

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

### **1.0 Introduction June 2023/2022**

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering June 2023 and benchmarking against June 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 June 2023**

The Scottish Accommodation Occupancy Survey: June 2023 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 June 2023 experienced a **3.44** percentage point increase when comparing percentage room occupancy rates with June 2022. Occupancy rates within the Guest House/B&B sector experienced a **7.38** percentage point increase in June 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales figures increased by 11.3% year-on-year in June. Retail sales in Scotland held steady for June with a growth of 9%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% increase on the May 2023 survey). The survey recorded 46% of respondents (a 3% decrease on the May 2023 Survey) saying they were "...cautious - things are okay but I feel I have to be very careful".

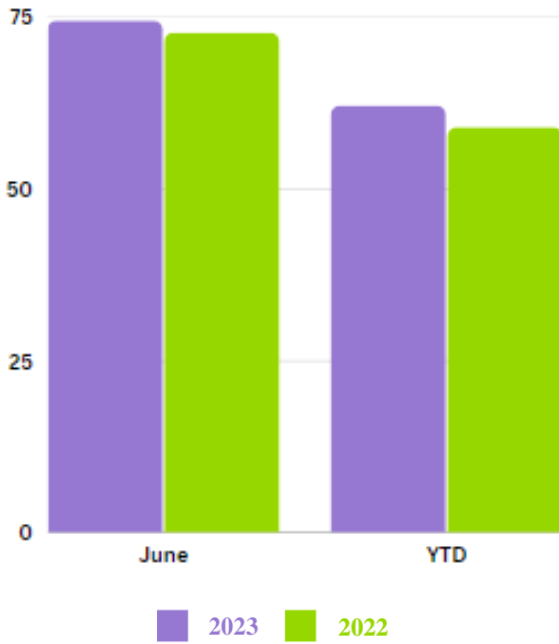
Despite consumer concern about the state of the economy, 11% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months remain the 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 June 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 0% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

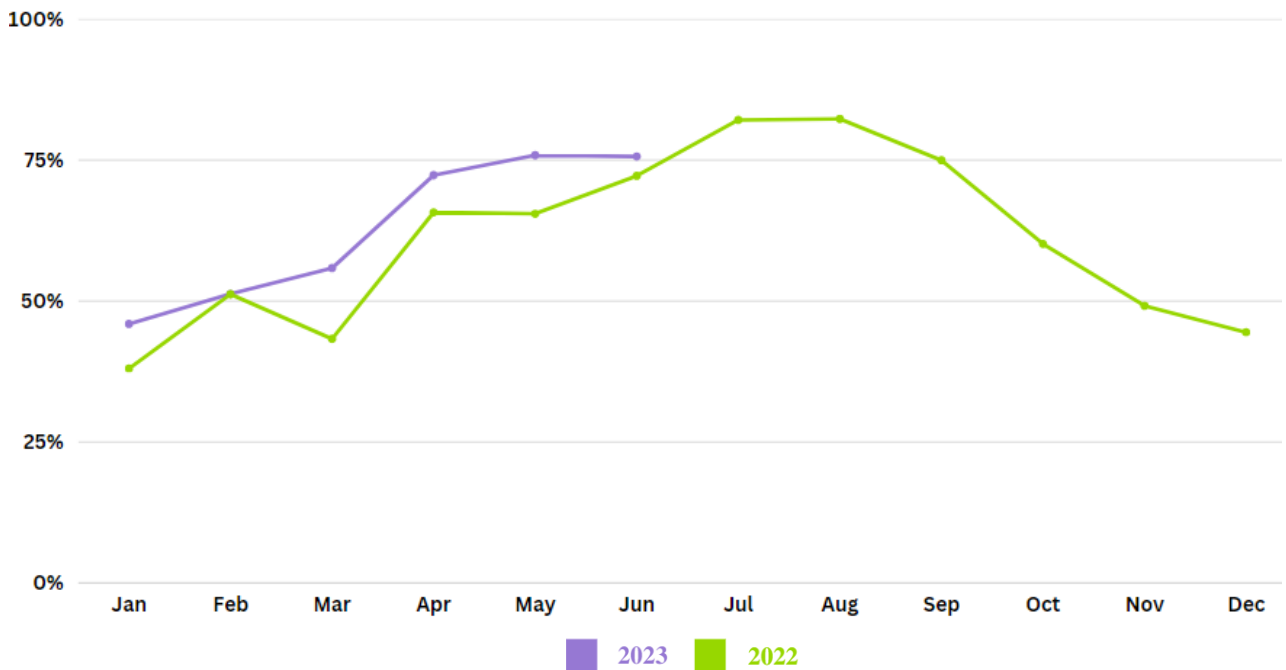
### All Serviced Accommodation

#### Room Occupancy – June 2023/2022

Scottish Serviced Accommodation room occupancy was 75.6% in June 2023. This shows a **3.44** percentage point increase when comparing percentage room occupancy rates with June 2022.



#### Room Occupancy – Year to Date

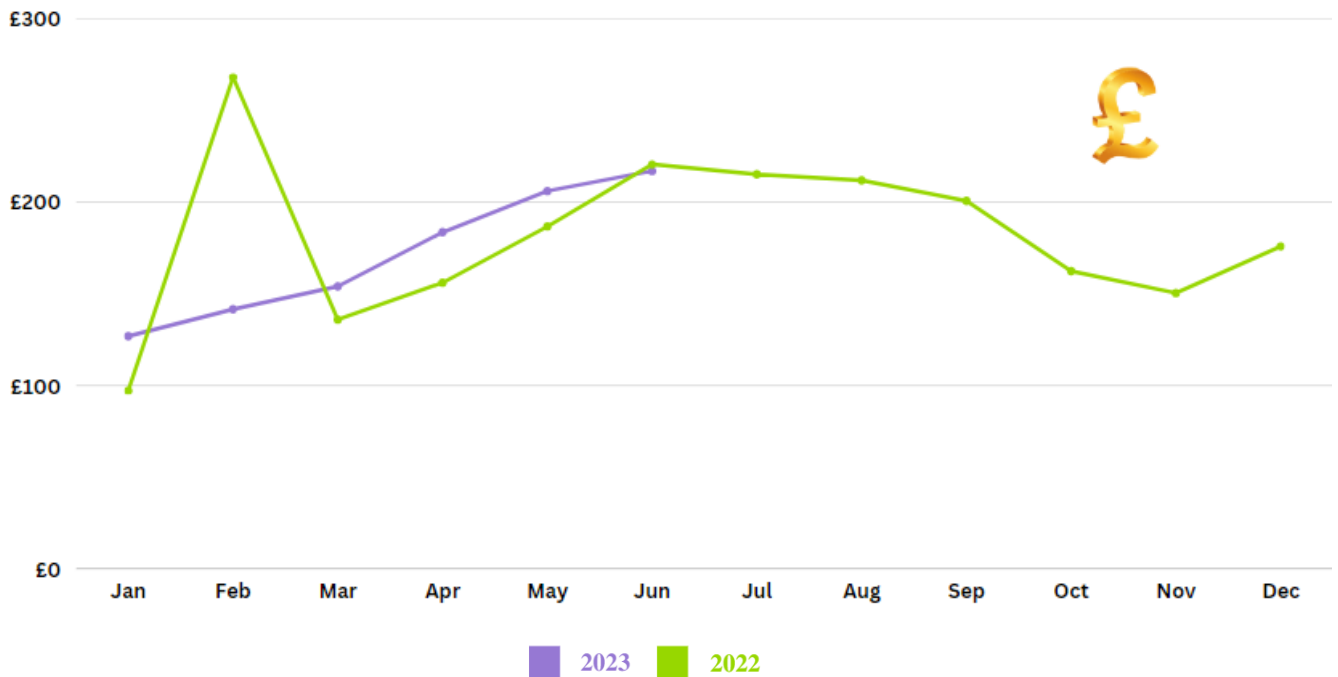


Room Occupancy	June 23	June 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	75.63%	72.19%	3.44	103	64.55%	58.87%	8.68	109

Bed Occupancy	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	66.19%	59.60%	6.59	107	54.25%	48.29%	5.96	106

The Revenue per available occupied room for June 2023 was **£217.12** compared with **£220.69** in June 2022. This figure is based solely on accommodation providers who provided financial information for either June 2023 and/or 2022.



### RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	June 23	June 22
All Serviced Accommodation	£217.12	£220.69

### RevPAR by Grading- June 2023/21

Grading – Average RevPAR (£)	June 23	June 22
2 Stars	£184.89	£126.64
3 Stars	£199.65	£211.52
4 Stars	£236.69	£277.38

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

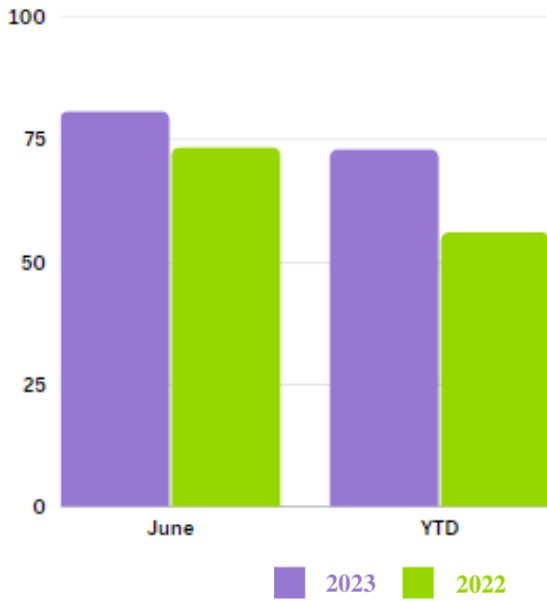
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

5 Stars	£448.01	£248.04
Unclassified	£139.05	£166.44

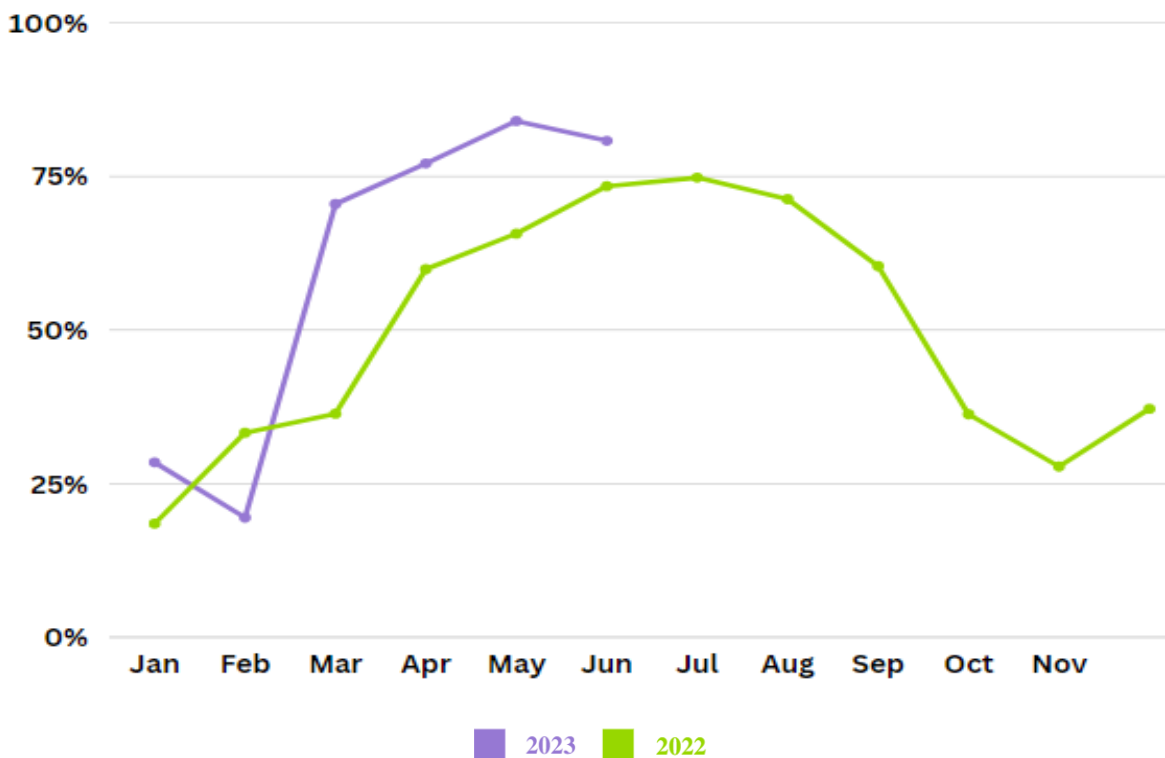
### 3.0 Serviced Accommodation – Guest House/B&B Sector

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

Guest House / B&B Room Occupancy – June 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 June 2023 was **80.77%** when compared to data from the previous year of **73.39%** occupancy rate; this shows an overall percentage point increase of **7.38**.

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

Room Occupancy	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	80.77%	73.39%	7.38	107	72.95%	56.00%	16.95	117

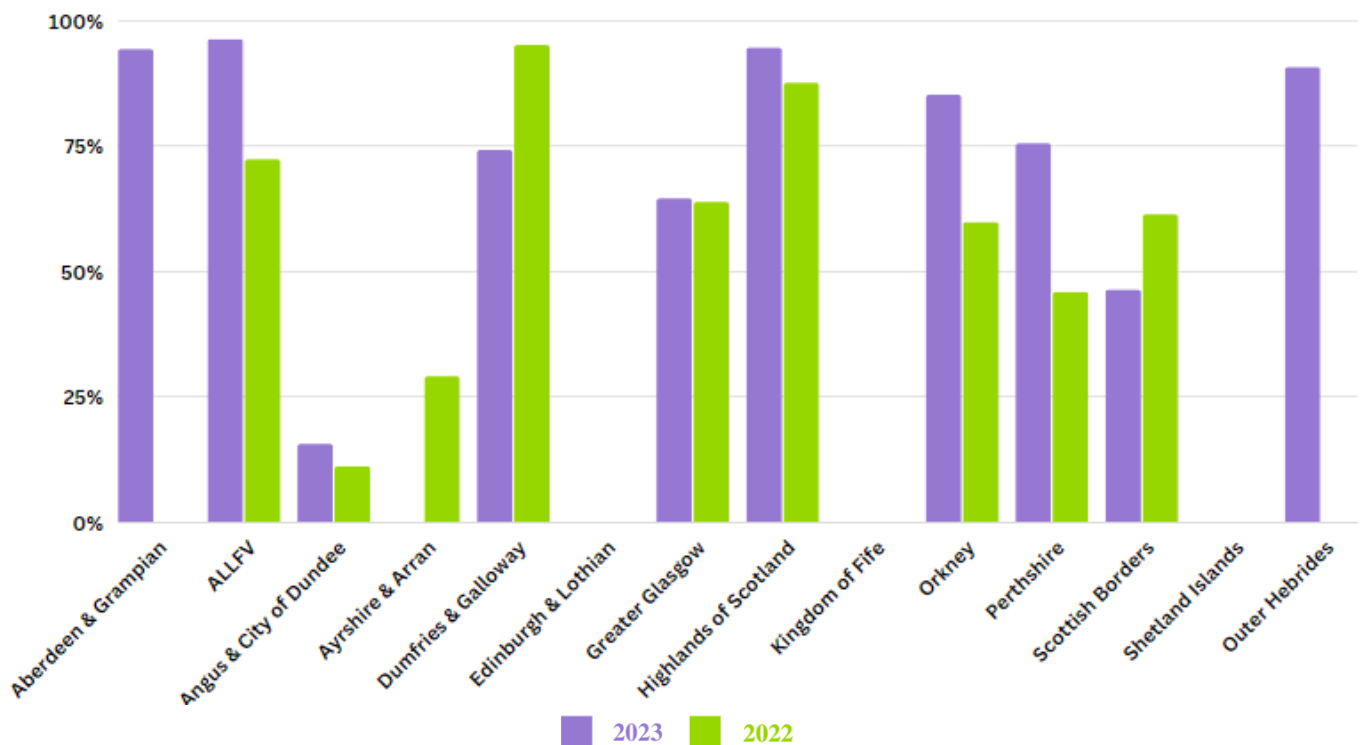
In the **Guest House/B&B sector**, the bed occupancy rate for the period June 2023 was **79.79%** when compared to data from the previous year of **64.55%** occupancy rate; this shows an overall percentage point increase of **15.24**.

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

Bed Occupancy	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	79.79%	64.55%	15.24	115	69.78%	47.78%	22.00	122

### Room Occupancy by Former Visit Scotland Area

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



Percentage room and bed occupancy rates for Guest House/B&Bs in the Argyll, Loch Lomond & Forth Valley (ALLV) were the highest in June 2023 compared to Dumfries and Galloway in June 2022. Operators in Accessible Rural Areas, Island locations and properties charging a tariff of over **£70** fared best in room occupancy rates in June 2023.

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

Area	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	*	-	*	*
ALLFV	*	*	*	*	85.40%	53.88%	31.52%	132
Angus & City of Dundee	*	*	*	*	*	10.11%	-2.42%	98
Ayrshire & Arran	-	*	*	*	-	30.08%	-30.08%	70
Dumfries & Galloway	*	*	*	*	79.37%	81.23%	-1.86%	98
Edinburgh & Lothian	-	-	-	-	-	-	-	-
Greater Glasgow	*	*	*	*	40.11%	29.59%	10.52%	111
Highlands of Scotland	*	*	*	*	93.76%	76.48%	17.28%	117
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	35.44%	24.35%	11.09%	111
Perthshire	*	*	*	*	*	24.42%	42.38%	142
Scottish Borders	*	*	*	*	41.80%	32.82%	8.98%	109
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 – June 2023/2022

Area	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	*	-	*	*
ALLFV	*	*	*	*	85.42%	41.95%	43.47%	143
Angus & City of Dundee	*	*	*	*	*	9.44%	-5.00%	95
Ayrshire & Arran	-	*	*	*	-	18.71%	-18.71%	81
Dumfries & Galloway	*	*	*	*	66.38%	61.72%	4.66%	105
Edinburgh & Lothian	-	-	-	-	-	-	-	-
Greater Glasgow	*	*	*	*	30.50%	22.91%	7.59%	108
Highlands of Scotland	*	*	*	*	93.12%	72.76%	20.36%	120
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	27.74%	21.75%	5.99%	106
Perthshire	*	*	*	*	*	23.18%	19.17%	119
Scottish Borders	*	*	*	*	39.20%	25.62%	13.58%	114
Shetland Islands	*	-	*	*	*	-	*	*
Outer Hebrides	*	-	*	*	*	-	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	68.37%	*	8.66%	109
Other Urban Areas	*	*	*	*	63.52%	52.61%	10.91%	111
Accessible Small Towns	75.03%	*	63.92%	164	61.82%	10.11%	51.71%	152
Remote Small Towns	*	*	*	*	72.12%	70.28%	1.84%	102
Accessible Rural	*	*	*	*	*	*	*	*
Remote Rural	*	72.31%	17.15%	117	84.95%	59.24%	25.71%	126
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	67.45%	*	7.02%	107
Other Urban Areas	*	*	*	*	54.82%	42.41%	12.41%	112
Accessible Small Towns	79.03%	*	69.59%	170	66.12%	9.44%	56.68%	157
Remote Small Towns	*	*	*	*	60.14%	54.10%	6.04%	106
Accessible Rural	*	*	*	*	*	*	*	*
Remote Rural	*	66.72%	20.51%	121	83.58%	52.60%	30.98%	131
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	*	*	*	34.23%	19.15%	15.08%	115
Inland	81.23%	74.21%	7.02%	107	72.80%	54.56%	18.24%	118
Island	*	*	*	*	84.95%	65.24%	19.71%	120
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	*	*	*	27.64%	12.99%	14.65%	115
Inland	82.00%	62.92%	19.08%	119	71.10%	46.07%	25.03%	125
Island	*	*	*	*	83.58%	58.90%	24.68%	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	71.39%	65.84%	5.55%	106	66.01%	51.01%	15.00%	115
4 to 10	86.22%	88.47%	-2.25%	98	82.18%	67.80%	14.38%	114
11 to 25	*	*	*	*	*	35.18%	34.92%	135
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 – June 2023/2022

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	69.44%	61.05%	8.39%	108	63.16%	45.70%	17.46%	117
4 to 10	84.87%	76.26%	8.61%	109	77.71%	57.01%	20.70%	121
11 to 25	*	*	*	*	*	25.45%	42.93%	143
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 – June 2023/2022

Tariff	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	-	-	-	-	-	-	-
£30 - £39.99	*	*	*	*	*	29.44%	-29.44%	71
£40 - £49.99	*	*	*	*	51.15%	49.64%	1.51%	102
£50 - £59.99	-	*	*	*	*	86.89%	8.84%	109
£60 - £69.99	*	*	*	*	91.43%	78.74%	12.69%	113
£70 +	83.16%	58.38%	24.78%	125	71.15%	42.20%	28.95%	129
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	-	-	-	-	-	-	-
£30 - £39.99	*	*	*	*	*	23.70%	-23.70%	76
£40 - £49.99	*	*	*	*	47.31%	46.22%	1.09%	101
£50 - £59.99	-	*	*	*	*	86.48%	7.91%	108
£60 - £69.99	*	*	*	*	84.84%	64.94%	19.90%	120
£70 +	81.58%	48.75%	32.83%	133	69.01%	32.57%	36.44%	136
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Grading – June 2023/2022

Grading	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	88.59%	72.07%	16.52%	117	71.71%	51.96%	19.75%	120
4 Stars	54.88%	*	-8.65%	91	46.46%	47.56%	-1.10%	99
5 Stars	-	-	-	-	-	-	-	-
Unclassified	*	*	*	*	76.87%	53.88%	22.99%	123
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Grading – June 2023/2022

Grading	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	83.79%	59.19%	24.60%	125	61.95%	42.50%	19.45%	119
4 Stars	52.15%	*	-5.37%	95	42.76%	42.85%	-0.09%	100
5 Stars	-	-	-	-	-	-	-	-
Unclassified	*	*	*	*	77.31%	41.95%	35.36%	135
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



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