

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

### *April 2024/2023 Report - GUEST HOUSE / B&Bs*

#### 1.0 Introduction April 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering April 2024 and benchmarking against April 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](mailto:hugh.sheridan@gcu.ac.uk)).

#### 2.0 Executive Summary April 2024

The SOAS Report: April 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 April 2024 experienced a **4.56** percentage point increase when comparing percentage room occupancy rates with April 2023. Occupancy rates within the Guest House/B&B sector experienced a **17.70** percentage point decrease in April 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 April 2024 is 2.3%, down from 3.2% in April. The inflation rate for April 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.6%. Inflation rates for restaurants and cafes were 6.1% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in April showed a 4% year-on-year decrease. It should be noted that with Easter falling in April the year-on-year figures will be distorted, therefore, by adjusting the April and April together this now shows a 0.2% decrease. After a strong start in the first quarter, total food sales dropped by 3.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the April 2024 survey). The survey recorded 48% of respondents (a 4% increase on the April 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

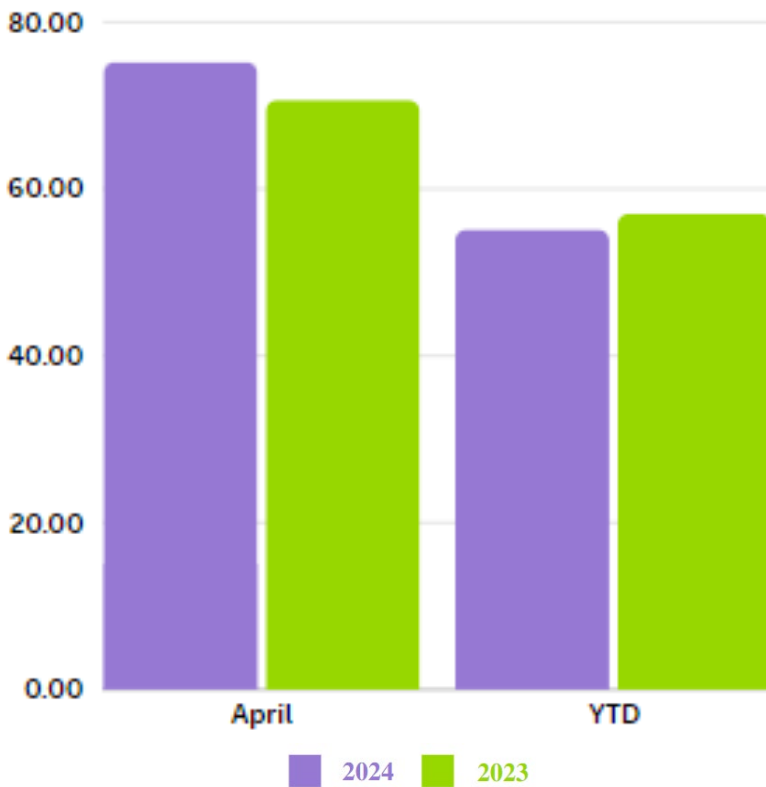
Despite consumer concern about the state of the economy, 33% of UK adults intended to take a domestic overnight trip in the second quarter of 2024, this is a slight decrease compared with April 2023, with 78% of UK adults intending to take a domestic overnight trip in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather and Personal finances.

The recovery in international inbound visitation continued to grow in April 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2023, however, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019.

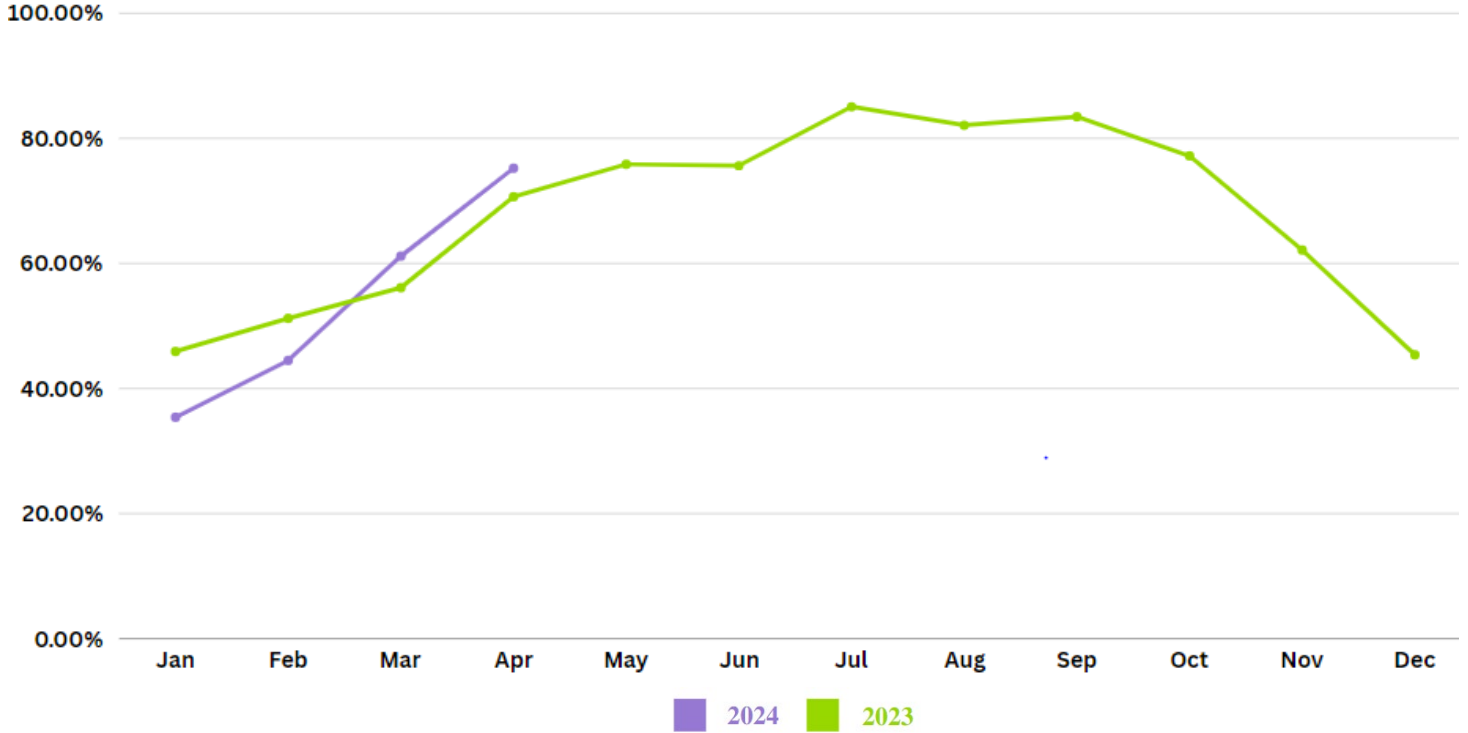
### All Serviced Accommodation

#### Room Occupancy – April 2024/2023

Scottish Serviced Accommodation room occupancy for April 2024 experienced a **4.56** percentage point increase when comparing percentage room occupancy rates with April 2023.



Room Occupancy – Year-to-Date



Room Occupancy	April 24	April 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	75.22%	70.66%	4.56	105	55.16%	57.04%	-1.88	98

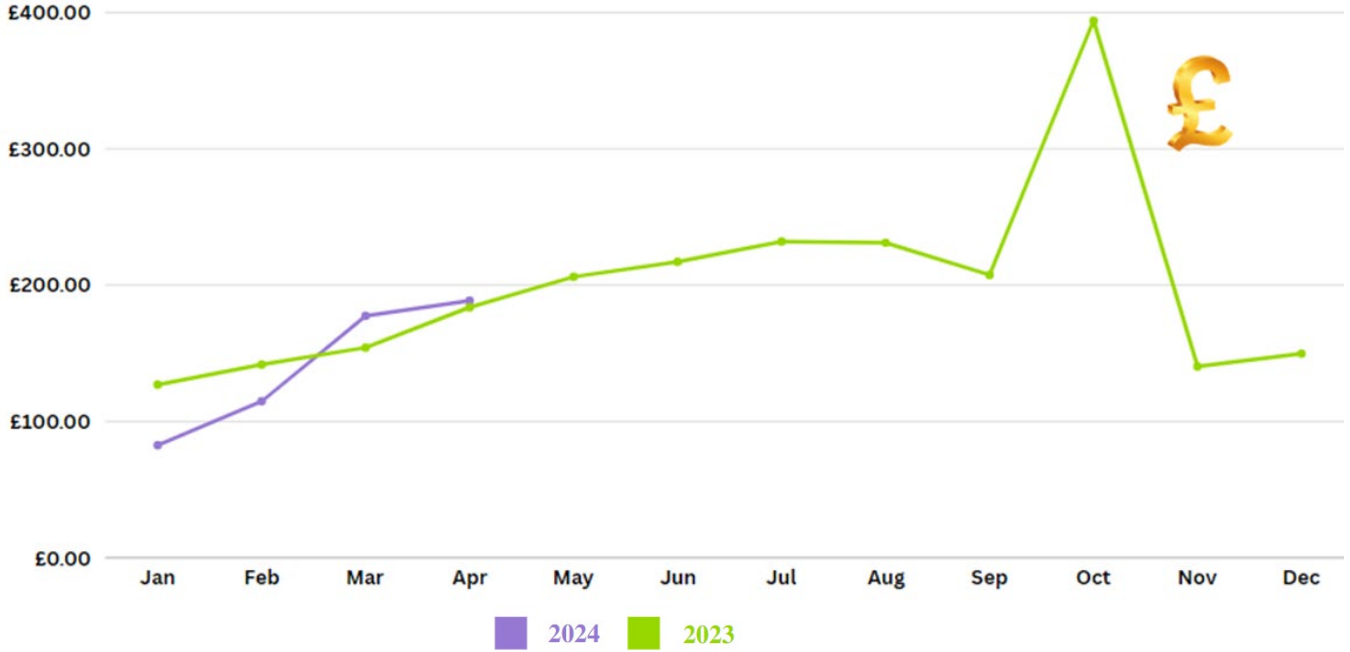
  

Bed Occupancy	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	62.81%	64.00%	-1.19	99	53.67%	47.50%	6.17	106

The Revenue per available occupied room for April 2024 was **£188.59** compared with **£183.71** in April 2023. This figure is based solely on accommodation providers who provided financial information for either April 2024 and/or 2023.

<sup>1</sup> 24/23 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 2023/2023**

Room – Average RevPAR (£)	April 24	April 23
All Serviced Accommodation	£188.59	£183.71

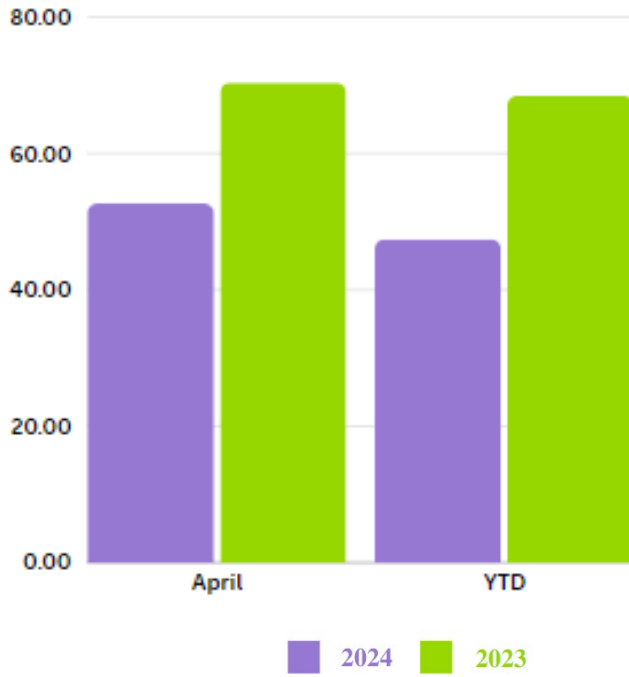
**RevPAR by Grading- April 2024/21**

Grading – Average RevPAR (£)	April 24	April 23
2 Stars	£185.37	£114.72
3 Stars	£166.98	£161.20
4 Stars	£214.80	£221.13
5 Stars	£243.50	£311.22
Unclassified	£57.04	£-

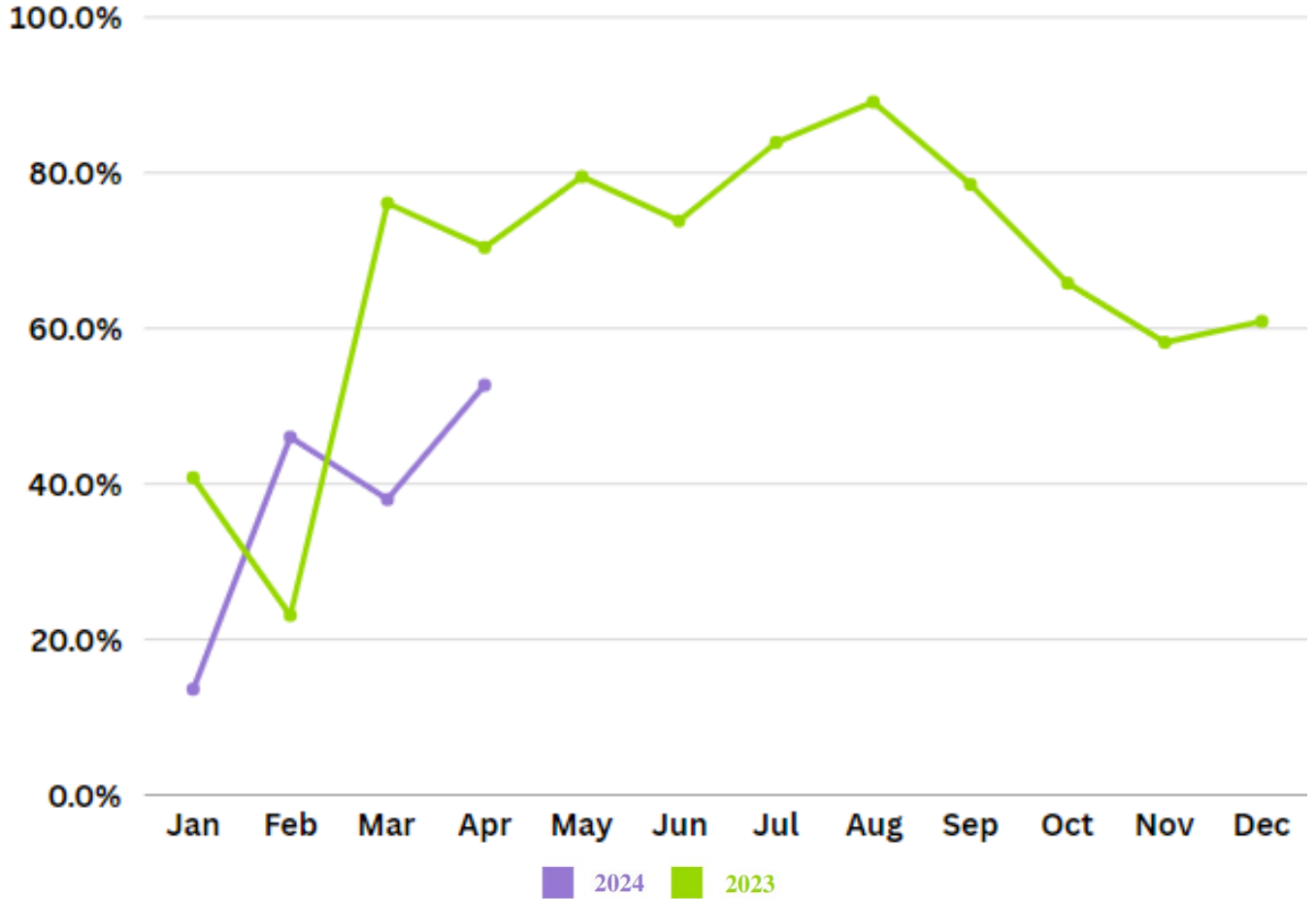
### 3.0 Serviced Accommodation – Guest House/B&B Sector

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

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



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



In the Guest House/B&B sector, the room occupancy rate for April 2024 was **52.67%** compared to data from the previous year of **70.37%** occupancy rate; this shows an overall percentage point decrease of **17.70**.

Operators (sample size >4) in Aberdeen & Grampian, Inland locations and properties charging a tariff of between £50.00 - £59.99 fared best in room occupancy rates in April 2024.

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

Room Occupancy	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	52.67%	70.37%	-17.70	82	47.42%	68.46%	-21.04	79

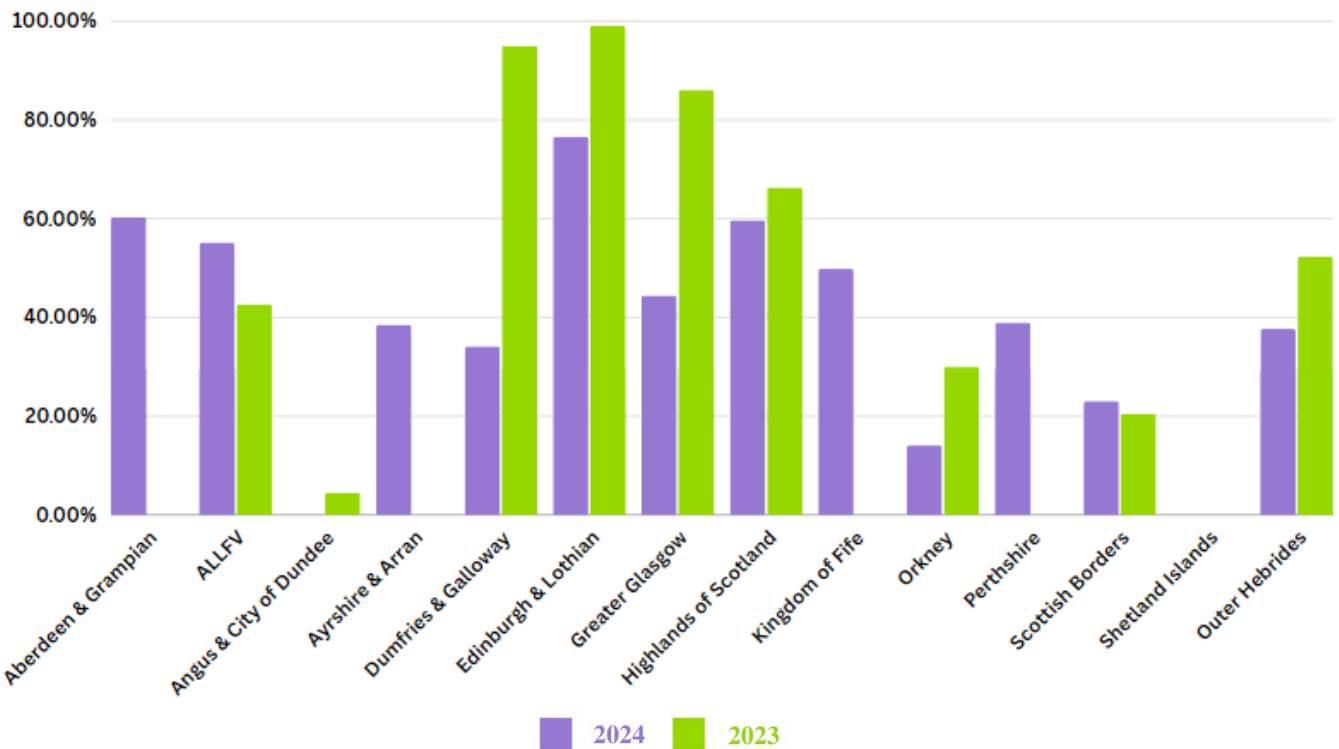
In the Guest House/B&B sector, the bed occupancy rate for April 2024 was **60.58%** compared to data from the previous year of **58.55%** occupancy rate; this shows an overall percentage point increase of **2.03**.

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

Bed Occupancy	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Guest House/B&B	60.58%	58.55%	2.03	102	50.58%	55.29%	-4.71	95

### Room Occupancy by Former Visit Scotland Area

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



#### Room Occupancy by Former Visit Scotland Area – April 2024/2023

Area	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	60.33%	-	60.33	160	39.95%	-	39.95	140
ALLFV	55.19%	*	12.54	113	47.74%	*	5.09	105
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	-	*	*	*	-	*	*
Dumfries & Galloway	34.12%	*	-60.92	39	25.69%	*	-52.37	48
Edinburgh & Lothian	*	*	*	*	76.11%	*	-13.83	86
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	59.67%	*	-6.66	93	53.10%	*	-13.23	87
Kingdom of Fife	49.83%	-	49.83	150	43.14%	-	43.14	143
Orkney	*	*	*	*	7.32%	*	-4.68	95
Perthshire	38.95%	-	38.95	139	37.95%	-	37.95	138
Scottish Borders	23.04%	*	2.54	103	19.32%	*	-1.18	99
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	*	*	*	*

- Sample Size = Nil

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

### Bed Occupancy by Former Visit Scotland Area – April 2024/2023

Area	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	68.64%	-	68.64	169	32.41%	-	32.41	132
ALLFV	62.68%	*	20.69	121	51.47%	*	9.48	109
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	-	*	*	*	-	*	*
Dumfries & Galloway	30.60%	*	-43.03	103	23.91%	*	-36.43	64
Edinburgh & Lothian	*	*	*	*	89.63%	*	-7.28	93
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	64.90%	*	1.72	102	54.57%	*	-8.61	91
Kingdom of Fife	50.62%	-	50.62	151	45.02%	-	45.02	145
Orkney	*	*	*	*	4.41%	*	-4.42	96
Perthshire	66.86%	-	66.86	167	73.24%	-	73.24	173
Scottish Borders	18.73%	*	-1.14	99	18.59%	*	-1.28	99
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	*	*	*	*

- Sample Size = Nil

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

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

Location accessibility/density	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	71.55%	*	-26.99	73	73.23%	85.52%	-12.29	88
Other Urban Areas	*	*	*	*	58.72%	*	-29.76	70
Accessible Small Towns	50.39%	*	41.04	141	42.73%	*	33.38	133
Remote Small Towns	52.35%	*	-5.70	94	50.54%	58.51%	-7.97	92
Accessible Rural	47.09%	-	47.09	147	42.02%	-	42.02	142
Remote Rural	39.64%	*	-17.27	83	36.04%	50.82%	-14.78	85

- Sample Size = Nil

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

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

Location accessibility/density	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	100.00%	*	3.09	103	89.63%	80.24%	9.39	109
Other Urban Areas	*	*	*	*	54.20%	*	-29.01	71
Accessible Small Towns	49.55%	*	42.80	143	41.83%	*	35.08	135
Remote Small Towns	53.94%	*	6.53	107	49.93%	46.86%	3.07	103
Accessible Rural	52.96%	-	52.96	153	44.26%	-	44.26	144
Remote Rural	47.96%	*	-7.00	93	38.43%	48.86%	-10.43	90

- Sample Size = Nil

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



### Room Occupancy by Location (Geographic) – April 2024/2023

Location (Geographic)	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	40.83%	*	19.17	119	31.20%	*	9.54	110
Inland	54.95%	77.13%	-22.18	78	49.52%	74.79%	-25.27	75
Island	52.17%	*	-27.40	73	59.96%	66.26%	-6.30	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Location (Geographic) – April 2024/2023

Location (Geographic)	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	34.91%	*	17.41	117	24.74%	*	7.24	107
Inland	65.77%	61.37%	4.40	104	57.58%	59.66%	-2.08	98
Island	66.44%	*	-12.62	87	67.25%	65.46%	1.79	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Size– April 2024/2023

Size	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	41.35%	46.74%	-5.39	95	44.22%	42.74%	1.48	101
4 to 10	61.70%	85.48%	-23.78	76	49.19%	81.43%	-32.24	68
11 to 25	*	*	*	*	51.91%	*	-26.55	73
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 – April 2024/2023

Size	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	48.14%	44.33%	3.81	104	51.43%	40.43%	11.00	111
4 to 10	70.63%	65.31%	5.32	105	50.08%	62.11%	-12.03	88
11 to 25	*	*	*	*	0.00%	*	-80.24	20
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 – April 2024/2023

Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	*	-	*	*	*	-	*	*
£30 – 39.99	*	-	*	*	56.70%	-	56.70	157
£40 – 49.99	51.20%	*	-24.50	76	41.93%	*	-33.77	66
£50 – 59.99	61.35%	*	-31.65	68	48.55%	*	-44.45	56
£60 – £69.00	49.49%	*	-45.55	54	41.73%	*	-36.33	64
£70+	53.16%	64.78%	-11.62	88	50.40%	64.67%	-14.27	86
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Tariff – April 2024/2023

Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	*	-	*	*	*	-	*	*
£30 – 39.99	*	-	*	*	43.52%	-	43.52	144
£40 – 49.99	0.00%	*	-75.70	24	0.00%	*	-75.70	24
£50 – 59.99	58.99%	*	-27.10	73	58.99%	*	-27.10	73
£60 – £69.00	55.31%	*	-18.32	82	43.06%	*	-17.28	83
£70+	64.64%	45.25%	19.39	119	56.56%	44.01%	12.55	113
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Grading – April 2024/2023

Grading	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	63.01%	*	-14.65	85	52.06%	55.10%	-3.04	97
4 Stars	40.33%	*	-7.57	92	40.88%	47.90%	-7.02	93
5 Stars	31.93%	-	31.93	132	32.07%	-	32.07	132
Unclassified	*	*	*	*	27.36%	*	-0.75	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Grading – April 2024/2023

Grading	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	58.36%	*	-0.85	99	41.37%	45.98%	-4.61	95
4 Stars	53.10%	*	10.50	111	54.60%	42.60%	12.00	112
5 Stars	35.34%	-	35.34	135	37.98%	-	37.98	138
Unclassified	*	*	*	*	27.43%	*	2.11	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						