



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

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

1.0 Introduction July 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering July 2024 and benchmarking against July 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 July 2024

The SOAS Report: July 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 July 2024 experienced an **20.16** percentage point increase when comparing percentage room occupancy rates with July 2023. Occupancy rates within the Guest House/B&B sector experienced a **7.13** percentage point decrease in July 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 July 2024 is 2.2%. The inflation rate for July 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.7%. Inflation rates for restaurants and cafes were 4.9% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -1.2% in July, however, compared to the 4.6% increase in July 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of July 2023, when they had increased by 9.1%.

Domestic consumer sentiment provided by the GB National Tourist Boards for July 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 2% decrease on the June 2024 survey). The survey recorded 47% of respondents (a 3% increase on the June 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, 51% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (75%). 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 the last six waves of the GB National Tourist Survey (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

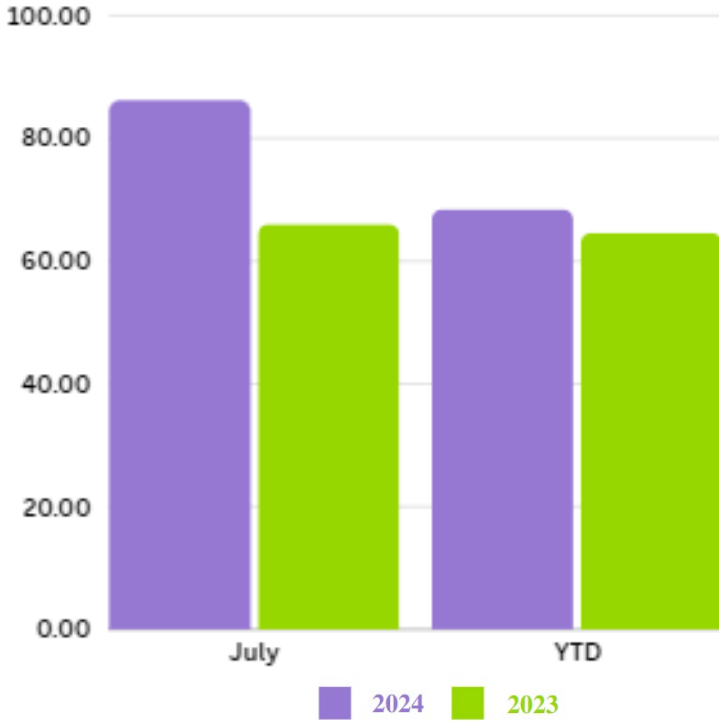
The recovery in international inbound visitation grew in July 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.



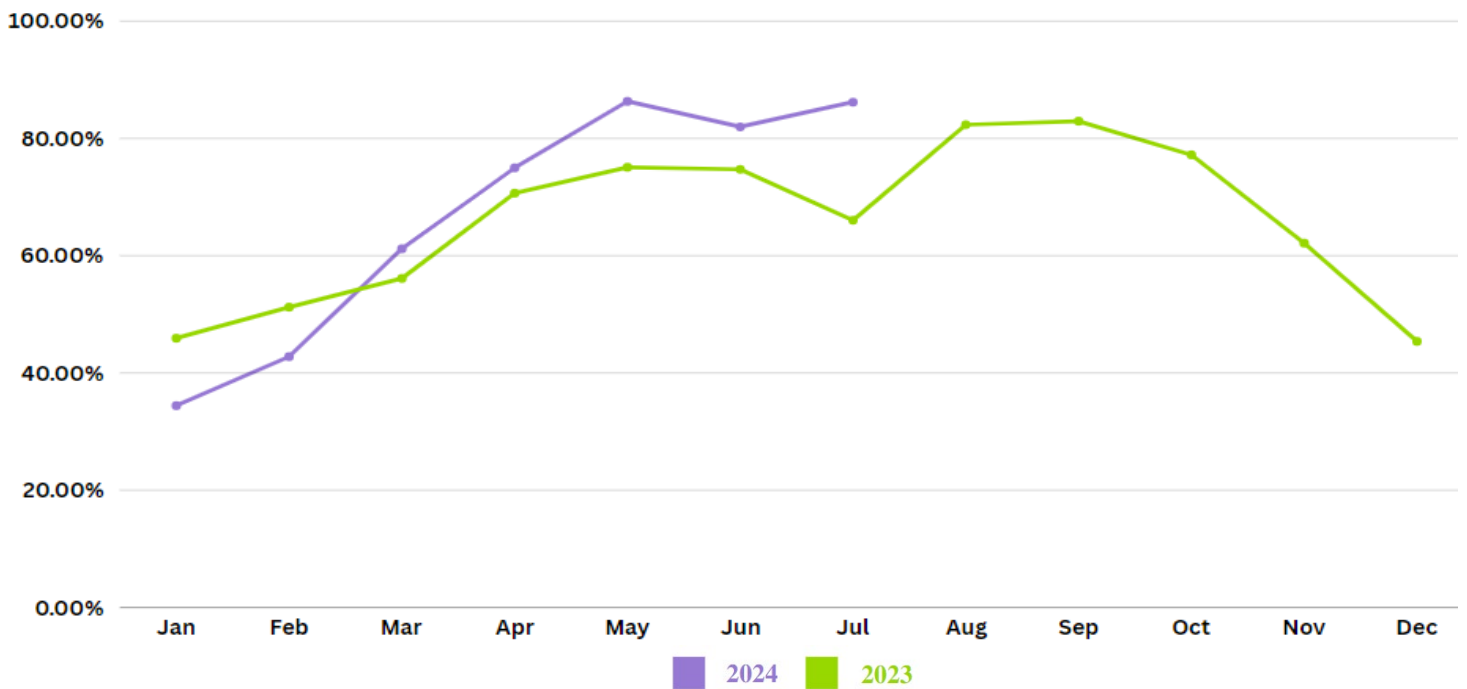
All Serviced Accommodation

Room Occupancy – July 2024/2023

Scottish Serviced Accommodation room occupancy for July 2024 experienced a **20.16** percentage point increase when comparing percentage room occupancy rates with July 2023.



Room Occupancy – Year-to-Date

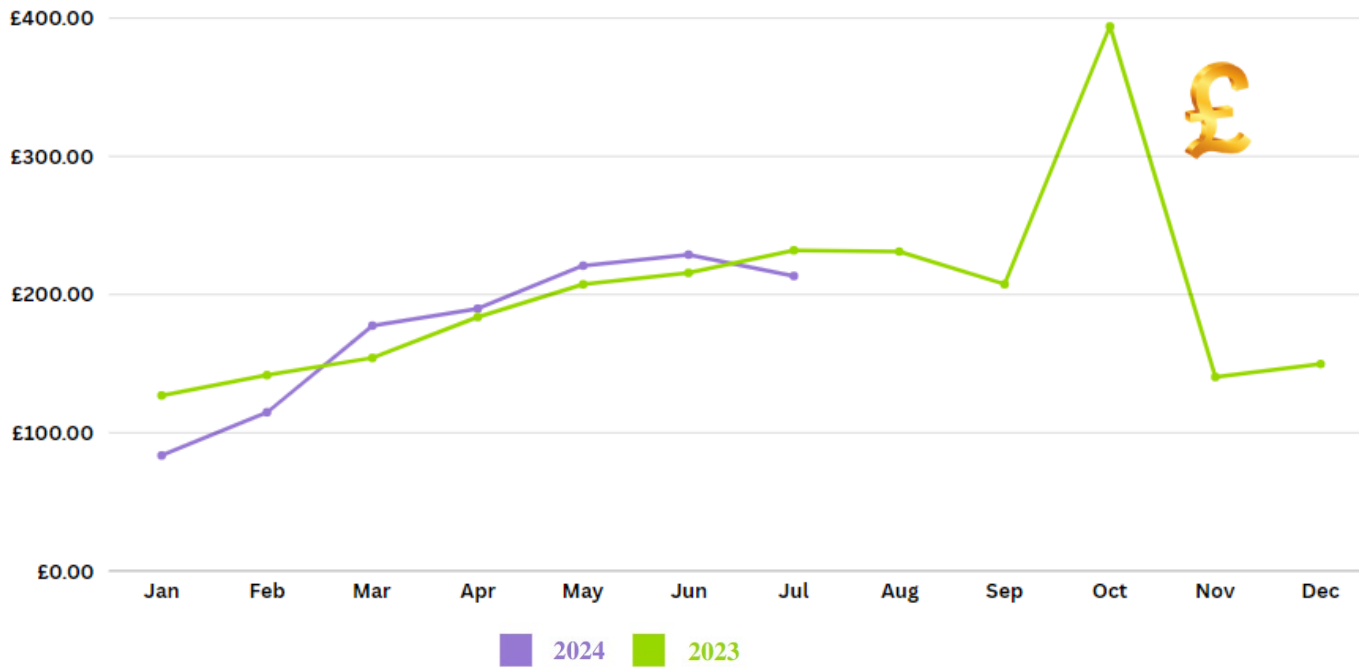




Room Occupancy	July 24	July 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	86.20%	66.04%	20.16	120	68.74%	64.61%	3.86	104

Bed Occupancy	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
All Serviced Accommodation	80.70%	53.20%	27.50	128	63.82%	53.75%	10.07	110

The Revenue per available occupied room for July 2024 was **£213.43** compared with **£232.01** in July 2023. This figure is based solely on accommodation providers who provided financial information for either July 2024 and/or 2023.



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.



RevPAR Year to Date 2023/2023

Room – Average RevPAR (£)	July 24	July 23
All Serviced Accommodation	£213.43	£232.01

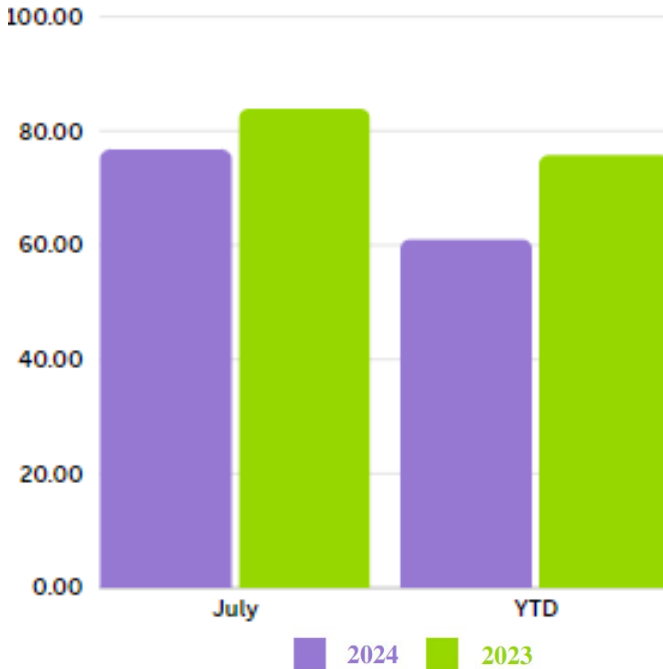
RevPAR by Grading- July 2024/21

Grading – Average RevPAR (£)	July 24	July 23
2 Stars	£184.54	£190.46
3 Stars	£251.06	£184.80
4 Stars	£190.10	£254.14
5 Stars	£483.84	£460.96
Unclassified	£	£133.25

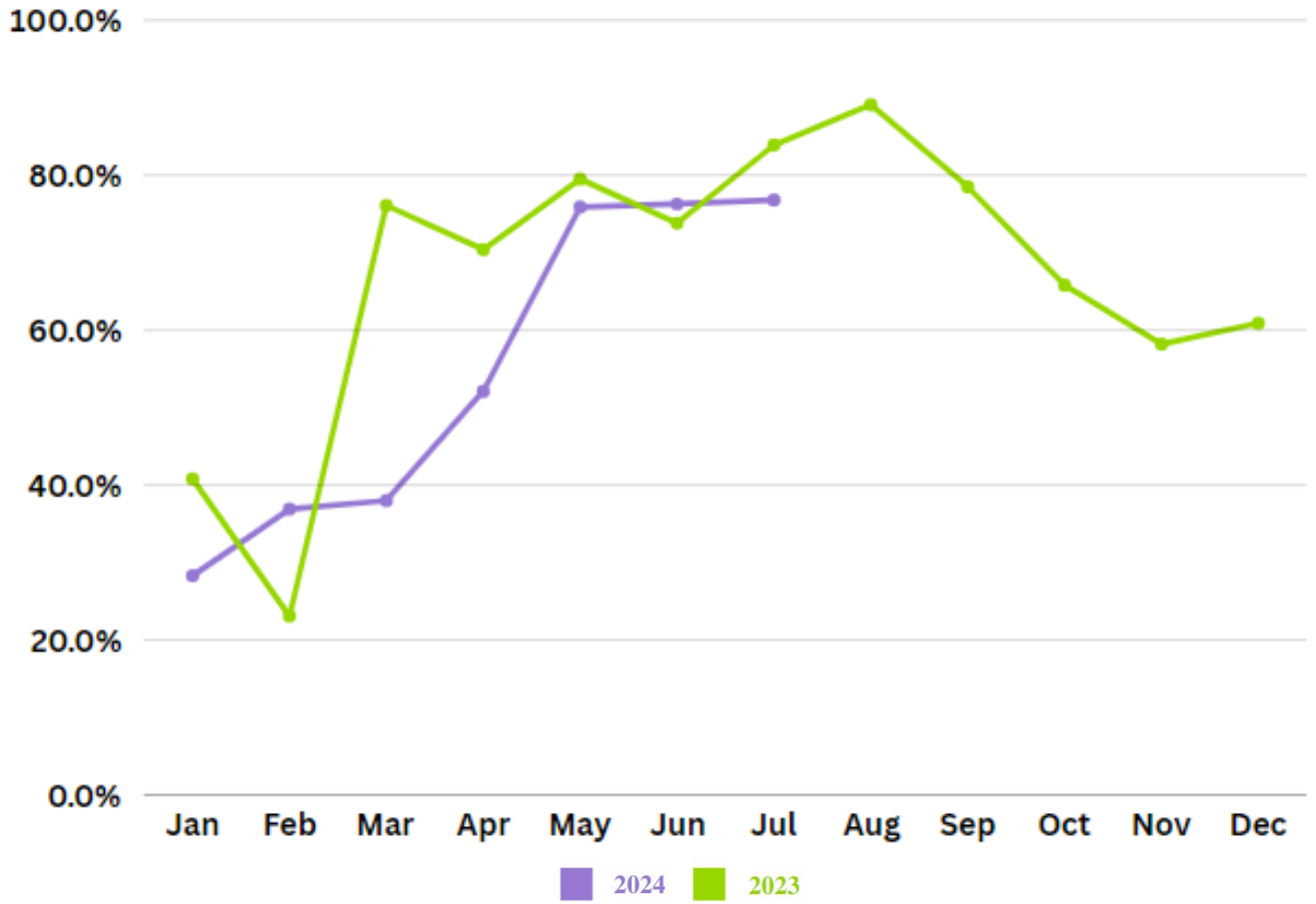
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

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



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



In the **Guest House/B&B** sector, the room occupancy rate for July 2024 was **76.76%** compared to data from the previous year of **83.89%** occupancy rate; this shows an overall percentage point decrease of **7.13**.

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

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

Room Occupancy	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Guest House/B&B	76.76%	83.89%	-7.13	93	61.08%	75.84%	-14.76	85

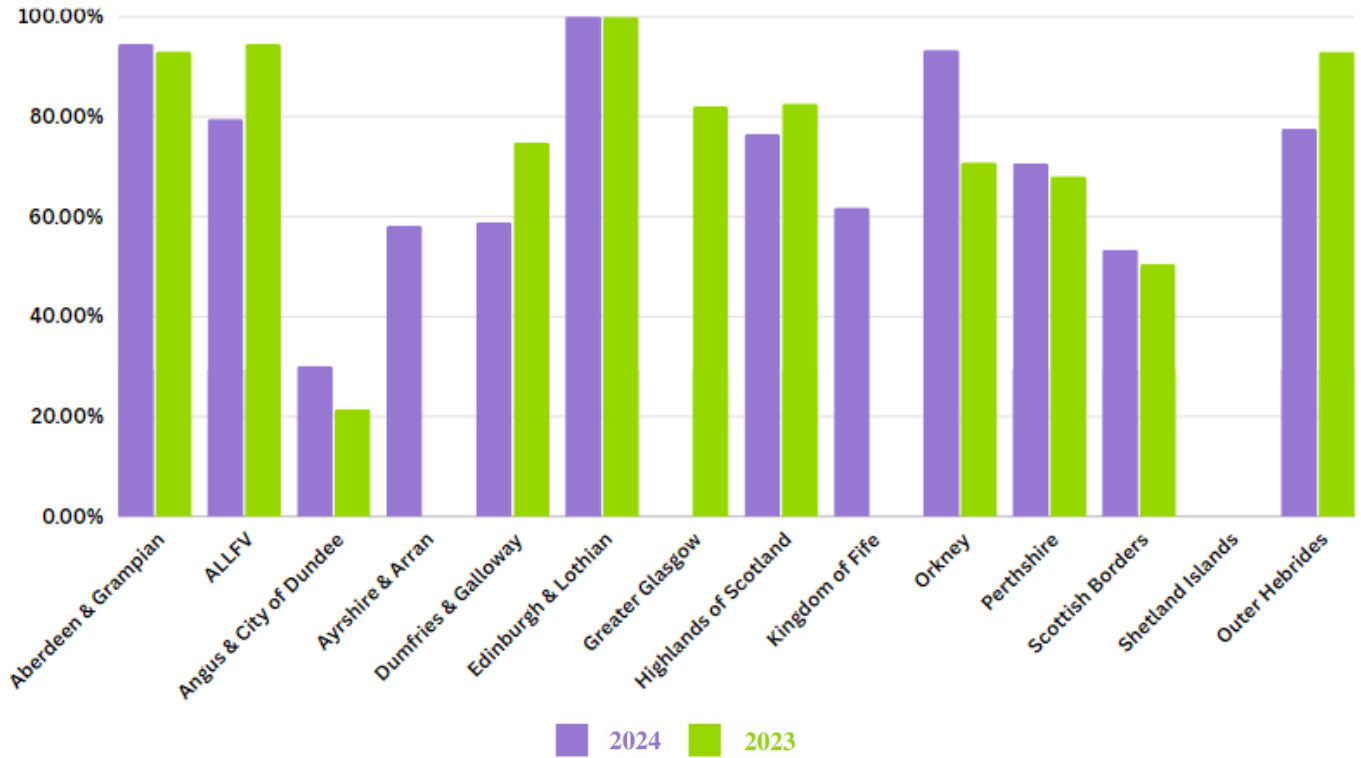
In the **Guest House/B&B** sector, the bed occupancy rate for July 2024 was **91.18%** compared to data from the previous year of **82.57%** occupancy rate; this shows an overall percentage point increase of **8.61**.

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

Bed Occupancy	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Guest House/B&B	91.18%	82.57%	8.61	109	65.30%	69.98%	-4.68	95

Room Occupancy by Former Visit Scotland Area

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



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

Area	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	94.57%	*	1.56	102	64.95%	93.51%	-28.56	71
ALLFV	79.57%	94.59%	-15.02	85	55.12%	84.50%	-29.38	71
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	-	*	*	58.84%	-	58.84	159
Dumfries & Galloway	*	*	*	*	42.85%	77.54%	-34.69	65
Edinburgh & Lothian	*	*	*	*	95.36%	*	1.05	101
Greater Glasgow	-	*	*	*	-	72.97%	-72.97	27
Highlands of Scotland	76.53%	*	-6.12	94	65.10%	73.96%	-8.86	91
Kingdom of Fife	*	-	*	*	48.58%	-	48.58	149
Orkney	*	*	*	*	45.88%	40.11%	5.77	106
Perthshire	70.63%	*	2.61	103	51.15%	62.11%	-10.96	89
Scottish Borders	53.41%	*	2.90	103	34.62%	43.23%	-8.61	91
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	*	*	*	*	70.40%	72.98%	-2.58	97

- Sample Size = Nil

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

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

Area	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	98.27%	*	4.84	105	57.48%	93.89%	-36.41	64
ALLFV	96.53%	94.68%	1.85	102	57.46%	82.49%	-25.03	75
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	-	*	*	11.74%	-	11.74	112
Dumfries & Galloway	*	*	*	*	25.20%	68.58%	-43.38	57
Edinburgh & Lothian	*	*	*	*	95.38%	*	26.40	126
Greater Glasgow	-	*	*	*	-	71.98%	-71.98	28
Highlands of Scotland	94.51%	*	13.22	113	74.17%	71.64%	2.53	103
Kingdom of Fife	*	-	*	*	46.89%	-	46.89	147
Orkney	*	*	*	*	50.16%	32.33%	17.83	118
Perthshire	49.11%	*	-13.68	86	58.67%	50.52%	8.15	108
Scottish Borders	23.43%	*	-16.95	83	28.33%	39.45%	-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) – July 2024/2023

Location accessibility/density	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	*	*	*	*	90.51%	88.97%	1.54	102
Other Urban Areas	*	*	*	*	67.82%	95.49%	-27.67	72
Accessible Small Towns	74.42%	77.52%	-3.10	97	59.33%	67.37%	-8.04	92
Remote Small Towns	76.49%	*	7.13	107	65.45%	65.77%	-0.32	100
Accessible Rural	73.92%	*	-12.31	88	48.93%	88.72%	-39.79	60
Remote Rural	68.56%	80.21%	-11.65	88	55.62%	67.12%	-11.50	89
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	*	*	*	*	95.64%	71.45%	24.19	124
Other Urban Areas	*	*	*	*	60.97%	94.14%	-33.17	67
Accessible Small Towns	88.44%	77.88%	10.56	111	61.43%	70.81%	-9.38	91
Remote Small Towns	0.00%	*	-63.70	36	47.31%	57.38%	-10.07	90
Accessible Rural	74.55%	*	-8.84	91	44.28%	86.29%	-42.01	58
Remote Rural	94.53%	77.49%	17.04	117	59.65%	63.88%	-4.23	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	72.12%	*	5.34	105	52.56%	51.19%	1.37	101
Inland	76.40%	85.22%	-8.82	91	61.38%	79.23%	-17.85	82
Island	83.72%	*	-6.95	93	68.45%	83.32%	-14.87	85
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	71.77%	*	6.96	107	43.94%	48.32%	-4.38	96
Inland	90.52%	84.13%	6.39	106	67.16%	72.07%	-4.91	95
Island	99.15%	*	9.23	109	81.09%	82.80%	-1.71	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by Size– July 2024/2023

Size	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	69.67%	79.38%	-9.71	90	52.70%	65.23%	-12.53	87
4 to 10	81.52%	87.55%	-6.03	94	67.50%	84.73%	-17.23	83
11 to 25	*	*	*	*	71.08%	72.97%	-1.89	98
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 – July 2024/2023

Size	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	84.95%	76.71%	8.24	108	55.20%	63.82%	-8.62	91
4 to 10	92.71%	87.17%	5.54	106	71.56%	75.69%	-4.13	96
11 to 25	*	*	*	*	97.96%	71.98%	25.98	126
26 to 50	-	-	-	-	-	-	-	-
51 to 100	-	-	-	-	-	-	-	-
Over 100	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



Moffat Centre

Room Occupancy by Tariff – July 2024/2023

Tariff	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	71.94%	*	20.33	120	59.56%	*	17.69	118
£40 – 49.99	62.46%	*	12.73	113	53.66%	56.73%	-3.07	97
£50 – 59.99	73.52%	*	-18.43	82	57.30%	*	-36.65	63
£60 – £69.00	*	*	*	*	44.44%	92.22%	-47.78	52
£70+	84.26%	83.61%	0.65	101	64.68%	73.56%	-8.88	91

- Sample Size = Nil

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

Bed Occupancy by Tariff – July 2024/2023

Tariff	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	88.87%	*	41.45	141	63.70%	*	26.32	126
£40 – 49.99	68.88%	*	21.68	122	55.26%	64.80%	-9.54	90
£50 – 59.99	94.98%	*	3.03	103	71.60%	*	-21.20	79
£60 – £69.00	*	*	*	*	54.20%	86.73%	-32.53	67
£70+	96.47%	82.81%	13.66	114	68.74%	65.29%	3.45	103

- Sample Size = Nil

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

Room Occupancy by Grading – July 2024/2023

Grading	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	81.09%	86.58%	-5.49	95	63.61%	74.38%	-10.77	89
4 Stars	74.65%	*	13.27	113	59.68%	56.98%	2.70	103
5 Stars	*	-	*	*	41.65%	-	41.65	142
Unclassified	*	72.43%	17.34	117	57.28%	56.18%	1.10	101

- Sample Size = Nil

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

Bed Occupancy by Grading – July 2024/2023

Grading	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	87.65%	82.60%	5.05	105	63.89%	68.30%	-4.41	96
4 Stars	80.00%	*	23.76	124	58.99%	55.93%	3.06	103
5 Stars	*	-	*	*	32.63%	-	32.63	133
Unclassified	*	71.09%	-71.09	29	51.34%	54.13%	-2.79	97

- Sample Size = Nil

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