



Moffat Centre



University for the Common Good

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2024/2023 Report - GUEST HOUSE / B&Bs

1.0 Introduction August 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2024 and benchmarking against August 2023. 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 August 2024

The SOAS Report: August 2024/2023 Hotels report shows a decrease in occupancy in the Serviced sector in Scotland compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for August 2024 experienced an **6.43** percentage point increase when comparing percentage room occupancy rates with August 2023. Occupancy rates within the Guest House/B&B sector experienced a **9.02** percentage point decrease in August 2024 when compared to the same period last year.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to August 2024 is 2.2%, unchanged from July. The inflation 12-month rate (%) for August 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.0%. Inflation rates for restaurants and cafes were 4.3% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in August, however, compared to the 5.6% increase in August 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of August 2023, when they had increased by 8.6%.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the July 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the July 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

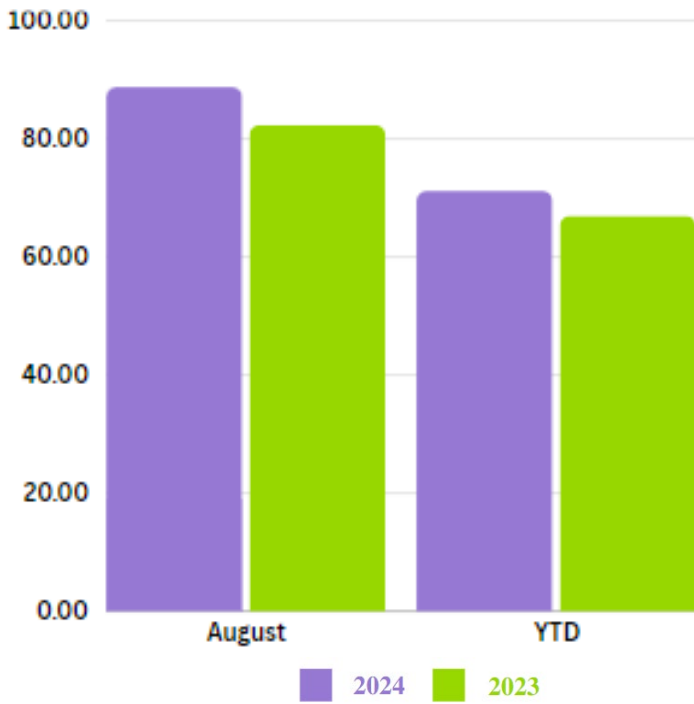
Despite consumer concern about the state of the economy, 33% of UK adults intended to take a domestic overnight trip in the August to September sector of 2024 and 79% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, the three key barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Survey s(VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation grew in August 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 1% increase when compared to the same period in 2023, however, UK air connectivity saw a 5% decrease in year-to-date flights compared to 2019.

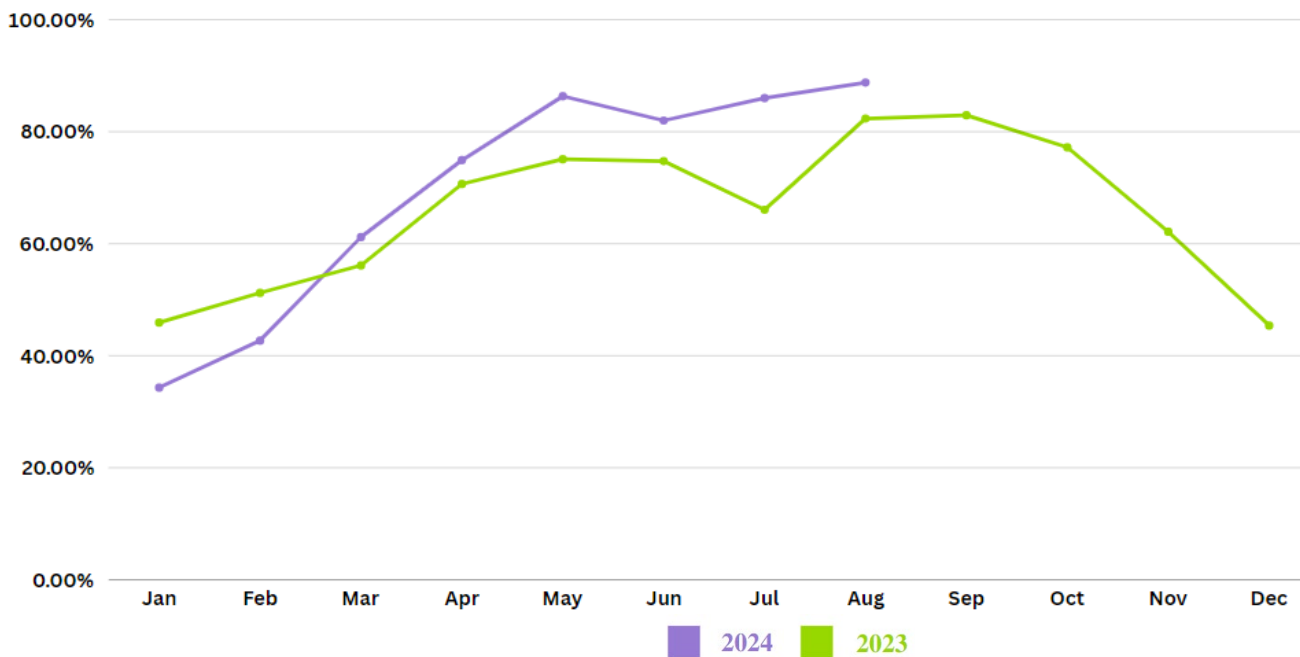


All Serviced Accommodation Room Occupancy – August 2024/2023

Scottish Serviced Accommodation room occupancy for August 2024 experienced a **6.43** percentage point increase when comparing percentage room occupancy rates with August 2023.



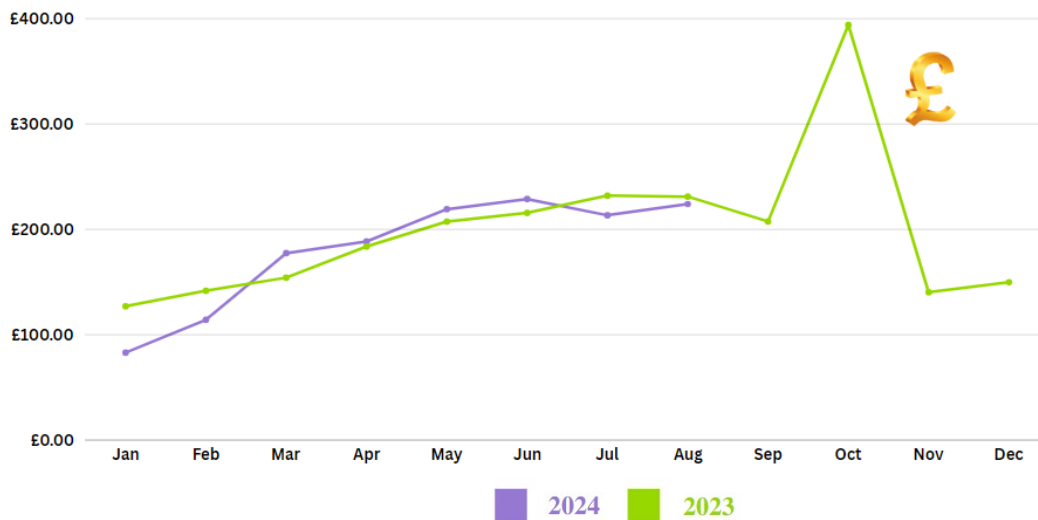
Room Occupancy – Year-to-Date



Room Occupancy	August 24	August 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	88.77%	82.34%	6.43	106	71.19%	66.97%	4.22	104

Bed Occupancy	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	81.72%	75.94%	5.78	106	64.93%	56.82%	8.11	108

The Revenue per available occupied room for August 2024 was **£223.99** compared with **£231.12** in August 2023. This figure is based solely on accommodation providers who provided financial information for either August 2024 and/or 2023.



RevPAR Year to Date 2023/2023

Room – Average RevPAR (£)	August 24	August 23
All Serviced Accommodation	£223.99	£231.12

RevPAR by Grading- August 2024/21

Grading – Average RevPAR (£)	August 24	August 23
2 Stars	£179.31	£200.84
3 Stars	£262.09	£211.64
4 Stars	£176.13	£253.71
5 Stars	£528.99	£467.76
Unclassified	£	£142.03

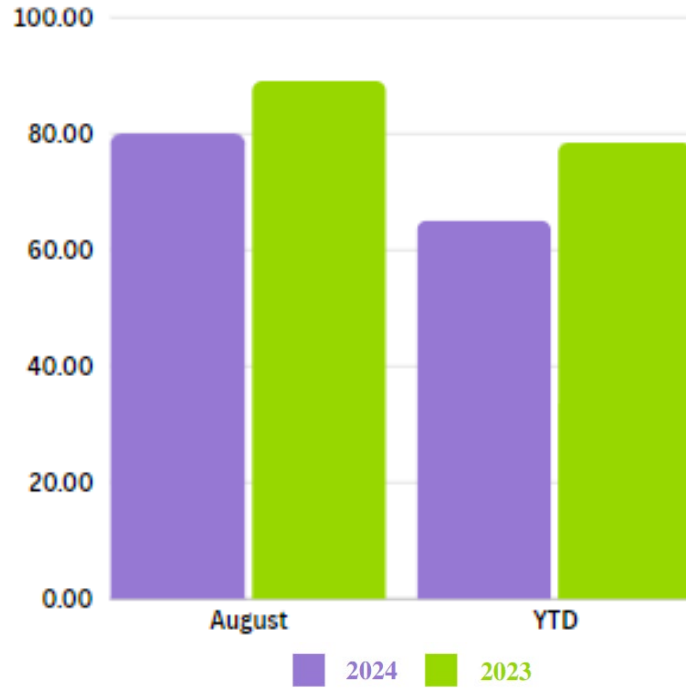
3.0 Serviced Accommodation – Guest House/B&B Sector

¹ 24/23 Diff throughout this report is expressed by % Point Change

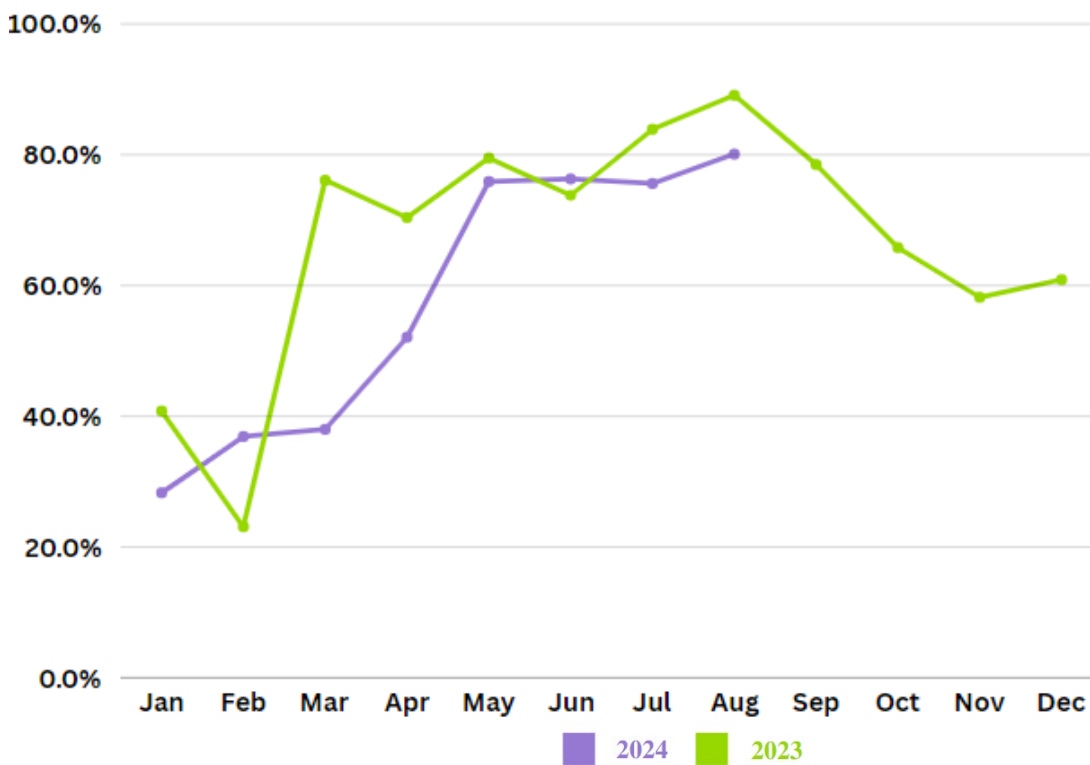
² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

3.1 Performance by Guest House/B&B Category

Guest House / B&B Room Occupancy – August 2024/2023



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





In the **Guest House/B&B** sector, the room occupancy rate for August 2024 was **80.07%** compared to data from the previous year of **89.09%** occupancy rate; this shows an overall percentage point decrease of **9.02**.

Percentage room and bed occupancy rates for Guest Houses/B&B (sample size >4) in Aberdeen & Grampian Region were the highest in August 2024. Operators in Inland locations and properties charging a tariff of £70+ fared best in room occupancy rates in August 2024.

The table below shows the **Room Occupancy** rate recorded for August 2024/2023 as well as the Change calculation for the **Guest House/B&B** sector

Room Occupancy	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Guest House/B&B	80.07%	89.09%	-9.02	91	65.10%	78.53%	-13.43	87

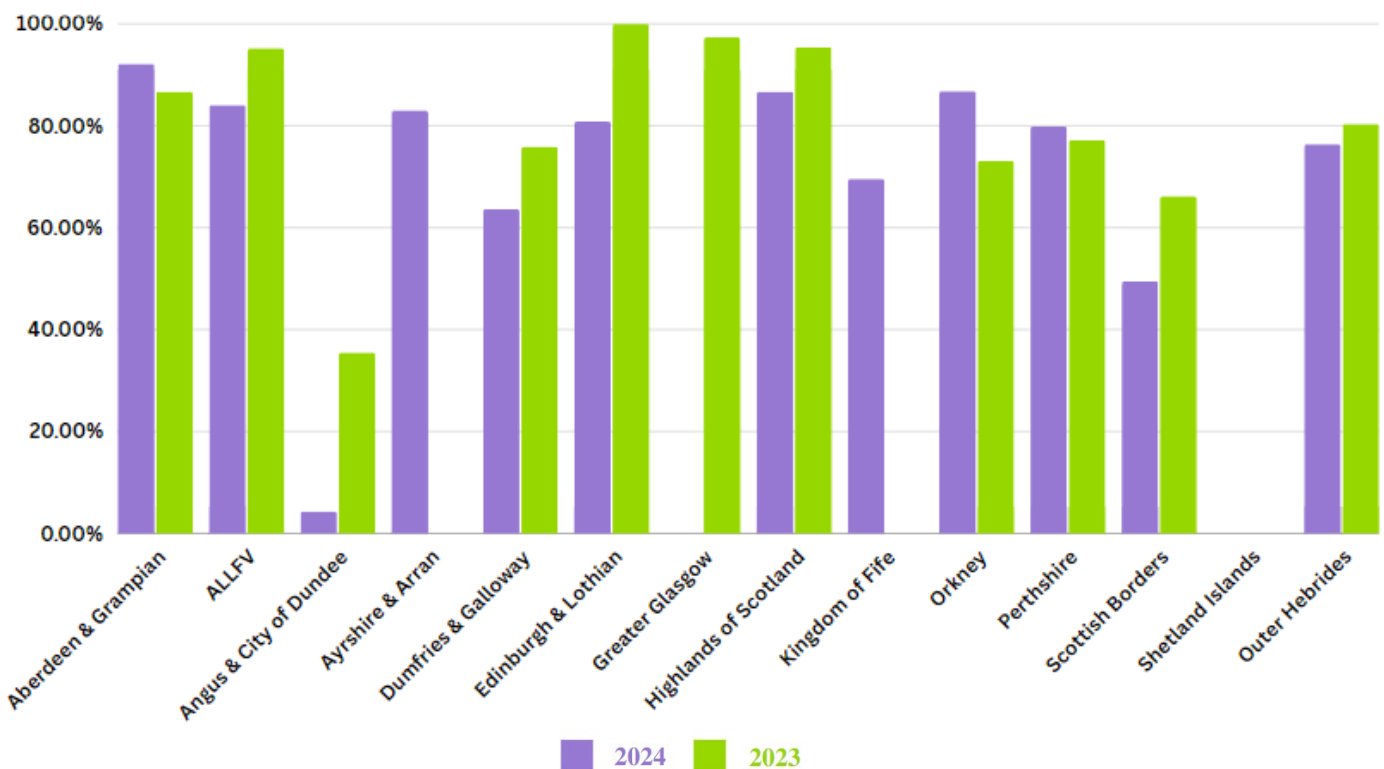
In the **Guest House/B&B** sector, the bed occupancy rate for August 2024 was **90.49%** compared to data from the previous year of **89.42%** occupancy rate; this shows an overall percentage point increase of **1.07**.

The table below shows the **Bed Occupancy** rate recorded for August 2024/2023 as well as the 24/23 Diff calculation for the **Guest House/B&B** sector

Bed Occupancy	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Guest House/B&B	90.49%	89.42%	1.07	101	68.06%	73.31%	-5.25	95

Room Occupancy by Former Visit Scotland Area

Guest House / B&B Room Occupancy by Former VisitScotland Area – August 2024/2023



Room Occupancy by Former Visit Scotland Area – August 2024/2023

Area	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	92.15%	*	5.46	105	69.29%	*	-17.14	83
ALLFV	84.06%	95.22%	-11.16	89	60.85%	88.43%	-27.58	72
Angus & City of Dundee	*	*	*	*	*	16.12%	3.08	103
Ayrshire & Arran	*	-	*	*	76.65%	-	76.65	177
Dumfries & Galloway	*	*	*	*	46.64%	77.37%	-30.73	69
Edinburgh & Lothian	*	*	*	*	86.51%	95.45%	-8.94	91
Greater Glasgow	-	*	*	*	-	77.67%	-77.67	22
Highlands of Scotland	86.68%	*	-8.69	91	69.72%	78.16%	-8.44	92
Kingdom of Fife	*	-	*	*	52.10%	-	52.10	152
Orkney	*	*	*	*	52.07%	44.23%	7.84	108
Perthshire	79.89%	*	2.69	103	59.69%	66.70%	-7.01	93
Scottish Borders	49.45%	*	-16.66	83	36.04%	48.02%	-11.98	88
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	70.85%	80.86%	-10.01	90

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Bed Occupancy by Former Visit Scotland Area – August 2024/2023

Area	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	96.20%	*	9.48	109	61.67%	*	-24.85	75
ALLFV	100.00%	95.48%	4.52	105	61.19%	88.46%	-27.27	73
Angus & City of Dundee	*	*	*	*	*	10.65%	-10.65	89
Ayrshire & Arran	*	-	*	*	0.00%	-	0.00	100
Dumfries & Galloway	*	*	*	*	25.20%	66.48%	-41.28	59
Edinburgh & Lothian	*	*	*	*	95.38%	80.16%	15.22	115
Greater Glasgow	-	*	*	*	-	77.20%	-77.20	23
Highlands of Scotland	98.98%	*	3.95	104	75.48%	76.22%	-0.74	99
Kingdom of Fife	*	-	*	*	46.89%	-	46.89	147
Orkney	*	*	*	*	52.64%	36.30%	16.34	116
Perthshire	54.55%	*	-15.43	85	58.43%	56.29%	2.14	102
Scottish Borders	36.81%	*	-16.80	83	31.08%	42.20%	-11.12	89
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	88.32%	52.38%	35.94	136

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Room Occupancy by Location (Accessibility & Density) – August 2024/2023

Location accessibility/density	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	82.94%	*	-16.66	83	84.29%	92.33%	-8.04	92
Other Urban Areas	*	*	*	*	76.66%	96.40%	-19.74	80
Accessible Small Towns	77.78%	78.29%	-0.51	99	60.04%	65.01%	-4.97	95
Remote Small Towns	85.62%	*	-0.77	99	75.80%	69.19%	6.61	107
Accessible Rural	84.87%	*	-0.41	100	57.98%	87.26%	-29.28	71
Remote Rural	67.85%	92.07%	-24.22	76	57.98%	72.38%	-14.40	86
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Location (Accessibility & Density) – August 2024/2023

Location accessibility/density	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	0.00%	*	-99.62	0	95.06%	80.10%	14.96	115
Other Urban Areas	*	*	*	*	0.00%	95.31%	-95.31	5
Accessible Small Towns	86.52%	81.39%	5.13	105	58.16%	67.30%	-9.14	91
Remote Small Towns	100.00%	*	20.84	121	80.66%	61.04%	19.62	120
Accessible Rural	91.87%	*	7.73	108	56.80%	85.38%	-28.58	71
Remote Rural	87.78%	92.58%	-4.80	95	60.30%	69.27%	-8.97	91
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Location (Geographic) – August 2024/2023

Location (Geographic)	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	77.74%	*	-10.18	90	56.24%	63.01%	-6.77	93
Inland	80.80%	88.56%	-7.76	92	66.56%	80.67%	-14.11	86
Island	77.41%	92.34%	-14.93	85	66.82%	86.30%	-19.48	81
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Location (Geographic) – August 2024/2023

Location (Geographic)	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	100.00%	*	12.39	112	46.76%	61.20%	-14.44	86
Inland	88.98%	89.07%	-0.09	100	72.43%	73.75%	-1.32	99
Island	92.48%	93.54%	-1.06	99	76.40%	85.23%	-8.83	91
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



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Room Occupancy by Size– August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	73.79%	85.84%	-12.05	88	57.53%	70.55%	-13.02	87
4 to 10	84.30%	91.81%	-7.51	92	70.12%	86.51%	-16.39	84
11 to 25	*	*	*	*	74.68%	77.67%	-2.99	97
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 – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	87.12%	86.28%	0.84	101	57.81%	69.25%	-11.44	89
4 to 10	94.86%	92.01%	2.85	103	73.46%	77.69%	-4.23	96
11 to 25	*	*	*	*	97.96%	77.20%	20.76	121
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 – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	67.03%	50.03%	17.00	117
£40 – 49.99	61.90%	*	3.98	104	57.31%	58.32%	-1.01	99
£50 – 59.99	80.93%	*	-19.07	81	61.98%	94.82%	-32.84	67
£60 - £69.00	*	*	*	*	61.35%	9.25%	52.10	152
£70+	82.24%	88.96%	-6.72	93	67.90%	76.23%	-8.33	92
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Tariff – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	67.39%	44.20%	23.19	123
£40 – 49.99	54.55%	*	-24.57	75	54.23%	66.18%	-11.95	88
£50 – 59.99	100.00%	*	0.00	100	76.20%	93.77%	-17.57	82
£60 - £69.00	*	*	*	*	60.54%	88.81%	-28.27	72
£70+	88.70%	88.87%	-0.17	100	70.91%	68.72%	2.19	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



Room Occupancy by Grading – August 2024/2023

Grading	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	89.93%	89.93%	0.00	100	67.86%	78.24%	-10.38	90
4 Stars	64.26%	*	-7.43	93	60.67%	59.88%	0.79	101
5 Stars	*	-	*	*	46.54%	-	46.54	147
Unclassified	*	*	*	*	63.86%	61.35%	2.51	103
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading – August 2024/2023

Grading	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	90.62%	84.47%	6.15	106	66.94%	71.35%	-4.41	96
4 Stars	86.67%	*	15.95	116	71.18%	58.64%	12.54	113
5 Stars	*	-	*	*	34.10%	-	34.10	134
Unclassified	*	*	*	*	51.59%	59.53%	-7.94	92
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					