

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

### **1.0 Introduction January 2023/2022**

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering January 2023 and benchmarking against January 2022. 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 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 January 2023**

The SOAS Report: January 2023/2022 Guest House/B&Bs report continued to show growth in the Guest House/B&Bs sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation room occupancy rates for January 2023 experienced a **7.92** percentage point increase when compared with January 2022. Occupancy rates within the Guest House/B&B sector experienced a **10.03** percentage point increase in January 2023 compared to the same period in 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 12.2% footfall increase in visitors for January 2023 compared to the same period in 2022.

Domestic consumer sentiment provided by the GB National Tourist Boards for January 2023 found that 52% of respondents stated (a 5% increase on the December 2022 Survey) saying they were “cautious - things are OK but I feel I have to be very careful”.

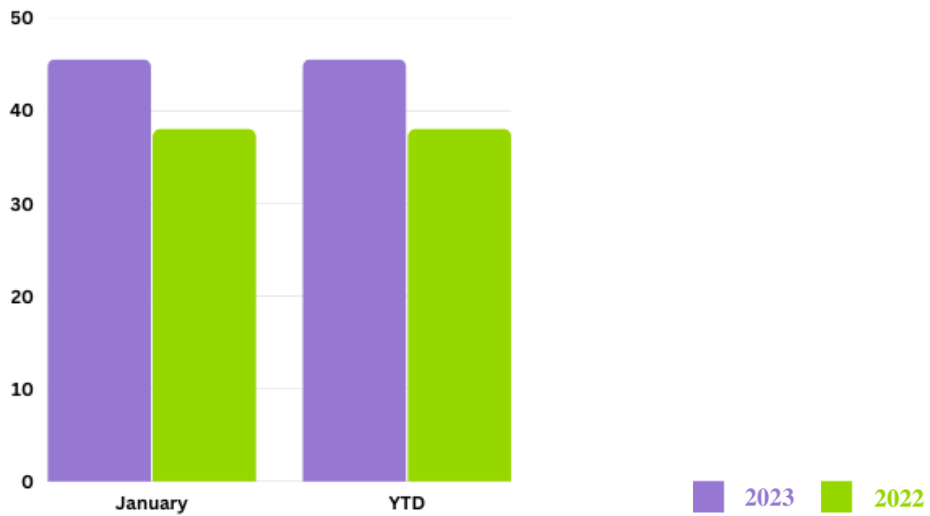
The survey also recorded 21% of respondents (a 1% decrease on the December 2022 Survey) saying they are “...been hit hard - no option but to cut back on spending”. Despite consumer concern about the state of the economy, 16% of UK adults intend to take a domestic overnight trip in the first quarter of 2023 and 70% in the next 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023).

The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 remained the major barrier to growth. One highlight in air transport is from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 42% in daily flights compared to 2019. Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a 17% decrease in year-to-date flights when compared to the same time in 2019, however, the UK was the busiest state within the network in 2023, with an average of 4,044 flights per day this is a 69% increase compared to the same time in 2022 (Eurocontrol, 2023), however, the start of 2023 saw Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.

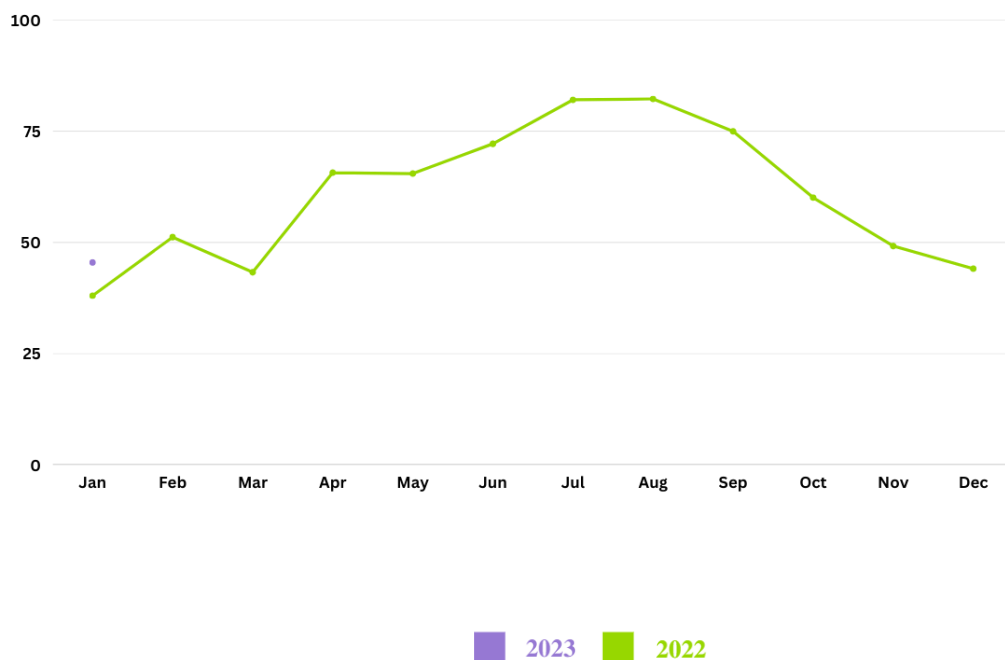
## All Serviced Accommodation

### Room Occupancy – January 2023/2022

Room occupancy rates for all Scottish Serviced Accommodation was 45.92% in January 2023 compared to 38.0% in January 2022. This is a 7.92 percentage point increase.



### Room Occupancy – Year to Date



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

Room Occupancy	January 23	January 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	45.9%	38.0%	7.92	108	45.9%	38.0%	7.92	108

Bed Occupancy	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	37.0%	31.3%	5.66	106	37.0%	31.3%	5.66	106

### RevPAR

The Revenue per available occupied room for January 2023 was **£127.00** compared with **£97.31** in January 2022. This figure is based solely on accommodation providers who provided financial information for either January 2023 and/or 2022.



### RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	January 23	January 22
All Serviced Accommodation	£127.00	£97.31

### RevPAR by Grading- January 2023/21

Grading – Average RevPAR (£)	January 23	January 22
2 Stars	£70.85	£33.25
3 Stars	£92.63	£67.20
4 Stars	£160.39	£163.17
5 Stars	£184.60	£72.03

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

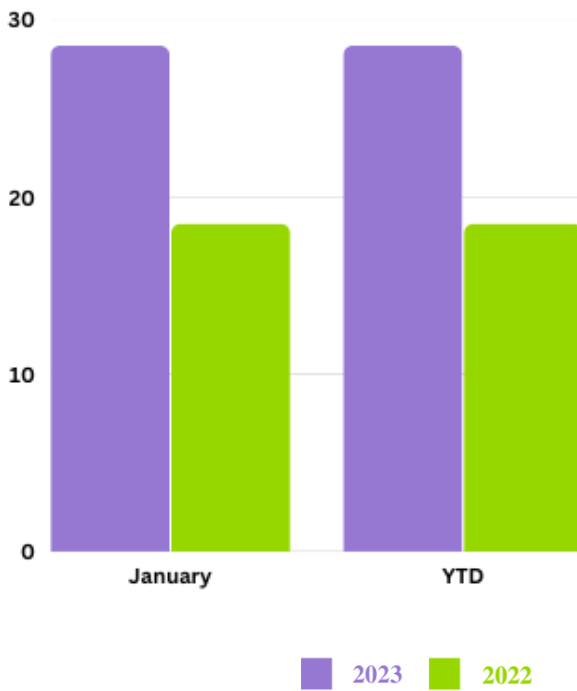
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

Unclassified                      £92.48                      £114.21

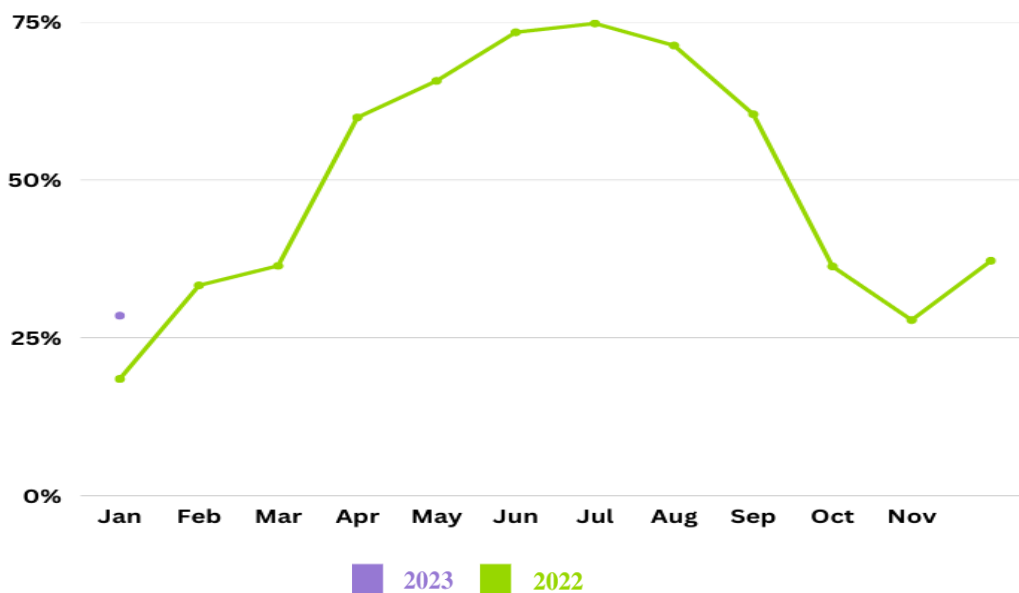
### 3.0 Serviced Accommodation – Guest House/B&B Sector

#### 3.1 Performance by Guest House/B&B Category

Guest House / B&B Room Occupancy – January 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 January 2023 was **28.50%** when compared to data from the previous year of **18.47%** occupancy rate; this shows an overall percentage point increase of **10.03**.

The table below shows the **Room Occupancy** rate for January 2023/2022 as well as the 23/22 Diff calculation for the **Guest House/B&B sector**.

Room Occupancy	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	28.50%	18.47%	10.03	110	28.50%	18.47%	10.03	110

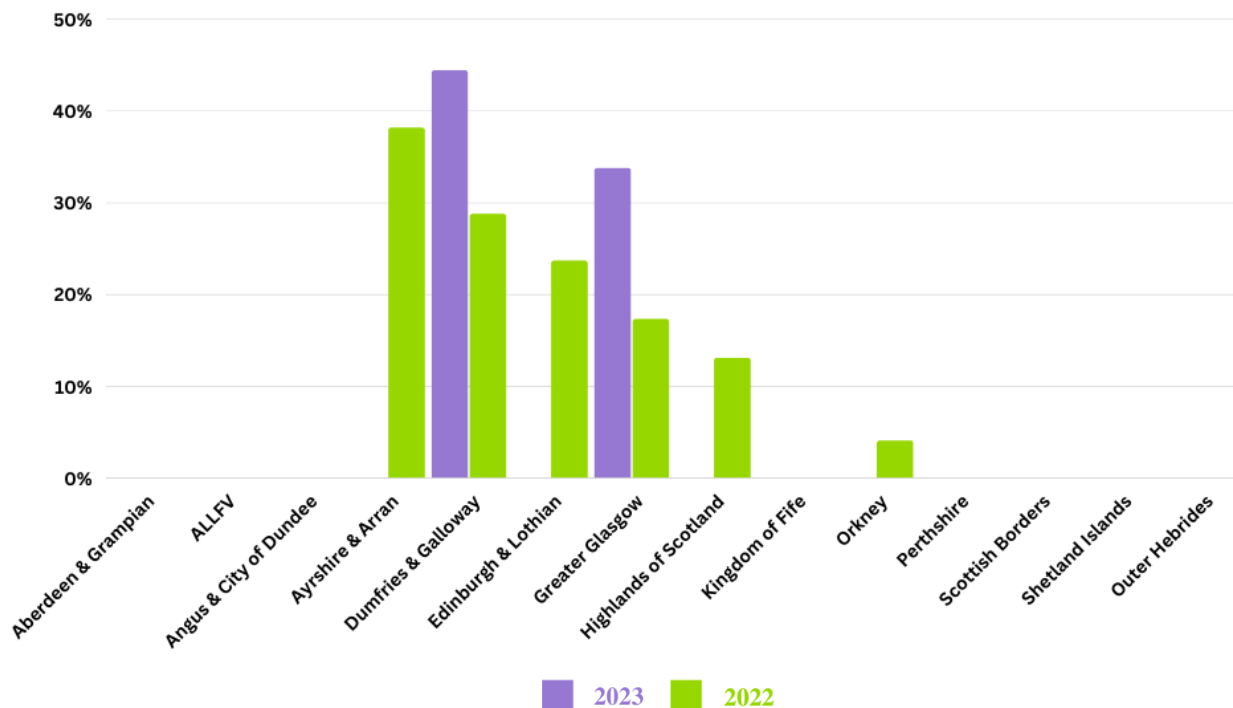
In the **Guest House/B&B sector**, the bed occupancy rate for the period January 2023 was **25.48%** when compared to data from the previous year of **12.10%** occupancy rate; this shows an overall percentage point increase of **13.38**.

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

Bed Occupancy	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	25.48%	12.10%	13.38	113	25.48%	12.10%	13.38	113

### Room Occupancy by Former Visit Scotland Area

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



Of the data available, Dumfries & Galloway had the highest room and bed occupancy rates in January 2023; this is compared to 2022 when Ayrshire & Arran had the highest percentage occupancy. Operators in Large Urban Areas, Inland locations and properties charging a tariff of between **£60 and £69.99** fared best in room occupancy rates in January 2023.

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

Area	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	-	-	-	-	-	-	-	-
ALLFV	*	*	*	*	*	*	*	*
Angus & City of Dundee	-	*	*	*	-	*	*	*
Ayrshire & Arran	-	*	*	*	-	*	*	*
Dumfries & Galloway	*	*	*	*	*	*	*	*
Edinburgh & Lothian	-	*	*	*	-	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	*	13.06%	-13.06	87	*	13.06%	-13.06	87
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	-	*	*	*	-	*	*	*
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Area	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	-	-	-	-	-	-	-	-
ALLFV	*	*	*	*	*	*	*	*
Angus & City of Dundee	-	*	*	*	-	*	*	*
Ayrshire & Arran	-	*	*	*	-	*	*	*
Dumfries & Galloway	*	*	*	*	*	*	*	*
Edinburgh & Lothian	-	*	*	*	-	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	*	8.96%	-8.96	91	*	8.96%	-8.96	91
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	-	*	*	*	-	*	*	*
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	*	*	*
Other Urban Areas	*	18.33%	-14.76	85	*	18.33%	-14.76	85
Accessible Small Towns	-	0.00%	0.00	100	-	0.00%	0.00	100
Remote Small Towns	*	*	*	*	*	*	*	*
Accessible Rural	-	*	*	*	-	*	*	*

Remote Rural	*	21.89%	-21.89	78	*	21.89%	-21.89	78
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location accessibility/density	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	*	*	*
Other Urban Areas	*	10.52%	-8.38	92	*	10.52%	-8.38	92
Accessible Small Towns	-	0.00%	0.00	100	-	0.00%	0.00	100
Remote Small Towns	*	*	*	*	*	*	*	*
Accessible Rural	-	*	*	*	-	*	*	*
Remote Rural	*	13.56%	-13.56	86	*	13.56%	-13.56	86
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	13.05%	-13.05	87	*	13.05%	-13.05	87
Inland	*	22.30%	-22.30	78	*	22.30%	-22.30	78
Island	*	26.15%	-26.15	74	*	26.15%	-26.15	74
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	7.53%	-5.39	95	*	7.53%	-5.39	95
Inland	*	16.53%	36.92	137	*	16.53%	36.92	137
Island	*	14.69%	-14.69	85	*	14.69%	-14.69	85
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	16.86%	-14.48	86	*	16.86%	-14.48	86
4 to 10	*	13.40%	31.00	131	*	13.40%	31.00	131
11 to 25	*	*	*	*	*	*	*	*
26 to 50	-	-	-	-	-	-	-	-
51 to 100	-	-	-	-	-	-	-	-
Over 100	-	-	-	-	-	-	-	-
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	9.79%	-8.26	92	*	9.79%	-8.26	92

4 to 10	*	8.50%	35.90	136	*	8.50%	35.90	136
11 to 25	*	*	*	*	*	*	*	*
26 to 50	-	-	-	-	-	-	-	-
51 to 100	-	-	-	-	-	-	-	-
Over 100	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Tariff	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	-	*	*	*	-	*	*	*
£40 - £49.99	*	20.35%	16.78	83	*	20.35%	-16.78	83
£50 - £59.99	*	*	*	*	*	*	*	*
£60 - £69.99	*	*	*	*	*	*	*	*
£70 +	*	21.11%	19.29	119	*	21.11%	19.29	119
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Tariff	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	-	*	*	*	-	*	*	*
£40 - £49.99	*	10.69%	-8.55	91	*	10.69%	-8.55	91
£50 - £59.99	*	*	*	*	*	*	*	*
£60 - £69.99	*	*	*	*	*	*	*	*
£70 +	*	14.55%	25.35	125	*	14.55%	25.35	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Grading	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	26.97%	13.58	114	*	26.97%	13.58	114
4 Stars	*	8.89%	-5.32	95	*	8.89%	-5.32	95
5 Stars	-	*	*	*	-	*	*	*
Unclassified	*	18.36%	-18.36	82	*	18.36%	-18.36	82
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Grading	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	15.24%	24.82	125	*	15.24%	24.82	125
4 Stars	*	4.95%	-2.81	97	*	4.95%	-2.81	97
5 Stars	-	*	*	*	-	*	*	*
Unclassified	*	11.80%	-11.80	88	*	11.80%	-11.80	88
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



## Disclaimer

This publication is provided in good faith to update VisitScotland stakeholders on its activity. The publication is provided “as is” and VisitScotland accepts no responsibility for any error or omission. We do not provide any guarantees, conditions or warranties that the publication is current, secure, accurate, complete or free from bugs or viruses.

This publication, including all data and other information contained within it, is not intended to amount to advice on which any reliance should be placed. VisitScotland is not responsible for how the publication is used or interpreted.

We therefore disclaim all liability and responsibility arising from any reliance placed on this publication by anyone who may use any of its contents. VisitScotland may add, change, improve or update this publication at any time without notice.