



Moffat Centre



Glasgow Caledonian
University

University for the Common Good

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

September 2024/2023 Report - HOTELS

1.0 Introduction September 2024/2023

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

The SOAS Report: September 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 September 2024 experienced an 0.16 percentage point increase when comparing percentage room occupancy rates with September 2023. Occupancy rates within the Hotel sector experienced a **2.77** percentage point increase in September 2024 compared to last year.

The Visitor Levy (Scotland) Act 2024 came into force on the 20th of September 2024. The Bill aims to allow Scottish local authorities to charge a visitor levy, which is charged for overnight stays in certain types of accommodation (such as hotels, B&Bs or holiday cottages). Each local authority will be able to decide if they wish to introduce the levy and at what level the levy should be.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to September 2024 is 1.7%, down from 2.2% in August. The CPI 12-month rate (%) for September 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.8% down from 4.0% in August. Inflation rates for restaurants and cafes were 4.1% down from 4.3% in August.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in September, however, compared to the 6.1% increase in September 2023 this was disappointing growth in total sales. Total food sales decreased by -0.7% compared to the monthly performance of September 2023, when they had increased by 9.2%.

Domestic consumer sentiment provided by the GB National Tourist Boards for September 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 August 2024 survey). The survey recorded 47% of respondents (a 1% increase on the August 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, 37% of UK adults intended to take a domestic overnight trip in the final 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 (76%). 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.

The recovery in international inbound visitation stalled in September 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% decrease when compared to the same period in 2023, also, UK air connectivity saw a 4% decrease in year-to-date flights compared to 2019.



Moffat Centre

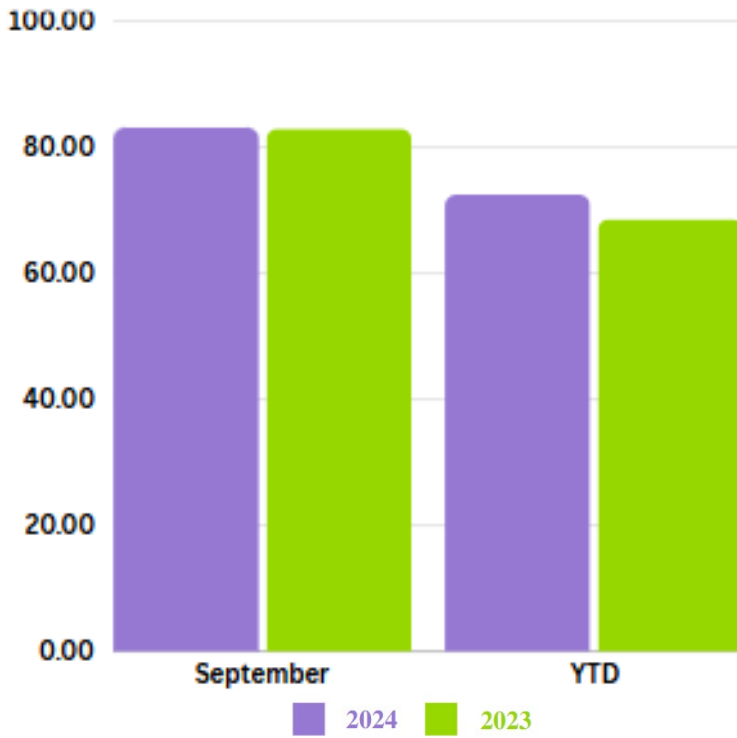


University for the Common Good

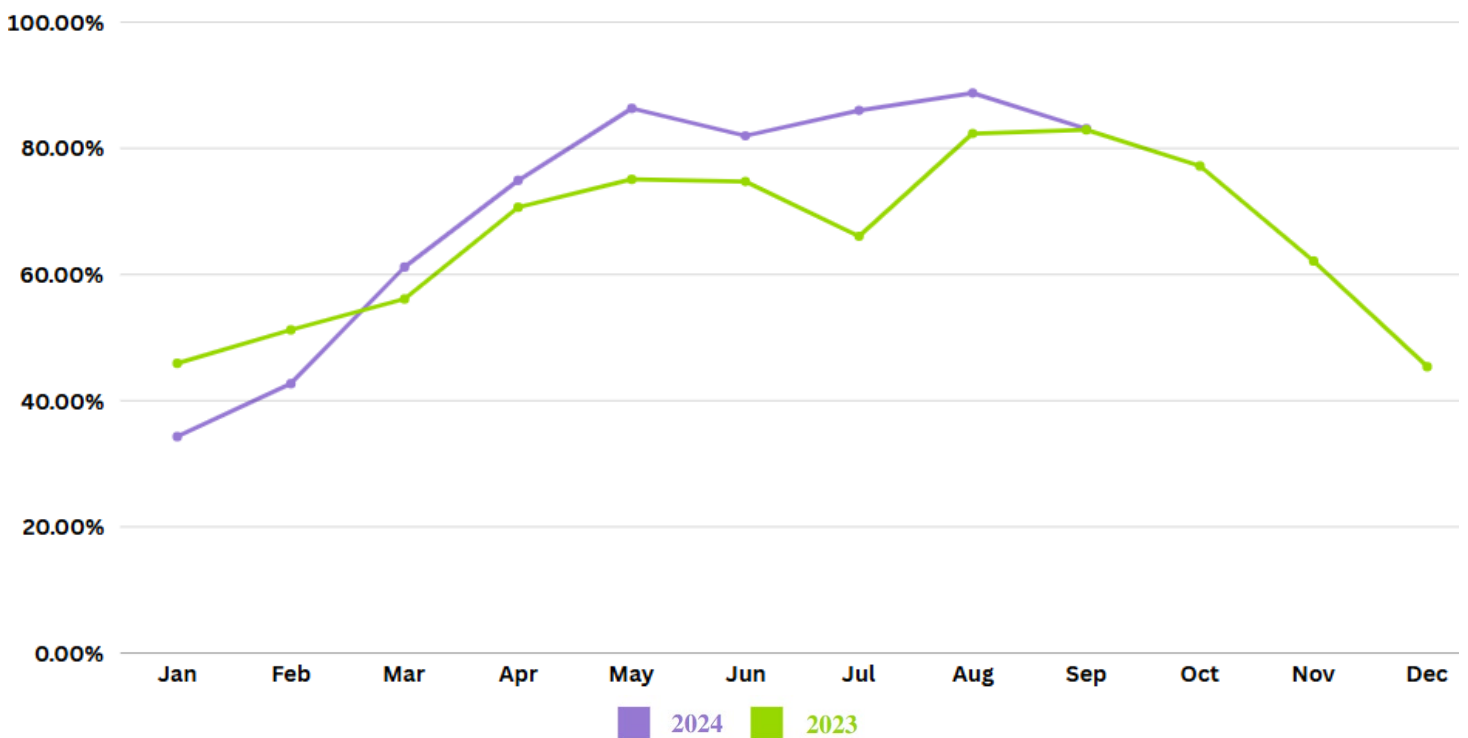
All Serviced Accommodation

Room Occupancy – September 2024/2023

Scottish Serviced Accommodation room occupancy for September 2024 experienced a 0.16 percentage point increase when comparing percentage room occupancy rates with September 2023.



Room Occupancy – Year-to-Date





Moffat Centre



Glasgow Caledonian University

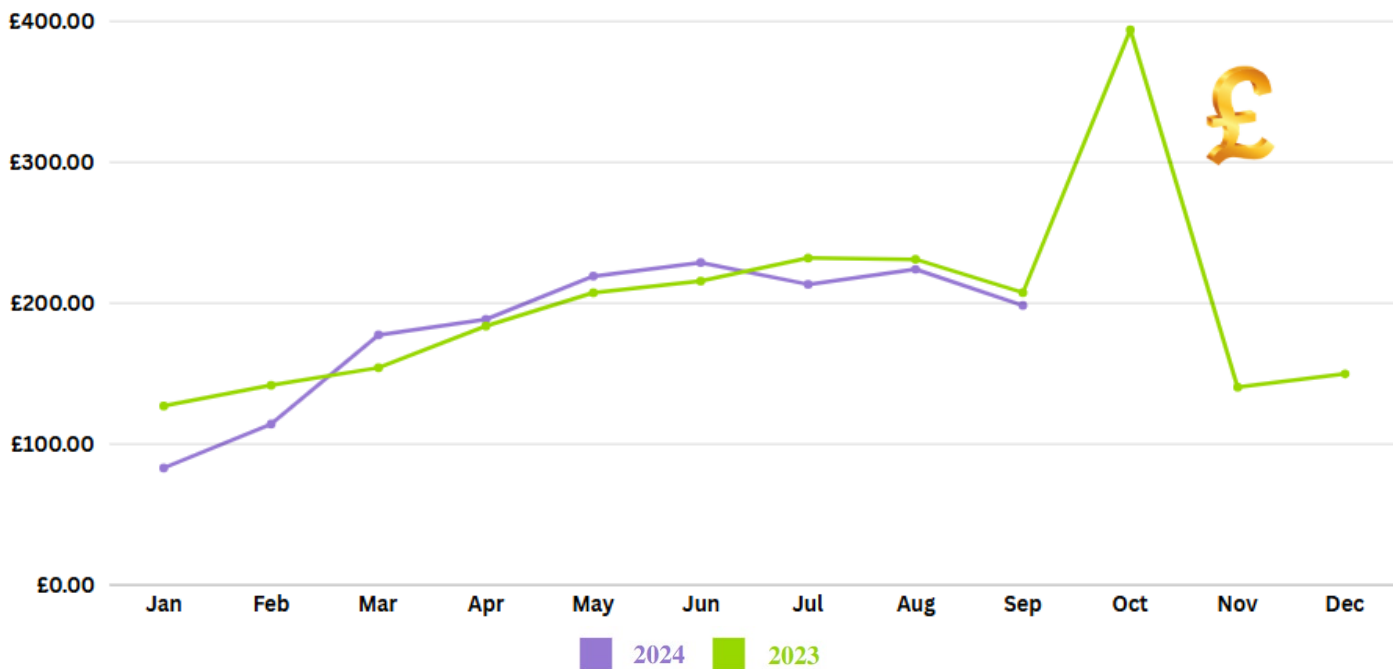
University for the Common Good

Room Occupancy	September 24	September 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	83.10%	82.94%	0.16	100	72.47%	68.58%	3.89	104

Bed Occupancy	September 24	September 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	71.97%	72.84%	-0.87	99	65.40%	58.40%	7.00	107

RevPAR

The Revenue per available occupied room for September 2024 was **£198.39** compared with **£207.47** in September 2023. This figure is based solely on accommodation providers who provided financial information for September 2024 and/or 2023.



RevPAR - Year to Date 2024/2023

Room - Average RevPAR (£)	September 24	September 23
All Serviced Accommodation	£198.39	£207.47

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.



Moffat Centre



University for the Common Good

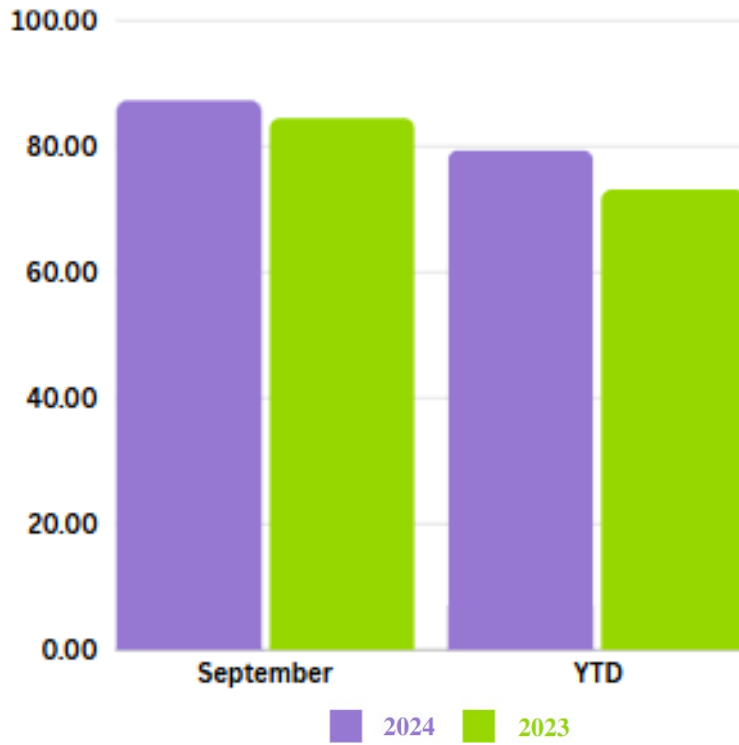
RevPAR by Grading- September 2024/21

Grading – Average RevPAR (£)	September 24	September 23
2 Stars	£191.20	£185.98
3 Stars	£222.90	£201.00
4 Stars	£174.62	£214.67
5 Stars	£421.18	£431.09
Unclassified	£	£

3.0 Serviced Accommodation – Hotel Sector

3.1 Performance by Hotel Category

Hotel Room Occupancy – September 2024/2023



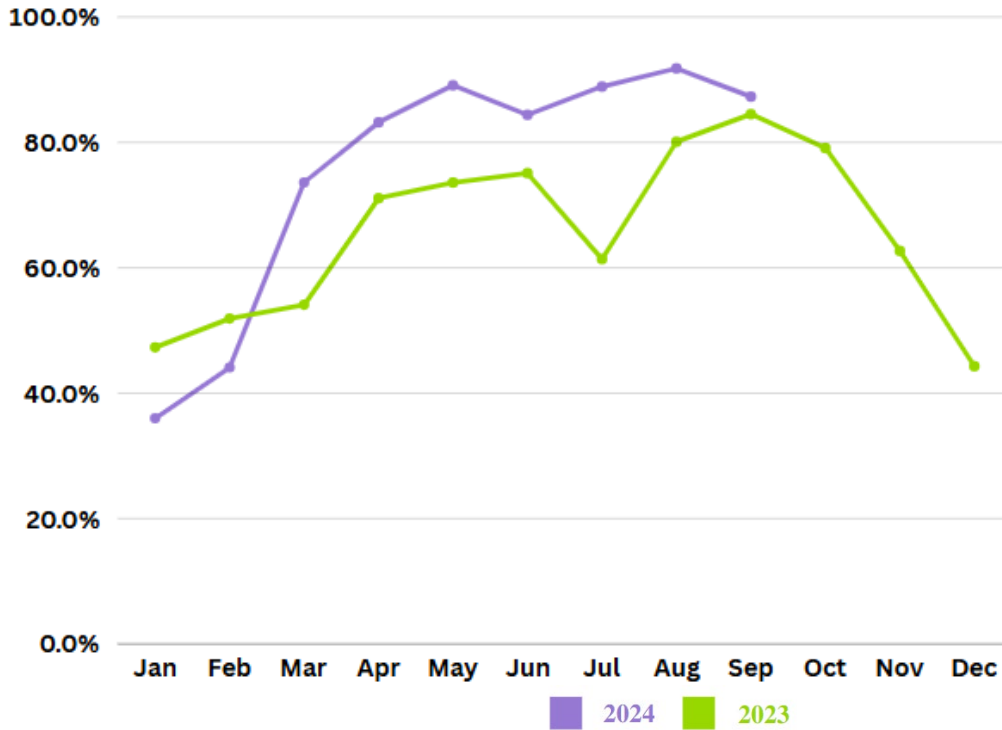


Moffat Centre



University for the Common Good

Hotel Room Occupancy – Year to Date



In the **Hotel sector**, the room occupancy rate for September 2024 was **87.31%** compared to data from the previous year of **84.54%** occupancy rate; this shows an overall percentage point increase of **2.77**.

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

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

Room Occupancy	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	87.31%	84.54%	2.77	103	79.45%	73.17%	6.28	106

In the **Hotel sector**, the bed occupancy rate for September 2024 was **74.90%** compared to data from the previous year of **70.86%** occupancy rate; this shows an overall percentage point increase of **4.04**.

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

Bed Occupancy	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Hotel	74.90%	70.86%	4.04	104	66.91%	63.18%	3.73	104



Moffat Centre

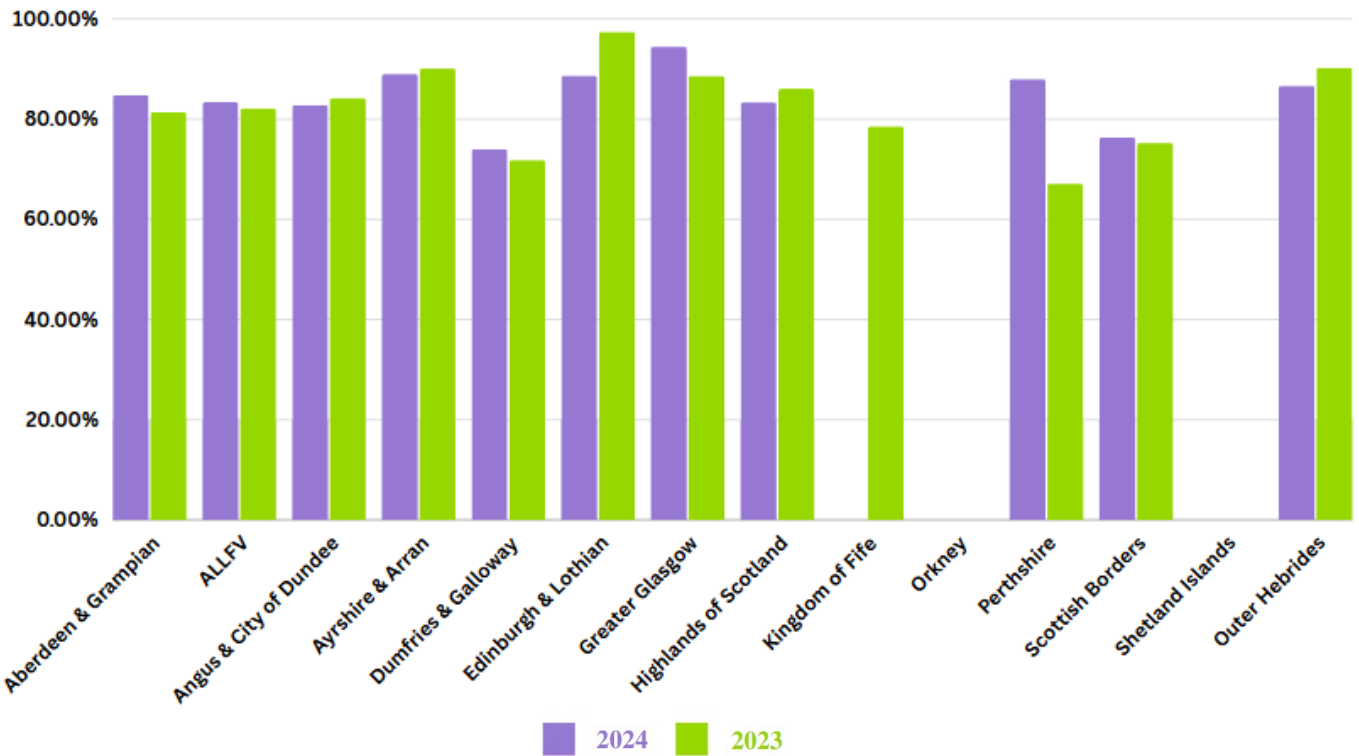


Glasgow Caledonian University

University for the Common Good

Room Occupancy by Former VisitScotland Area

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



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

Area	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	84.82%	81.39%	3.43	103	72.60%	70.61%	1.99	102
ALLFV	83.44%	82.16%	1.28	101	76.06%	73.45%	2.61	103
Angus & City of Dundee	*	*	*	*	72.06%	70.37%	1.69	102
Ayrshire & Arran	*	*	*	*	80.94%	85.48%	-4.54	95
Dumfries & Galloway	*	*	*	*	61.28%	59.66%	1.62	102
Edinburgh & Lothian	88.67%	*	-8.75	91	64.61%	70.37%	-5.76	94
Greater Glasgow	94.42%	*	5.80	106	86.02%	81.96%	4.06	104
Highlands of Scotland	83.35%	86.07%	-2.72	97	78.42%	76.41%	2.01	102
Kingdom of Fife	-	*	*	*	56.20%	72.24%	-16.04	84
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	74.61%	66.15%	8.46	108
Scottish Borders	76.35%	*	1.15	101	63.61%	50.51%	13.10	113
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	74.90%	73.57%	1.33	101

- Sample Size = Nil

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



Moffat Centre



University for the Common Good

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

Area	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	66.37%	73.98%	-7.61	92	59.00%	61.65%	-2.65	97
ALLFV	79.25%	78.40%	0.85	101	70.56%	70.43%	0.13	100
Angus & City of Dundee	*	*	*	*	36.65%	38.46%	-1.81	98
Ayrshire & Arran	*	*	*	*	56.15%	53.64%	2.51	103
Dumfries & Galloway	*	*	*	*	35.00%	39.81%	-4.81	95
Edinburgh & Lothian	71.46%	*	8.99	109	68.70%	54.77%	13.93	114
Greater Glasgow	80.57%	*	-5.21	95	75.99%	79.09%	-3.10	97
Highlands of Scotland	86.30%	77.58%	8.72	109	69.97%	67.50%	2.47	102
Kingdom of Fife	-	*	*	*	45.11%	57.70%	-12.59	87
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	52.62%	49.32%	3.30	103
Scottish Borders	54.48%	*	-4.24	96	47.98%	41.61%	6.37	106
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	56.60%	61.40%	-4.80	95

- Sample Size = Nil

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

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

Location accessibility/density	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	89.34%	92.29%	-2.95	97	84.26%	76.57%	7.69	108
Other Urban Areas	94.02%	86.89%	7.13	107	83.46%	78.23%	5.23	105
Accessible Small Towns	81.54%	76.75%	4.79	105	71.38%	70.69%	0.69	101
Remote Small Towns	72.12%	70.15%	1.97	102	64.92%	57.59%	7.33	107
Accessible Rural	*	*	*	*	69.23%	57.59%	11.64	112
Remote Rural	83.22%	84.56%	-1.34	99	74.95%	72.41%	2.54	103

- Sample Size = Nil

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

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

Location accessibility/density	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	72.85%	71.74%	1.11	101	72.09%	65.33%	6.76	107
Other Urban Areas	76.10%	73.54%	2.56	103	64.57%	65.91%	-1.34	99
Accessible Small Towns	63.11%	65.68%	-2.57	97	55.64%	58.15%	-2.51	97
Remote Small Towns	79.98%	78.12%	1.86	102	71.38%	55.68%	15.70	116
Accessible Rural	*	*	*	*	53.75%	41.98%	11.77	112
Remote Rural	78.19%	72.83%	5.36	105	63.42%	64.30%	-0.88	99

- Sample Size = Nil

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



Moffat Centre



Glasgow Caledonian University

University for the Common Good

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

Location (Geographic)	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	83.23%	84.15%	-0.92	99	74.71%	67.27%	7.44	107
Inland	88.30%	84.09%	4.21	104	80.71%	75.89%	4.82	105
Island	93.38%	93.26%	0.12	100	79.71%	75.14%	4.57	105
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	72.01%	61.05%	10.96	111	63.20%	54.89%	8.31	108
Inland	77.43%	75.46%	1.97	102	68.47%	66.80%	1.67	102
Island	78.88%	79.50%	-0.62	99	69.61%	72.42%	-2.81	97
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Size- September 2024/2023

Size	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	67.82%	72.08%	-4.26	96	61.30%	60.55%	0.75	101
11 to 25	78.82%	78.28%	0.54	101	66.28%	65.32%	0.96	101
26 to 50	90.58%	88.27%	2.31	102	82.43%	80.60%	1.83	102
51 to 100	85.17%	86.12%	-0.95	99	79.93%	79.07%	0.86	101
Over 100	92.05%	*	-3.24	97	86.57%	73.71%	12.86	113
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Size – September 2024/2023

Size	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	-	-	-	-	-	-	-	-
4 to 10	0.00%	45.91%	-45.91	54	62.61%	41.93%	20.68	121
11 to 25	78.48%	73.96%	4.52	105	58.45%	63.50%	-5.05	95
26 to 50	77.64%	79.29%	-1.65	98	74.24%	70.61%	3.63	104
51 to 100	71.97%	75.29%	-3.32	97	65.93%	68.86%	-2.93	97
Over 100	74.91%	*	14.06	114	68.48%	55.76%	12.72	113
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					



Moffat Centre



University for the Common Good

Room Occupancy by Tariff – September 2024/2023

Tariff	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	-	-	-	-	-	-	-	-
£40 – 49.99	*	*	*	*	42.18%	*	-7.29	93
£50 – 59.99	*	*	*	*	75.23%	50.07%	25.16	125
£60 - £69.00	83.18%	*	4.48%	104	73.24%	66.78%	6.46	106
£70+	88.18%	86.04	2.14%	102	80.97%	74.62%	6.35	106

- Sample Size = Nil

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

Bed Occupancy by Tariff – September 2024/2023

Tariff	Sept 24	Sept 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	*	*	*	*	38.29%	43.38%	-5.09	95
£60 - £69.00	51.09%	*	-16.47%	84	67.90%	53.02%	14.88	115
£70+	75.68%	71.83	3.85%	104	66.96%	64.63%	2.33	102

- Sample Size = Nil

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

Room Occupancy by Grading – September 2024/2023

Grading	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	80.19%	76.74%	3.45	103
3 Stars	87.56%	77.56%	10.00	110	78.29%	67.03%	11.26	111
4 Stars	86.73%	89.72%	-2.99	97	79.76%	75.81%	3.95	104
5 Stars	*	*	*	*	59.42%	60.07%	-0.65	99
Unclassified	87.70%	*	1.86	102	81.54%	74.41%	7.13	107

- Sample Size = Nil

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

Bed Occupancy by Grading – September 2024/2023

Grading	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	*	*	*	*	74.61%	66.79%	7.82	108
3 Stars	76.38%	67.50%	8.88	109	62.73%	59.36%	3.37	103
4 Stars	73.25%	70.21%	3.04	103	67.34%	62.79%	4.55	105
5 Stars	*	*	*	*	47.37%	48.08%	-0.71	99
Unclassified	63.11%	*	1.85	102	51.06%	53.40%	-2.34	98

- Sample Size = Nil

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