

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

### *August 2023/2022 Report - GUEST HOUSE / B&Bs*

#### 1.0 Introduction August 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2023 and benchmarking against August 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)).

#### 2.0 Executive Summary August 2023

The SOAS Report: August 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 August 2023 experienced a **0.42** percentage point decrease when comparing percentage room occupancy rates with August 2022. Occupancy rates within the Guest House/B&B sector experienced an **17.78** percentage point increase in August 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that the retail sales figures in Scotland improved by 5.6% year-on-year in August, however, this is well below the three-month average of 7.5%. Food sales continue to be the biggest growth area.

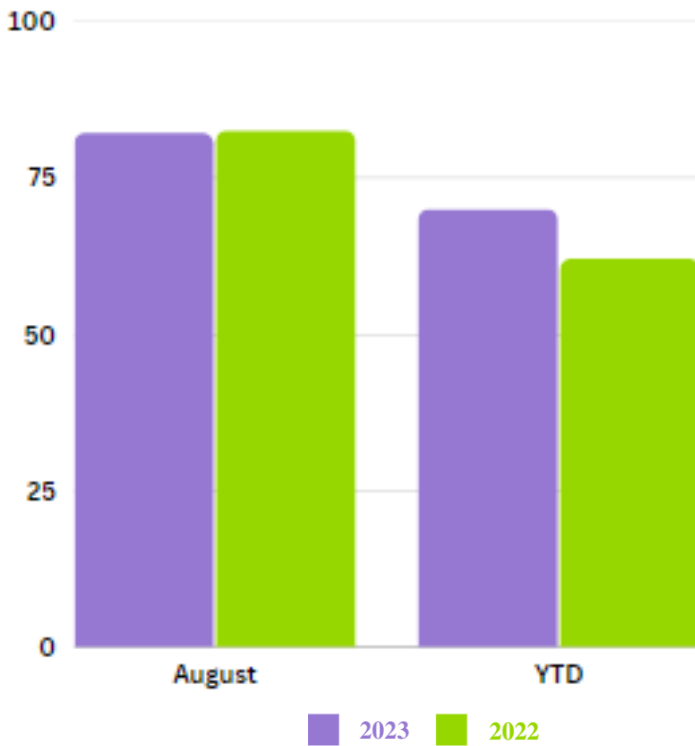
Domestic consumer sentiment provided by the GB National Tourist Boards for August 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the August 2023 survey). The survey recorded 45% of respondents (No change on the August 2023 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, 33% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be the 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 stalled in August 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 8% decrease in year-to-date flights compared to 2019.

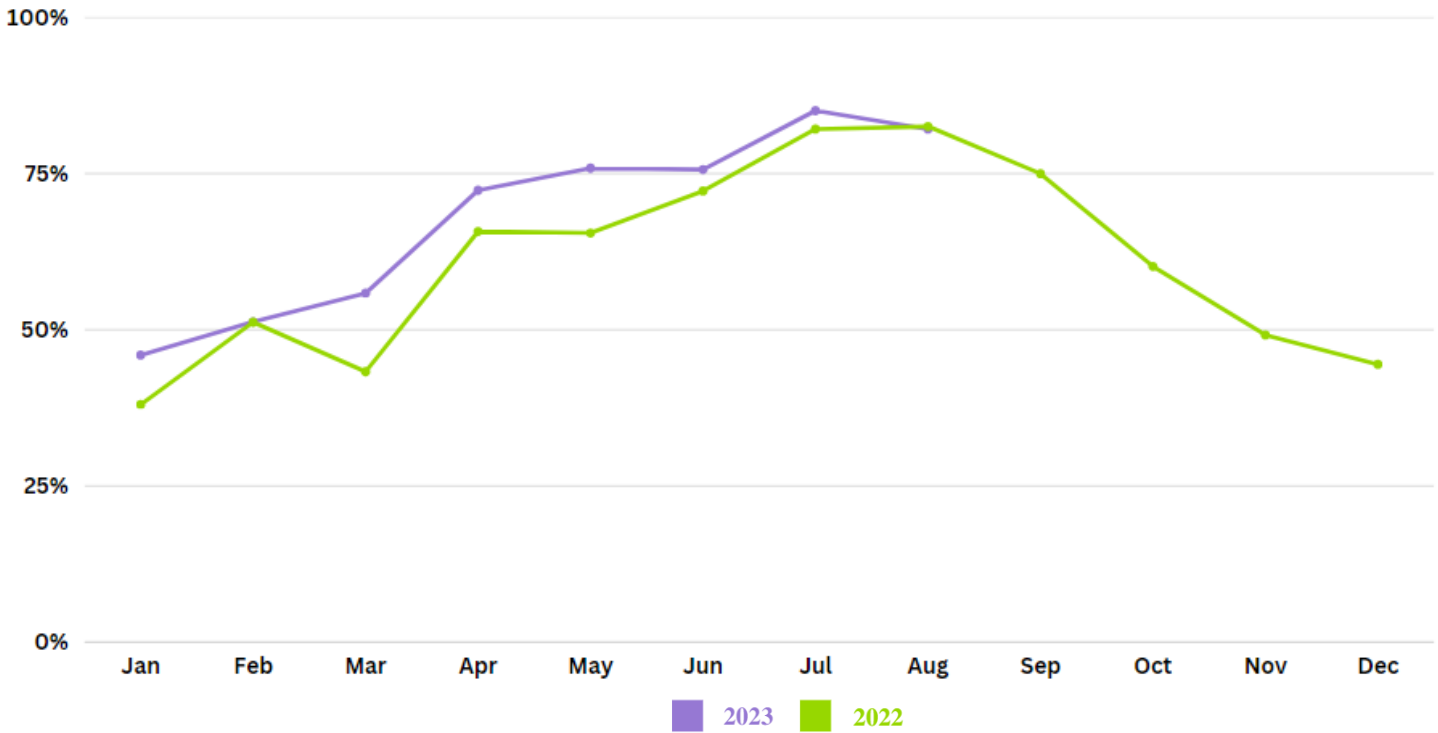
### All Serviced Accommodation

#### Room Occupancy – August 2023/2022

Scottish Serviced Accommodation room occupancy for August 2023 experienced a **0.42** percentage point decrease when comparing percentage room occupancy rates with August 2022.



#### Room Occupancy – Year-to-Date



Room Occupancy	August 23	August 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	82.11%	82.53%	-0.42	100	69.90%	61.98%	7.92	108

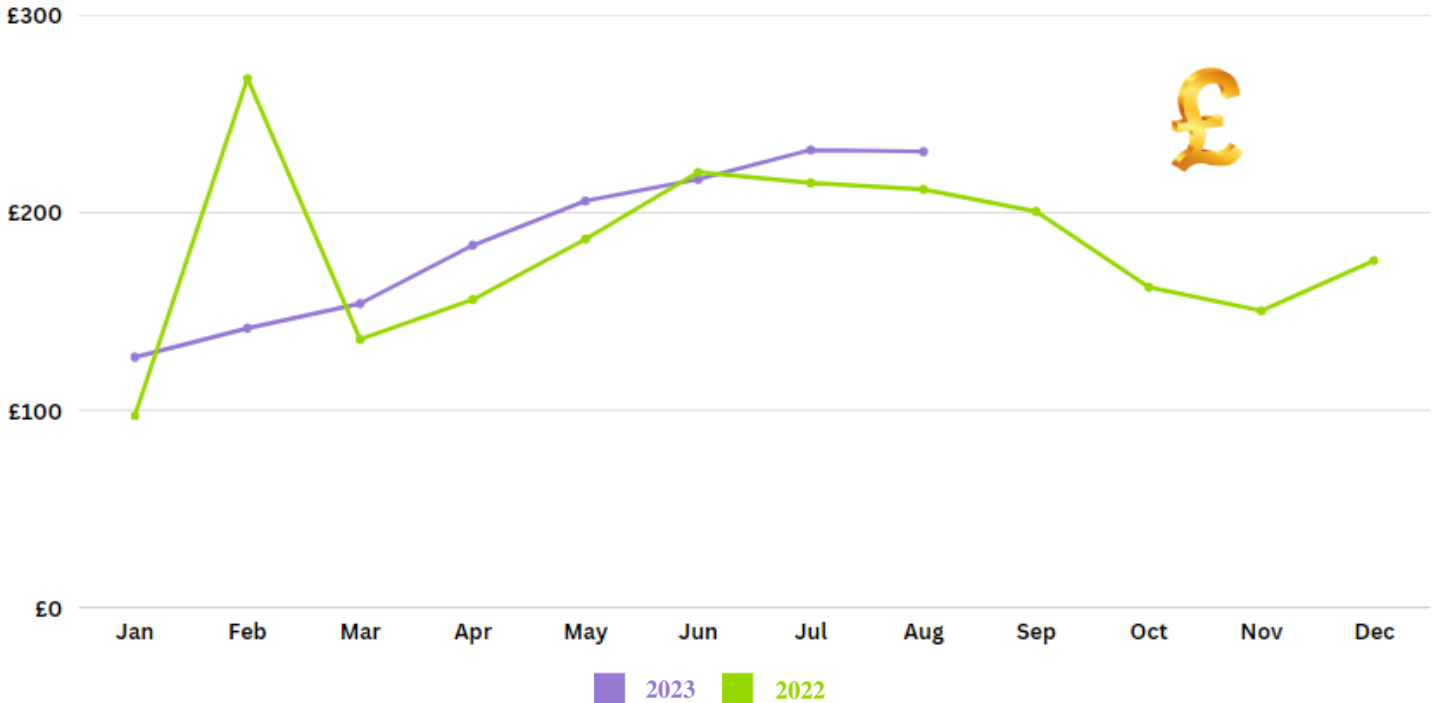
  

Bed Occupancy	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	75.59%	69.53%	6.06	106	60.78%	53.28%	7.50	108

The Revenue per available occupied room for August 2023 was **£231.12** compared with **£212.01** in August 2022. This figure is based solely on accommodation providers who provided financial information for either August 2023 and/or 2022.

<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.



**RevPAR Year to Date 2023/2022**

Room – Average RevPAR (£)	August 23	August 22
All Serviced Accommodation	£231.12	£212.01

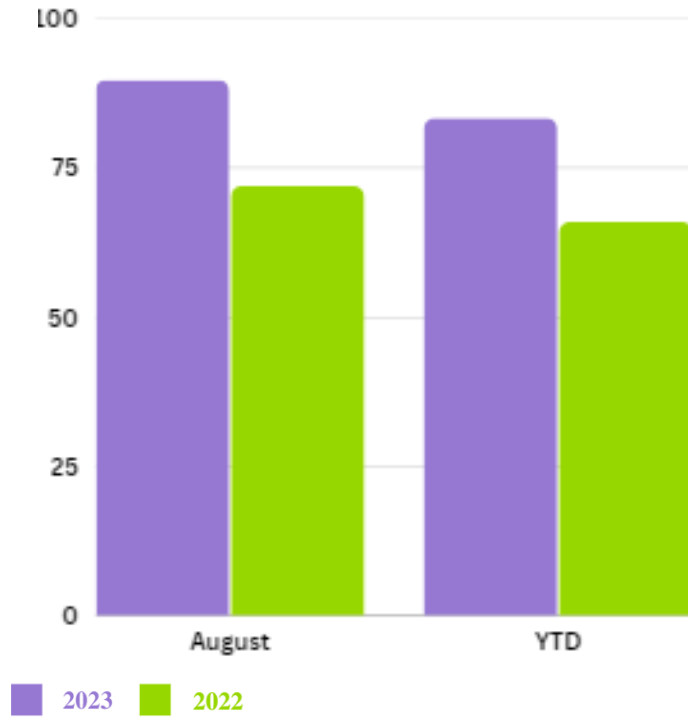
**RevPAR by Grading- August 2023/21**

Grading – Average RevPAR (£)	August 23	August 22
2 Stars	£200.84	£138.54
3 Stars	£211.64	£170.11
4 Stars	£253.71	£304.09
5 Stars	£467.76	£290.68
Unclassified	£142.03	£0.00

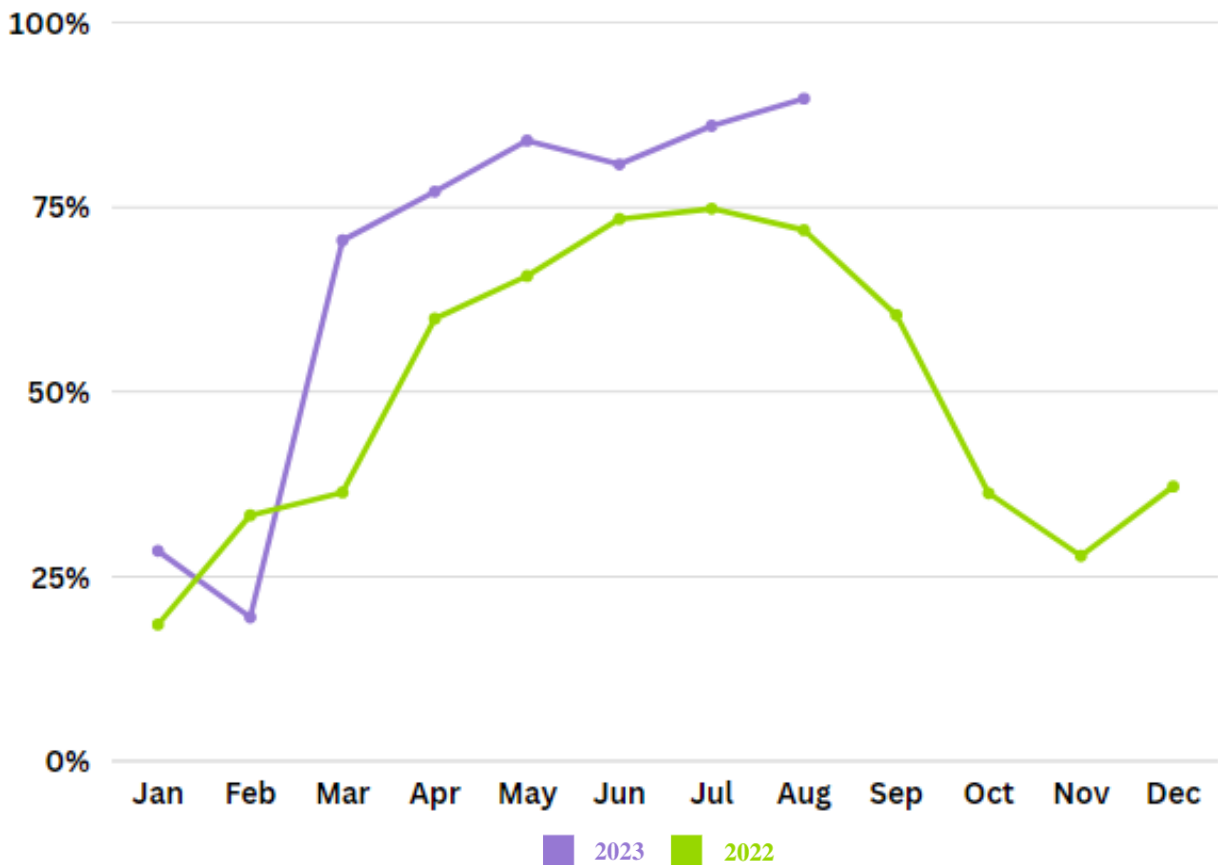
**3.0 Serviced Accommodation – Guest House/B&B Sector**

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

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



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



In the **Guest House/B&B sector**, the room occupancy rate for August 2023 was **89.68%** compared to data from the previous year of **71.90%** occupancy rate; this shows an overall percentage point increase of **17.78**.

Percentage room and bed occupancy rates for Guest House/B&Bs in the Argyll, Loch Lomond & Forth Valley (ALLV) were the highest in August 2023. Operators (sample size >4) in Remote Rural Areas, Inland locations and properties charging a tariff of over £70 fared best in room occupancy rates in August 2023.

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

Room Occupancy	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Guest House/B&amp;B</b>	<b>89.68%</b>	<b>71.90%</b>	<b>17.78</b>	<b>118</b>	<b>83.23%</b>	<b>65.93%</b>	<b>17.30</b>	<b>117</b>

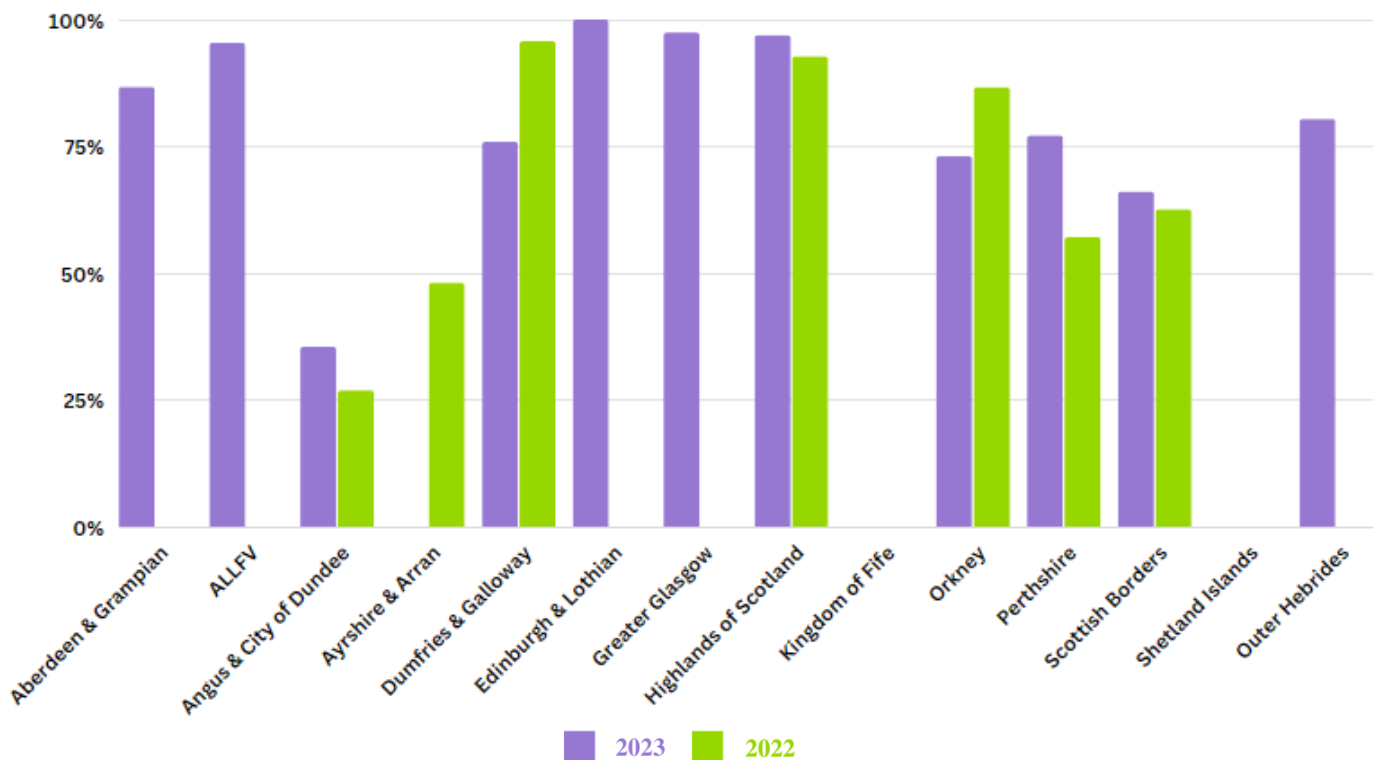
In the **Guest House/B&B sector**, the bed occupancy rate for August 2023 was **90.09%** compared to data from the previous year of **66.61** occupancy rate; this shows an overall percentage point increase of **23.48**.

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

Bed Occupancy	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Guest House/B&amp;B</b>	<b>90.09%</b>	<b>66.61%</b>	<b>23.48</b>	<b>123</b>	<b>78.86%</b>	<b>58.78%</b>	<b>20.08</b>	<b>120</b>

### Room Occupancy by Former Visit Scotland Area

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



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

Area	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	*	-	*	*
ALLFV	95.34%	-	95.34	195	88.56%	45.12%	43.44	143
Angus & City of Dundee	*	*	*	*	16.12%	23.90%	-7.78	92
Ayrshire & Arran	-	*	*	*	-	38.39%	-38.39	62
Dumfries & Galloway	*	*	*	*	77.37%	88.40%	-11.03	89
Edinburgh & Lothian	*	-	*	*	95.45%	-	95.45	195
Greater Glasgow	*	-	*	*	77.67%	-	77.67	178
Highlands of Scotland	*	*	*	*	94.25%	90.83%	3.42	103
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	44.23%	41.96%	2.27	102
Perthshire	*	*	*	*	66.70%	42.52%	24.18	124
Scottish Borders	*	*	*	*	48.02%	32.08%	15.94	116
Shetland Islands	*	-	*	*	*	0.00%	0.00	100
Outer Hebrides	*	-	*	*	80.86%	-	80.86	181
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Area	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	*	-	*	*
ALLFV	95.51%	-	95.51	196	88.58%	34.57%	54.01	154
Angus & City of Dundee	*	*	*	*	10.65%	9.44%	1.21	101
Ayrshire & Arran	-	*	*	*	-	24.73%	-24.73	75
Dumfries & Galloway	*	*	*	*	66.48%	68.45%	-1.97	98
Edinburgh & Lothian	*	-	*	*	80.16%	-	80.16	180
Greater Glasgow	*	-	*	*	77.20%	-	77.20	177
Highlands of Scotland	*	*	*	*	93.92%	89.63%	4.29	104
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	36.30%	37.39%	-1.09	99
Perthshire	*	*	*	*	56.29%	41.75%	14.54	115
Scottish Borders	*	*	*	*	42.20%	23.89%	18.31	118
Shetland Islands	*	-	*	*	*	0.00%	0.00	100
Outer Hebrides	*	-	*	*	52.38%	-	52.38	152
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	92.37%	-	92.37	192
Other Urban Areas	*	*	*	*	96.44%	74.99%	21.45	121
Accessible Small Towns	78.29%	26.88%	51.41	151	65.01%	19.32%	45.69	146
Remote Small Towns	*	*	*	*	69.20%	78.41%	-9.21	91
Accessible Rural	*	*	*	*	87.26%	32.79%	54.47	154

Remote Rural	93.93%	65.42%	28.51	129	88.53%	69.53%	19.00	119
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location accessibility/density	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	-	*	*	80.27%	-	80.27	180
Other Urban Areas	*	*	*	*	95.38%	68.46%	26.92	127
Accessible Small Towns	81.39%	*	81.39	181	67.30%	6.95%	60.35	160
Remote Small Towns	*	*	*	*	61.03%	62.14%	-1.11	99
Accessible Rural	*	*	*	*	85.38%	32.07%	53.31	153
Remote Rural	94.89%	*	38.45	138	87.95%	62.83%	25.12	125
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	*	-	*	*
Inland	88.71%	74.77%	13.94	114	80.74%	62.97%	17.77	118
Island	93.93%	*	28.51	129	88.53%	69.53%	19.00	119
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	*	-	*	*
Inland	89.21%	71.61%	17.60	118	73.86%	55.35%	18.51	119
Island	94.89%	*	38.45	138	87.95%	62.83%	25.12	125
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

### Room Occupancy by Size– August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	86.98%	*	26.38	126	80.02%	67.12%	12.90	113
4 to 10	91.92%	80.28%	11.64	112	86.56%	72.99%	13.57	114
11 to 25	*	*	*	*	77.67%	38.39%	39.28	139
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 – August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	87.60%	*	12.94	113	80.00%	67.12%	12.88	113





Unclassified	*	-	*	*	77.54%	26.35%	51.19	151
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					