

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

1.0 Introduction February 2023/2022

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

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 February 2023

The SOAS Report: February 2023/2022 Guest House/B&Bs report showed a decline in the Guest House/B&Bs sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for February 2023 experienced a **0.05** percentage point increase when comparing percentage room occupancy rates with February 2022. Occupancy rates within the Guest House/B&B sector experienced an **13.88** percentage point decrease in February 2023 when compared to last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 14.5% footfall increase in visitors for February 2023 compared to February 2022, with both Edinburgh and Glasgow seeing significant increases (27.8% and 16.7% respectively). However, when comparing footfall in February 2023 with February 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the wider cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for February 2023 evidenced similar findings with 47% of respondents Undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

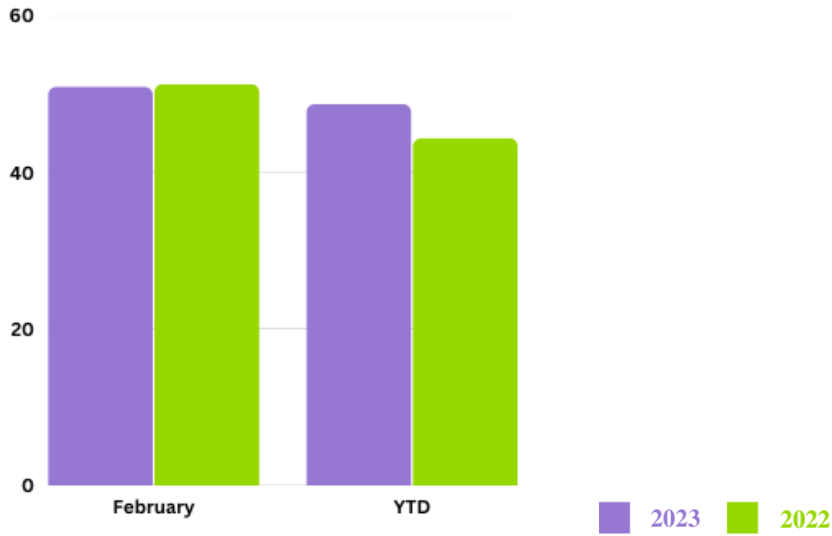
Notably, some 25% of respondents Recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 11% of UK adults intended to take a domestic overnight trip in the first quarter of 2023 although that figure rose to 72% in the following 12 months. These figures have 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 be restrain growth. A highlight in air transport was from Scotland's Regional Carrier, Loganair which saw a year-to-date growth of 17% 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 -15% decrease in year-to-date flights when compared to in 2019.

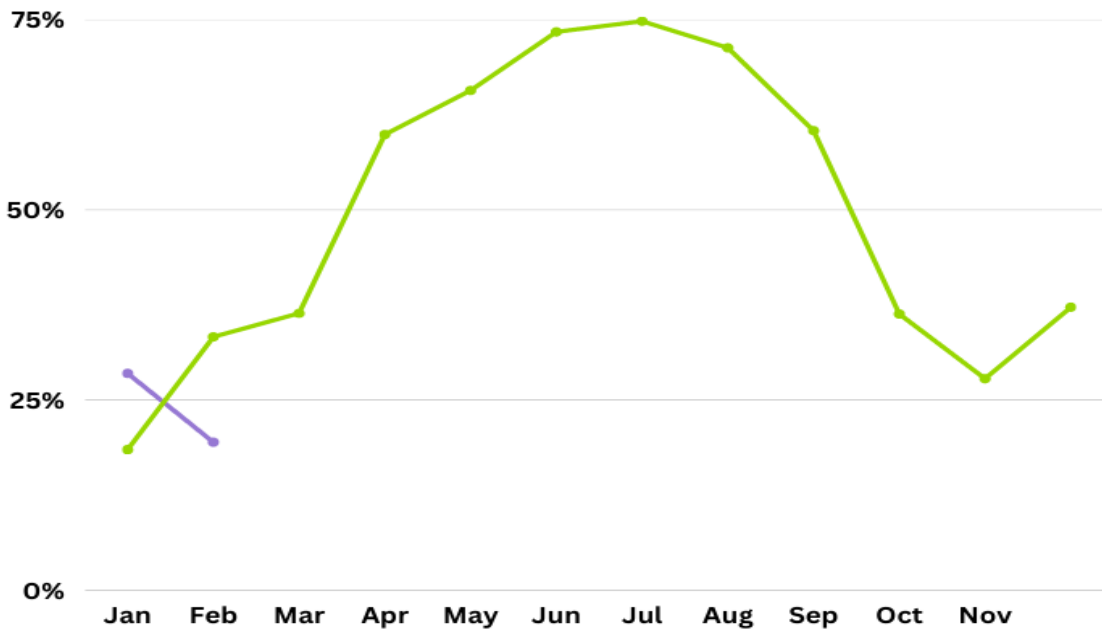
All Serviced Accommodation

Room Occupancy – February 2023/2022

Scottish Serviced Accommodation room occupancy rates for February 2023 experienced a 0.05 percentage point increase when comparing percentage room occupancy rates with February 2022.



Room Occupancy – Year to Date



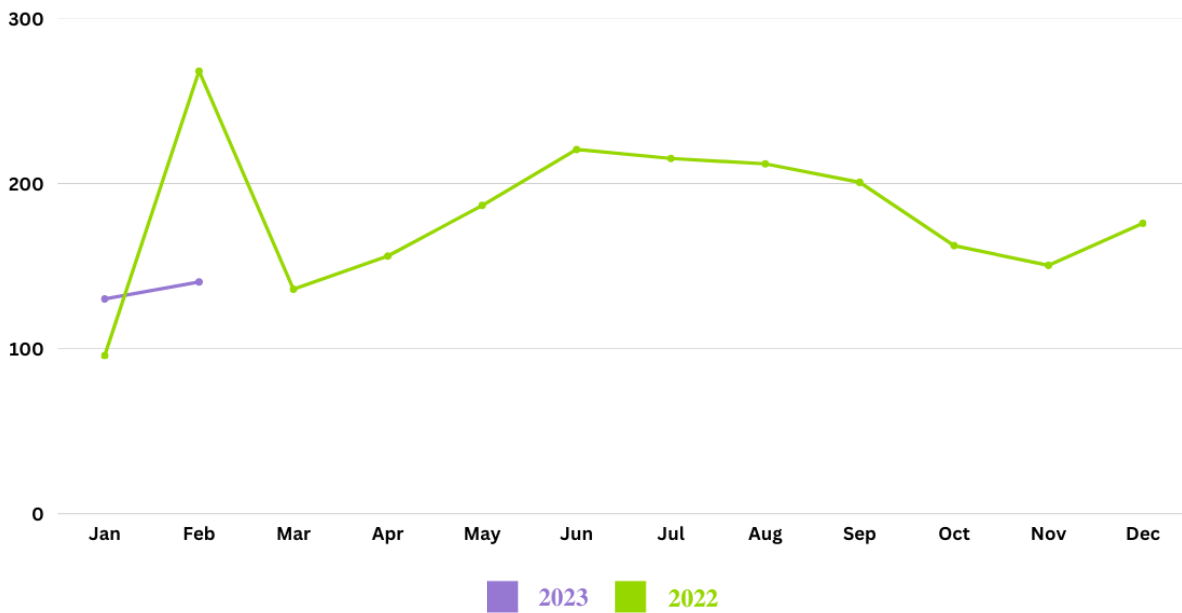
2023 2022

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

Room Occupancy	Feb 23	Feb 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	51.23%	51.18%	0.05	100	48.94%	44.26%	4.68	105

Bed Occupancy	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	38.79%	40.51%	-1.72	98	37.97%	35.33%	2.64	103

The Revenue per available occupied room for February 2023 was **£141.70** compared with **£268.20** in February 2022. This figure is based solely on accommodation providers who provided financial information for either February 2023 and/or 2022.



RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	February 23	February 22
All Serviced Accommodation	£141.70	£268.20

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.

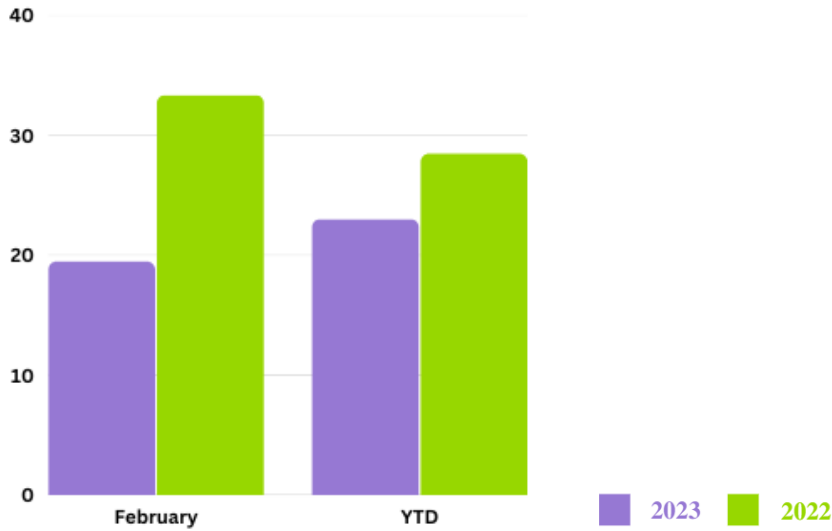
RevPAR by Grading- February 2023/21

Grading – Average RevPAR (£)	February 23	February 22
2 Stars	£98.07	£84.12
3 Stars	£99.90	£108.55
4 Stars	£188.35	£225.63
5 Stars	£138.08	£3571.76
Unclassified	£139.60	£155.12

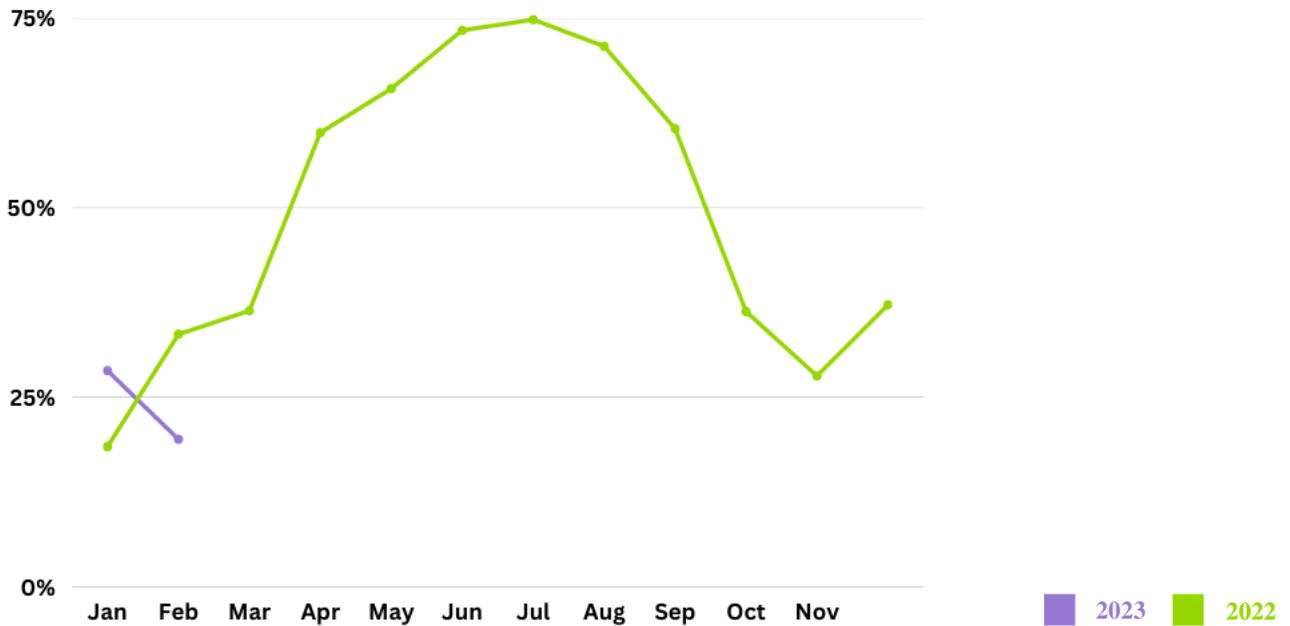
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

Guest House / B&B Room Occupancy – February 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 February 2023 was **19.45%** when compared to data from the previous year of **33.33%** occupancy rate; this shows an overall percentage point decrease of **13.88**.

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

Room Occupancy	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	19.45%	33.33%	-13.88	86	22.98%	28.43%	-5.45	95

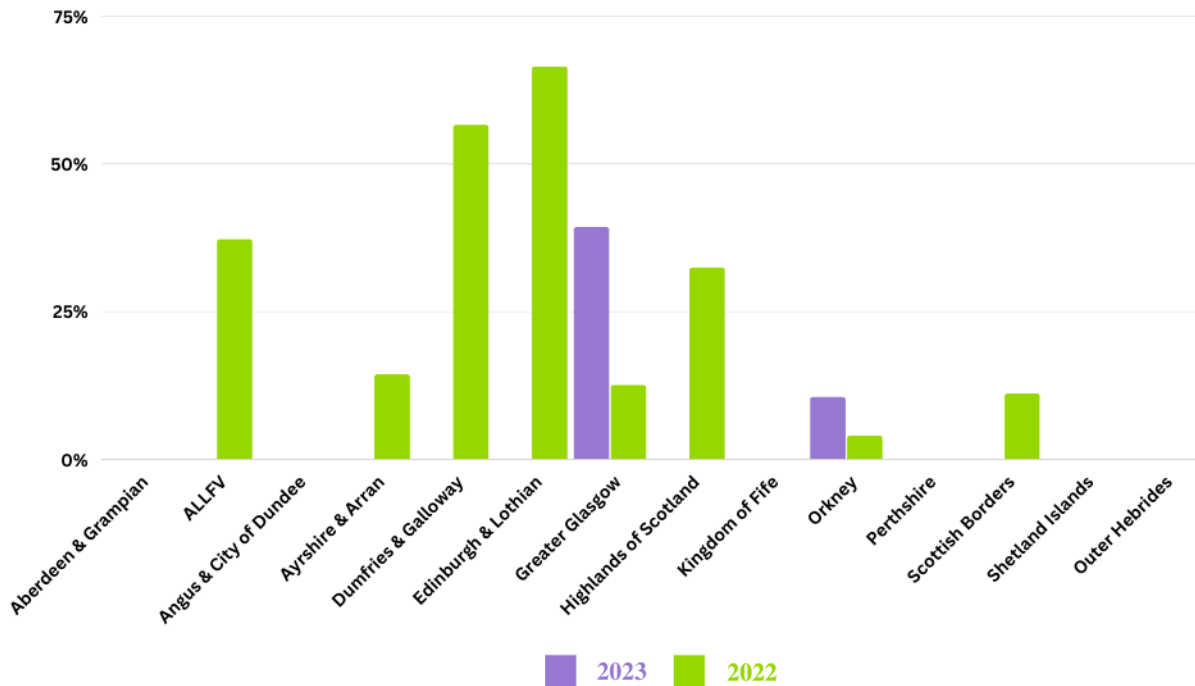
In the **Guest House/B&B sector**, the bed occupancy rate for the period February 2023 was **17.11%** when compared to data from the previous year of **26.38%** occupancy rate; this shows an overall percentage point decrease of **9.27**.

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

Bed Occupancy	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	17.11%	26.38%	-9.27	91	20.43%	21.66%	-1.23	99

Room Occupancy by Former Visit Scotland Area

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



Percentage room and bed occupancy rates for Guest House/B&Bs in Greater Glasgow were the highest in February 2023 compared to February 2022 where Edinburgh & Lothian was the highest occupancy rate. Operators in Large Urban Areas, Inland locations and properties charging a tariff of £70 and over fared best in room occupancy rates in February 2023, similarly to the same period in 2022/

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

Area	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	-	-	-	-	-	-	-	-
ALLFV	-	*	*	*	*	33.23%	-33.23	67
Angus & City of Dundee	-	*	*	*	-	0.00%	0.00	100
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	*	*	*	*	42.25%	2.15	102
Edinburgh & Lothian	-	*	*	*	-	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	-	32.38%	-32.38	68	*	23.74%	-23.74	76
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 – February 2023/2022

Area	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	-	-	-	-	-	-	-	-

ALLFV	-	*	*	*	*	25.42%	-25.42	75
Angus & City of Dundee	-	*	*	*	-	0.00%	0.00	100
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	*	*	*	*	31.69%	12.71	113
Edinburgh & Lothian	-	*	*	*	-	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	-	18.53%	-18.53	81	-	14.31%	-14.31	86
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) – February 2023/2022

Location accessibility/density	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	46.06%	11.88	112
Other Urban Areas	*	27.29%	-21.53	78	*	23.09%	-18.47	82
Accessible Small Towns	-	24.96%	-24.96	75	-	21.75%	-21.75	78
Remote Small Towns	-	*	*	*	*	*	*	*
Accessible Rural	-	*	*	*	-	*	*	*
Remote Rural	*	35.16%	-33.68	66	*	28.16%	-26.93	73
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	43.77%	14.18	114
Other Urban Areas	*	17.07%	-14.76	85	*	14.02%	-11.80	88
Accessible Small Towns	-	19.01%	-19.01	81	-	16.53%	-16.53	83
Remote Small Towns	-	*	*	*	*	*	*	*
Accessible Rural	-	*	*	*	-	*	*	*
Remote Rural	*	20.62%	-19.88	80	*	16.89%	-16.27	84
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	30.05%	-24.29	76	*	25.00%	-20.38	80
Inland	*	41.60%	20.74	121	57.59%	35.22%	22.37	122
Island	*	9.51%	-8.03	92	*	18.36%	-17.13	83
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	21.20%	-18.89	81	*	17.05%	-14.83	85
Inland	*	35.70%	26.71	127	57.59%	29.44%	28.15	128
Island	*	5.01%	-4.27	96	*	10.15%	-9.53	90
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by size– February 2023/2022

Size	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	28.30%	-21.23	79	*	25.27%	-20.73	79
4 to 10	-	31.04%	-31.04	69	*	23.78%	20.62	121
11 to 25	*	*	*	*	*	41.28%	-8.37	92
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 – February 2023/2022

Size	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	20.42%	-17.43	83	*	17.60%	-13.06	87
4 to 10	-	20.41%	-20.41	80	*	15.55%	28.85	129
11 to 25	*	*	*	*	*	37.63%	-4.72	95
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 – February 2023/2022

Tariff	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	-	*	*	*	-	*	*	*
£40 - £49.99	*	0.00%	5.76	106	*	10.91%	-6.29	94
£50 - £59.99	-	*	*	*	*	14.60%	-14.60	85
£60 - £69.99	-	*	*	*	*	19.11%	25.29	125
£70 +	*	41.58%	-18.85	81	28.75%	34.72%	-5.97	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by tariff – February 2023/2022

Tariff	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	-	*	*	*	-	*	*	*
£40 - £49.99	*	0.00%	2.31	102	*	5.63%	-3.41	97
£50 - £59.99	-	*	*	*	*	8.78%	-8.78	91
£60 - £69.99	-	*	*	*	*	13.96%	30.44	130
£70 +	*	34.66%	-13.03	87	27.77%	27.82%	-0.05	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by grading – February 2023/2022

Grading	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	25.00%	-2.27	98	28.94%	25.83%	3.11	103
4 Stars	*	14.02%	-8.26	92	*	11.93%	-7.31	93
5 Stars	-	*	*	*	-	*	*	*
Unclassified	-	37.08%	-37.08	63	*	28.83%	-28.83	71
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by grading – February 2023/2022

Grading	Feb 23	Feb 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	21.72%	-0.09	100	27.99%	18.98%	9.01	109
4 Stars	*	7.71%	-5.40	95	*	6.58%	-4.36	96
5 Stars	-	*	*	*	-	*	*	*
Unclassified	-	21.84%	-21.84	78	*	17.55%	-17.55	82
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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