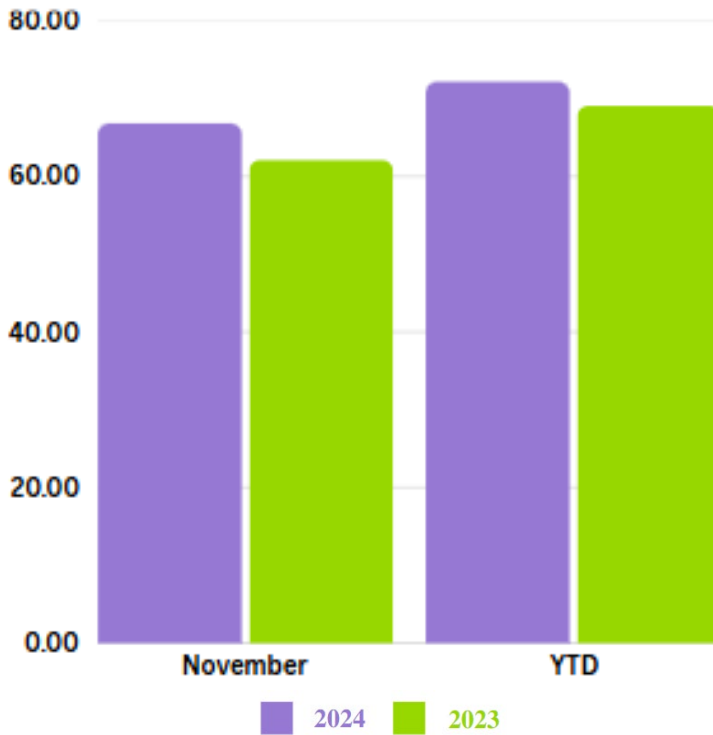


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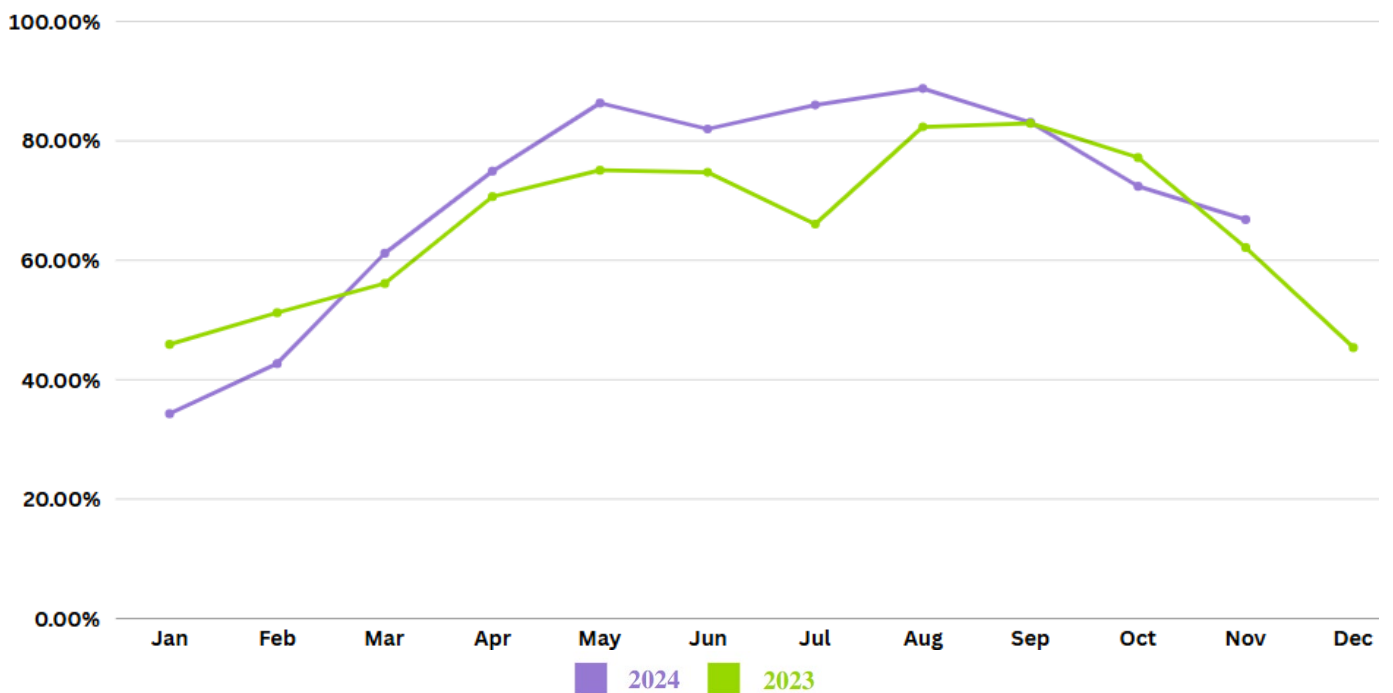
All Serviced Accommodation

Room Occupancy – November 2024/2023

Scottish Serviced Accommodation room occupancy rates for November 2024 experienced a **4.68** percentage point increase when comparing percentage room occupancy rates with November 2023.



Room Occupancy – Year-to-Date





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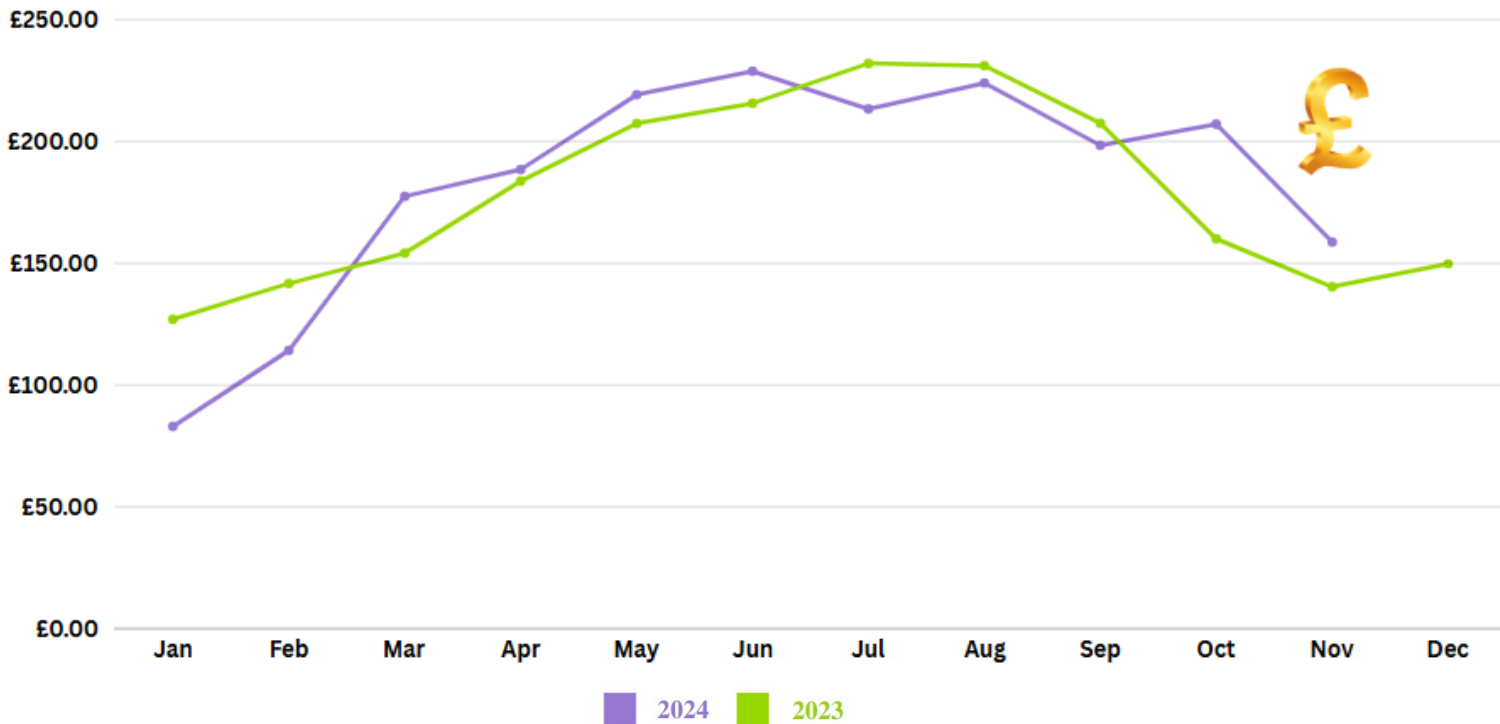
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Room Occupancy	November 24	November 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	66.82%	62.14%	4.68	105	72.17%	69.07%	3.10	103

Bed Occupancy	November 24	November 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	66.82%	50.06%	16.76	117	64.72%	58.21%	6.51	107

RevPAR

The Revenue per available occupied room for November 2024 was **£158.71** compared with **£140.34** in November 2023. This figure is based solely on accommodation providers who provided financial information for November 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 (£)	November 24	November 23
All Serviced Accommodation	£158.71	£140.34

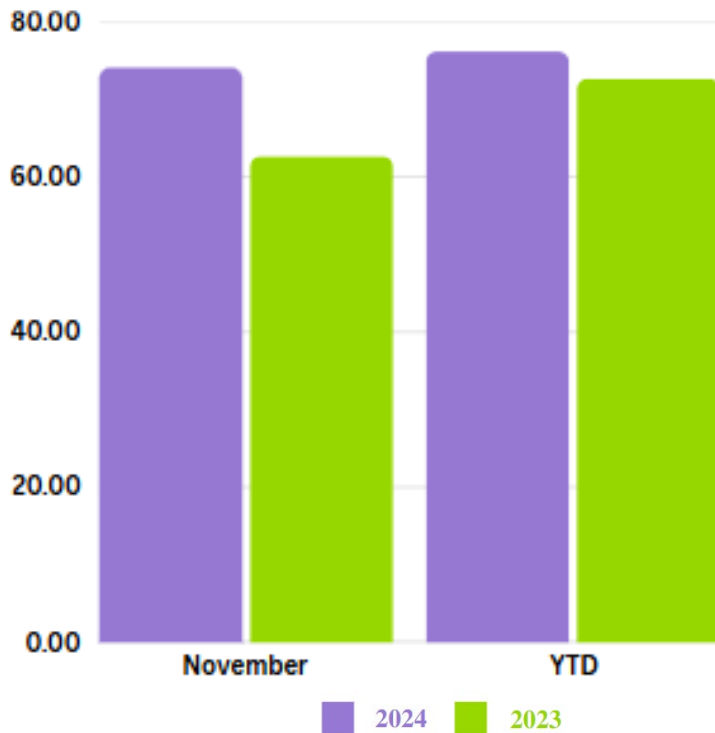
RevPAR by Grading- November 2024/21

Grading – Average RevPAR (£)	November 24	November 23
2 Stars	£99.22	£84.53
3 Stars	£189.80	£127.38
4 Stars	£112.56	£172.25
5 Stars	£306.84	£309.20
Unclassified	£	£

3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – November 2024/2023



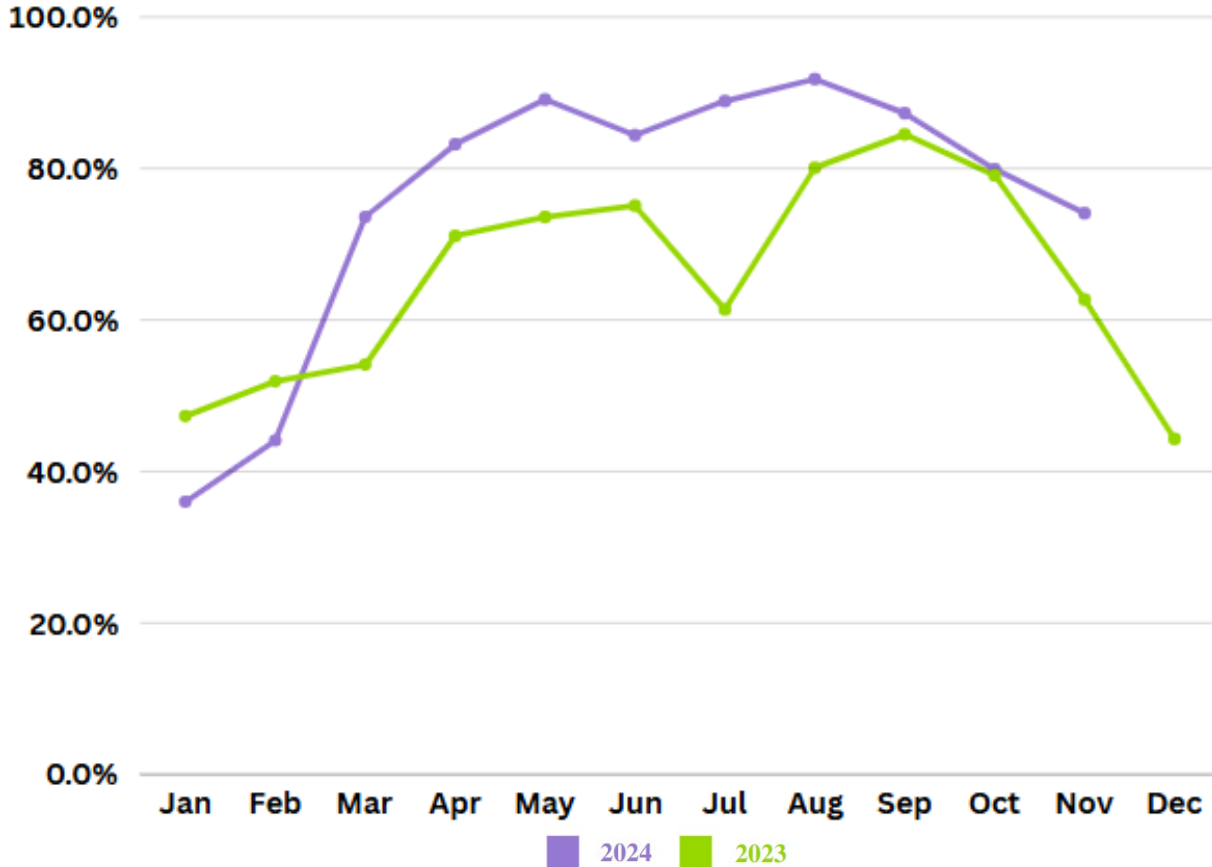


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Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for November 2024 was **74.05%** compared to data from the previous year of **62.65%** occupancy rate; this shows an overall percentage point increase of **11.40**.

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

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

Room Occupancy	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	74.05%	62.65%	11.40	111	76.14%	72.64%	3.50	104

In the **Hotel sector**, the bed occupancy rate for November 2024 was **52.27%** compared to data from the previous year of **48.16%** occupancy rate; this shows an overall percentage point increase of **4.11**.

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

Bed Occupancy	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	52.27%	48.16%	4.11	104	66.09%	62.33%	3.76	104



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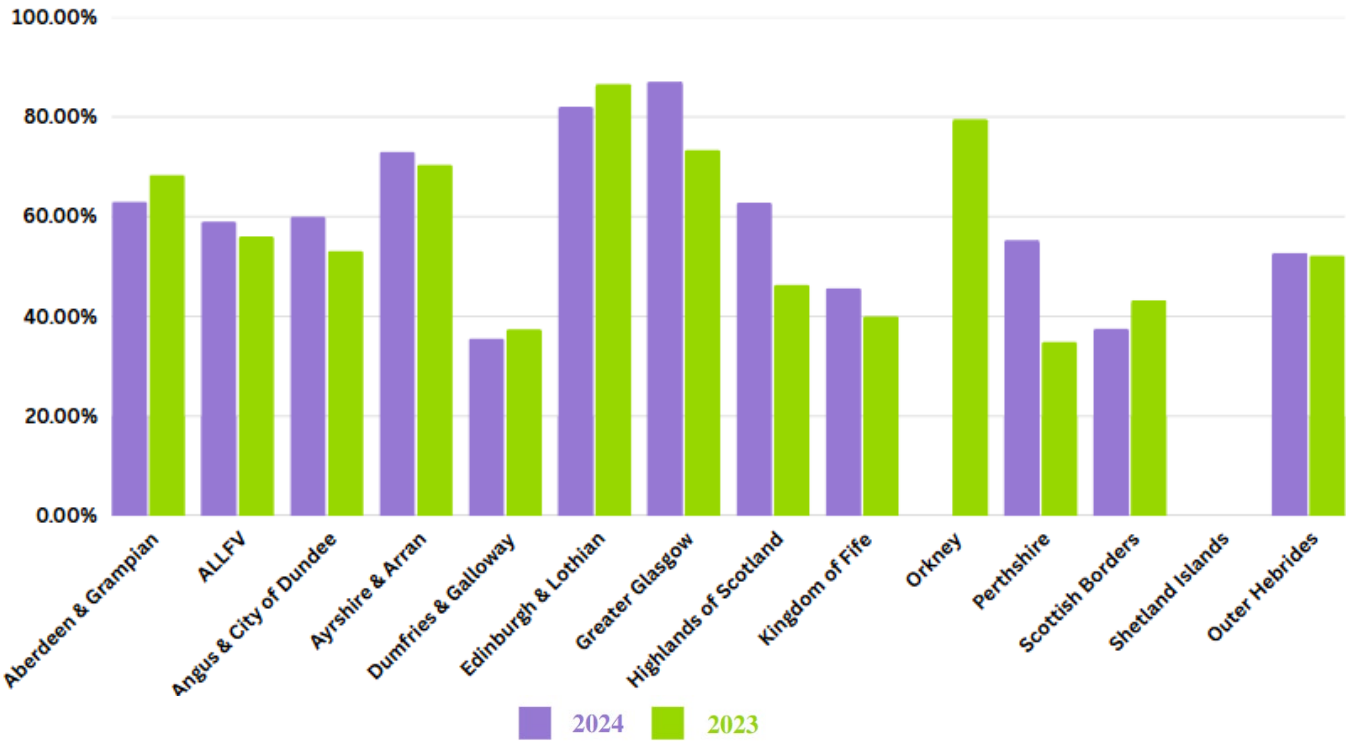


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Room Occupancy by Former VisitScotland Area

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



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

Area	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	63.02%	68.39%	-5.37	95	72.23%	71.77%	0.46	100
ALLFV	59.04%	56.04%	3.00	103	73.04%	71.06%	1.98	102
Angus & City of Dundee	*	*	*	*	67.93%	69.12%	-1.19	99
Ayrshire & Arran	*	*	*	*	80.24%	83.83%	-3.59	96
Dumfries & Galloway	*	*	*	*	58.20%	56.52%	1.68	102
Edinburgh & Lothian	82.04%	*	-4.53	95	86.84%	72.79%	14.05	114
Greater Glasgow	87.05%	73.43%	13.62	114	77.53%	81.83%	-4.30	96
Highlands of Scotland	62.82%	46.39%	16.43	116	77.06%	73.14%	3.92	104
Kingdom of Fife	*	*	*	*	59.66%	68.46%	-8.80	91
Orkney	-	*	*	*	-	*	*	*
Perthshire	*	*	*	*	72.49%	60.73%	11.76	112
Scottish Borders	37.58%	*	-5.68	94	58.68%	52.11%	6.57	107
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	72.10%	71.03%	1.07	101

- Sample Size = Nil

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



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

Area	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	41.81%	58.03%	-16.22	84	58.06%	62.71%	-4.65	95
ALLFV	51.39%	51.12%	0.27	100	68.11%	69.86%	-1.75	98
Angus & City of Dundee	*	*	*	*	37.27%	36.41%	0.86	101
Ayrshire & Arran	*	*	*	*	56.47%	53.77%	2.70	103
Dumfries & Galloway	*	*	*	*	35.00%	38.27%	-3.27	97
Edinburgh & Lothian	80.31%	*	25.31	125	85.71%	55.76%	29.95	130
Greater Glasgow	72.06%	75.67%	-3.61	96	75.84%	78.37%	-2.53	97
Highlands of Scotland	53.97%	28.10%	25.87	126	68.70%	61.97%	6.73	107
Kingdom of Fife	*	*	*	*	48.97%	53.36%	-4.39	96
Orkney	-	*	*	*	-	*	*	*
Perthshire	*	*	*	*	51.13%	44.10%	7.03	107
Scottish Borders	20.76%	*	-25.24	75	45.39%	43.84%	1.55	102
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	53.75%	57.50%	-3.75	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	83.08%	81.44%	1.64	102	76.83%	78.65%	-1.82	98
Other Urban Areas	83.88%	67.91%	15.97	116	84.24%	78.52%	5.72	106
Accessible Small Towns	61.11%	52.67%	8.44	108	70.58%	67.22%	3.36	103
Remote Small Towns	40.35%	39.50%	0.85	101	61.89%	55.90%	5.99	106
Accessible Rural	*	*	*	*	65.44%	43.10%	22.34	122
Remote Rural	47.55%	41.93%	5.62	106	72.58%	69.32%	3.26	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	69.24%	65.67%	3.57	104	77.13%	66.66%	10.4%	110
Other Urban Areas	58.08%	53.21%	4.87	105	62.53%	66.54%	-4.01	96
Accessible Small Towns	28.59%	36.65%	-8.06	92	55.92%	55.94%	-0.02	100
Remote Small Towns	41.15%	38.18%	2.97	103	68.78%	55.16%	13.62	114
Accessible Rural	*	*	*	*	50.09%	25.73%	24.36	124
Remote Rural	42.08%	33.14%	8.94	109	61.55%	60.83%	0.72	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



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

Location (Geographic)	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	53.79%	65.15%	-11.36	89	68.54%	67.01%	1.53	102
Inland	78.33%	62.15%	16.18	116	77.18%	75.07%	2.11	102
Island	53.16%	53.23%	-0.07	100	76.01%	73.50%	2.51	103
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	39.14%	48.01%	-8.87	91	59.49%	5.06%	54.43	154
Inland	57.37%	48.05%	9.32	109	67.42%	65.69%	1.73	102
Island	62.08%	51.75%	10.33	110	69.45%	70.90%	-1.45	99
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Size– November 2024/2023

Size	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	44.22%	31.41%	12.81	113	58.44%	52.37%	6.07	106
11 to 25	48.18%	43.17%	5.01	105	64.87%	63.56%	1.31	101
26 to 50	70.08%	63.54%	6.54	107	81.47%	78.37%	3.10	103
51 to 100	73.87%	72.02%	1.85	102	79.22%	80.17%	-0.95	99
Over 100	87.17%	76.59%	10.58	111	78.69%	76.87%	1.82	102
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Size – November 2024/2023

Size	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	0.00%	17.45%	-17.45	83	62.61%	34.30%	28.31	128
11 to 25	30.76%	36.90%	-6.14	94	57.30%	60.70%	-3.40	97
26 to 50	49.26%	58.91%	-9.65	90	71.75%	69.46%	2.29	102
51 to 100	57.65%	62.99%	-5.34	95	64.67%	69.74%	-5.07	95
Over 100	80.58%	53.22%	27.36	127	80.03%	58.37%	21.66	122
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					



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Room Occupancy by Tariff – November 2024/2023

Tariff	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	*	*	*	40.00%	41.43%	-1.43	99
£50 – 59.99	*	*	*	*	75.29%	56.61%	18.68	119
£60 - £69.00	63.45%	58.92%	4.53	105	72.41%	66.37%	6.04	106
£70+	75.68%	63.51%	12.17	112	77.04%	73.77%	3.27	103

- Sample Size = Nil

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

Bed Occupancy by Tariff – November 2024/2023

Tariff	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	*	*	*	0.00%	8.44%	-8.44	92
£50 – 59.99	*	*	*	*	38.29%	48.80%	-10.51	89
£60 - £69.00	0.00%	59.90%	-59.90	40	67.11%	55.32%	11.79	112
£70+	52.27%	47.17%	5.10	105	66.13%	63.24%	2.89	103

- Sample Size = Nil

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

Room Occupancy by Grading – November 2024/2023

Grading	Nov 24	Novr 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	79.31%	74.23%	5.08	105
3 Stars	68.84%	52.44%	16.40	116	77.76%	67.46%	10.30	110
4 Stars	80.43%	75.33%	5.10	105	73.48%	76.19%	-2.71	97
5 Stars	*	*	*	*	58.52%	59.41%	-0.89	99
Unclassified	67.81%	*	-4.60	95	80.32%	74.40%	5.92	106

- Sample Size = Nil

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

Bed Occupancy by Grading – November 2024/2023

Grading	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	72.70%	62.48%	10.22	110
3 Stars	48.07%	36.67%	11.40	111	61.54%	58.86%	2.68	103
4 Stars	63.42%	58.83%	4.59	105	69.23%	62.95%	6.28	106
5 Stars	*	*	*	*	46.83%	47.42%	-0.59	99
Unclassified	28.59%	*	-5.40	95	48.86%	52.33%	-3.47	97

- Sample Size = Nil

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