

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

### *December 2023/2022 Report - GUEST HOUSE / B&Bs*

#### 1.0 Introduction December 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering December 2023 and benchmarking against December 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](mailto:hugh.sheridan@gcu.ac.uk)).

#### 2.0 Executive Summary December 2023

The SOAS Report: December 2023/2022 Hotels report shows an increase in occupancy in the Hotels sector in Scotland compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for December 2023 experienced a **0.94** percentage point increase when comparing percentage room occupancy rates with December 2022. Occupancy rates within the Guest House/B&B sector experienced a **14.41** percentage point increase in December 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in December with growth of just 1.9%. Food and drink and health and beauty categories continued to drive sales, however, food sales in December were the weakest monthly performance in 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the December 2023 survey). The survey recorded 47% of respondents (a 5% decrease on the December 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

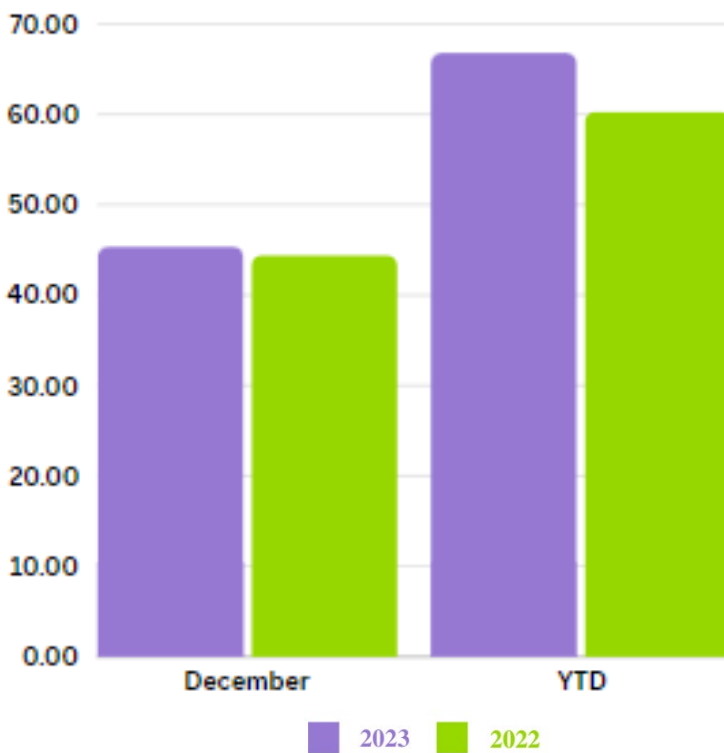
Despite consumer concern about the state of the economy, 28% of UK adults intend to take a domestic overnight trip in the first quarter of 2024, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be the 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 2024) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation continued to stall in December 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 6% decrease in year-to-date flights compared to 2019.

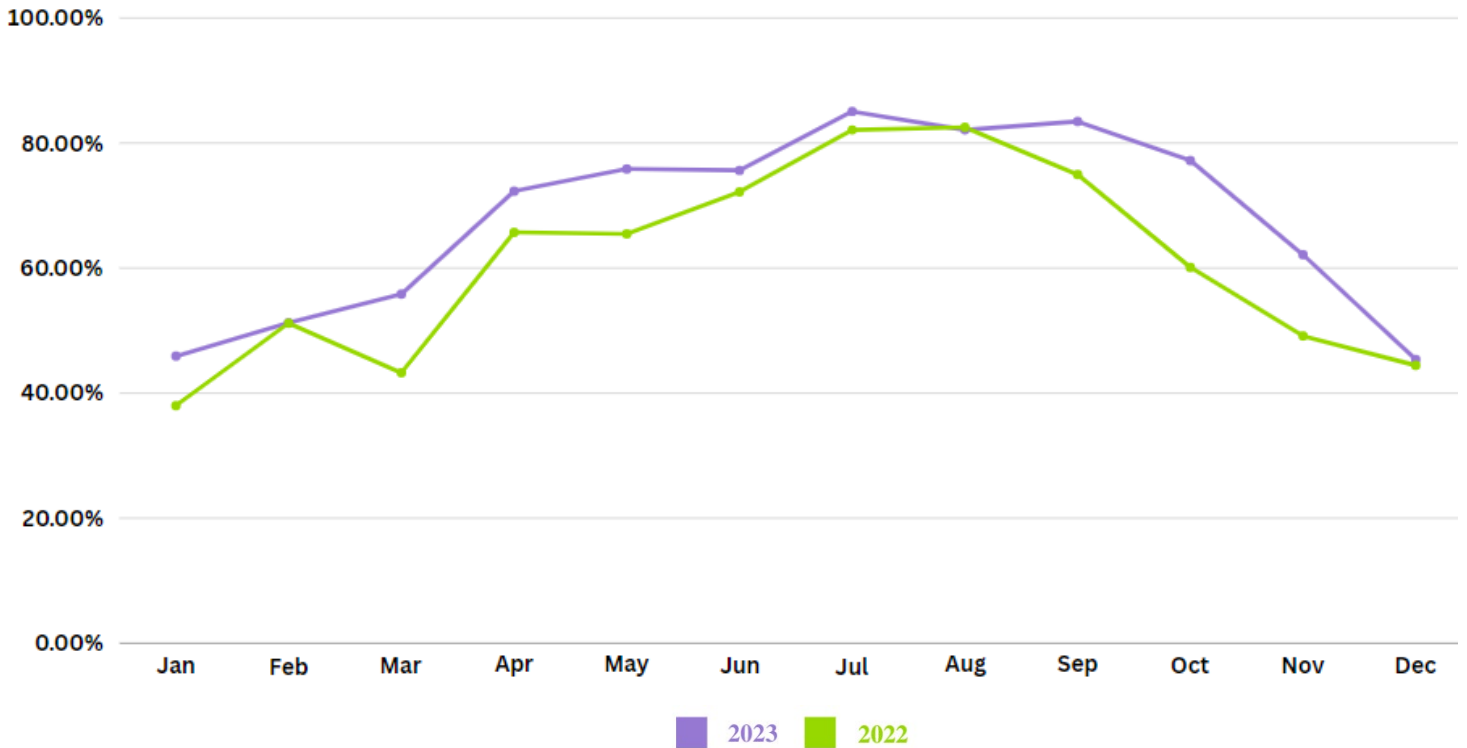
### All Serviced Accommodation

#### Room Occupancy – December 2023/2022

Scottish Serviced Accommodation room occupancy for December 2023 experienced a **0.94** percentage point decrease when comparing percentage room occupancy rates with December 2022.



#### Room Occupancy – Year-to-Date



Room Occupancy	December 23	December 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
<b>All Serviced Accommodation</b>	45.38%	44.44%	0.94	101	66.80%	60.30%	6.50	107

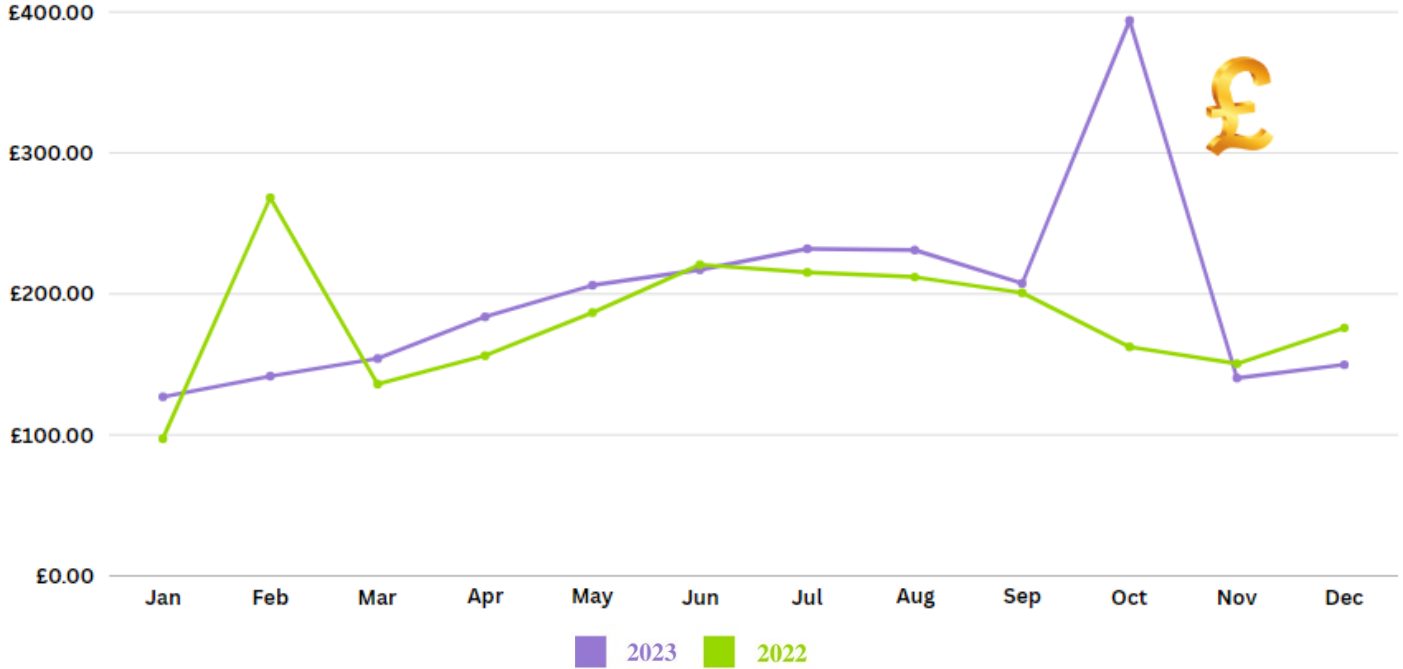
  

Bed Occupancy	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>All Serviced Accommodation</b>	54.39%	35.15%	19.24	119	58.00%	51.18%	6.82	107

The Revenue per available occupied room for December 2023 was **£149.76** compared with **£176.00** in December 2022. This figure is based solely on accommodation providers who provided financial information for either December 2023 and/or 2022.

<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.



**RevPAR Year to Date 2023/2022**

Room - Average RevPAR (£)	December 23	December 22
All Serviced Accommodation	£149.76	£176.00

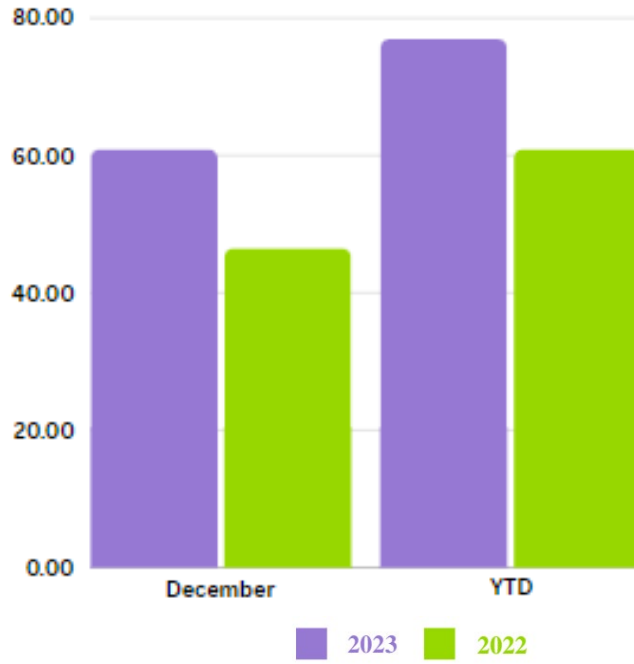
**RevPAR by Grading- December 2023/21**

Grading - Average RevPAR (£)	December 23	December 22
2 Stars	£77.91	£89.85
3 Stars	£126.51	£122.51
4 Stars	£185.91	£241.68
5 Stars	£330.56	£139.68
Unclassified	£0.00	£0.00

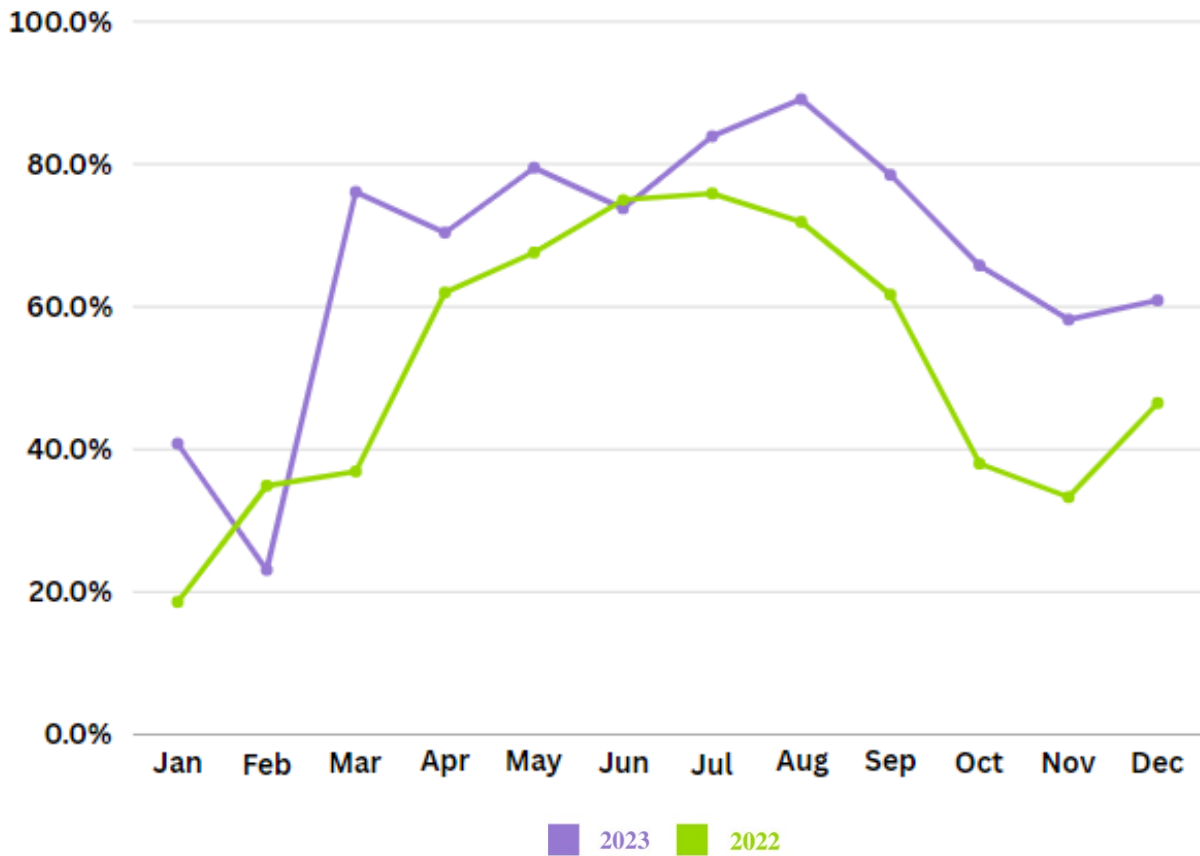
### 3.0 Serviced Accommodation – Guest House/B&B Sector

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

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



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



In the **Guest House/B&B sector**, the room occupancy rate for December 2023 was **60.92%** compared to data from the previous year of **46.51%** occupancy rate; this shows an overall percentage point increase of **14.41**.

Percentage room and bed occupancy rates for Guest House/B&Bs in Edinburgh & Lothian were the highest in January - December 2023. Operators (sample size >4) in Inland locations and properties charging a tariff of over **£70** fared best in room occupancy rates in December 2023.

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

Room Occupancy	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Guest House/B&amp;B</b>	60.92%	46.51%	14.41	114	76.97%	60.93%	16.04	116

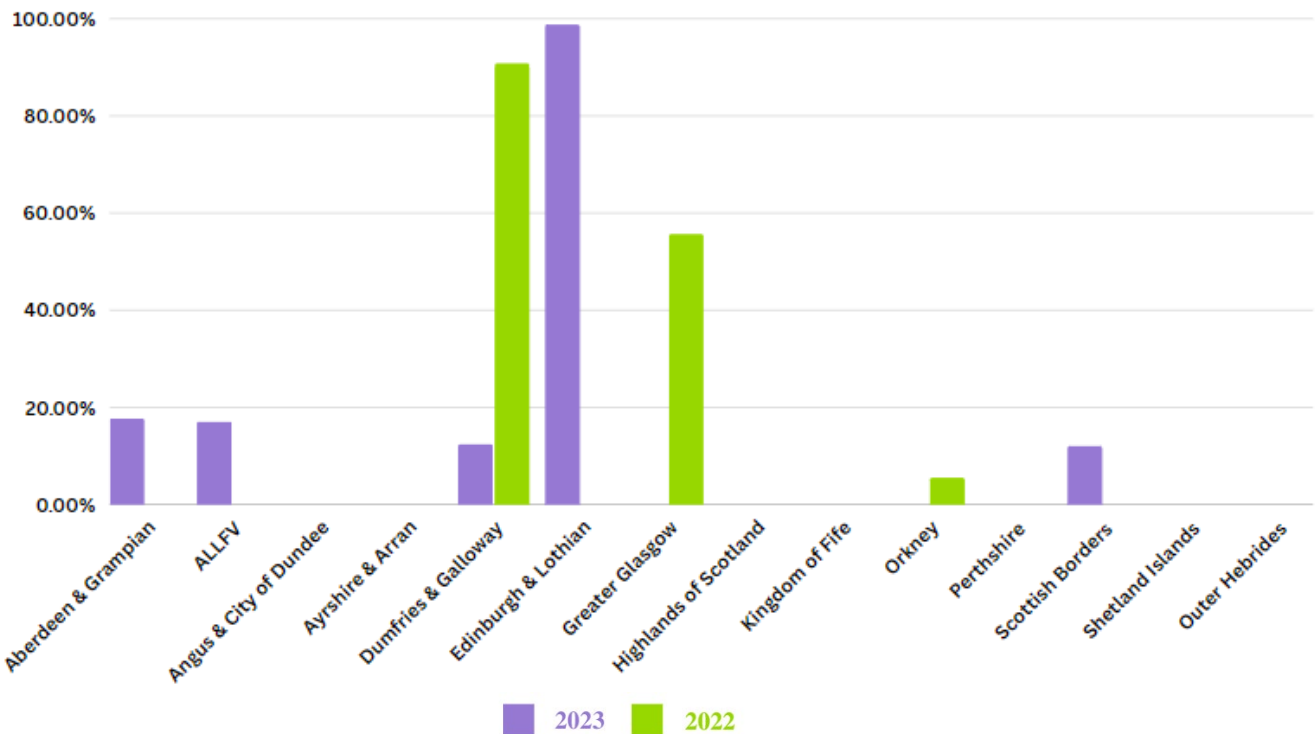
In the **Guest House/B&B sector**, the bed occupancy rate for December 2023 was **77.04%** compared to data from the previous year of **46.32%** occupancy rate; this shows an overall percentage point increase of **30.72**.

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

Bed Occupancy	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	77.04%	46.32%	30.72	131	77.06%	53.33%	23.73	124

### Room Occupancy by Former Visit Scotland Area

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



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

Area	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	66.76%	-	66.76	167
ALLFV	*	*	*	*	86.36%	53.12%	33.24	133
Angus & City of Dundee	*	*	*	*	13.24%	25.68%	-12.44	88
Ayrshire & Arran	-	-	-	-	-	32.96%	-32.96	67
Dumfries & Galloway	*	*	*	*	74.98%	88.92%	-13.94	86
Edinburgh & Lothian	*	-	*	*	97.33%	-	97.33	197
Greater Glasgow	-	*	*	*	-	65.12%	-65.12	35
Highlands of Scotland	-	*	*	*	87.84%	89.79%	-1.95	98
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	38.81%	38.03%	0.78	101
Perthshire	-	-	-	-	-	33.01%	-33.01	67
Scottish Borders	*	*	*	*	42.21%	7.14%	35.07	135
Shetland Islands	-	-	-	-	-	0.00%	0.00	100
Outer Hebrides	-	*	*	*	76.58%	0.00%	76.58	177

- Sample Size = Nil

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





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

Location (Geographic)	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	66.76%	-	66.76	167
Inland	74.79%	57.95%	16.84	117	79.27%	62.75%	16.52	117
Island	*	*	*	*	72.64%	58.03%	14.61	115
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	75.11%	-	75.11	175
Inland	93.43%	58.23%	35.21	135	78.46%	55.77%	22.69	123
Island	*	*	*	*	68.01%	49.61%	18.40	118
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Size– December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	5.55%	2.11	102	65.64%	62.52%	3.12	103
4 to 10	66.53%	*	-24.36	76	82.81%	70.77%	12.04	112
11 to 25	-	*	*	*	-	39.98%	-39.98	60
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 – December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	5.55%	-5.55%	94	68.14%	63.07%	5.07%	105
4 to 10	78.58%	*	-12.32%	88	81.80%	60.06%	21.74%	122
11 to 25	-	*	*	*	-	30.37%	-30.37%	70
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 – December 2023/2022

Tariff	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	*	*	*
£30 – 39.99	-	*	*	*	-	19.08%	-19.08	81
£40 – 49.99	*	*	*	*	13.24%	62.09%	-48.85	51
£50 – 59.99	-	*	*	*	-	76.74%	-76.74	23
£60 – £69.00	*	*	*	*	88.40%	91.64%	-3.24	97
£70+	61.09%	*	16.89	117	78.20%	44.08%	34.12	134
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Tariff – December 2023/2022

Tariff	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	*	*	*
£30 – 39.99	-	*	*	*	-	17.67%	-17.67	82
£40 – 49.99	*	*	*	*	10.65%	68.33%	-57.68	42
£50 – 59.99	-	*	*	*	-	73.64%	-73.64	26
£60 – £69.00	*	*	*	*	80.55%	76.02%	4.53	105
£70+	77.38%	*	33.45	133	77.49%	34.56%	42.93	143
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Grading – December 2023/2022

Grading	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	46.51%	-37.10	63	77.61%	56.32%	21.29	121
4 Stars	*	*	*	*	36.54%	66.99%	-30.45	70
5 Stars	-	-	-	-	-	*	*	*
Unclassified	*	*	*	*	71.14%	49.01%	22.13	122
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Grading – December 2023/2022

Grading	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	46.33%	-36.92	63	69.90%	44.00%	25.90	126
4 Stars	*	*	*	*	38.24%	76.76%	-38.52	61
5 Stars	-	-	-	-	-	*	*	*
Unclassified	*	*	*	*	75.15%	37.86%	37.29	137
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						