

SCOTTISH ACCOMMODATION BAROMETER REPORT: August 2020/2019 Report – GUEST HOUSE / B&Bs

1.0 Introduction August 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering August 2020 and benchmarking against August 2019. The survey 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 Giancarlo Fedeli (E-mail: gfe2@gcu.ac.uk).

2.0 Executive Summary August 2019

Scottish Serviced Accommodation occupancy rates for the month of August 2020 experienced % Point decrease of **-36.36%** when comparing percentage room occupancy rates with August 2019. Being a peak month for tourism, August would normally show a significant increase in occupancy, however, the current lockdown situation is still heavily restricting travel and tourism at this time. Occupancy rates within the Guest House/B&B sector **experienced % Point decrease of -30.66%** in August 2020 when comparing same period last year. The visitor attraction sector saw a decrease of **-72.2%** in visits numbers when comparing August 2020 with August 2019.

All Serviced Accommodation - August 2020/19

Room Occupancy	August 20	August 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
All Serviced Accommodation	48.49	84.85	-36.36%	64	19.08%	67.94%	-48.86%	51

Bed Occupancy	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
All Serviced Accommodation	39.12	70.40	-31.28%	69	12.13%	50.23%	-38.10%	62

The Revenue per available occupied room for August 2020 was **£39.39** compared with **£156.61** in August 2019. This figure is based solely on accommodation providers who provided financial information for either August 2020 and/or 2019.

RevPAR - August 2020/19

Room – Average RevPAR (£)	August 20	August 19
All Serviced Accommodation	74.85	159.68

RevPAR by Grading- August 2020/19

Room – Average RevPAR (£)	August 20	August 19
2 Stars	59.17	125
3 Stars	73.14	130.94
4 Stars	79.63	170.09
5 Stars	91.52	629.11
Unclassified	0.00	90.28

3.0 Serviced Accommodation – Guest House / B&B Sector

3.1 Performance by Guest House, B&B Category – August 2020/2019

In the **Guest House, B&B sector**, the room occupancy rate for the period August 2020 was **49.10%** when compared to data from the previous year of **79.76%** occupancy rate; this shows a % Point decrease of **-30.66%**.

¹ 20/19 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.

Percentage room occupancy rates and percentage bed occupancy for Guest House/B&B's in Perthshire were the highest in August 2020. Operators in Coastal, Remote Small Towns; and properties with 1 to 3 bedrooms fared best in room occupancy rates in August 2020.

The table below shows the **Room Occupancy** rate recorded for August 2020/2019 as well as the 20/19 Diff calculation for the **Guest House / B&B sector**

Room Occupancy	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Guest House/B&Bs	49.10%	79.76%	-30.66%	69	9.95%	52.54%	-42.59%	57

In the **Guest House / B&B sector**, the bed occupancy rate for the period August 2020 was **43.87%** when compared to data from the previous year of **70.43%** occupancy rate; this shows a % Point decrease of **-26.56%**.

The table below shows the **Bed Occupancy** rate recorded for August 2020/2019 as well as the 20/19 Diff calculation for the **Guest House / B&B sector**

Bed Occupancy	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Guest House/B&Bs	43.87%	70.43%	-26.56%	73	7.77%	44.46%	-36.69%	63

Room Occupancy by Former VisitScotland Area – August 2020/2019

Area	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	0.00%	0.00%	0.00%	100	0.00%	2.38%	-2.38%	98
ALLFV	54.84%	86.22%	-31.38%	69	11.66%	56.58%	-44.92%	55
Angus & City of Dundee	18.42%	49.27%	-30.85%	69	13.40%	31.26%	-17.86%	82
Ayrshire & Arran	13.98%	45.16%	-31.18%	69	4.73%	43.71%	-38.98%	61
Dumfries & Galloway	62.50%	80.21%	-17.71%	82	10.83%	54.73%	-43.90%	56
Edinburgh & Lothian	39.30%	95.74%	-56.44%	44	14.33%	78.93%	-64.60%	35
Greater Glasgow	0.00%	35.48%	-35.48%	65	0.60%	28.37%	-27.77%	72
Highlands of Scotland	51.57%	85.08%	-33.51%	66	12.98%	47.56%	-34.58%	65
Kingdom of Fife	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Orkney	0.00%	72.05%	-72.05%	28	2.77%	51.87%	-49.10%	51
Perthshire	83.87%	61.03%	22.84%	123	9.15%	43.53%	-34.38%	66
Scottish Borders	52.69%	74.87%	-22.18%	78	4.95%	38.82%	-33.87%	66
Shetland Islands	0.00%	0.00%	0.00%	100	0.00%	4.84%	-4.84%	95
Outer Hebrides	0.00%	86.00%	-86.00%	14	0.00%	58.42%	-58.42%	42

Bed Occupancy by Former VisitScotland Area – August 2020/2019

Area	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	0.00%	0.00%	0.00%	100	0.00%	2.38%	-2.38%	98
ALLFV	41.47%	75.84%	-34.37%	66	8.08%	46.50%	-38.42%	62
Angus & City of Dundee	18.05%	44.69%	-26.64%	73	9.02%	26.48%	-17.46%	83
Ayrshire & Arran	14.47%	39.75%	-25.28%	75	4.40%	35.52%	-31.12%	69
Dumfries & Galloway	53.47%	63.78%	-10.31%	90	8.86%	43.69%	-34.83%	65
Edinburgh & Lothian	36.56%	87.34%	-50.78%	49	13.31%	72.90%	-59.59%	40
Greater Glasgow	0.00%	28.39%	-28.39%	72	0.51%	18.09%	-17.58%	82
Highlands of Scotland	50.82%	78.27%	-27.45%	73	11.66%	40.39%	-28.73%	71
Kingdom of Fife	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Orkney	0.00%	60.75%	-60.75%	39	2.18%	45.65%	-43.47%	57

Perthshire	0.00%	51.20%	-51.20%	49	1.54%	33.15%	-31.61%	68
Scottish Borders	42.63%	54.61%	-11.98%	88	3.31%	28.82%	-25.51%	74
Shetland Islands	0.00%	0.00%	0.00%	100	0.00%	3.23%	-3.23%	97
Outer Hebrides	0.00%	55.83%	-55.83%	44	0.00%	37.77%	-37.77%	62

Room Occupancy by Location (Accessibility & Density) – August 2020/2019

Location accessibility/density	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	35.87%	86.32%	-50.45%	50	11.24%	68.61%	-57.37%	43
Other Urban Areas	44.49%	82.66%	-38.17%	62	8.64%	66.96%	-58.32%	42
Accessible Small Towns	49.60%	78.60%	-29.00%	71	9.97%	49.05%	-39.08%	61
Remote Small Towns	75.40%	80.19%	-4.79%	95	13.97%	58.16%	-44.19%	56
Accessible Rural	69.91%	57.40%	12.51%	113	16.85%	32.85%	-16.00%	84
Remote Rural	27.18%	78.56%	-51.38%	49	4.79%	37.57%	-32.78%	67

Bed Occupancy by Location (Accessibility & Density) – August 2020/2019

Location accessibility/density	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	34.29%	80.06%	-45.77%	54	9.79%	63.89%	-54.10%	46
Other Urban Areas	39.24%	72.44%	-33.20%	67	6.66%	55.36%	-48.70%	51
Accessible Small Towns	45.78%	63.21%	-17.43%	83	8.07%	37.83%	-29.76%	70
Remote Small Towns	69.59%	68.50%	1.09%	101	12.92%	47.54%	-34.62%	65
Accessible Rural	41.47%	50.39%	-8.92%	91	5.90%	26.56%	-20.66%	79
Remote Rural	31.97%	71.77%	-39.80%	60	3.91%	31.50%	-27.59%	72

Room Occupancy by Location (Geographic) – August 2020/2019

Location (Geographic)	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	49.60%	75.67%	-26.07%	74	10.81%	42.76%	-31.95%	68
Inland	53.79%	80.78%	-26.99%	73	10.37%	57.03%	-46.66%	53
Island	24.84%	82.78%	-57.94%	42	4.57%	55.94%	-51.37%	49

Bed Occupancy by Location (Geographic) – August 2020/2019

Location (Geographic)	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Coastal	45.78%	63.87%	-18.09%	82	8.43%	33.46%	-25.03%	75
Inland	45.16%	71.98%	-26.82%	73	7.98%	49.90%	-41.92%	58
Island	29.99%	75.41%	-45.42%	55	4.13%	43.66%	-39.53%	60

Room Occupancy by size– August 2020/2019

Size	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 to 3	67.68%	69.56%	-1.88%	98	6.58%	36.43%	-29.85%	70
4 to 10	52.56%	84.03%	-31.47%	69	13.38%	59.53%	-46.15%	54
11 to 25	31.71%	93.09%	-61.38%	39	8.02%	90.40%	-82.38%	18
26 to 50	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
51 to 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Over 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100

Bed Occupancy by size – August 2020/2019

Size	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 to 3	37.50%	57.86%	-20.36%	80	3.43%	28.99%	-25.56%	74
4 to 10	49.46%	75.05%	-25.59%	74	11.38%	49.10%	-37.72%	62
11 to 25	31.21%	88.16%	-56.95%	43	8.20%	84.08%	-75.88%	24
26 to 50	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
51 to 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Over 100	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100

Room Occupancy by tariff – August 2020/2019

Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
£20 - £29.99	0.00%	50.00%	-50.00%	50	0.00%	26.42%	-26.42%	74
£30 - £39.99	49.15%	82.60%	-33.45%	67	7.03%	49.54%	-42.51%	57
£40 - £49.99	71.83%	75.08%	-3.25%	97	11.68%	53.80%	-42.12%	58
£50 - £59.99	52.93%	80.24%	-27.31%	73	19.36%	55.08%	-35.72%	64
£60 - £69.99	52.69%	47.96%	4.73%	105	2.73%	49.63%	-46.90%	53
£70 +	31.71%	85.93%	-54.22%	46	9.50%	55.26%	-45.76%	54

Bed Occupancy by tariff – August 2020/2019

Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
£20 - £29.99	0.00%	50.00%	-50.00%	50	0.00%	26.42%	-26.42%	74
£30 - £39.99	25.40%	69.18%	-43.78%	56	3.06%	41.43%	-38.37%	62
£40 - £49.99	84.05%	65.17%	18.88%	119	9.53%	43.23%	-33.70%	66
£50 - £59.99	47.78%	71.90%	-24.12%	76	16.77%	47.39%	-30.62%	69
£60 - £69.99	42.63%	37.49%	5.14%	105	2.71%	37.83%	-35.12%	65
£70 +	31.21%	78.25%	-47.04%	53	7.68%	48.73%	-41.05%	59

Room Occupancy by grading – August 2020/2019

Grading	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
2 Stars	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
3 Stars	45.46%	76.82%	-31.36%	69	7.01%	54.02%	-47.01%	53
4 Stars	54.21%	75.29%	-21.08%	79	11.79%	53.30%	-41.51%	58
5 Stars	0.00%	0.00%	0.00%	100	4.30%	36.87%	-32.57%	67
Unclassified	18.42%	77.01%	-58.59%	41	7.77%	34.90%	-27.13%	73

Bed Occupancy by grading – August 2020/2019

Grading	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
2 Stars	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
3 Stars	42.57%	67.20%	-24.63%	75	6.17%	44.98%	-38.81%	61
4 Stars	49.21%	67.96%	-18.75%	81	10.60%	46.42%	-35.82%	64
5 Stars	0.00%	0.00%	0.00%	100	3.35%	33.36%	-30.01%	70
Unclassified	18.05%	64.79%	-46.74%	53	4.64%	27.76%	-23.12%	77