

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: *April 2023/2022 Report - GUEST HOUSE / B&Bs*

1.0 Introduction April 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering April 2023 and benchmarking against April 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 Sheridan (E-mail: hugh.sheridan@gcu.ac.uk).

2.0 Executive Summary April 2023

The SOAS Report: April 2023/2022 Guest House/B&Bs report showed a significant occupancy increase in the Guest House/B&Bs sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for April 2023 experienced a **7.45** percentage point increase when comparing percentage room occupancy rates with April 2022. Occupancy rates within the Guest House/B&B sector experienced a **15.21** percentage point increase in April 2023 when comparing the same period last year.

Data from the Scottish Retail Consortium showed that Easter provided a slender but nonetheless welcome uplift to retail sales in Scotland last month. The real terms value of retail sales edged back into positive territory after the decline witnessed in March. Retail sales in Scotland held steady in April with decent growth of +9.1%. Food sales are the biggest growth area, aided by the Easter weekend and family gatherings. From the Visitor Attraction Barometer, Scottish Retail Attractions footfall increased by +2% in April 2023 compared to April 2022. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the broader cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

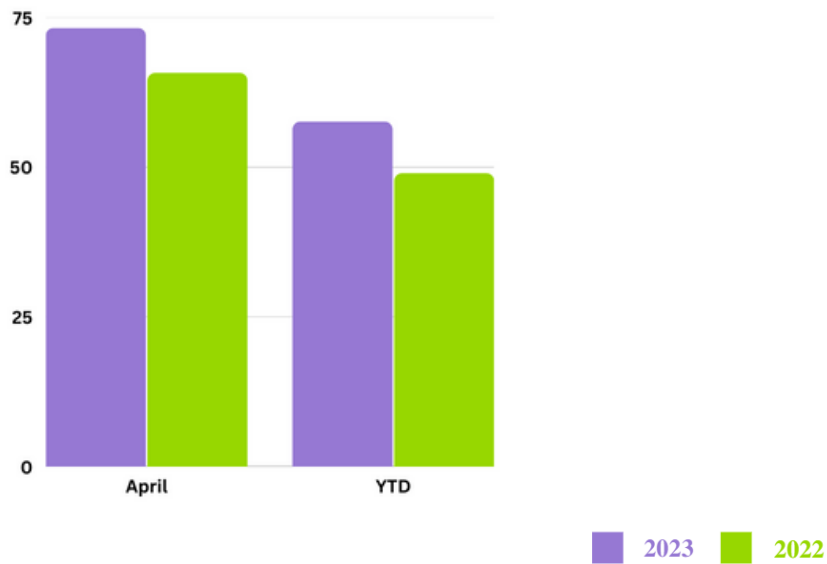
Notably, some 21% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 34% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 77% in the following 12 months. These figures have 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 2023; however, the reduced availability of flights and routes when compared with 2019 continues to restrain growth. A highlight in air transport was from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 16% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a -12% decrease in year-to-date flights compared to 2019.

All Serviced Accommodation

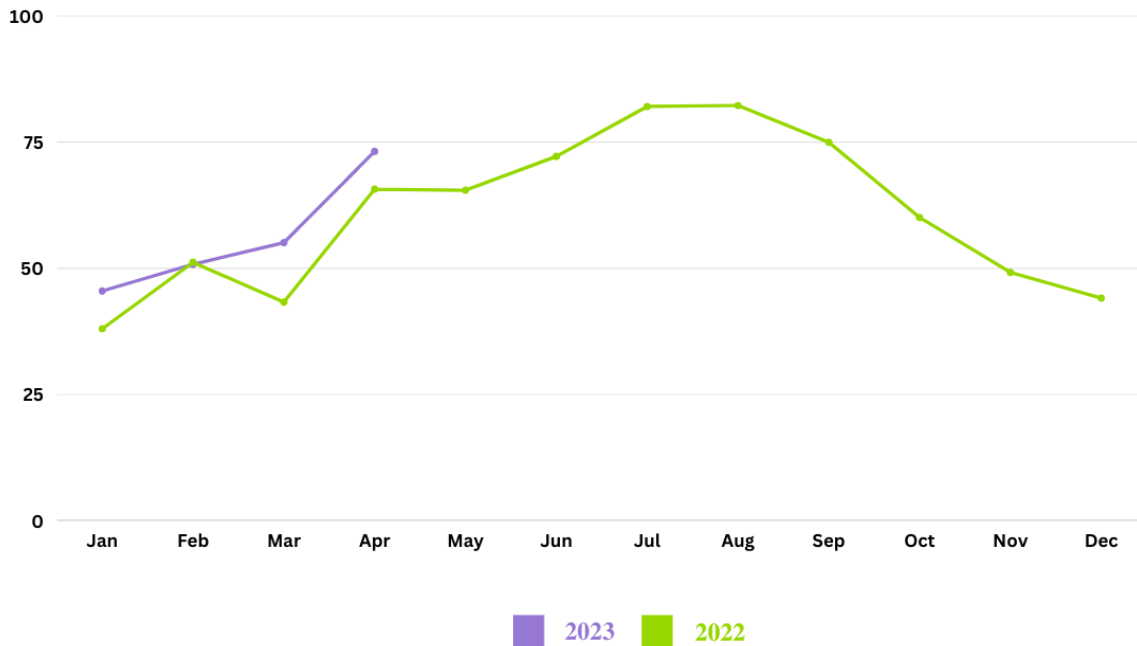
Room Occupancy – April 2023/2022

Scottish Serviced Accommodation room occupancy rates for April 2023 experienced an 7.45 percentage point increase when comparing percentage room occupancy rates with April 2022.



Serviced accommodation occupancy was 73.2% in April 2023. This shows a 7.45 percentage point increase when compared with April 2022.

Room Occupancy – Year to Date



In 2022, room occupancy reached at peak in August at 82.29%.

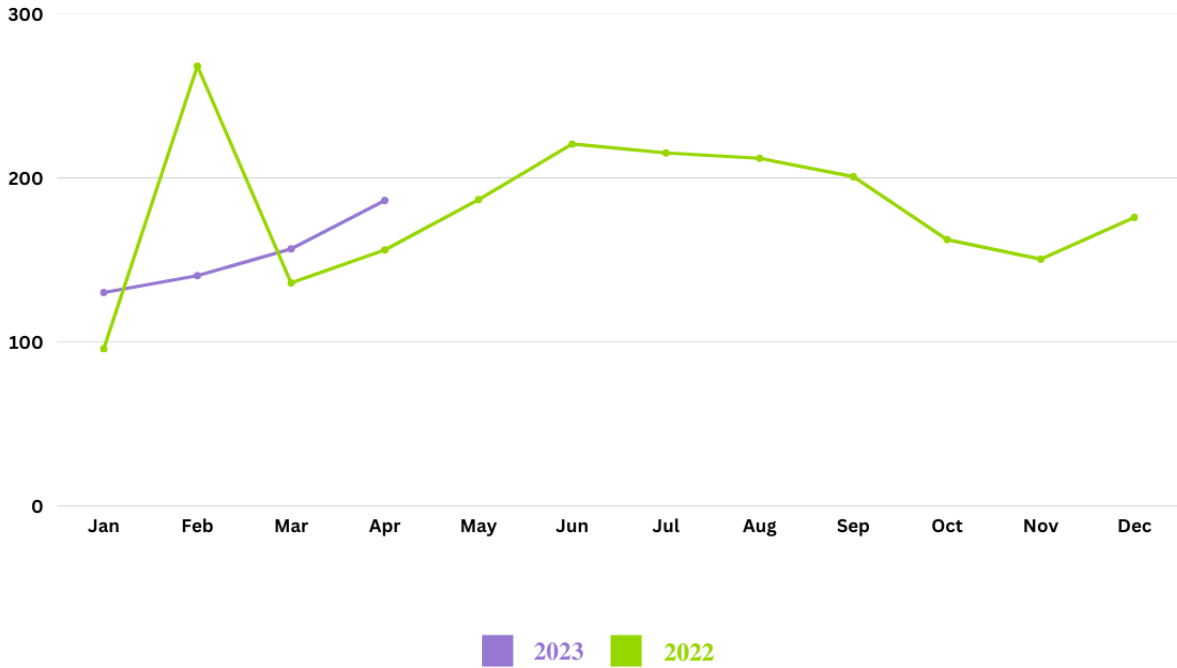
Room Occupancy	April 23	April 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	73.2%	65.7%	7.45%	107	57.54%	48.95%	8.59%	109

Bed Occupancy	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	66.4%	53.9%	12.45%	112	47.79%	43.48%	4.31%	104

The Revenue per available occupied room for April 2023 was **£186.29** compared with **£156.19** in April 2022. This figure is based solely on accommodation providers who provided financial information for either April 2023 and/or 2022.

¹ 23/22 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.



RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	April 23	April 22
All Serviced Accommodation	£186.29	£156.19

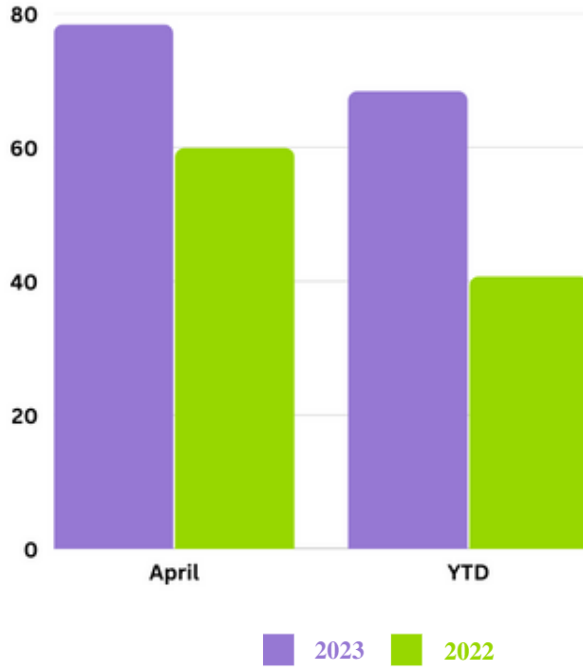
RevPAR by Grading- April 2023/21

Grading – Average RevPAR (£)	April 23	April 22
2 Stars	£115.76	£79.77
3 Stars	£169.20	£131.16
4 Stars	£221.13	£224.53
5 Stars	£311.22	£195.00
Unclassified	£0.00	£104.16

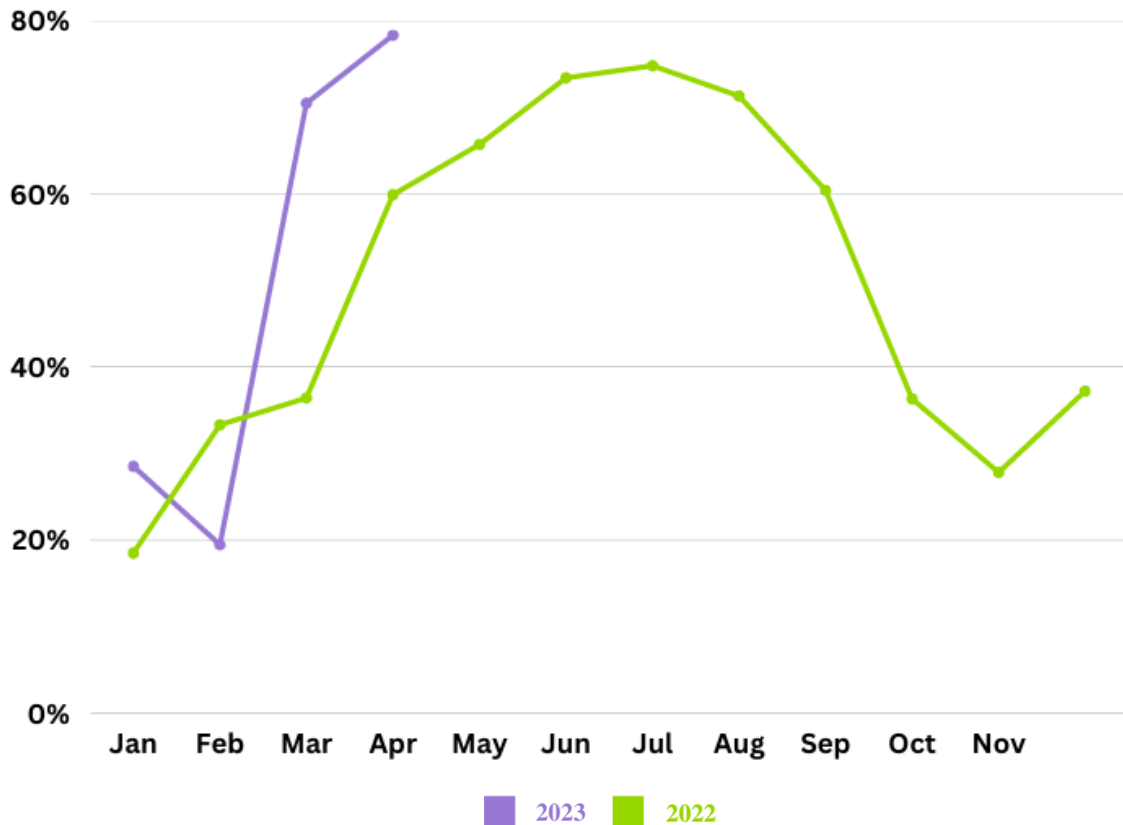
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

Guest House / B&B Room Occupancy – April 2023/2022



Guest House / B&B Room Occupancy – Year to Date



In the **Guest House/B&B sector**, the room occupancy rate for the period April 2023 was **78.337%** when compared to data from the

previous year of **59.87%** occupancy rate; this shows an overall percentage point increase of **18.46**.

Percentage room and bed occupancy rates for Guest House/B&Bs in Edinburgh & Lothian were the highest in April 2023. Operators in Large Urban Areas, Island locations and properties charging a tariff of between **£60-£69.99** fared best in room occupancy rates in April 2023.

The table below shows the **Room Occupancy** rate recorded for April 2023/2022 as well as the Change calculation for the **Guest House/B&B sector**

Room Occupancy	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	78.33%	59.87%	18.46%	118	68.35%	40.68%	27.67%	128

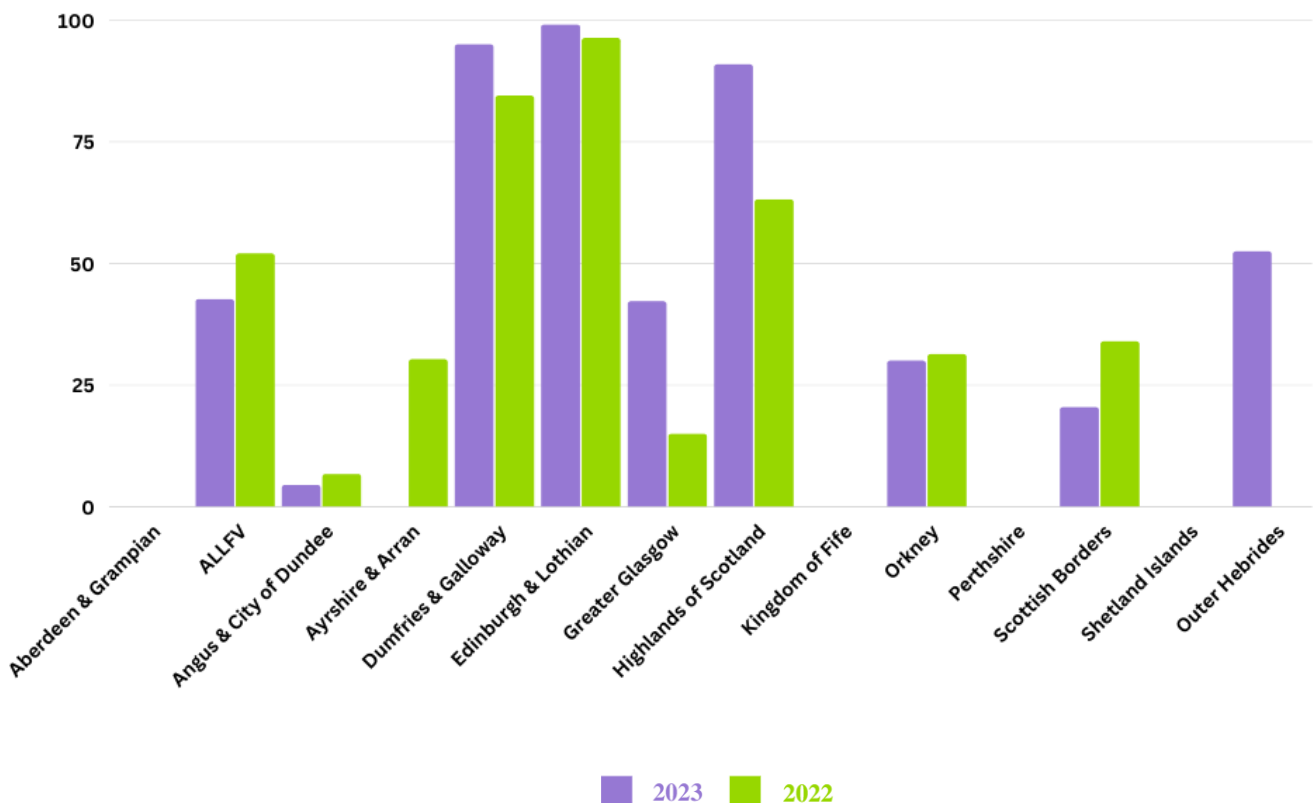
In the **Guest House/B&B sector**, the bed occupancy rate for the period April 2023 was **68.05%** when compared to data from the previous year of **52.84%** occupancy rate; this shows an overall percentage point increase of **15.21**.

The table below shows the **Bed Occupancy** rate recorded for April 2023/2022 as well as the 23/22 Diff calculation for the **Guest House/B&B sector**

Bed Occupancy	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	68.05%	52.84%	15.21%	115	57.51%	33.41%	24.10%	124

Room Occupancy by Former Visit Scotland Area

Guest House / B&B Room Occupancy by Former VisitScotland Area – April 2023/2022



Room Occupancy by Former Visit Scotland Area – April 2023/2022

Area	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
ALLFV	42.64%	52.00%	-9.36%	91	49.71%	34.67%	15.04%	115
Angus & City of Dundee	4.44%	6.66%	-2.22%	98	4.44%	6.66%	-2.22%	98
Ayrshire & Arran	0.00%	30.19%	-30.19%	70	0.00%	26.46%	-26.46%	74
Dumfries & Galloway	95.04%	84.52%	10.52%	111	85.95%	64.66%	21.29%	121
Edinburgh & Lothian	99.12%	96.36%	2.76%	103	91.65%	72.91%	18.74%	119
Greater Glasgow	42.21%	15.00%	27.21%	127	33.37%	15.13%	18.24%	118
Highlands of Scotland	90.90%	63.19%	27.71%	128	90.90%	43.12%	47.78%	148
Kingdom of Fife	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Orkney	30.01%	31.36%	-1.35%	99	12.00%	7.53%	4.47%	104
Perthshire	0.00%	0.00%	0.00%	100	0.00%	16.67%	-16.67%	83
Scottish Borders	20.50%	33.98%	-13.48%	87	20.50%	14.67%	5.83%	106
Shetland Islands	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Outer Hebrides	52.38%	0.00%	52.38%	152	52.38%	0.00%	52.38%	152

*Sample Size (4 or under) too small to be included

Bed Occupancy by Former Visit Scotland Area – April 2023/2022

Area	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
ALLFV	42.00%	46.23%	-4.23%	96	49.55%	27.50%	22.05%	122
Angus & City of Dundee	4.44%	0.00%	4.44%	104	4.44%	0.00%	4.44%	104
Ayrshire & Arran	0.00%	18.68%	-18.68%	81	0.00%	16.13%	-16.13%	84
Dumfries & Galloway	73.63%	66.88%	6.75%	111	66.57%	50.33%	16.24%	116
Edinburgh & Lothian	96.91%	86.30%	10.61%	105	98.48%	65.83%	32.65%	133
Greater Glasgow	17.14%	12.00%	5.14%	105	24.47%	10.57%	13.90%	114
Highlands of Scotland	89.34%	55.51%	33.83%	134	89.34%	33.78%	55.56%	156
Kingdom of Fife	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Orkney	24.45%	25.50%	-1.05%	99	8.83%	5.75%	3.08%	103
Perthshire	0.00%	0.00%	0.00%	100	0.00%	12.50%	-12.50%	88
Scottish Borders	19.87%	28.02%	-8.15%	92	19.87%	11.62%	8.25%	108
Shetland Islands	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Outer Hebrides	52.38%	0.00%	52.38%	152	52.38%	0.00%	52.38%	152

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

Location accessibility/density	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	98.54%	96.36%	2.18%	102	83.82%	68.92%	14.90%	115
Other Urban Areas	72.14%	55.09%	17.05%	117	44.16%	35.15%	9.01%	109
Accessible Small Towns	9.35%	34.69%	-25.34%	75	9.35%	25.34%	-15.99%	84
Remote Small Towns	73.65%	62.26%	11.39%	111	71.00%	57.51%	13.49%	113

Accessible Rural	0.00%	0.00%	0.00%	100	0.00%	16.67%	-16.67%	83
Remote Rural	83.21%	56.64%	26.57%	127	60.83%	43.86%	16.97%	117

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

Location accessibility/density	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	96.91%	86.30%	10.61%	111	79.21%	63.23%	15.98%	116
Other Urban Areas	64.28%	48.12%	16.16%	116	35.86%	26.21%	9.65%	110
Accessible Small Towns	6.75%	31.34%	-24.59%	75	6.75%	19.35%	-12.60%	87
Remote Small Towns	58.38%	50.12%	8.26%	108	56.01%	45.20%	10.81%	111
Accessible Rural	0.00%	0.00%	0.00%	100	0.00%	12.50%	-12.50%	88
Remote Rural	82.87%	47.99%	34.88%	135	60.37%	34.24%	26.13%	126

Room Occupancy by Location (Geographic) – April 2023/2022

Location (Geographic)	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	21.43%	32.84%	-11.41%	89	9.46%	27.09%	-17.63%	82
Inland	78.89%	59.59%	19.30%	119	76.51%	49.30%	27.21%	127
Island	83.21%	68.76%	14.45%	114	60.83%	52.83%	8.00%	108

Bed Occupancy by Location (Geographic) – April 2023/2022

Location (Geographic)	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	17.14%	23.05%	-5.91%	94	6.13%	19.20%	-13.07%	87
Inland	63.21%	55.41%	7.80%	108	65.95%	43.14%	22.81%	123
Island	82.87%	60.32%	22.55%	123	60.37%	44.52%	15.85%	116

Room Occupancy by size – April 2023/2022

Size	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	63.09%	56.85%	6.24%	106	48.52%	34.93%	13.59%	114
4 to 10	86.77%	58.37%	28.40%	128	79.36%	38.70%	40.66%	141
11 to 25	95.47%	68.17%	27.30%	127	70.86%	56.20%	14.66%	115
26 to 50	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
51 to 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Over 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100

Bed Occupancy by size – April 2023/2022

Size	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	60.47%	50.70%	9.77%	110	44.51%	27.09%	17.42%	117
4 to 10	67.51%	50.23%	17.28%	117	61.95%	29.74%	32.21%	132

11 to 25	96.91%	59.96%	36.95%	137	72.13%	50.81%	21.32%	121
26 to 50	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
51 to 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Over 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100

Room Occupancy by tariff – April 2023/2022

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£30 - £39.99	0.00%	24.69%	-24.69%	75	0.00%	22.97%	-22.97%	77
£40 - £49.99	74.78%	44.41%	30.37%	130	58.60%	28.87%	29.73%	130
£50 - £59.99	93.00%	45.33%	47.67%	148	93.00%	24.99%	68.01%	168
£60 - £69.99	95.04%	80.28%	14.76%	115	85.95%	59.43%	26.52%	127
£70 +	74.88%	62.19%	12.69%	113	67.93%	42.05%	25.88%	126

Bed Occupancy by tariff – April 2023/2022

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£30 - £39.99	0.00%	17.28%	-17.28%	83	0.00%	16.26%	-16.26%	84
£40 - £49.99	72.91%	46.37%	26.54%	127	53.83%	23.33%	30.50%	131
£50 - £59.99	86.09%	45.00%	41.09%	141	86.09%	18.54%	67.55%	168
£60 - £69.99	73.63%	68.89%	4.74%	105	66.57%	48.36%	18.21%	118
£70 +	56.60%	55.11%	1.49%	101	55.00%	35.69%	19.31%	119

Room Occupancy by grading – April 2023/2022

Grading	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
3 Stars	86.03%	39.44%	46.59%	147	52.36%	34.78%	17.58%	118
4 Stars	43.88%	44.42%	-0.54%	99	31.95%	26.11%	5.84%	106
5 Stars	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Unclassified	42.64%	52.00%	-9.36%	91	49.71%	36.29%	13.42%	113

Bed Occupancy by grading – April 2023/2022

Grading	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
3 Stars	67.01%	30.69%	36.32%	136	42.72%	26.71%	16.01%	116

4 Stars	38.13%	40.26%	-2.13%	98	25.90%	19.13%	6.77%	107
5 Stars	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Unclassified	42.00%	46.23%	-4.23%	96	49.55%	25.44%	24.11%	124

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