

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

October 2023/2022 Report - GUEST HOUSE / B&Bs

1.0 Introduction October 2023/2022

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

The SOAS Report: October 2023/2022 Guest House/B&Bs report showed a significant occupancy increase in the Guest House/B&Bs sector in Scotland compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for October 2023 experienced an **17.17** percentage point increase when comparing percentage room occupancy rates with October 2022. Occupancy rates within the Guest House/B&B sector experienced a **27.84** percentage point increase in October 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in October with growth of just 2.5%. Food and drink and health and beauty categories continued to drive sales. October's food and drink sales enjoyed a slight increase in volume and value sales compared to last year, but value sales were slightly down on September's performance.

Domestic consumer sentiment provided by the GB National Tourist Boards for October 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease on the September 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful". were "...been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease on the September 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

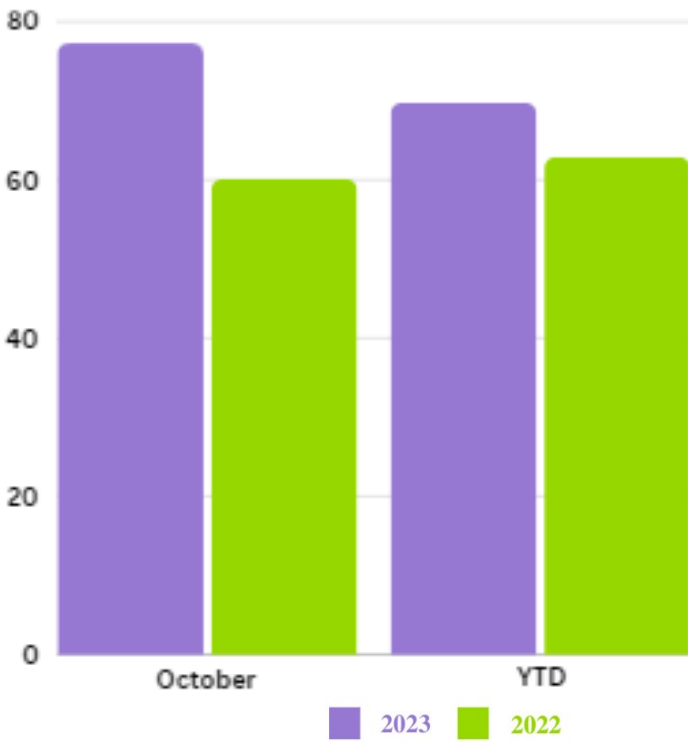
Despite consumer concern about the state of the economy, 21% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be the 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 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in October 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 10% 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.

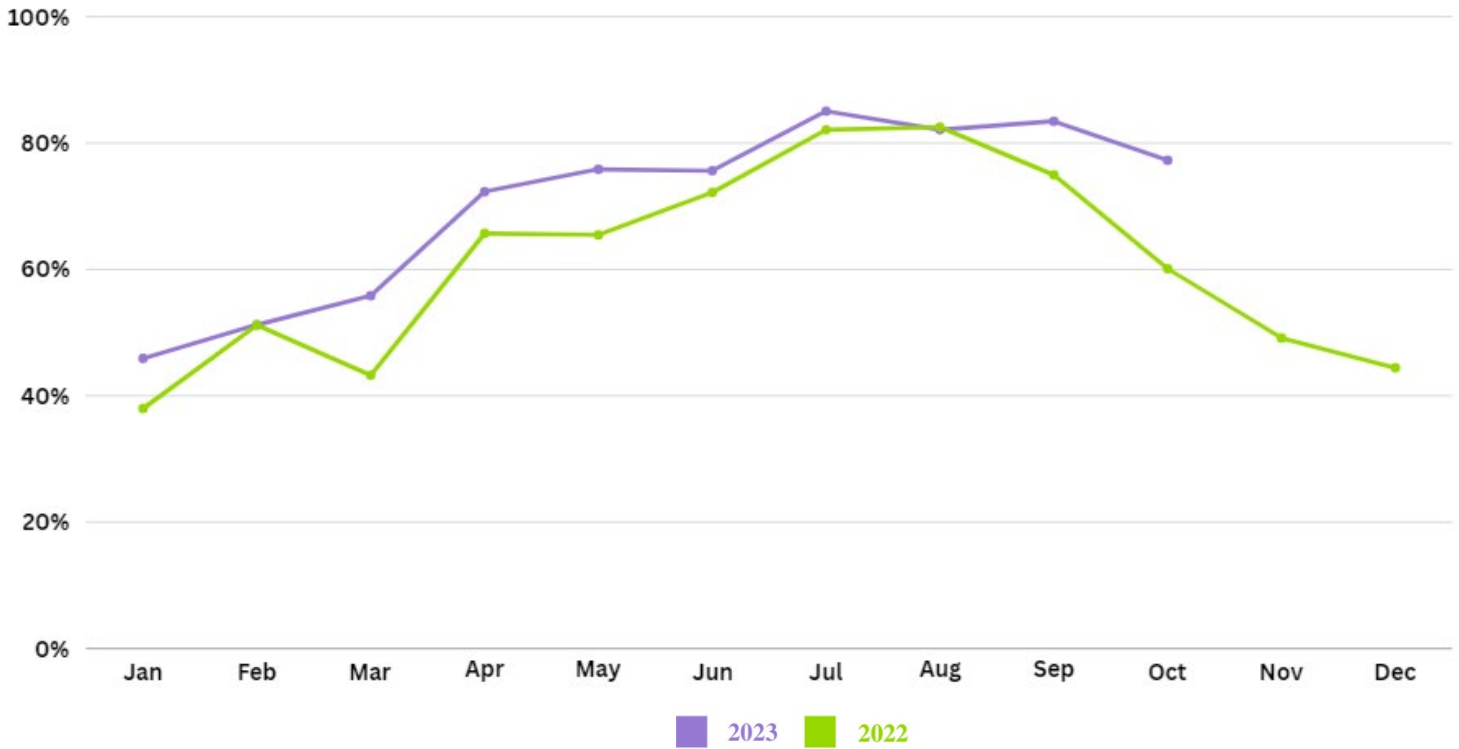
All Serviced Accommodation

Room Occupancy – October 2023/2022

Scottish Serviced Accommodation room occupancy for October 2023 experienced a **17.17** percentage point decrease when comparing percentage room occupancy rates with October 2022.



Room Occupancy – Year-to-Date



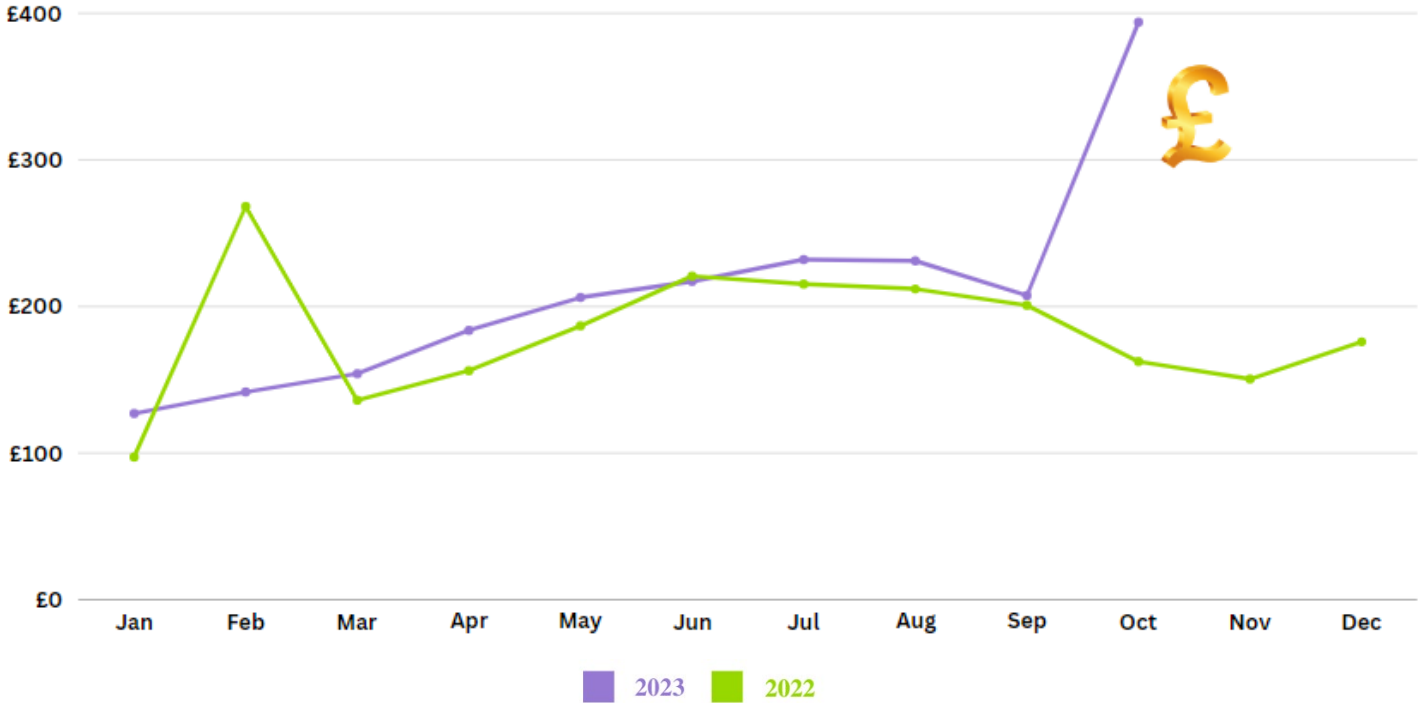
Room Occupancy	October 23	October 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	77.28%	60.11%	17.17	117	69.74%	62.89%	6.85	107

Bed Occupancy	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	65.22%	51.85%	13.37	113	58.90%	54.06%	4.84	105

The Revenue per available occupied room for October 2023 was **£393.96** compared with **£162.48** in October 2022. This figure is based solely on accommodation providers who provided financial information for either October 2023 and/or 2022.

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.



RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	October 23	October 22
All Serviced Accommodation	£393.96	£162.48

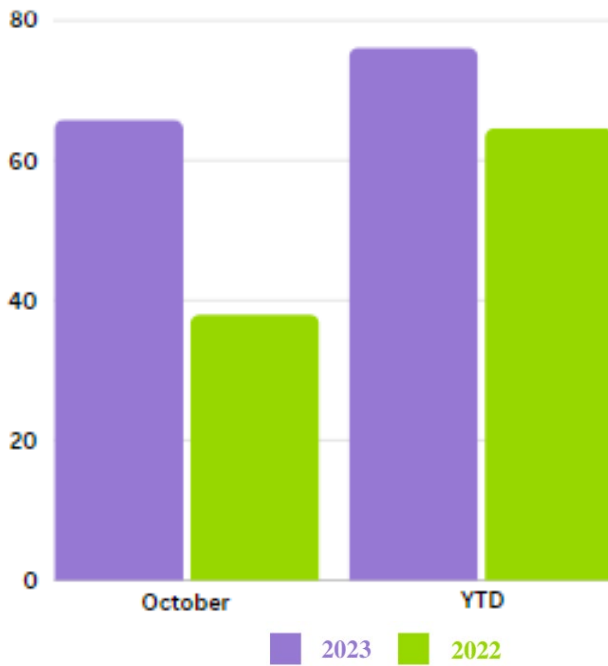
RevPAR by Grading- October 2023/21

Grading – Average RevPAR (£)	October 23	October 22
2 Stars	£187.69	£125.00
3 Stars	£693.38	£127.83
4 Stars	£203.24	£226.91
5 Stars	£306.56	£190.20
Unclassified	£0.00	£104.80

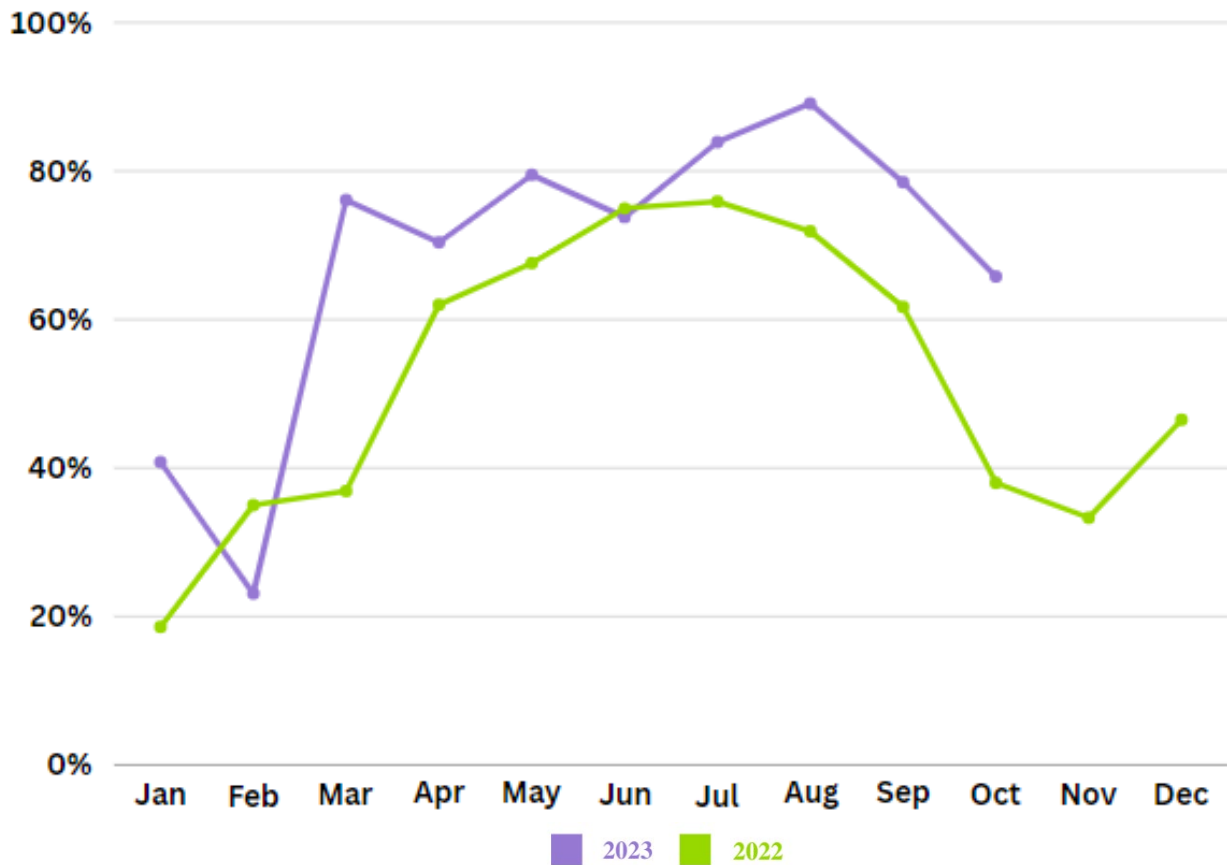
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

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



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



In the Guest House/B&B sector, the room occupancy rate for October 2023 was **65.83%** compared to data from the previous year of **37.99%** occupancy rate; this shows an overall percentage point increase of **27.84**.

Percentage room and bed occupancy rates for Guest House/B&Bs in the Argyll, Loch Lomond & Forth Valley (ALLV) were the highest in October 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 October 2023.

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

Room Occupancy	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	65.83%	37.99%	27.84	128	76.14%	64.62%	11.52	112

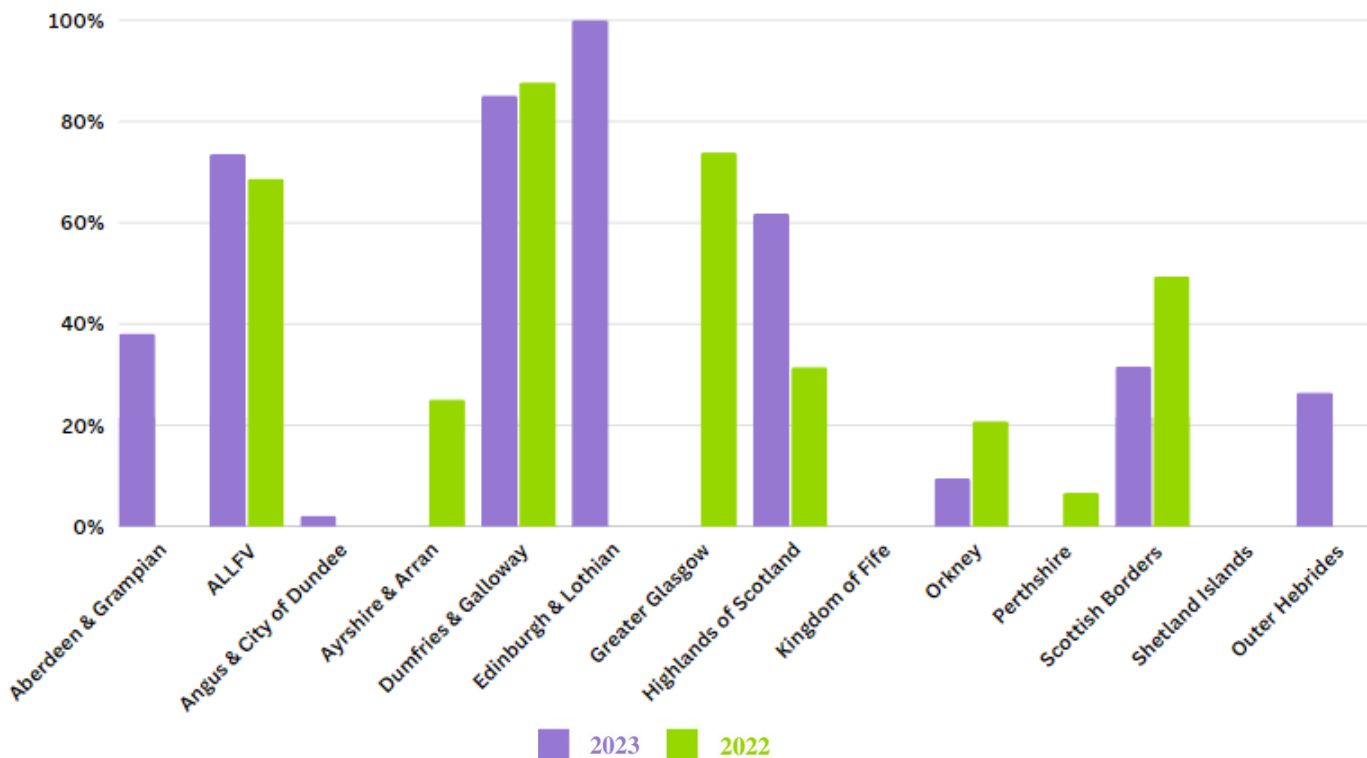
In the **Guest House/B&B** sector, the bed occupancy rate for October 2023 was **72.10%** compared to data from the previous year of **32.21%** occupancy rate; this shows an overall percentage point increase of **39.89**.

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

Bed Occupancy	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	72.10%	32.21%	39.89	140	73.42%	57.61%	15.81	116

Room Occupancy by Former Visit Scotland Area

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



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

Area	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	74.36%	-	74.36	174
ALLFV	73.60%	*	4.85	105	82.60%	53.71%	28.89	129
Angus & City of Dundee	*	-	*	*	13.24%	25.68%	-12.44	88
Ayrshire & Arran	-	*	*	*	-	36.13%	-36.13	64
Dumfries & Galloway	*	*	*	*	89.59%	88.90%	0.69	101
Edinburgh & Lothian	*	-	*	*	96.74%	77.65%	19.09	119
Greater Glasgow	-	*	*	*	-	64.65%	-64.65	35
Highlands of Scotland	*	*	*	*	76.88%	85.94%	-9.06	91
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	42.70%	43.54%	-0.84	99
Perthshire	-	*	*	*	45.43%	39.35%	6.08	106
Scottish Borders	*	*	*	*	46.33%	42.48%	3.85	104
Shetland Islands	*	*	*	*	0.00%	0.00%	0.00	100
Outer Hebrides	*	*	*	*	66.20%	*	66.20	166

- Sample Size = Nil

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

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

Area	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	-	*	*	83.38%	-	83.38	183
ALLFV	76.76%	*	21.76	122	84.00%	42.57%	41.43	141
Angus & City of Dundee	*	-	*	*	10.65%	9.44%	1.21	101
Ayrshire & Arran	-	*	*	*	-	23.24%	-23.24	77
Dumfries & Galloway	*	*	*	*	72.13%	69.05%	3.08	103
Edinburgh & Lothian	*	-	*	*	88.39%	68.92%	19.47	119
Greater Glasgow	-	*	*	*	-	65.11%	-65.11	35
Highlands of Scotland	*	*	*	*	74.66%	84.92%	-10.26	90
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	34.60%	38.42%	-3.82	96
Perthshire	-	*	*	*	39.70%	38.10%	1.60	102
Scottish Borders	*	*	*	*	40.54%	32.11%	8.43	108
Shetland Islands	*	*	*	*	0.00%	0.00%	0.00	100
Outer Hebrides	*	*	*	*	31.86%	*	31.86	132

- Sample Size = Nil

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

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

Location accessibility/density	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	94.73%	75.28%	19.45	119
Other Urban Areas	*	*	*	*	95.15%	67.57%	27.58	128
Accessible Small Towns	47.06%	-	47.06	147	62.90%	25.68%	37.22	137
Remote Small Towns	*	*	*	*	68.86%	73.02%	-4.16	96
Accessible Rural	*	*	*	*	66.06%	33.01%	33.05	133
Remote Rural	57.82%	32.45%	25.37	125	70.20%	65.05%	5.15	105
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	87.51%	68.36%	19.15	119
Other Urban Areas	*	*	*	*	94.20%	58.98%	35.22	135
Accessible Small Towns	60.18%	-	60.18	160	69.16%	9.44%	59.72	160
Remote Small Towns	*	*	*	*	61.00%	57.99%	3.01	103
Accessible Rural	*	*	*	*	62.48%	32.34%	30.14	130
Remote Rural	54.16%	27.21%	26.95	127	67.29%	58.32%	8.97	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	61.44%	-	61.44	161
Inland	74.62%	41.80%	32.82	133	79.47%	64.35%	15.12	115
Island	67.32%	32.45%	34.87	135	83.27%	65.05%	18.22	118
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	60.91%	-	60.91	161
Inland	81.31%	35.50%	45.81	146	75.42%	57.19%	18.23	118
Island	73.35%	27.21%	46.14	146	83.01%	58.32%	24.69	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Size– October 2023/2022

Size	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	53.56%	*	44.67	145	64.82%	65.26%	-0.44	100
4 to 10	77.47%	46.10%	31.37	131	85.50%	69.59%	15.91	116
11 to 25	-	*	*	*	-	54.23%	-54.23	46
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 – October 2023/2022

Size	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	52.71%	*	46.35	146	64.34%	66.07%	-1.73	98
4 to 10	89.72%	40.88%	48.84	149	81.53%	60.48%	21.05	121
11 to 25	-	*	*	*	-	45.76%	-45.76	54
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 – October 2023/2022

Tariff	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	*	*	*
£30 – 39.99	*	*	*	*	45.43%	19.08%	26.35	126
£40 – 49.99	*	*	*	*	42.23%	60.85%	-18.62	81
£50 – 59.99	*	*	*	*	94.70%	80.34%	14.36	114
£60 – £69.00	*	*	*	*	92.08%	82.50%	9.58	110
£70+	66.07%	*	20.05	120	74.10%	53.19%	20.91	121
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Tariff – October 2023/2022

Tariff	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	39.70%	17.67%	22.03	122
£40 – 49.99	*	*	*	*	61.41%	64.38%	-2.97	97
£50 – 59.99	*	*	*	*	93.80%	80.13%	13.67	114
£60 – £69.00	*	*	*	*	87.55%	67.52%	20.03	120
£70+	71.26%	*	33.43%	133	69.31%	44.31%	25.00	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Grading – October 2023/2022

Grading	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	36.36%	40.97	141	76.58%	62.07%	14.51	115
4 Stars	*	*	*	*	57.46%	66.99%	-9.53	90
5 Stars	-	-	-	-	-	*	*	*
Unclassified	48.80%	*	-19.95	80	62.23%	53.71%	8.52	109
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading – October 2023/2022

Grading	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	30.47%	41.20	141	69.62%	51.56%	18.06	118
4 Stars	*	*	*	*	58.01%	76.77%	-18.76	81
5 Stars	-	-	-	-	-	*	*	*
Unclassified	49.97%	*	-5.03	95	61.86%	42.57%	19.29	119
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					