

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2023/2022 Report - GUEST HOUSE / B&Bs

1.0 Introduction November 2023/2022

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

2.0 Executive Summary November 2023

The SOAS Report: November 2023/2022 Guest House/B&Bs report showed a significant occupancy increase in the Guest House/B&Bs sector in Scotland compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for November 2023 experienced a **13.11** percentage point increase when comparing percentage room occupancy rates with November 2022. Occupancy rates within the Guest House/B&B sector experienced a **24.92** percentage point increase in November 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in November with growth of just 3.1% despite the Black Friday deals. Food and drink and health and beauty categories continued to drive sales. November's food and drink sales rose by 5.8%, which was still below the 3-month average.

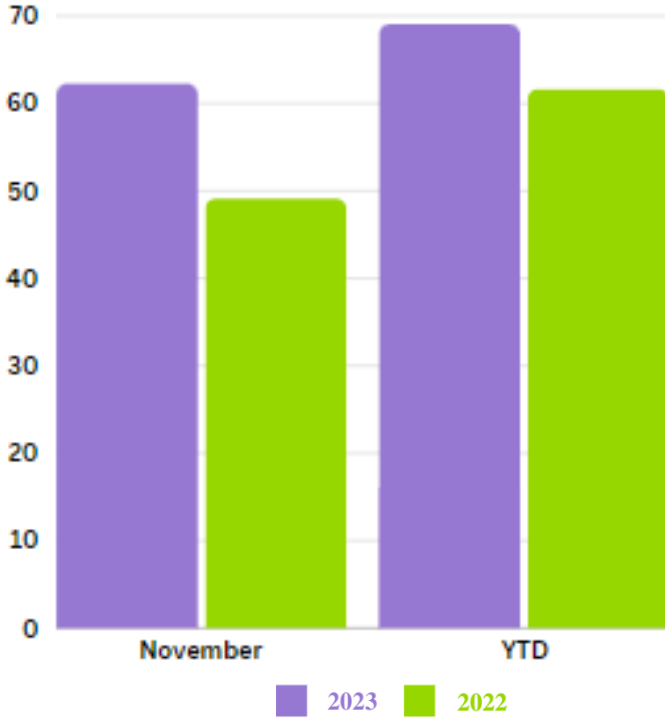
Domestic consumer sentiment provided by the GB National Tourist Boards for November 2023 found that 20% of respondents said they have "...been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2023 survey). The survey recorded 52% of respondents (a 7% increase on the September 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, 14% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 77% 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 continued to stall in November 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw an 8% 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.

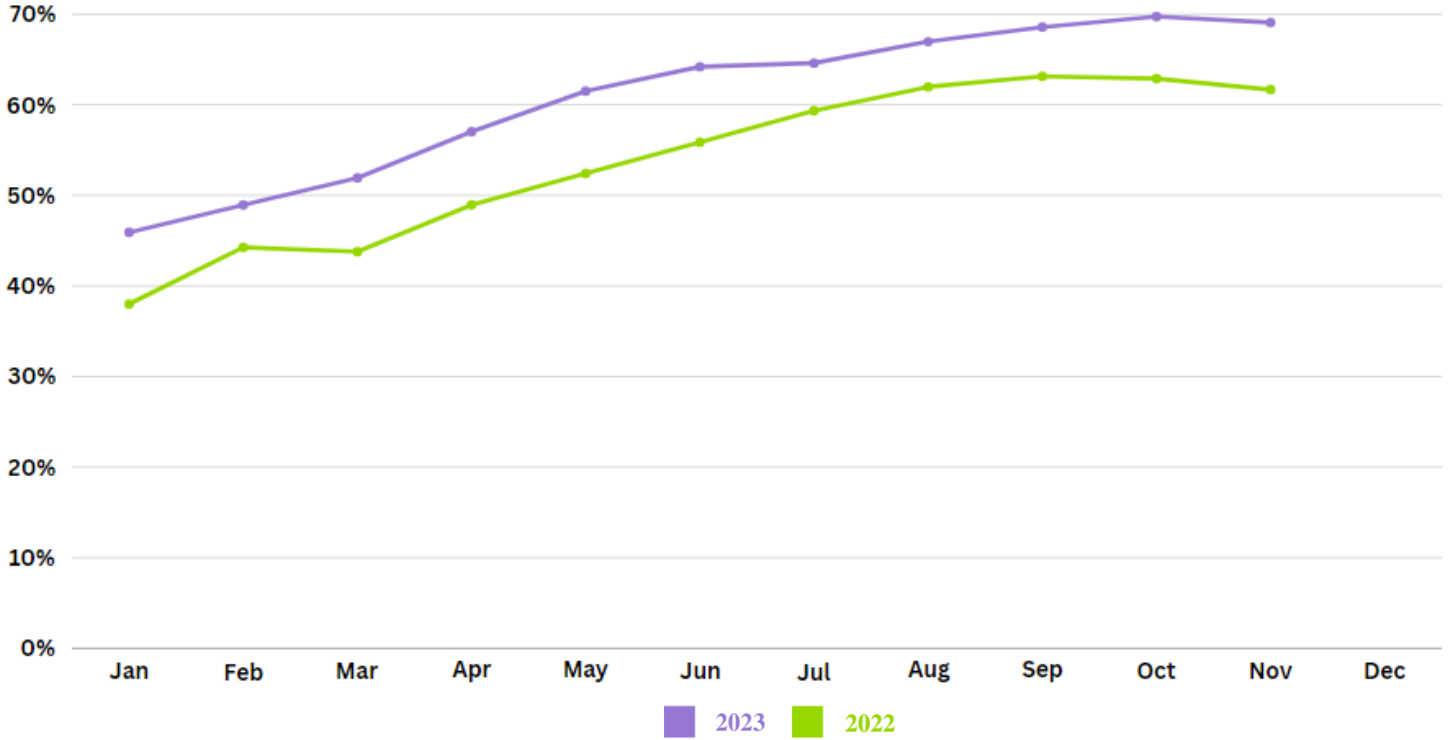
All Serviced Accommodation

Room Occupancy – November 2023/2022



Scottish Serviced Accommodation room occupancy for November 2023 experienced a **13.11** percentage point decrease when comparing percentage room occupancy rates with November 2022.

Room Occupancy – Year-to-Date



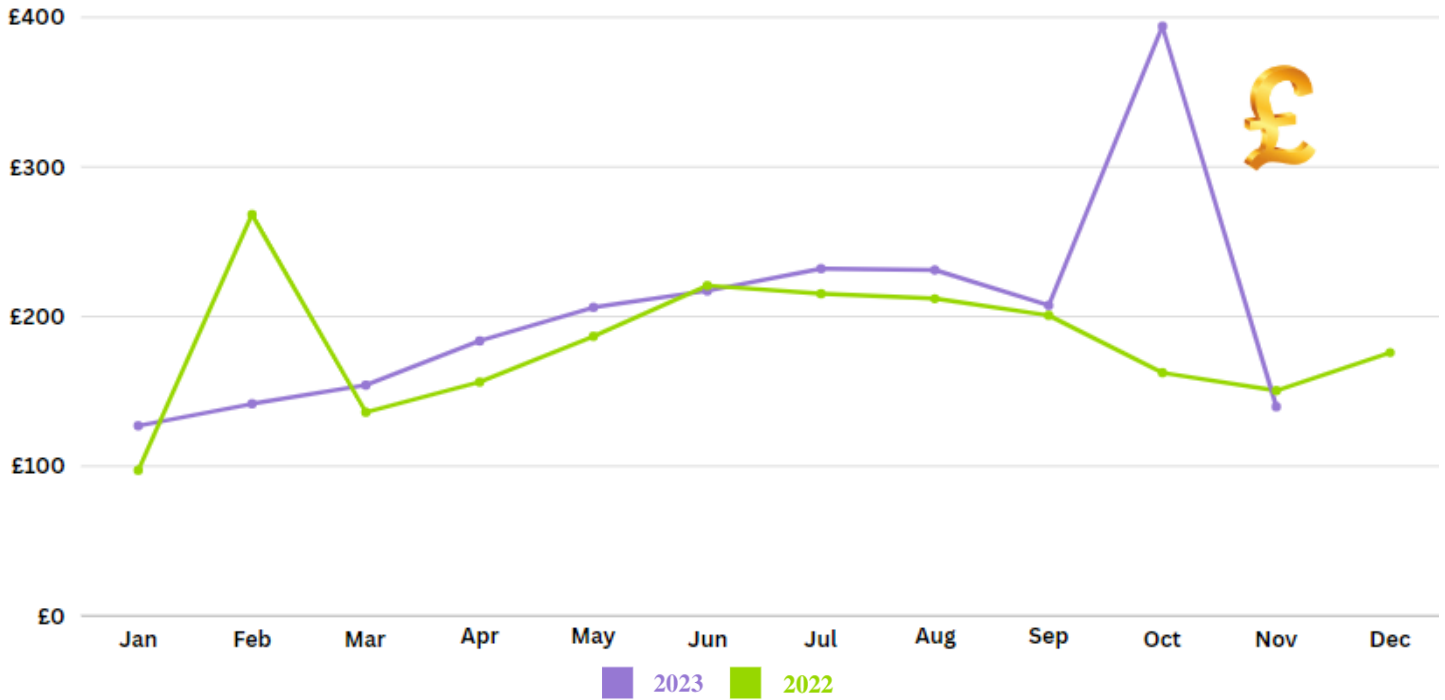
Room Occupancy	November 23	November 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	62.26%	49.15%	13.11	113	69.08%	61.68%	7.40	107

Bed Occupancy	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	50.34%	38.14%	12.20	112	58.25%	52.73%	5.52	106

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.

The Revenue per available occupied room for November 2023 was **£139.75** compared with **£150.53** in November 2022. This figure is based solely on accommodation providers who provided financial information for either November 2023 and/or 2022.



RevPAR Year to Date 2023/2022

Room - Average RevPAR (£)	November 23	November 22
All Serviced Accommodation	£139.75	£150.53

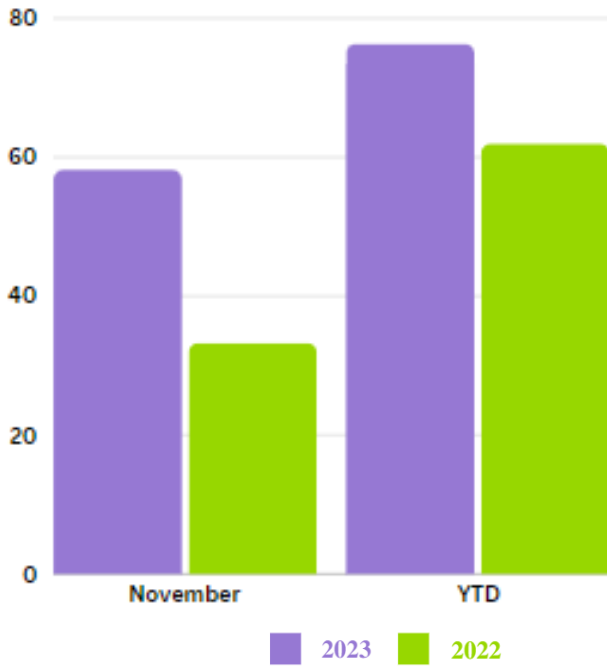
RevPAR by Grading- November 2023/21

Grading - Average RevPAR (£)	November 23	November 22
2 Stars	£84.53	£78.23
3 Stars	£126.37	£125.42
4 Stars	£172.25	£221.32
5 Stars	£309.20	£135.17
Unclassified	£0.00	£86.96

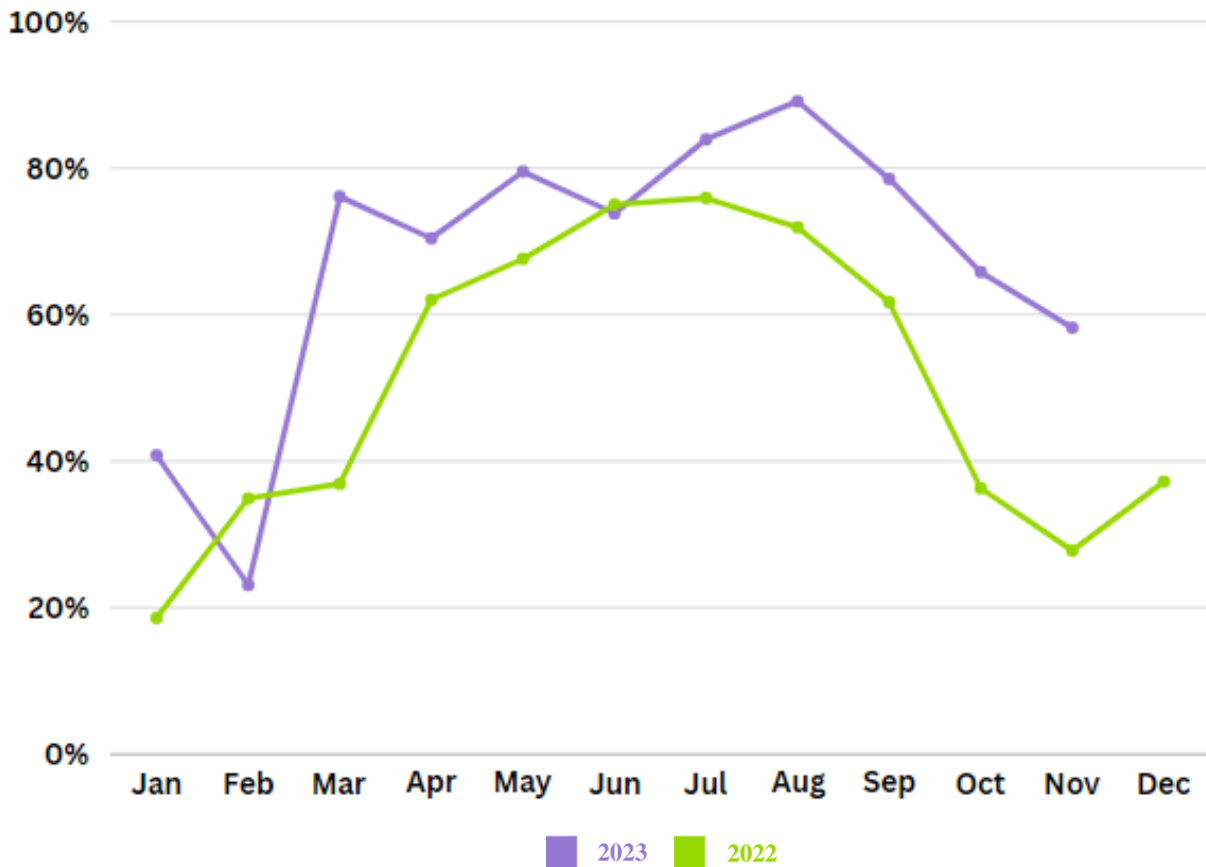
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

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



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



In the **Guest House/B&B sector**, the room occupancy rate for November 2023 was **58.18%** compared to data from the previous year of **33.26%** occupancy rate; this shows an overall percentage point increase of **24.92**.

Percentage room and bed occupancy rates for Guest House/B&Bs in the Edinburgh & Lothian were the highest in January - November 2023. Operators (sample size >4) in Inland locations and properties charging a tariff of over **£70** fared best in room occupancy rates in November 2023.

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

Room Occupancy	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	58.18%	33.26%	24.92	125	76.35%	61.97%	14.38	114

In the **Guest House/B&B sector**, the bed occupancy rate for November 2023 was **60.88%** compared to data from the previous year of **27.79%** occupancy rate; this shows an overall percentage point increase of **33.09**.

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

Bed Occupancy	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	60.88%	27.79%	33.09	133	73.97%	54.36%	19.61	120

Area	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	85.33%	-	85.33	185
ALLFV	*	*	*	*	84.53%	41.52%	43.01	143
Angus & City of Dundee	-	-	-	-	10.65%	9.44%	1.21	101
Ayrshire & Arran	-	*	*	*	-	21.14%	-21.14	79
Dumfries & Galloway	*	*	*	*	72.16%	69.08%	3.08	103
Edinburgh & Lothian	*	-	*	*	90.36%	-	90.36	190
Greater Glasgow	-	*	*	*	-	68.67%	-68.67	31
Highlands of Scotland	*	*	*	*	70.67%	88.61%	-17.94	82
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	40.43%	36.21%	4.22	104
Perthshire	-	-	-	-	65.64%	32.34%	33.30	133
Scottish Borders	*	-	*	*	42.22%	-	42.22	142
Shetland Islands	*	-	*	*	0.00%	0.00%	0.00	100
Outer Hebrides	-	*	*	*	52.38%	0.00%	52.38	152
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	95.30%	68.33%	26.97	127
Other Urban Areas	*	*	*	*	93.17%	72.72%	20.45	120
Accessible Small Towns	*	-	*	*	64.85%	25.68%	39.17	139
Remote Small Towns	*	*	*	*	70.42%	76.52%	-6.10	94
Accessible Rural	*	*	*	*	83.86%	33.01%	50.85	151
Remote Rural	*	*	*	*	67.27%	58.58%	8.69	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	88.65%	68.67%	19.98	120
Other Urban Areas	*	*	*	*	91.93%	65.12%	26.81	127
Accessible Small Towns	*	-	*	*	72.53%	9.44%	63.09	163
Remote Small Towns	*	*	*	*	61.69%	59.80%	1.89	102
Accessible Rural	*	*	*	*	81.81%	32.34%	49.47	149
Remote Rural	*	*	*	*	63.83%	50.08%	13.75	114
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	56.28%	-	56.28	156

Inland	79.09%	64.20%	14.89	115	80.96%	64.19%	16.77	117
Island	0.00%	6.61%	-6.61	93	84.38%	58.58%	25.80	126
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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

Location (Geographic)	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	55.20%	-	55.20	155
Inland	94.07%	55.54%	38.53	139	78.31%	57.30%	21.01	121
Island	0.00%	3.55%	-3.55	96	83.74%	50.08%	33.66	134
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Size– November 2023/2022

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	*	*	*	66.00%	66.20%	-0.20	100
4 to 10	75.14%	*	32.12	132	85.10%	70.73%	14.37	114
11 to 25	-	*	*	*	-	39.06%	-39.06	61
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 – November 2023/2022

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	*	*	*	65.14%	68.53%	-3.39	97
4 to 10	85.06%	*	61.23	161	82.08%	60.00%	22.08	122
11 to 25	-	*	*	*	-	28.94%	-28.94	71
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 – November 2023/2022

Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	*	*	*
£30 – 39.99	*	-	*	*	45.43%	19.08%	26.35	126
£40 – 49.99	-	*	*	*	52.91%	62.09%	-9.18	91
£50 – 59.99	-	*	*	*	94.70%	85.97%	8.73	109
£60 - £69.00	*	*	*	*	92.09%	91.65%	0.44	100
£70+	58.13%	*	25.12	125	74.31%	44.08%	30.23	130
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Tariff – November 2023/2022

