

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

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

#### 1.0 Introduction June 2024/2023

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

The SOAS Report: June 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 June 2024 experienced an **6.39** percentage point increase when comparing percentage room occupancy rates with June 2023. Occupancy rates within the Guest House/B&B sector experienced a **2.48** percentage point increase in June 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 June 2024 is 2.0%. The inflation rate for June 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.9%. Inflation rates for restaurants and cafes were 6.2% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.6% in June, however, compared to the 8.8% increase in June 2023 this was disappointing growth in total sales. Total food sales decreased by 1.1% compared to the monthly performance of June 2023, when they had increased by 15.8%.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the May 2024 survey). The survey recorded 44% of respondents (a 2% decrease on the May 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

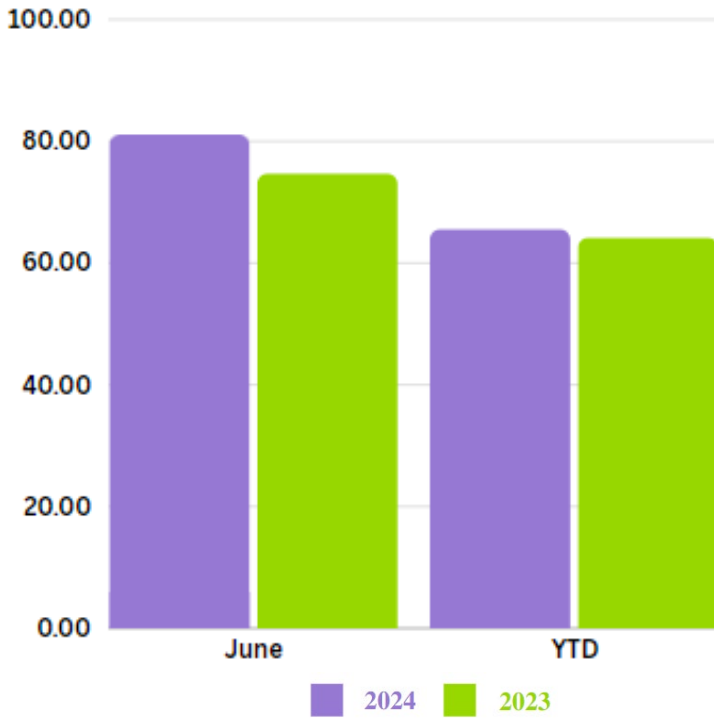
Despite consumer concern about the state of the economy, 55% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, 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 figures above have been consistent across the last five 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 stalled in June 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw no 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.

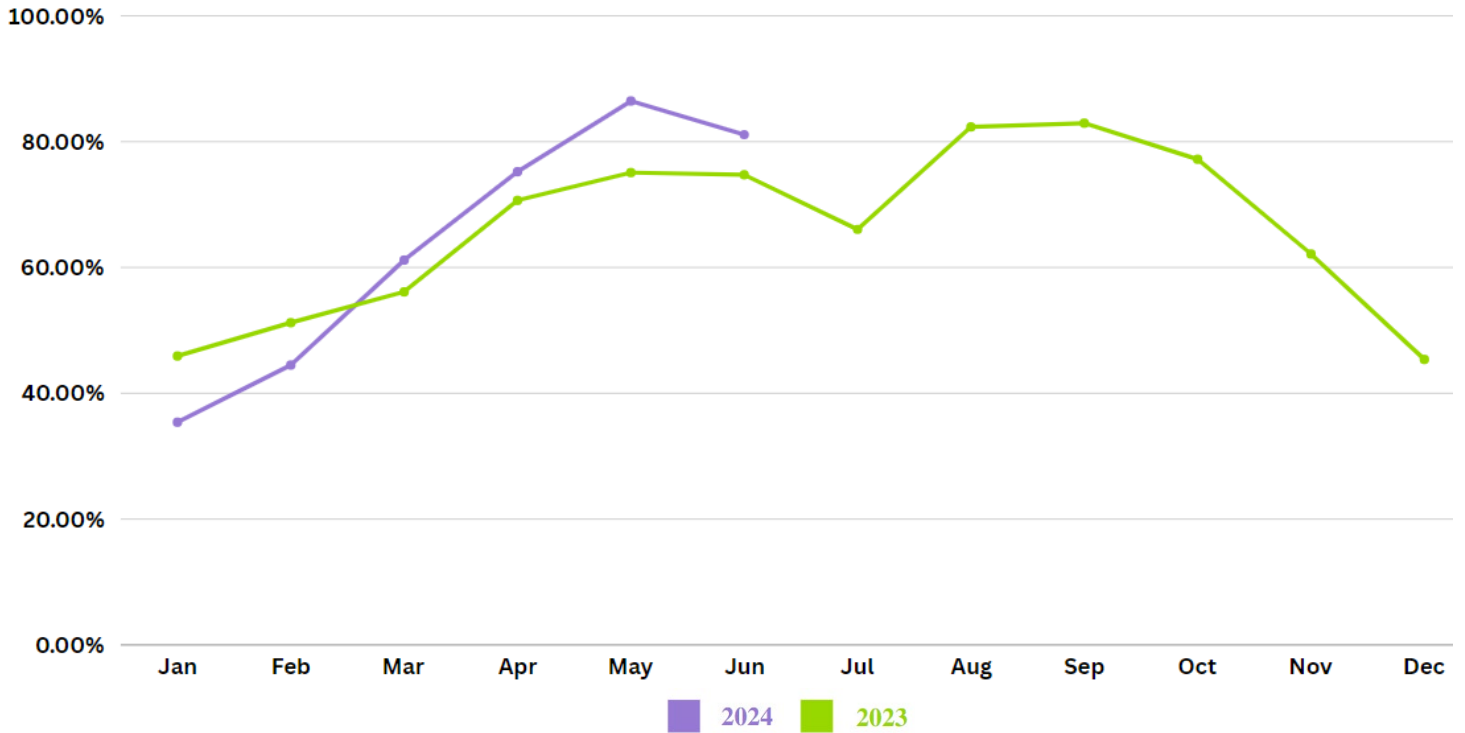
### All Serviced Accommodation

#### Room Occupancy – June 2024/2023

Scottish Serviced Accommodation room occupancy for June 2024 experienced a **6.39** percentage point increase when comparing percentage room occupancy rates with June 2023.



#### Room Occupancy – Year-to-Date



Room Occupancy	June 24	June 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	81.12%	74.73%	6.39	106	65.60%	64.20%	1.40	101

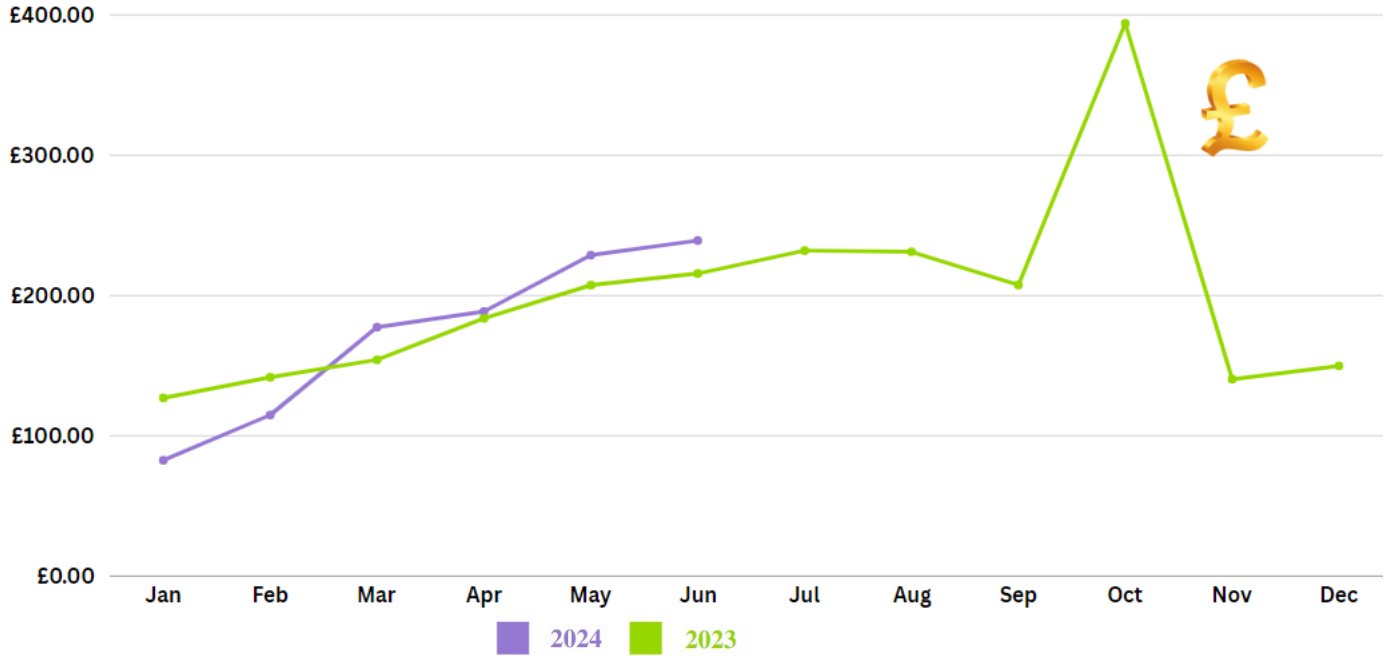
  

Bed Occupancy	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	81.61%	65.84%	15.77	116	62.49%	53.94%	8.55	109

The Revenue per available occupied room for June 2024 was **£239.20** compared with **£215.66** in June 2023. This figure is based solely on accommodation providers who provided financial information for either June 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 (£)	June 24	June 23
All Serviced Accommodation	£239.20	£215.66

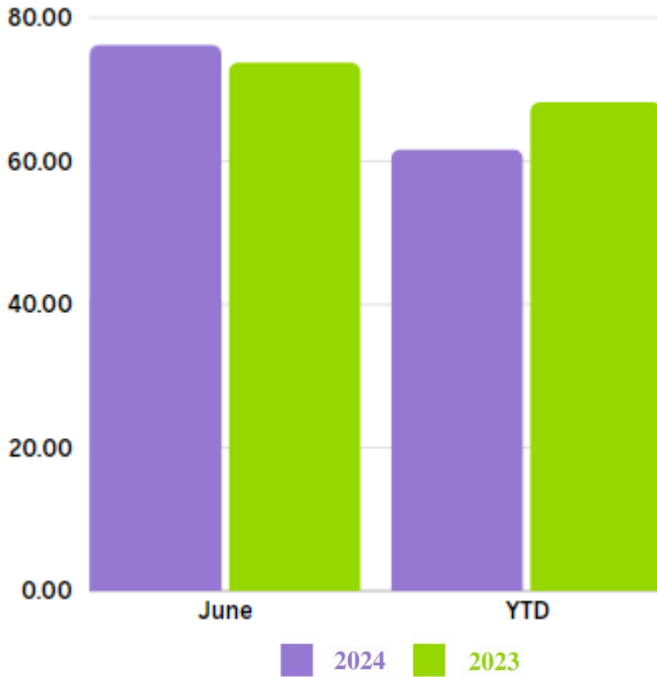
**RevPAR by Grading- June 2024/21**

Grading – Average RevPAR (£)	June 24	June 23
2 Stars	£158.23	£119.61
3 Stars	£161.10	£143.28
4 Stars	£180.36	£209.31
5 Stars	£251.96	£214.88
Unclassified	£57.04	£103.54

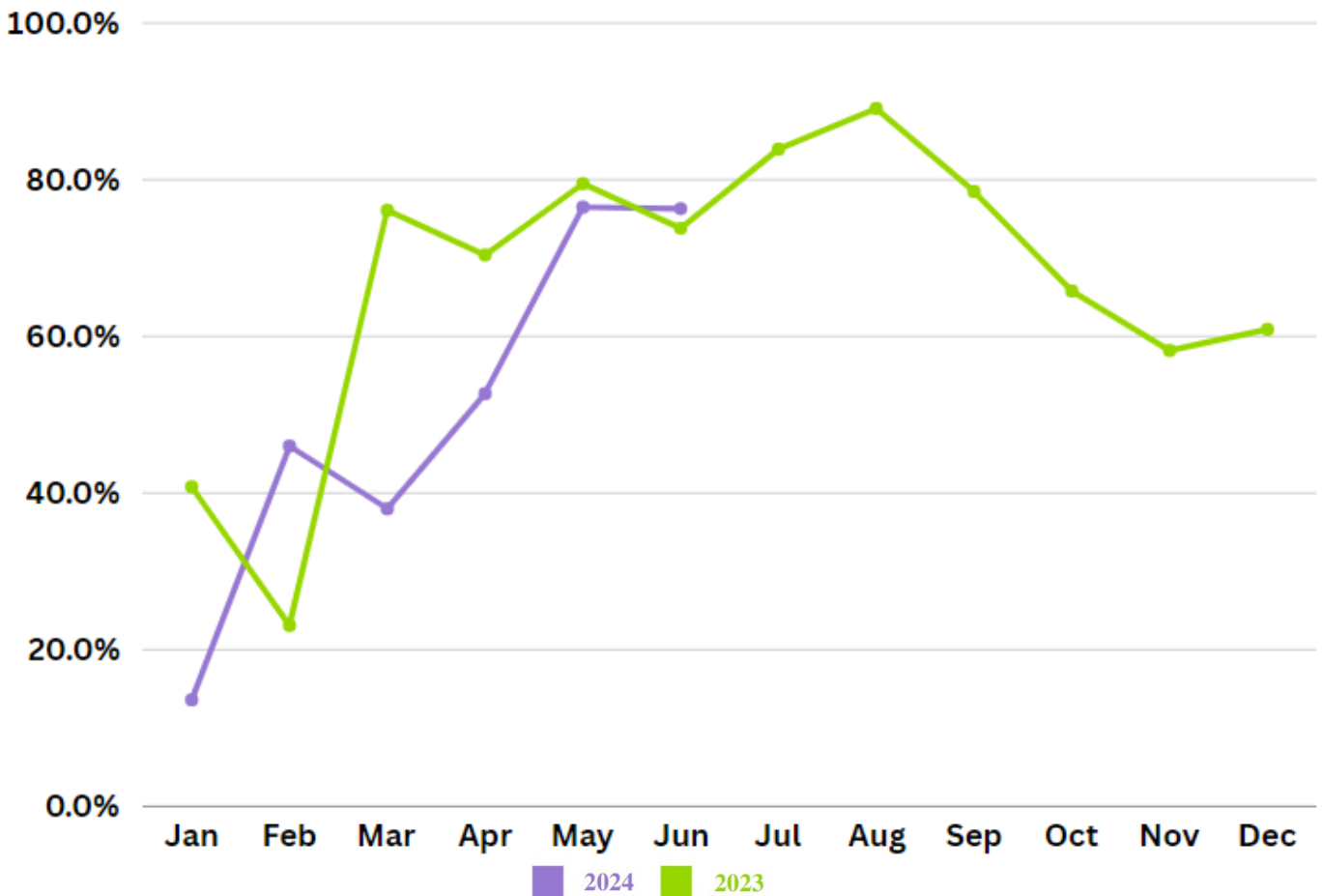
**3.0 Serviced Accommodation – Guest House/B&B Sector**

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

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



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



In the Guest House/B&B sector, the room occupancy rate for June 2024 was **76.27%** compared to data from the previous year of **73.79%** occupancy rate; this shows an overall percentage point increase of **2.48**.

Percentage room occupancy rates for Guest Houses/B&B (sample size >4) in Aberdeen & Grampian with the percentage bed occupancy rates in the Highlands of Scotland Region were the highest in June 2024. Operators in Island locations and properties charging a tariff between £50.00 and £59.99 fared best in room occupancy rates in June 2024.

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

Room Occupancy	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	76.27%	73.79%	2.48	102	61.68%	68.25%	-6.57	93

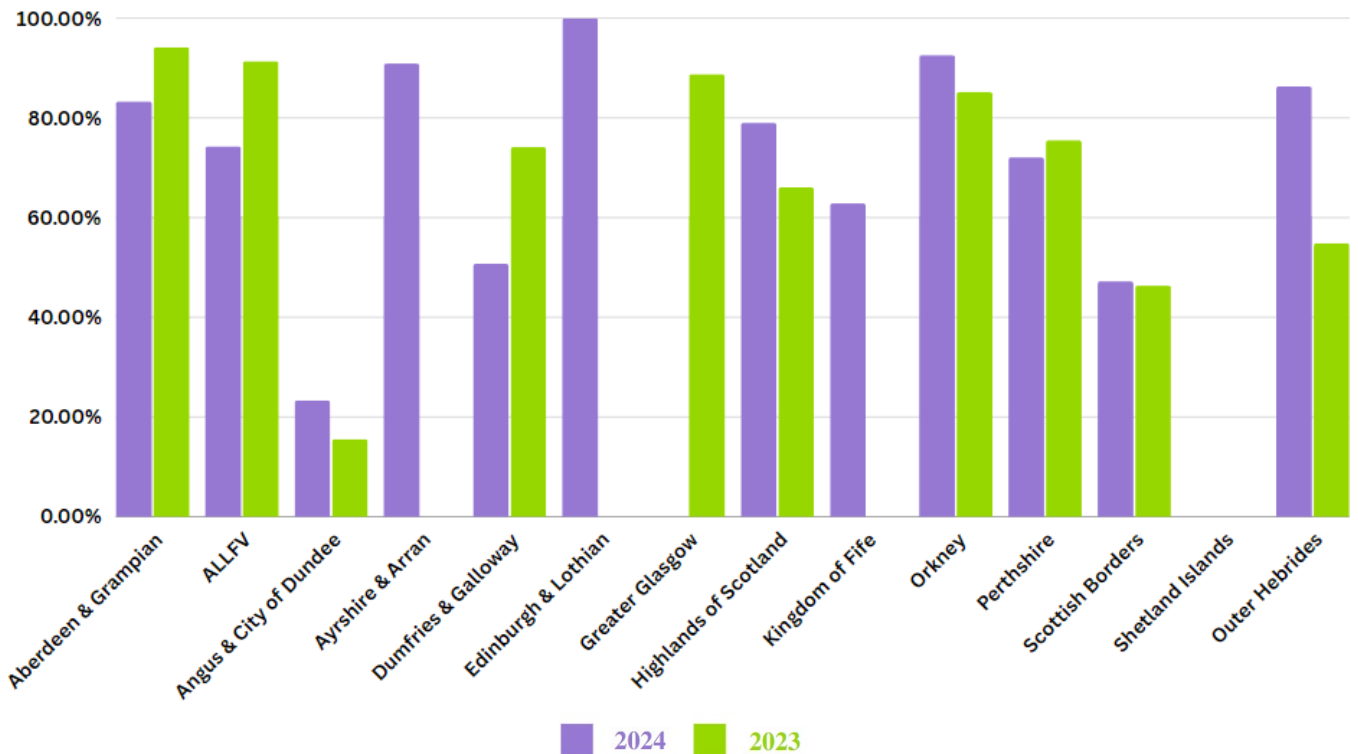
In the **Guest House/B&B** sector, the bed occupancy rate for June 2024 was **86.77%** compared to data from the previous year of **73.34%** occupancy rate; this shows an overall percentage point increase of **13.43**.

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

Bed Occupancy	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	86.77%	73.34%	13.43	113	65.05%	66.36%	-1.31	99

### Room Occupancy by Former Visit Scotland Area

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



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

Area	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	83.24%	*	-10.93	89	57.15%	*	-36.74	63
ALLFV	74.30%	91.38%	-17.08	83	60.06%	79.69%	-19.63	80
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	-	*	*	68.37%	-	68.37	168
Dumfries & Galloway	*	*	*	*	39.22%	79.37%	-40.15	60
Edinburgh & Lothian	*	-	*	*	94.05%	-	94.05	194
Greater Glasgow	-	*	*	*	-	*	*	*
Highlands of Scotland	79.02%	*	12.96	113	65.06%	70.81%	-5.75	94
Kingdom of Fife	*	-	*	*	54.62%	-	54.62	155
Orkney	*	*	*	*	42.47%	35.44%	7.03	107
Perthshire	72.09%	*	-3.39	97	55.36%	*	-13.71	86
Scottish Borders	47.20%	*	0.84	101	34.24%	41.80%	-7.56	92
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	66.86%	67.17%	-0.31	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Area	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	88.42%	*	-6.15	94	50.88%	*	-43.37	57
ALLFV	81.89%	90.98%	-9.09	91	65.83%	79.32%	-13.49	87
Angus & City of Dundee	*	*	*	*	*	*	*	*
Ayrshire & Arran	*	-	*	*	27.92%	-	27.92	128
Dumfries & Galloway	*	*	*	*	25.20%	66.38%	-41.18	59
Edinburgh & Lothian	*	-	*	*	94.05%	-	94.05	194
Greater Glasgow	-	*	*	*	-	*	*	*
Highlands of Scotland	96.57%	*	35.16	135	68.27%	68.14%	0.13	100
Kingdom of Fife	*	-	*	*	53.51%	-	53.51	154
Orkney	*	*	*	*	39.19%	27.74%	11.45	111
Perthshire	58.43%	*	-5.44	95	69.86%	*	22.65	123
Scottish Borders	51.10%	*	8.99	109	35.64%	39.20%	-3.56	96
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) – June 2024/2023

Location accessibility/density	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	87.69%	*	-1.72	98	87.34%	69.66%	17.68	118
Other Urban Areas	*	*	*	*	69.26%	94.86%	-25.60	74
Accessible Small Towns	73.50%	75.03%	-1.53	98	55.82%	61.82%	-6.00	94
Remote Small Towns	82.64%	*	16.04	116	69.59%	64.73%	4.86	105
Accessible Rural	69.41%	*	-30.59	69	54.00%	*	-43.33	57
Remote Rural	62.09%	59.78%	2.31	102	54.57%	62.64%	-8.07	92
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location accessibility/density	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	97.31%	*	7.82	108	93.59%	68.74%	24.85	125
Other Urban Areas	*	*	*	*	56.74%	92.85%	-36.11	64
Accessible Small Towns	83.67%	79.03%	4.64	105	57.28%	66.12%	-8.84	91
Remote Small Towns	85.89%	*	25.36	125	71.55%	55.56%	15.99	116
Accessible Rural	76.50%	*	-23.50	77	55.52%	*	-41.81	58
Remote Rural	87.73%	55.19%	32.54	133	57.05%	59.27%	-2.22	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	70.13%	*	11.06	111	44.16%	*	-1.89	98
Inland	76.37%	79.73%	-3.36	97	64.53%	71.21%	-6.68	93
Island	83.59%	78.83%	4.76	105	71.25%	80.18%	-8.93	91
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	87.84%	*	32.87	133	39.23%	*	-3.53	96
Inland	85.23%	80.22%	5.01	105	71.33%	69.80%	1.53	102
Island	95.70%	87.23%	8.47	108	77.05%	79.75%	-2.70	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	70.70%	62.84%	7.86	108	59.75%	59.52%	0.23	100
4 to 10	79.55%	84.08%	-4.53	95	62.42%	79.83%	-17.41	83
11 to 25	*	*	*	*	68.71%	*	-1.39	99
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 – June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	79.36%	62.20%	17.16	117	64.97%	58.36%	6.61	107
4 to 10	91.55%	82.49%	9.06	109	64.38%	75.93%	-11.55	88
11 to 25	*	*	*	*	97.96%	*	29.58	130
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 – June 2024/2023

Tariff	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	74.24%	*	74.24	174
£40 – 49.99	65.58%	*	30.50	131	52.99%	58.05%	-5.06	95
£50 – 59.99	83.42%	-	83.42	183	61.59%	*	-33.81	66
£60 – £69.00	*	*	*	*	45.69%	91.43%	-45.74	54
£70+	78.98%	73.06%	5.92	106	64.79%	61.77%	3.02	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Tariff	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	73.20%	*	73.20	173
£40 – 49.99	75.19%	*	11.32	111	48.47%	69.38%	-20.91	79
£50 – 59.99	95.00%	-	95.00	195	65.21%	*	-28.21	72
£60 – £69.00	*	*	*	*	54.20%	84.84%	-30.64	69
£70+	88.17%	70.69%	17.48	117	69.10%	59.26%	9.84	110
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Grading	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	83.64%	82.63%	1.01	101	71.38%	70.61%	0.77	101
4 Stars	76.36%	*	17.87	118	67.67%	55.63%	12.04	112
5 Stars	*	-	*	*	40.02%	-	40.02	140
Unclassified	*	63.13%	19.56	120	41.39%	50.96%	-9.57	90
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Grading	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	84.58%	83.79%	0.79	101	69.89%	63.62%	6.27	106
4 Stars	78.15%	*	18.52	119	68.53%	55.83%	12.70	113
5 Stars	*	-	*	*	32.46%	-	32.46	132
Unclassified	*	59.75%	22.99	123	41.31%	48.58%	-7.27	93
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					