

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

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

#### 1.0 Introduction May 2024/2023

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

The SOAS Report: May 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 May 2024 experienced an **11.38** percentage point increase when comparing percentage room occupancy rates with May 2023. Occupancy rates within the Guest House/B&B sector experienced a **2.98** percentage point decrease in May 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 May 2024 is 2.0%, down from 2.3% in April. The inflation rate for May 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.1%. Inflation rates for restaurants and cafes were 5.8% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in May showed a 0.5% year-on-year decrease, it should be noted that May 2023 saw the King's Coronation and two Bank Holidays. With food inflation stabilising (lowest grocery inflation since October 2021), May 2024 saw total food sales increase by just under 1.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for May 2024 found that 20% 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 46% of respondents (a 2% decrease on the April 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

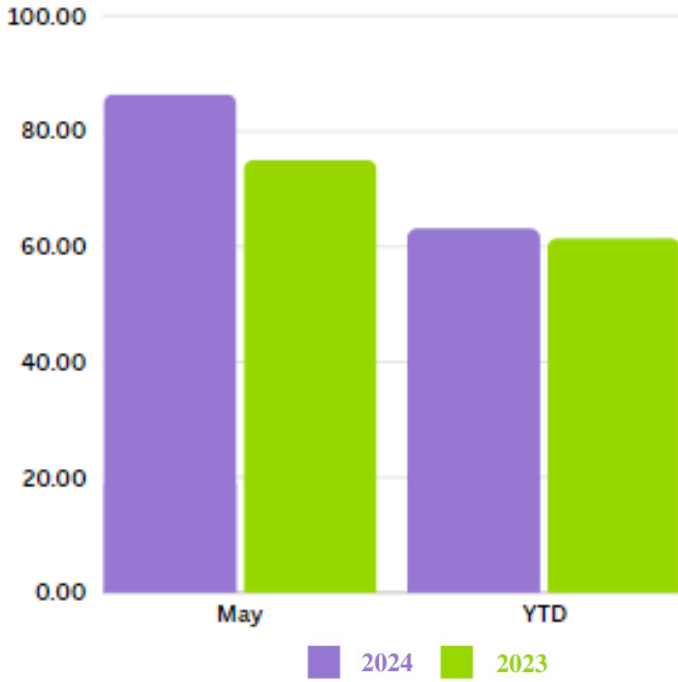
Despite consumer concern about the state of the economy, 25% of UK adults intended to take a domestic overnight trip in the second quarter of 2024, this is an increase compared with May 2023, with 76% of UK adults intending to take a domestic overnight trip in the following 12 months. However, the key 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 May 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 3% 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.

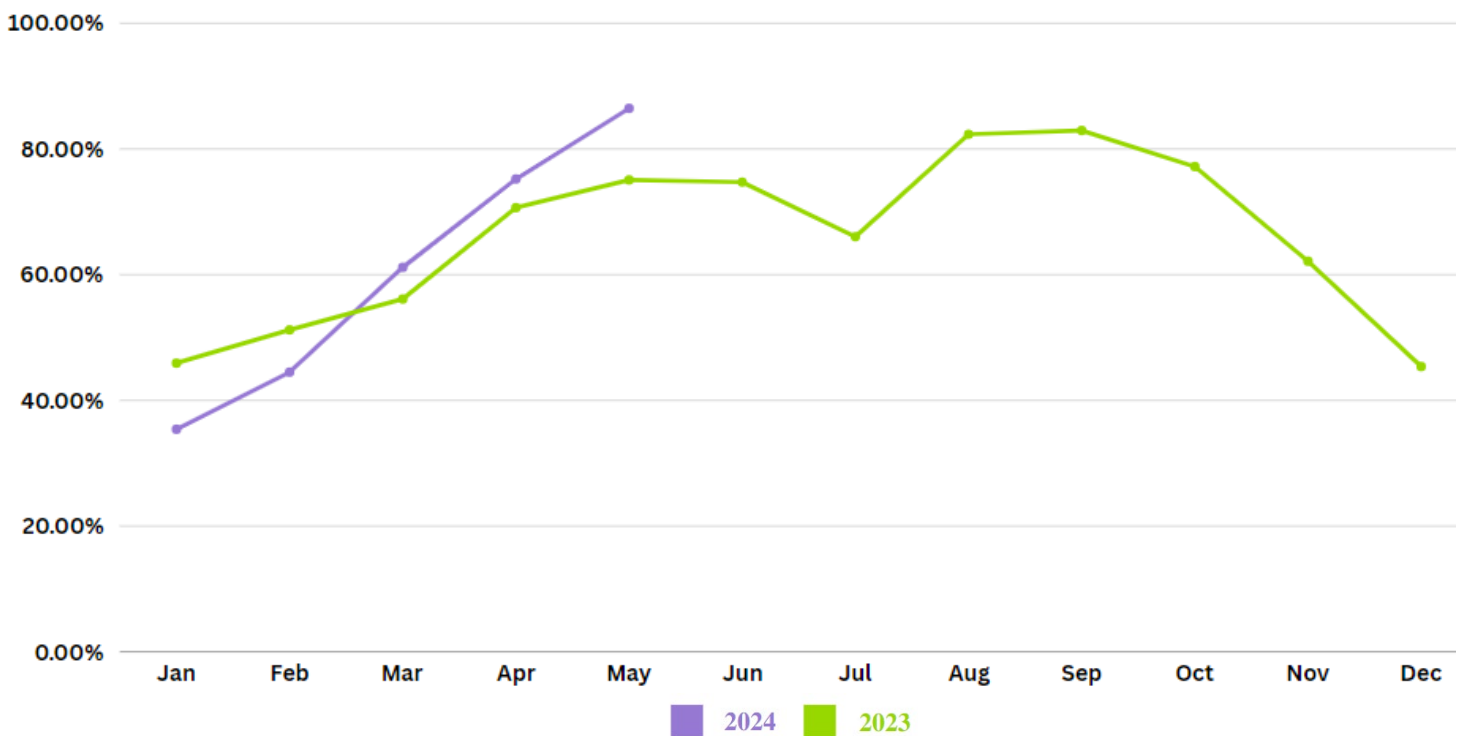
**All Serviced Accommodation**

**Room Occupancy – May 2024/2023**

Scottish Serviced Accommodation room occupancy for May 2024 experienced a **11.38** percentage point increase when comparing percentage room occupancy rates with May 2023.



**Room Occupancy – Year-to-Date**

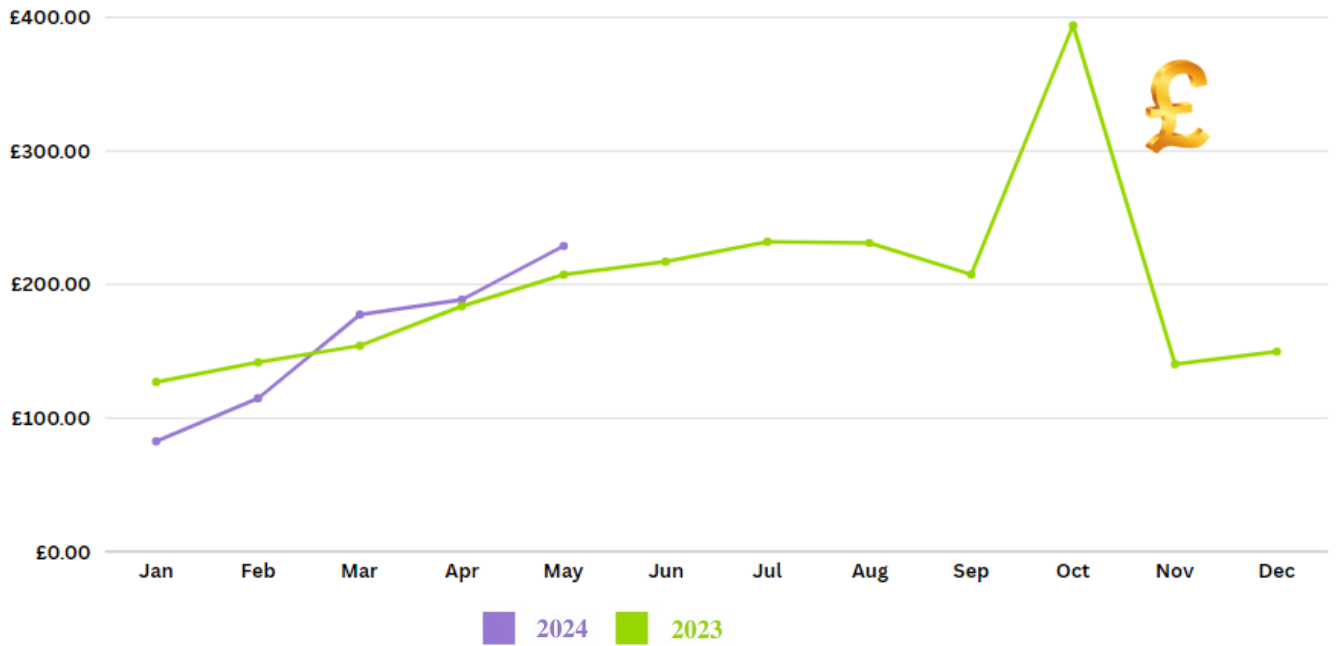


Room Occupancy	May 24	May 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	86.46%	75.08%	11.38	111	63.22%	61.51%	1.71	102

Bed Occupancy	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	79.18%	61.35%	17.83	118	58.90%	50.85%	8.05	108

The Revenue per available occupied room for May 2024 was **£228.80** compared with **£207.37** in May 2023. This figure is based solely on accommodation providers who provided financial information for either May 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 (£)	May 24	May 23
All Serviced Accommodation	£228.80	£207.37

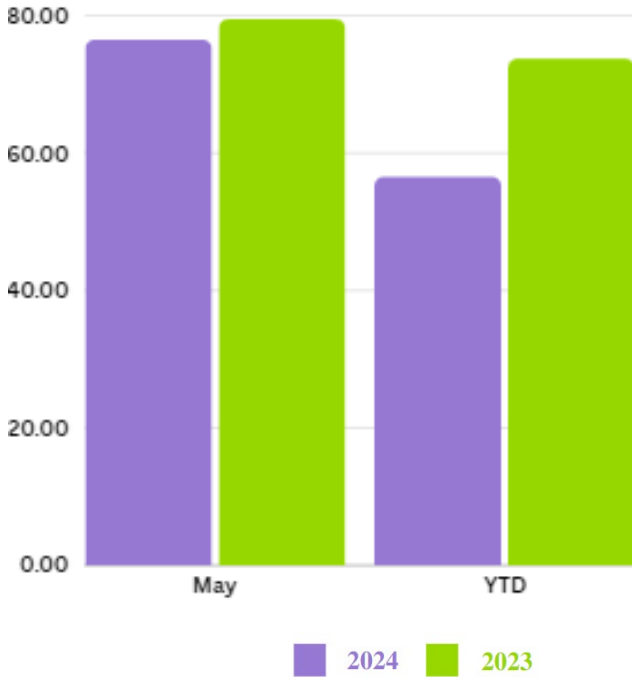
### RevPAR by Grading- May 2024/21

Grading – Average RevPAR (£)	May 24	May 23
2 Stars	£188.00	£139.09
3 Stars	£194.49	£179.46
4 Stars	£284.75	£236.86
5 Stars	£378.54	£407.04
Unclassified	£-	£147.21

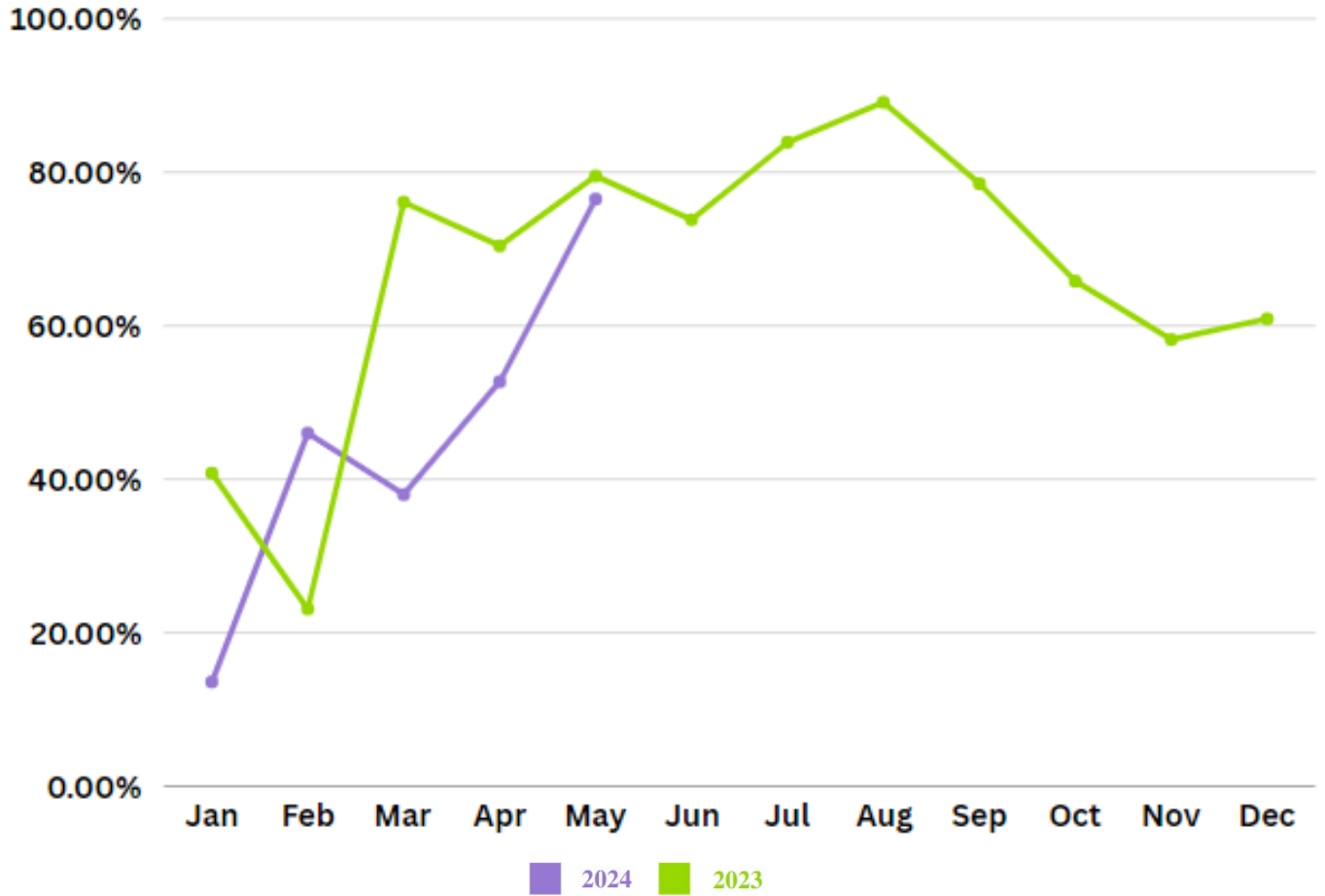
## 3.0 Serviced Accommodation – Guest House/B&B Sector

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

#### Guest House / B&B Room Occupancy – May 2024/2023



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



In the **Guest House/B&B** sector, the room occupancy rate for May 2024 was **76.53%** compared to data from the previous year of **79.51%** occupancy rate; this shows an overall percentage point decrease of **2.98**.

Percentage room occupancy rates for Hotels (sample size >4) in Aberdeen & Grampian with the percentage bed occupancy rates in the Highlands of Scotland Region were the highest in May 2024. Operators in Island locations and properties charging a tariff of £70.00+ fared best in room occupancy rates in May 2024.

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

Room Occupancy	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	76.53%	79.51%	-2.98	97	56.61%	73.78%	-17.17	83

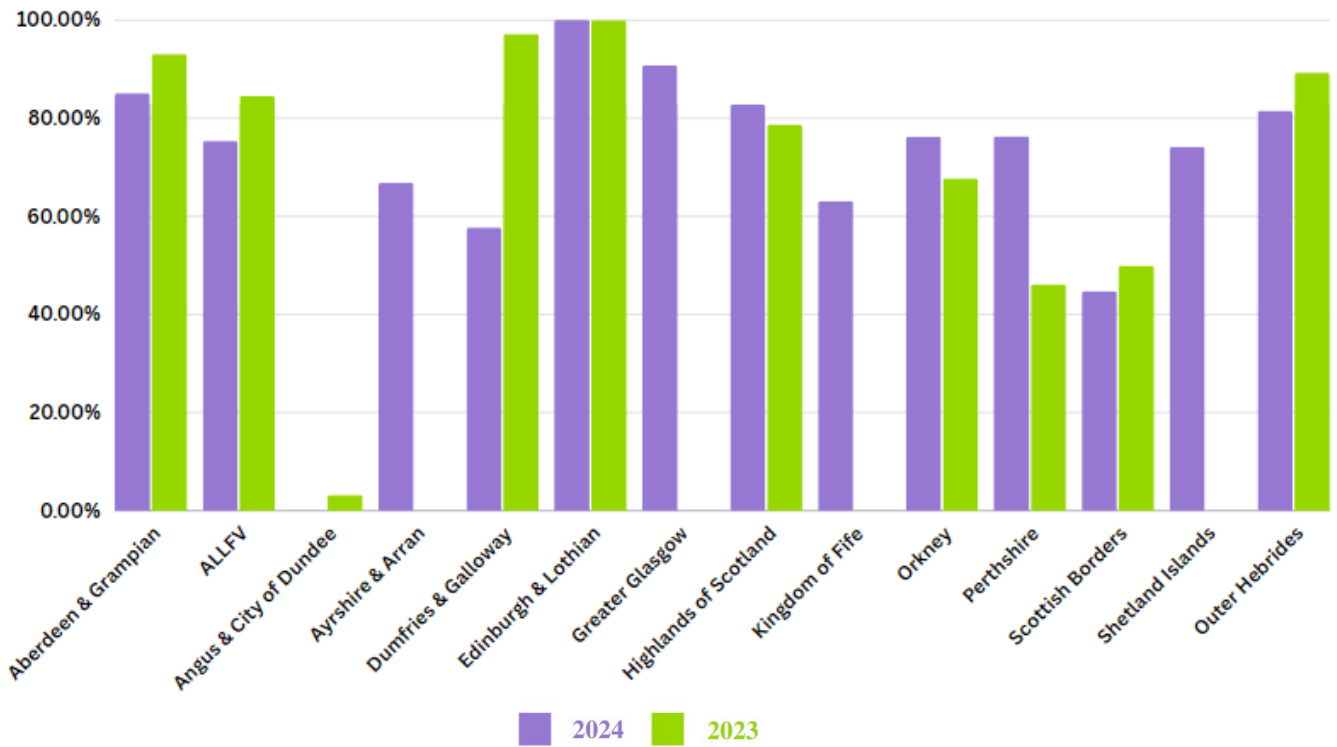
In the **Guest House/B&B** sector, the bed occupancy rate for May 2024 was **79.07%** compared to data from the previous year of **66.36%** occupancy rate; this shows an overall percentage point increase of **12.71**.

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

Bed Occupancy	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	79.07%	66.36%	12.71	113	59.01%	59.53%	-0.52	99

### Room Occupancy by Former Visit Scotland Area

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





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

Location accessibility/density	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	*	*	*	*	92.22%	*	63.31	163
Other Urban Areas	*	*	*	*	*	90.54%	-90.54	9
Accessible Small Towns	77.94%	72.22%	5.72	106	50.61%	55.78%	-5.17	95
Remote Small Towns	77.58%	*	19.00	119	70.10%	53.09%	17.01	117
Accessible Rural	71.98%	*	-7.33	93	51.26%	*	-28.05	72
Remote Rural	72.95%	72.94%	0.01	100	51.31%	61.12%	-9.81	90
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	74.55%	*	38.35	138	40.47%	*	11.66	112
Inland	75.58%	81.36%	-5.78	94	59.19%	78.33%	-19.14	81
Island	82.80%	92.04%	-9.24	91	66.94%	80.46%	-13.52	86
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	73.35%	*	38.01	138	37.12%	*	10.85	111
Inland	77.40%	63.27%	14.13	114	65.24%	58.49%	6.75	107
Island	91.90%	90.82%	1.08	101	72.57%	78.60%	-6.03	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Size	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	71.71%	70.46%	1.25	101	56.87%	59.15%	-2.28	98
4 to 10	79.79%	88.63%	-8.84	91	55.86%	85.59%	-29.73	70
11 to 25	*	-	*	*	63.02%	-	63.02	163
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 – May 2024/2023

Size	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	76.61%	71.69%	4.92	105	61.19%	58.24%	2.95	103
4 to 10	79.24%	60.82%	18.42	118	56.37%	61.20%	-4.83	95
11 to 25	*	-	*	*	97.96%	-	97.96	198
26 to 50	-	-	-	-	-	-	-	-
51 to 100	-	-	-	-	-	-	-	-
Over 100	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



