

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

### **1.0 Introduction May 2023/2022**

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering May 2023 and benchmarking against May 2022. The report reviews Accommodation performance throughout Scotland, highlighting trends across various sectors and categories of the industry. 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)).

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 May 2023**

The SOAS Report: May 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 May 2023 experienced a **10.14** percentage point increase when comparing percentage room occupancy rates with May 2022. Occupancy rates within the Guest House/B&B sector experienced a **19.02** percentage point increase in May 2023 when comparing the same period last year.

Data from the Scottish Retail Consortium showed that the additional Bank Holiday, the King's Coronation and dry, warm weather saw total retail sales figures increase by 10.9% year-on-year in May. Retail sales in Scotland held steady for May with a growth of 7.7%. Food sales continue to be the biggest growth area.

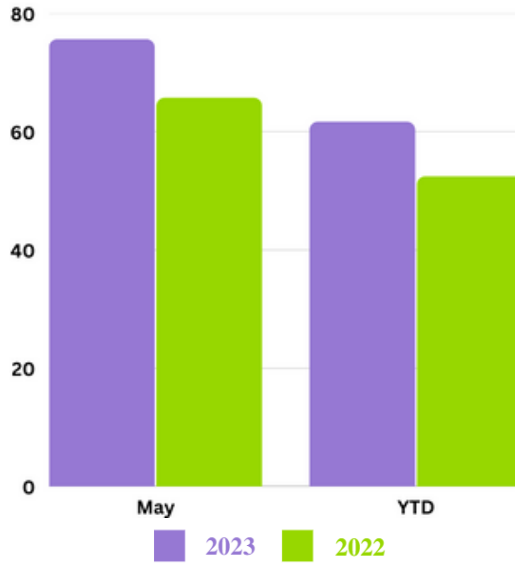
Domestic consumer sentiment provided by the GB National Tourist Boards for May 2023 found that 49% of respondents were cautious about demand and were concerned with cost escalation. The survey recorded 18% of respondents (a 3% decrease on the April 2023 Survey) saying they were "...been hit hard - no option but to cut back on spending". Despite consumer concern about the state of the economy, 20% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 76% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were; 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 continues in May 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2022, however, UK air connectivity had seen a 10% decrease in year-to-date flights compared to 2019.

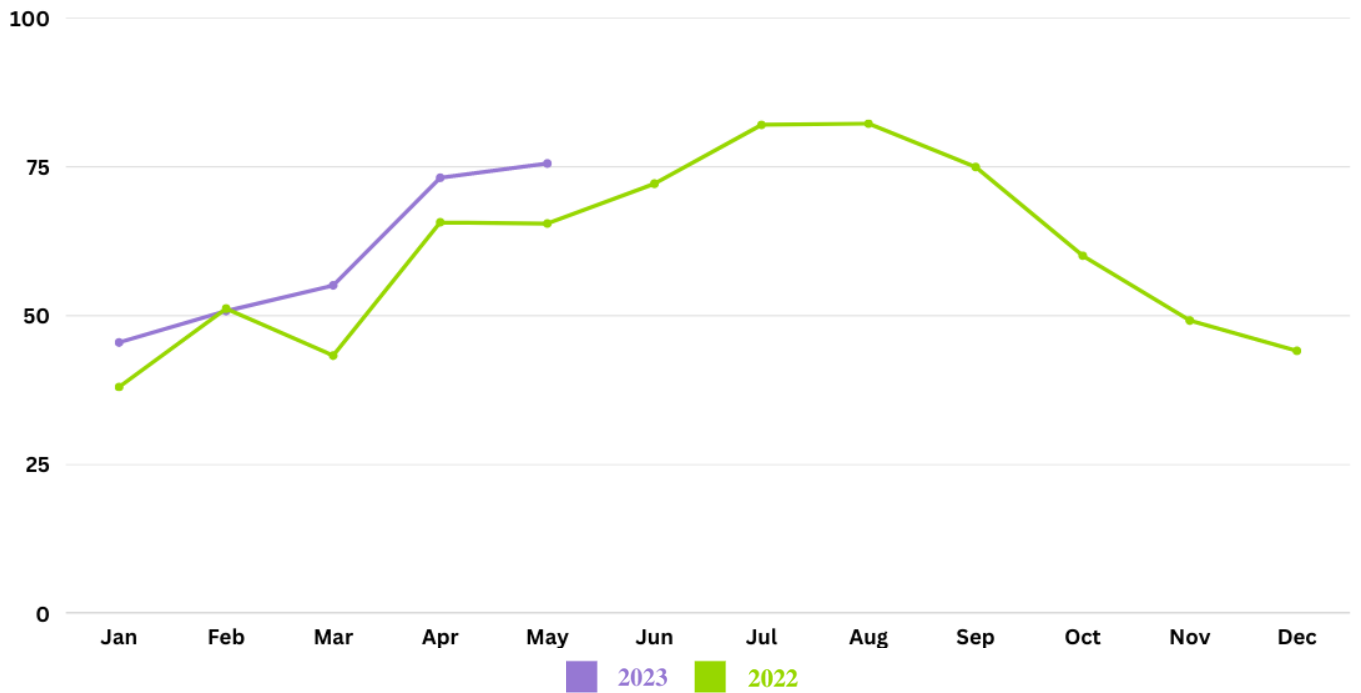
## All Serviced Accommodation

### Room Occupancy – May 2023/2022

Scottish Serviced Accommodation room occupancy rates for May 2023 experienced an 10.38 percentage point increase when comparing percentage room occupancy rates with May 2022.



### Room Occupancy – Year to Date



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

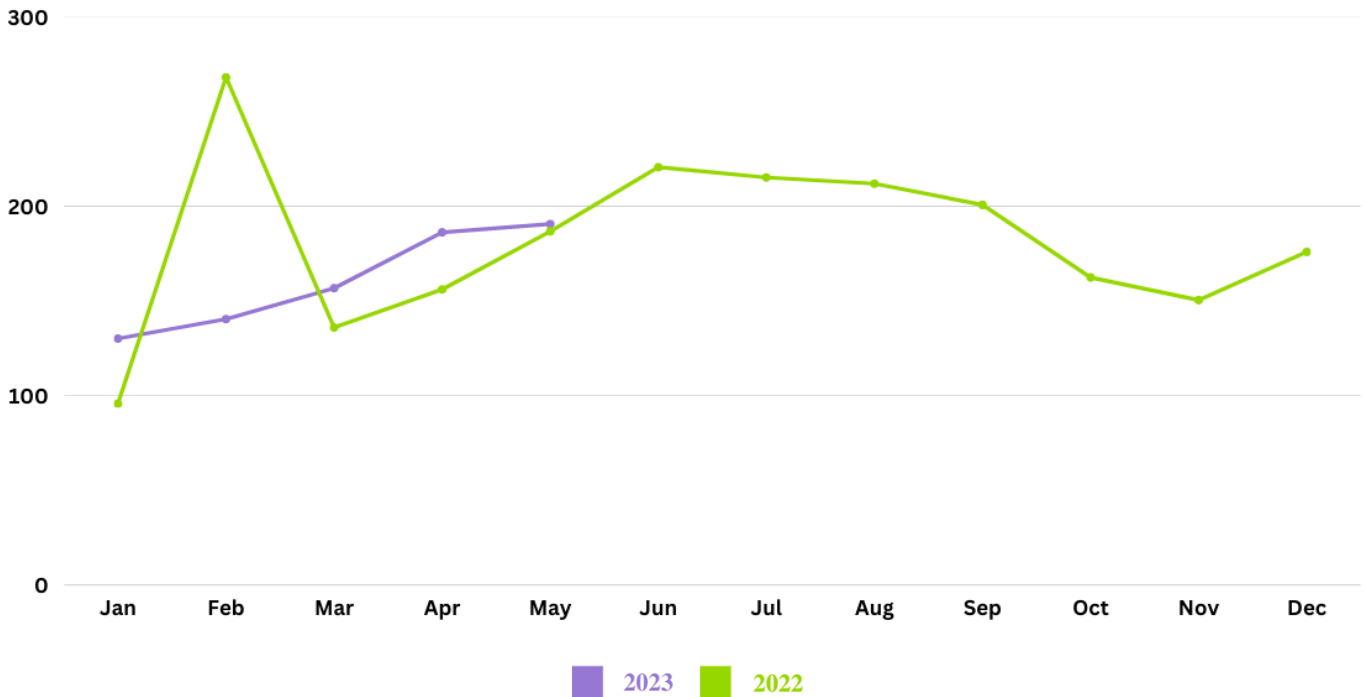
Room Occupancy	May 23	May 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	75.85%	65.47%	10.38	110	61.88%	52.42%	9.46	109

Bed Occupancy	May 23	May 22	23/22 Diff <sup>1</sup>	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	62.04%	52.91%	9.13	109	51.38%	45.65%	5.73	106

### RevPAR

The Revenue per available occupied room for May 2023 was **£206.17** compared with **£186.80** in May 2022. This figure is based solely on accommodation providers who provided financial information for either May 2023 and/or 2022.



### RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	May 23	May 22
All Serviced Accommodation	£206.17	£186.80

### RevPAR by Grading- May 2023/21

Grading – Average RevPAR (£)	May 23	May 22
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<sup>1</sup> 23/22 Diff throughout this report is expressed by % Point Change

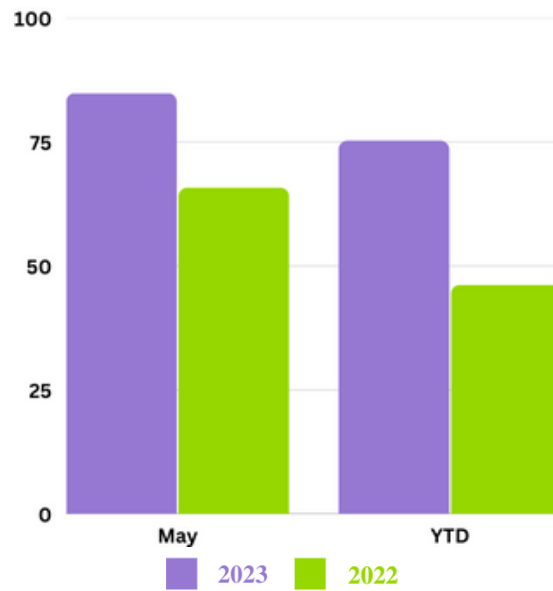
<sup>2</sup> Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

2 Stars	£139.09	£103.83
3 Stars	£176.92	£178.79
4 Stars	£236.76	£241.06
5 Stars	£407.04	£152.95
Unclassified	£147.21	£123.16

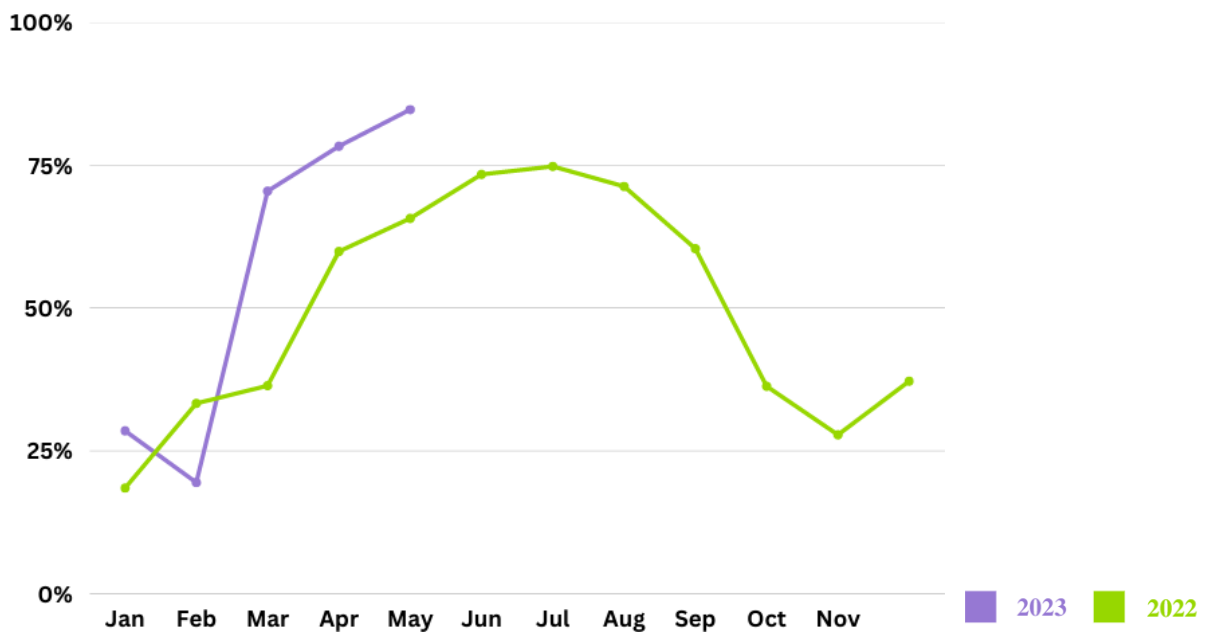
### 3.0 Serviced Accommodation – Guest House/B&B Sector

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

Guest House / B&B Room Occupancy – May 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 May 2023 was **83.97%** when compared to data from the previous year of **65.74%** occupancy rate; this shows an overall percentage point increase of **18.23**.

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

Room Occupancy	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	83.97%	65.74%	18.23	118	76.21%	53.43%	22.78	123

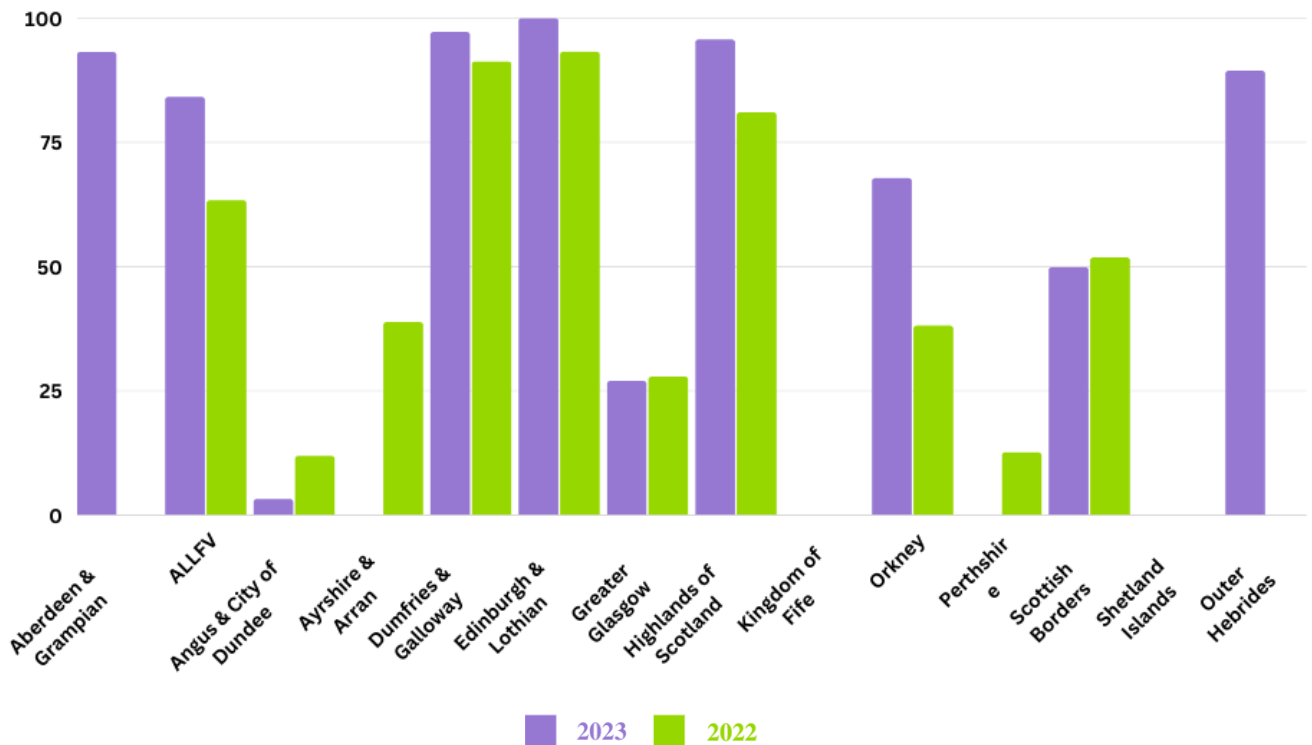
In the **Guest House/B&B sector**, the bed occupancy rate for the period May 2023 was **70.62%** when compared to data from the previous year of **58.62%** occupancy rate; this shows an overall percentage point increase of **18.23**.

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

Bed Occupancy	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	70.62%	58.62%	12.00%	112	62.21%	53.43%	8.78%	109

### Room Occupancy by Former Visit Scotland Area

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



Percentage room occupancy rates for Guest House/B&Bs in Edinburgh & Lothian were the highest in May 2023. Operators in Large Urban Areas, Island locations and properties charging a tariff of between **£50-£59.99** fared best in room occupancy rates in May 2023.

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

Area	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	*	-	*	*
ALLFV	83.65%	*	20.32	120	77.40%	49.00%	28.40	128
Angus & City of Dundee	*	*	*	*	*	9.28%	-5.46	95
Ayrshire & Arran	-	*	*	*	-	30.45%	-30.45	70
Dumfries & Galloway	*	*	*	*	83.04%	71.00%	12.04	112
Edinburgh & Lothian	*	*	*	*	*	77.65%	14.74	115
Greater Glasgow	*	*	*	*	12.77%	15.75%	-2.98	97
Highlands of Scotland	*	81.03%	14.68	115	93.63%	70.58%	23.05	123
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	25.19%	15.18%	10.01	110
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	*	*	*	*	*	19.80%	19.25	119
Shetland Islands	*	*	*	*	*		0.00	100
Outer Hebrides	*	-	*	*	*	-	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Area	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	*	-	*	*
ALLFV	84.17%	*	36.31	136	46.79%	36.69%	10.10	110
Angus & City of Dundee	*	*	*	*	*		4.44	104
Ayrshire & Arran	-	*	*	*	-	19.61%	-19.61	80
Dumfries & Galloway	*	*	*	*	64.28%	55.28%	9.00	109
Edinburgh & Lothian	*	*	*	*	*	68.92%	-40.01	60
Greater Glasgow	*	*	*	*	8.18%	9.92%	-1.74	98
Highlands of Scotland	*	78.32%	17.42	117	92.96%	66.02%	26.94	127
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	17.56%	13.24%	4.32	104
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	*	*	*	*	*	15.00%	22.45	122
Shetland Islands	*	*	*	*	*		0.00	100
Outer Hebrides	*	-	*	*	*	-	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	77.65%	14.20	114
Other Urban Areas	*	72.15%	9.92	110	58.04%	44.54%	13.50	114
Accessible Small Towns	64.47%	11.82%	52.65	153	51.15%	8.07%	43.08	143
Remote Small Towns	*	*	*	*	63.05%	61.45%	1.60	102
Accessible Rural	*	*	*	*	*	14.06%	80.56	181

Remote Rural	93.30%	64.62%	28.68	129	84.29%	53.41%	30.88	131
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	68.92%	-40.01	60
Other Urban Areas	*	61.08%	15.08	115	49.74%	34.72%	15.02	115
Accessible Small Towns	72.22%		72.22	172	55.78%	5.71%	50.07	150
Remote Small Towns	*	*	*	*	50.77%	46.86%	3.91	104
Accessible Rural	*	*	*	*	*	12.50%	82.12	182
Remote Rural	92.58%	58.58%	34.00	134	83.20%	46.08%	37.12	137
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	*	*	*	12.77%	15.75%	-2.98	97
Inland	81.67%	64.90%	16.77	117	78.56%	54.50%	24.06	124
Island	93.30%	72.73%	20.57	121	84.29%	59.88%	24.41	124
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	*	*	*	8.18%	9.92%	-1.74	98
Inland	63.20%	58.32%	4.88	105	58.57%	47.78%	10.79	111
Island	92.58%	66.20%	26.38	126	83.20%	52.42%	30.78	131
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by size– May 2023/2022

Size	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	79.25%	49.09%	30.16	130	65.44%	42.08%	23.36	123
4 to 10	88.66%	81.48%	7.18	107	85.68%	58.55%	27.13	127
11 to 25	-	*	*	*	-	61.28%	-61.28	39
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 – May 2023/2022

Size	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	79.99%	46.56%	33.43	133	62.91%	35.79%	27.12	127
4 to 10	60.86%	71.21%	-10.35	90	61.21%	48.58%	12.63	113
11 to 25	-	*	*	*	-	53.78%	-53.78	46
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 – May 2023/2022

Tariff	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	0.00	100
£30 - £39.99	*	*	*	*	*	25.83%	-25.83	74
£40 - £49.99	*	21.71%	12.53	113	53.66%	27.46%	26.20	126
£50 - £59.99	*	95.01%	1.42	101	*	62.45%	33.28	133
£60 - £69.99	*	*	*	*	89.16%	75.56%	13.60	114
£70 +	83.72%	66.14%	17.58	118	77.06%	54.76%	22.30	122
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by tariff – May 2023/2022

Tariff	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	*	*	*	*	*	21.03%	-21.03	79
£40 - £49.99	*	19.26%	8.74	109	49.08%	22.69%	26.39	126
£50 - £59.99	*	95.39%	1.04	101	*	58.22%	36.17	136
£60 - £69.99	*	*	*	*	80.33%	64.34%	15.99	116
£70 +	61.29%	54.52%	6.77	107	52.54%	46.78%	5.76	106
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by grading – May 2023/2022

Grading	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	57.49%	22.76	123	65.56%	43.00%	22.56	123
4 Stars	55.24%	62.90%	-7.66	92	42.66%	40.82%	1.84	102
5 Stars	-	*	*	*	-	*	*	*
Unclassified	*	63.33%	3.87	104	55.19%	42.53%	12.66	113
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



### Bed Occupancy by grading – May 2023/2022

Grading	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	49.47%	12.46	112	51.31%	34.65%	16.66	117
4 Stars	56.90%	64.88%	-7.98	92	38.89%	36.30%	2.59	103
5 Stars	-	*	*	*	-	*	*	*
Unclassified	*	47.86%	17.46	117	53.94%	31.33%	22.61	123
	<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>					

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