

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

1.0 Introduction July 2023/2022

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

The SOAS Report: July 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 July 2023 experienced a **2.95** percentage point increase when comparing percentage room occupancy rates with July 2022. Occupancy rates within the Guest House/B&B sector experienced an **11.26** percentage point increase in July 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that total retail sales figures decreased by 3% year-on-year in July. Retail sales in Scotland held steady for July with a growth of 4.6%. Food sales continue to be the biggest growth area, however, many customers were seeking more warming traditional foods instead of the seasonal specials.

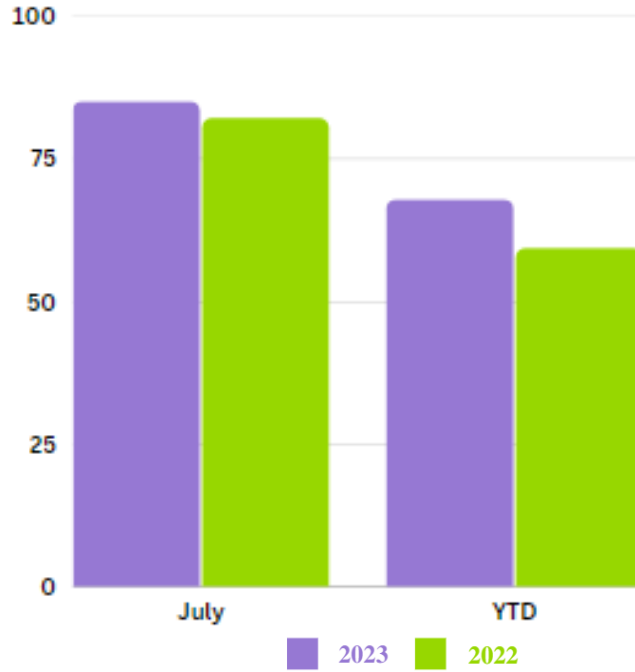
Domestic consumer sentiment provided by the GB National Tourist Boards for July 2023 found that 23% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the June 2023 survey). The survey recorded 45% of respondents (a 1% decrease on the June 2023 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, 50% of UK adults intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 75% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were 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 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 July 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 7% decrease in year-to-date flights compared to 2019.

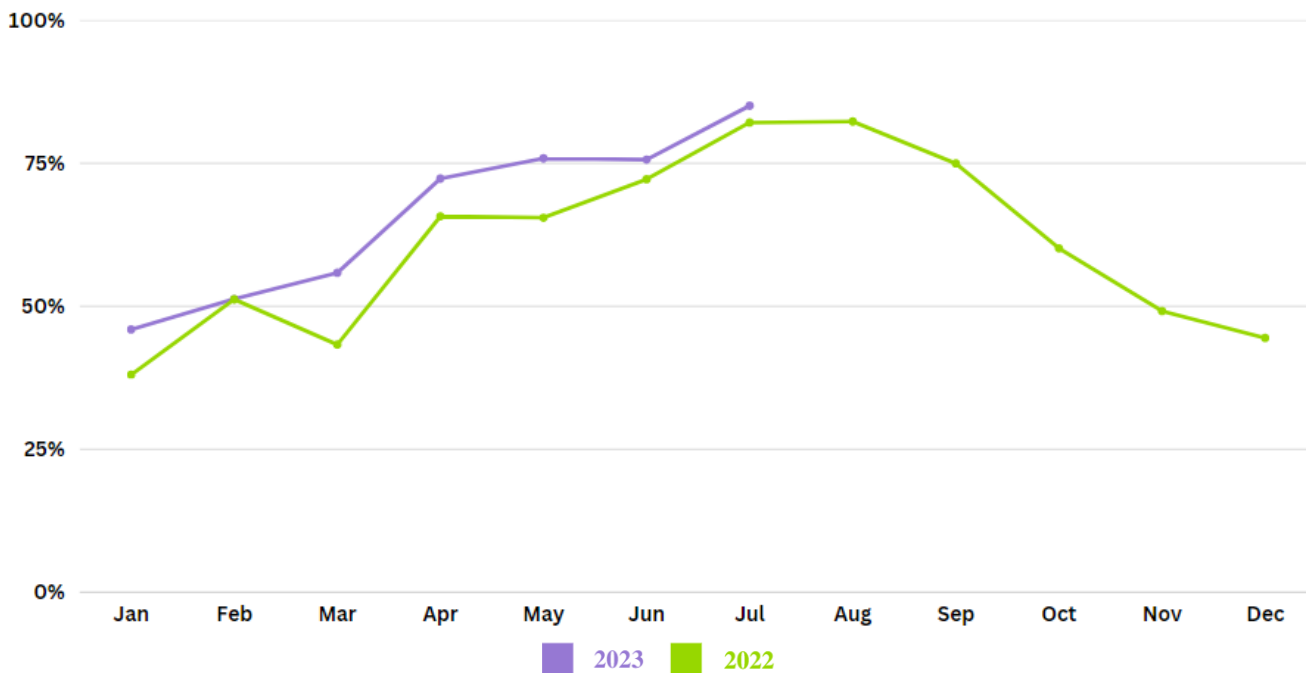
All Serviced Accommodation

Room Occupancy – July 2023/2022

Scottish Serviced Accommodation room occupancy for July 2023 experienced a **2.95** percentage point increase when comparing percentage room occupancy rates with July 2022.



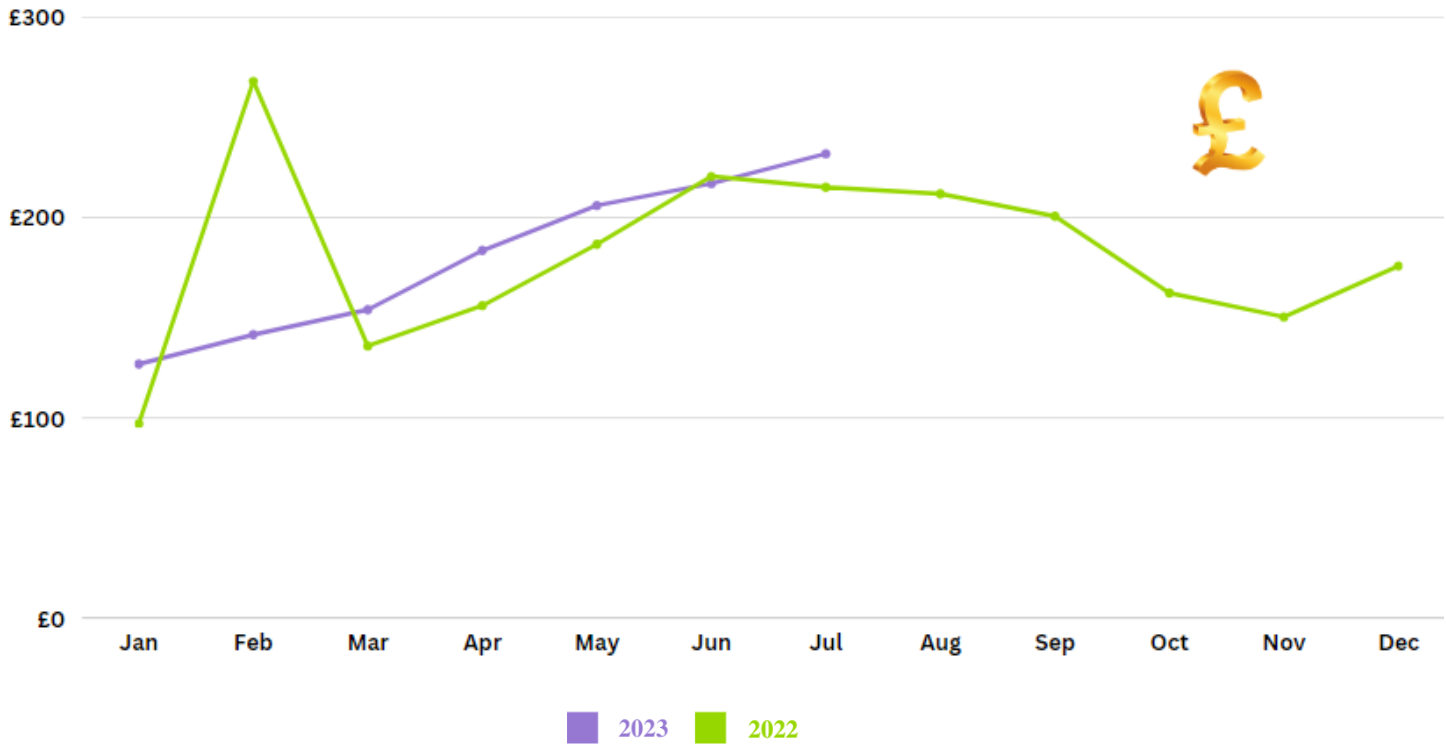
Room Occupancy – Year to Date



Room Occupancy	July 23	July 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	85.06%	82.11%	2.95	103	67.86%	59.34%	8.52	109

Bed Occupancy	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	77.35%	70.10%	7.25	107	58.09%	51.22%	6.87	107

The Revenue per available occupied room for July 2023 was **£232.01** compared with **£215.27** in July 2022. This figure is based solely on accommodation providers who provided financial information for either July 2023 and/or 2022.



RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	July 23	July 22
All Serviced Accommodation	£232.01	£215.27

RevPAR by Grading- July 2023/21

Grading – Average RevPAR (£)	July 23	July 22
2 Stars	£190.46	£129.22
3 Stars	£214.79	£186.82
4 Stars	£254.14	£294.23

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

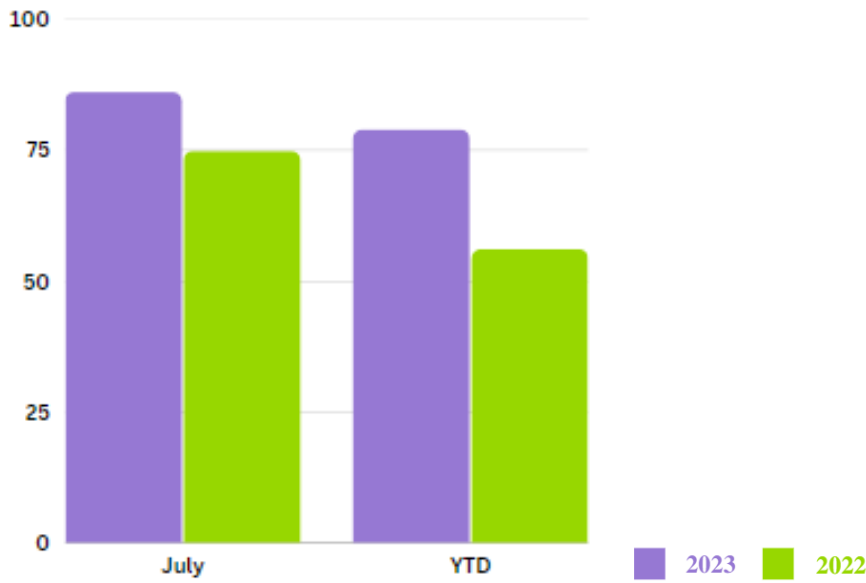
² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

5 Stars	£460.96	£344.56
Unclassified	£133.25	£155.98

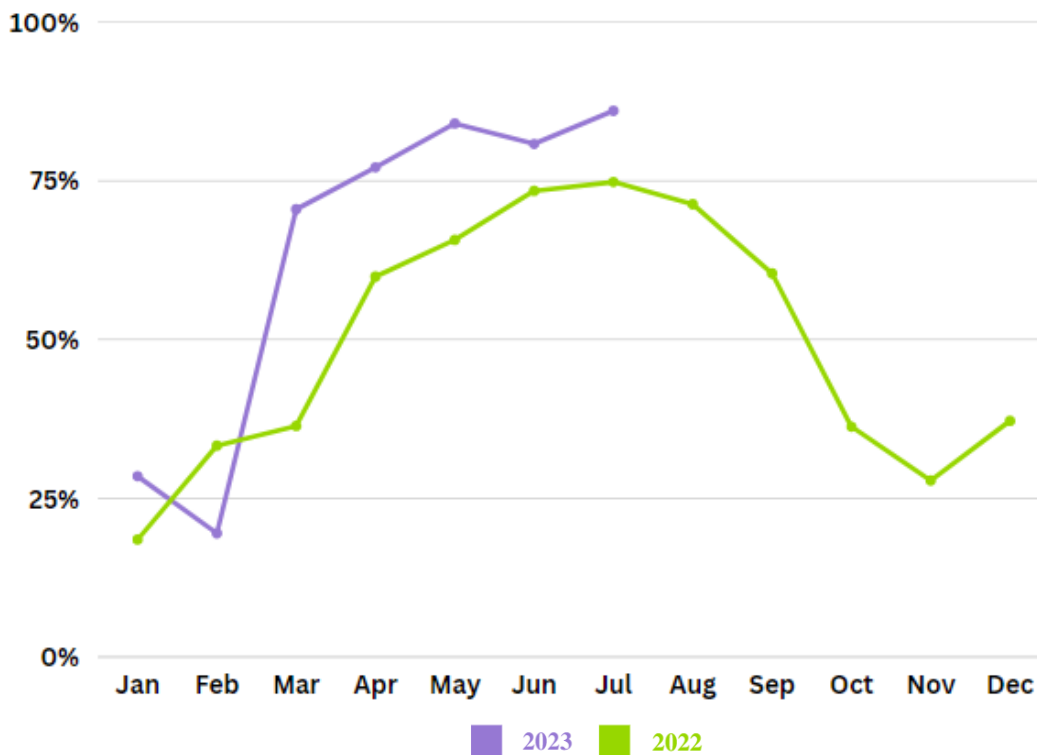
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

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



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



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

In the **Guest House/B&B sector**, the room occupancy rate for July 2023 was **86.01%** compared to data from the previous year of **74.75%** occupancy rate; this shows an overall percentage point increase of **11.26**.

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

Room Occupancy	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	86.01%	74.75%	11.26	111	78.84%	60.63%	18.21	118

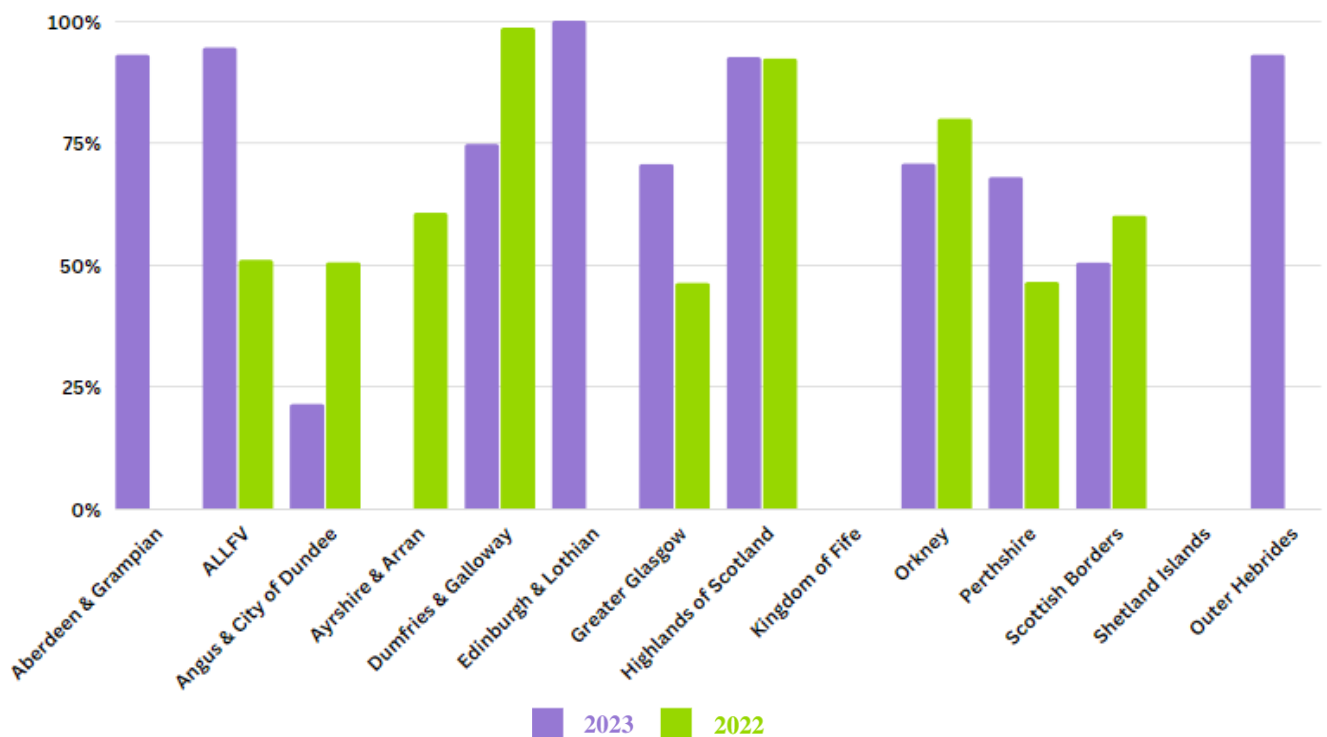
In the **Guest House/B&B sector**, the bed occupancy rate for July 2023 was **84.25%** compared to data from the previous year of **66.50%** occupancy rate; this shows an overall percentage point increase of **17.75**.

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

Bed Occupancy	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	84.25%	66.50%	17.75	118	72.36%	52.49%	19.87	120

Room Occupancy by Former Visit Scotland Area

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



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

Area	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	93.51%	-	93.51	194
ALLFV	94.59%	*	43.53	144	84.32%	*	39.20	139
Angus & City of Dundee	*	*	*	*	*	22.95%	-11.75	88
Ayrshire & Arran	-	*	*	*	-	36.40%	-36.40	64
Dumfries & Galloway	*	*	*	*	77.54%	86.60%	-9.06	91
Edinburgh & Lothian	*	-	*	*	*	-	*	*
Greater Glasgow	*	*	*	*	45.88%	23.20%	22.68	123
Highlands of Scotland	*	*	*	*	93.40%	80.22%	13.18	113
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	40.11%	34.11%	6.00	106
Perthshire	*	*	*	*	67.35%	36.64%	30.71	131
Scottish Borders	*	*	*	*	43.23%	36.91%	6.32	106
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	-	*	*	82.47%	-	82.47	182
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Former Visit Scotland Area – July 2023/2022

Area	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	93.89%	-	93.89	194
ALLFV	94.68%	*	54.36	154	84.25%	*	49.68	150
Angus & City of Dundee	*	*	*	*	*	9.44%	1.21	101
Ayrshire & Arran	-	*	*	*	-	22.56%	-22.56	77
Dumfries & Galloway	*	*	*	*	68.58%	65.88%	2.70	103
Edinburgh & Lothian	*	-	*	*	*	-	*	*
Greater Glasgow	*	*	*	*	35.59%	15.91%	19.68	120
Highlands of Scotland	*	*	*	*	92.98%	77.00%	15.98	116
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	32.33%	31.78%	0.55	101
Perthshire	*	*	*	*	51.07%	36.33%	14.74	115
Scottish Borders	*	*	*	*	39.45%	28.28%	11.17	111
Shetland Islands	-	-	-	-	-	-	-	-
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) – July 2023/2022

Location accessibility/density	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	-	*	*	88.12%	-	88.12%	188
Other Urban Areas	*	*	*	*	68.32%	55.06%	13.26%	113
Accessible Small Towns	77.52%	*	26.98%	127	67.37%	22.95%	44.42%	144
Remote Small Towns	*	*	*	*	66.43%	75.23%	-8.80%	91
Accessible Rural	*	*	*	*	92.30%	26.47%	65.83%	166
Remote Rural	*	83.36%	7.71%	108	86.87%	64.54%	22.33%	122
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	-	*	*	70.84%	-	70.84	171
Other Urban Areas	*	*	*	*	59.33%	45.70%	13.63	114
Accessible Small Towns	77.88%	*	77.88	178	70.81%	9.44%	61.37	161
Remote Small Towns	*	*	*	*	56.89%	58.82%	-1.93	98
Accessible Rural	*	*	*	*	90.84%	25.69%	65.15	165
Remote Rural	*	76.12%	14.48	114	85.81%	57.72%	28.09	128
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	*	*	*	45.48%	23.20%	22.28	122
Inland	85.22%	70.14%	15.08	115	49.37%	58.23%	-8.86	91
Island	*	*	*	*	86.87%	70.01%	16.86	117
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	*	*	*	37.74%	15.91%	21.83	122
Inland	84.13%	61.60%	22.53	123	72.14%	49.93%	22.21	122
Island	*	*	*	*	85.81%	63.59%	22.22	122
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Size– July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	84.41%	81.46%	2.95	103	71.72%	57.35%	14.37	114
4 to 10	87.55%	72.95%	14.60	115	84.83%	71.18%	13.65	114
11 to 25	*	*	*	*	72.97%	36.40%	36.57	137
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 – July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	80.87%	79.54%	1.33	101	68.78%	52.25%	16.53	117
4 to 10	87.17%	64.05%	23.12	123	75.70%	61.69%	14.01	114
11 to 25	*	*	*	*	71.98%	22.56%	49.42	149
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 – July 2023/2022

Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	*	31.68%	19.93	120
£40 – 49.99	*	67.89%	-16.77	83	51.15%	57.27%	-6.12	94
£50 – 59.99	*	*	*	*	*	88.61%	5.41	105
£60 – £69.00	*	*	*	*	92.22%	81.85%	10.37	110
£70+	86.95%	*	27.27	127	79.49%	38.19%	41.30	141
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	*	25.28%	22.14	122
£40 – 49.99	*	66.41%	-26.36	74	46.27%	54.24%	-7.97	92
£50 – 59.99	*	*	*	*	*	88.20%	5.08	105
£60 – £69.00	*	*	*	*	86.73%	67.55%	19.18	119
£70+	86.58%	*	42.89	143	71.46%	26.96%	44.50	145
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Grading – July 2023/2022

Grading	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	86.58%	83.35%	3.23	103	75.19%	59.01%	16.18	116
4 Stars	60.27%	*	-13.24	87	49.43%	53.56%	-4.13	96
5 Stars	-	-	-	-	-	-	-	-
Unclassified	*	*	*	*	73.35%	*	28.23	128
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Grading – July 2023/2022

Grading	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	82.60%	68.13%	14.47	114	66.81%	47.77%	19.04	119
4 Stars	51.75%	*	-20.33	80	44.75%	48.51%	-3.76	96
5 Stars	-	-	-	-	-	-	-	-
Unclassified	*	*	*	*	73.33%	*	38.76	139
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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