



# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

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

### 1.0 Introduction October 2024/2023

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

The SOAS Report: October 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 October 2024 experienced an **4.81** percentage point decrease when comparing percentage room occupancy rates with October 2023. Occupancy rates within the Guest House/B&B sector experienced a **12.65** percentage point decrease in October 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 October 2024 is 2.3%, up from 1.7% in September. The CPI 12-month rate (%) for October 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.0% down from 3.8% in September. Inflation rates for restaurants and cafes were 4.3% up from 4.1% in September.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 0.7% in October, however, compared to the 2.9% increase in October 2023 this was disappointing growth in total sales.

Domestic consumer sentiment provided by the GB National Tourist Boards for October 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2024 survey). The survey recorded 45% of respondents (a 2% decrease on the September 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 two months of 2024 and 78% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (78%). 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 previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

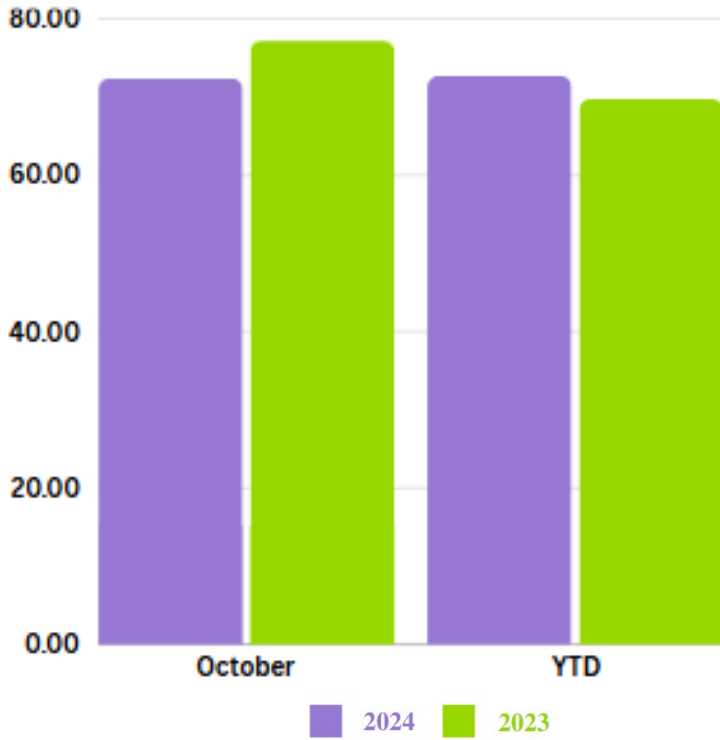
Eurocontrol (European Air Traffic Agency) indicated in October 2024 that UK air connectivity saw a 3% increase when compared to the same period in 2023, also, UK air connectivity saw a 3% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for October 2024 global air passenger demand, measured by revenue per kilometer, was up 7.1% compared to October 2023. International demand rose 9.5% over the same period with domestic demand increasing 3.5%. Asia-Pacific region was the biggest global air passenger growth driver in October 2024 at 12.7% when compared to Europe.



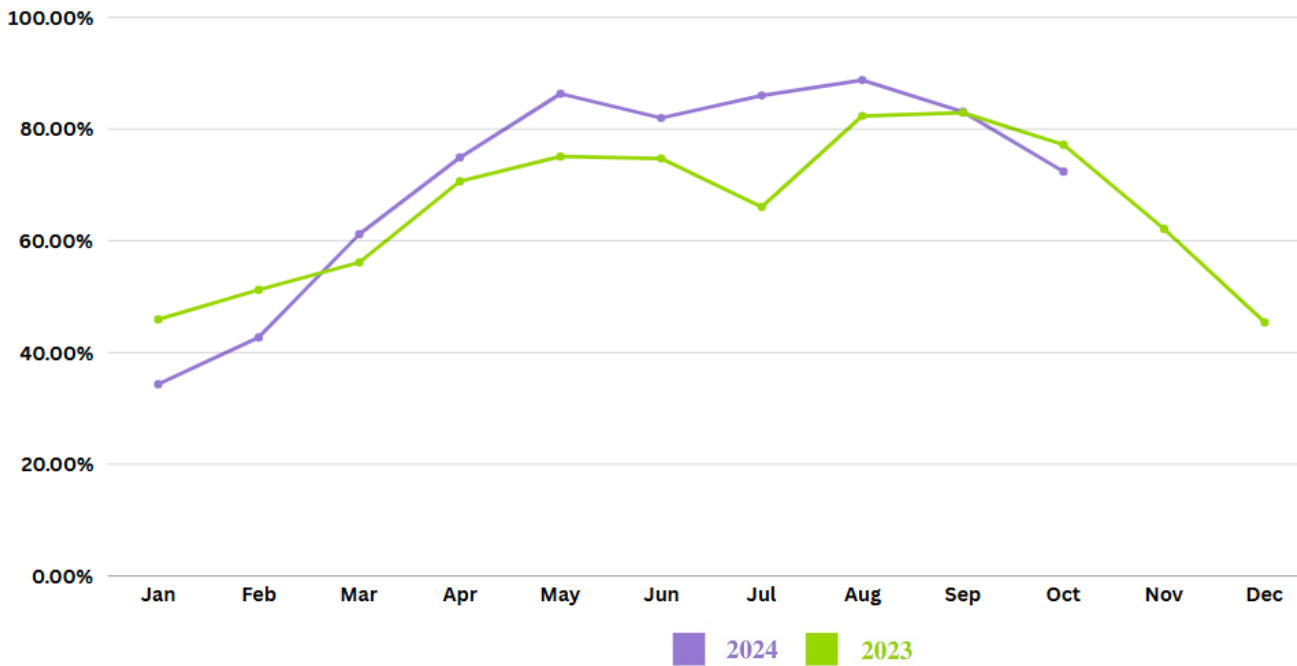
### All Served Accommodation

#### Room Occupancy – October 2024/2023

Scottish Served Accommodation room occupancy for October 2024 experienced a **4.81** percentage point decrease when comparing percentage room occupancy rates with October 2023.



#### Room Occupancy – Year-to-Date



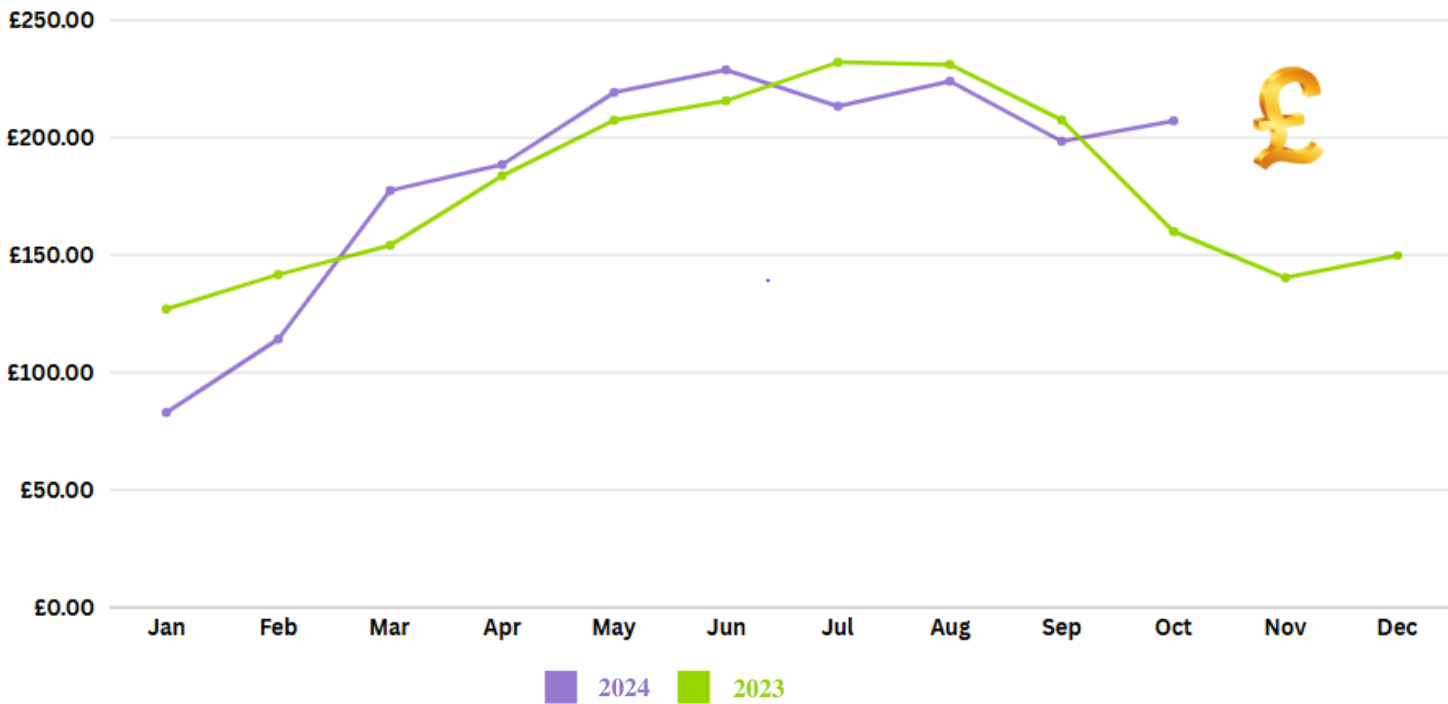


Room Occupancy	October 24	October 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	72.39%	77.20%	-4.81	95	72.70%	69.73%	2.97	103

Bed Occupancy	October 24	October 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>All Serviced Accommodation</b>	64.68%	65.01%	-0.33	100	65.49%	58.88%	6.61	107

The Revenue per available occupied room for October 2024 was **£207.12** compared with **£160.00** in October 2023. This figure is based solely on accommodation providers who provided financial information for either October 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 (£)	October 24	October 23
All Serviced Accommodation	£207.12	£160.00

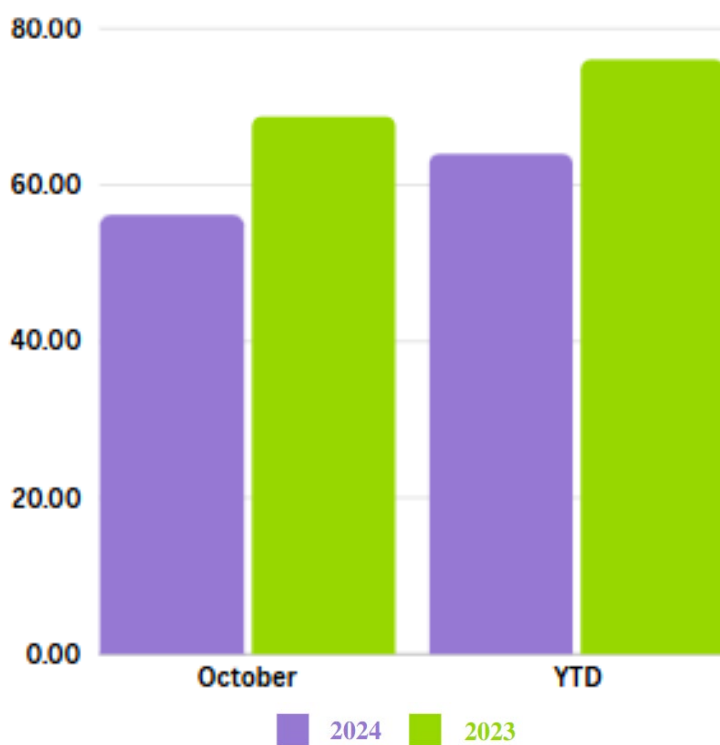
### RevPAR by Grading- October 2024/21

Grading – Average RevPAR (£)	October 24	October 23
2 Stars	£171.57	£187.69
3 Stars	£231.50	£97.38
4 Stars	£156.56	£203.24
5 Stars	£315.87	£306.56
Unclassified	£	£

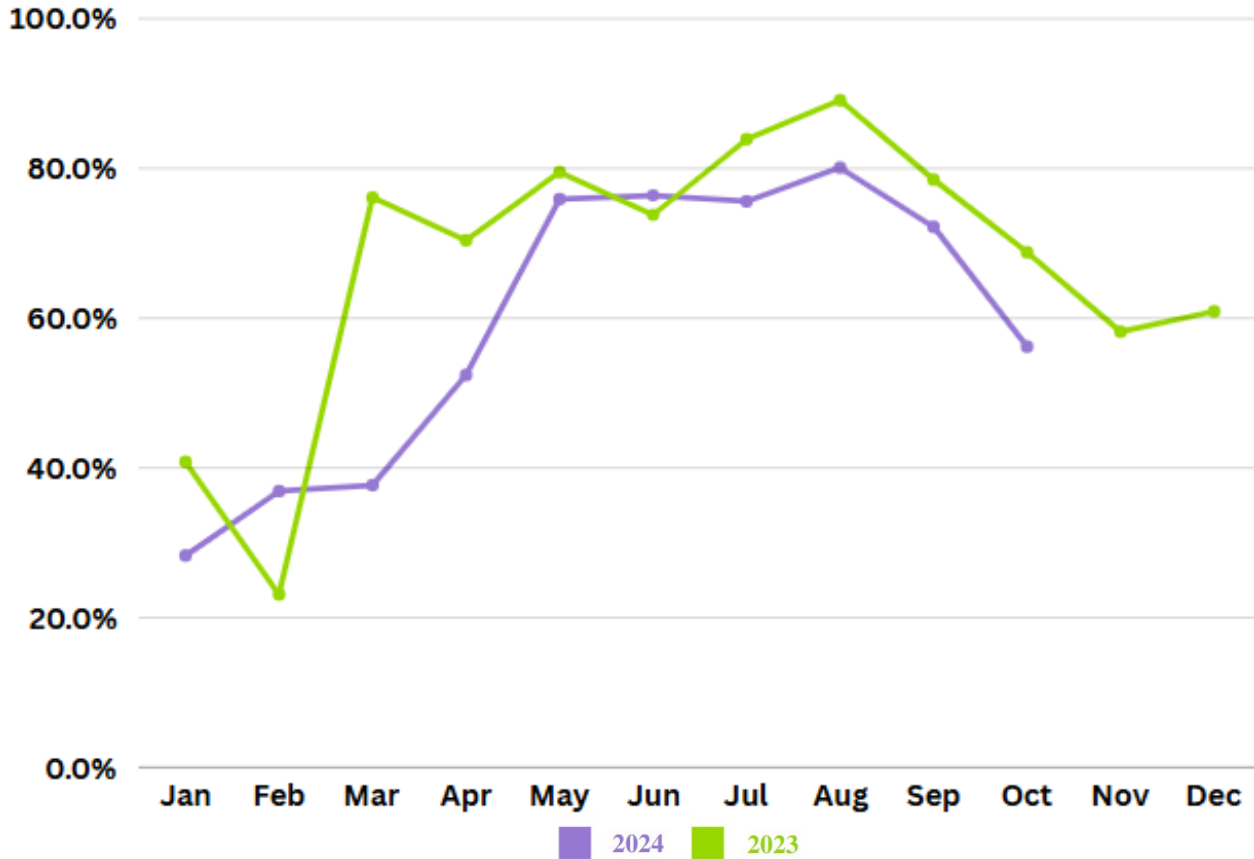
## 3.0 Serviced Accommodation – Guest House/B&B Sector

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

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



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



In the **Guest House/B&B sector**, the room occupancy rate for October 2024 was **56.18%** compared to data from the previous year of **68.83%** occupancy rate; this shows an overall percentage point decrease of **12.65**.

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

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

Room Occupancy	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	56.18%	68.83%	-12.65	87	64.02%	76.10%	-12.08	88

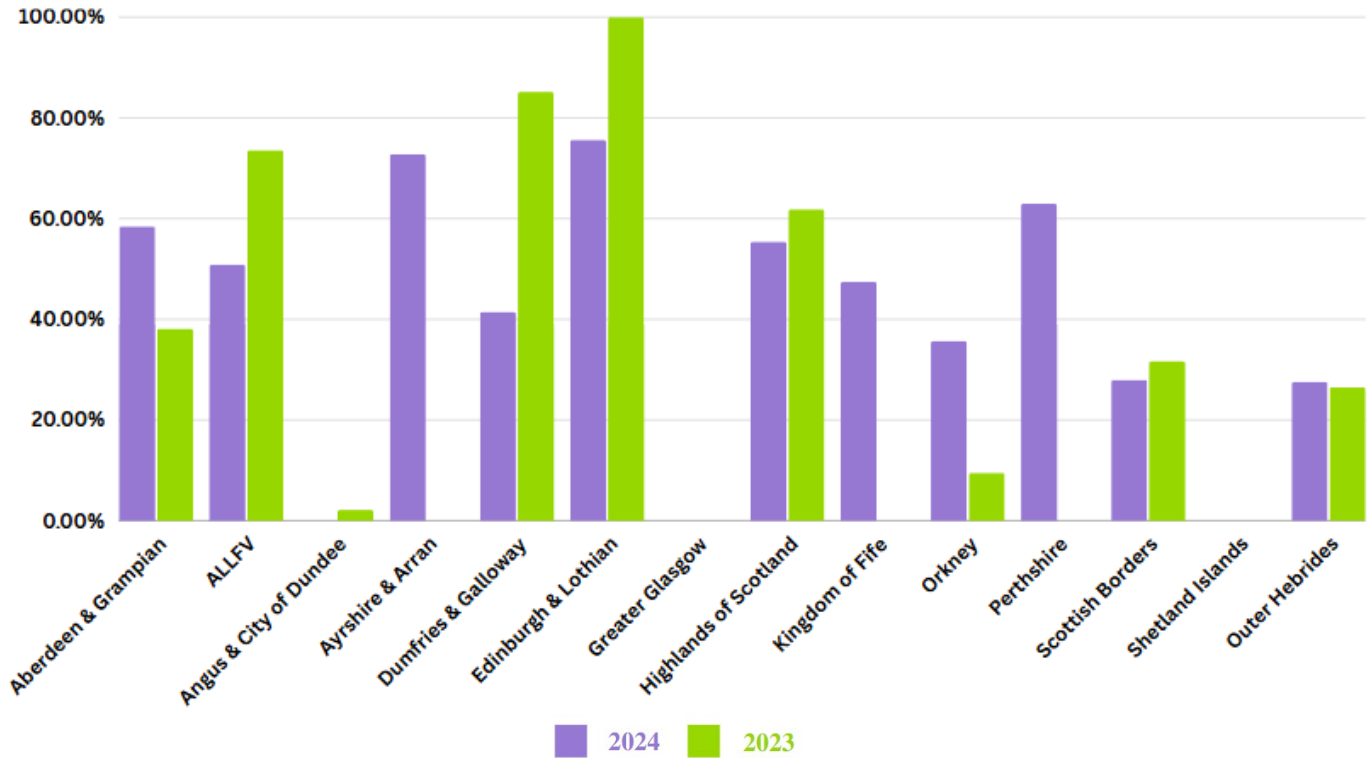
In the **Guest House/B&B sector**, the bed occupancy rate for October 2024 was **44.56%** compared to data from the previous year of **72.10%** occupancy rate; this shows an overall percentage point decrease of **27.54**.

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

Bed Occupancy	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
<b>Guest House/B&amp;B</b>	44.56%	72.10%	-27.54	72	68.01%	73.24%	-5.23	95

### Room Occupancy by Former Visit Scotland Area

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



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

Area	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	58.45%	*	20.31	120	66.10%	74.36%	-8.26	92
ALLFV	50.86%	73.60%	-22.74	77	60.30%	82.60%	-22.30	78
Angus & City of Dundee	-	*	*	*	14.48%	13.24%	1.24	101
Ayrshire & Arran	*	-	*	*	72.79%	-	72.79	173
Dumfries & Galloway	*	*	*	*	46.60%	89.59%	-42.99	57
Edinburgh & Lothian	*	*	*	*	84.99%	96.74%	-11.75	88
Greater Glasgow	-	-	-	-	-	-	-	-
Highlands of Scotland	55.41%	*	-6.44	94	67.48%	76.88%	-9.40	91
Kingdom of Fife	*	-	*	*	51.79%	-	51.79	152
Orkney	*	*	*	*	45.35%	42.70%	2.65	103
Perthshire	62.99%	-	62.99	163	60.56%	45.43%	15.13	115
Scottish Borders	27.97%	*	-3.66	96	34.43%	46.33%	-11.90	88
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	62.30%	66.20%	-3.90	96

- Sample Size = Nil

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

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

Area	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	57.14%	0.00%	57.14	157	55.56%	83.80%	-28.24	72
ALLFV	0.00%	76.76%	-76.76	23	55.56%	84.00%	-28.44	72
Angus & City of Dundee	-	*	*	*	0.00%	10.65%	-10.65	89
Ayrshire & Arran	*	-	*	*	0.00%	-	0.00	100
Dumfries & Galloway	*	*	*	*	30.80%	72.13%	-41.33	59
Edinburgh & Lothian	*	*	*	*	95.38%	88.39%	6.99	107
Greater Glasgow	-	-	-	-	-	-	-	-
Highlands of Scotland	0.00%	*	-57.21	43	77.74%	74.66%	3.08	103
Kingdom of Fife	*	-	*	*	46.89%	-	46.89	147
Orkney	*	*	*	*	0.00%	34.60%	-34.60	65
Perthshire	0.00%	-	0.00	100	78.01%	39.70%	38.31	138
Scottish Borders	17.64%	*	-14.07	86	24.42%	40.54%	-16.12	84
Shetland Islands	-	*	*	*	-	*	*	*
Outer Hebrides	*	*	*	*	88.31%	31.86%	56.45	156

- Sample Size = Nil

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

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

Location accessibility/density	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	*	*	*	*	83.18%	94.73%	-11.55	88
Other Urban Areas	*	*	*	*	72.79%	95.15%	-22.36	78
Accessible Small Towns	59.80%	47.06%	12.74	113	61.00%	62.90%	-1.90	98
Remote Small Towns	72.73%	*	1.83	102	77.34%	68.86%	8.48	108
Accessible Rural	35.37%	*	-19.18	81	52.36%	66.06%	-13.70	86
Remote Rural	45.08%	57.82%	-12.74	87	59.08%	70.20%	-11.12	89

- Sample Size = Nil

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

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

Location accessibility/density	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	*	*	*	*	95.06%	87.51%	7.55	108
Other Urban Areas	*	*	*	*	0.00%	94.20%	-94.20	6
Accessible Small Towns	17.64%	60.18%	-42.54	57	60.22%	69.16%	-8.94	91
Remote Small Towns	0.00%	*	-62.44	38	82.92%	61.00%	21.92	122
Accessible Rural	57.14%	*	57.14	157	53.42%	62.48%	-9.06	91
Remote Rural	0.00%	54.16%	-54.16	46	64.44%	67.29%	-2.85	97

- Sample Size = Nil

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



Moffat Centre



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

Location (Geographic)	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	42.47%	*	-6.22	94	56.30%	61.44%	-5.14	95
Inland	57.52%	74.62%	-17.10	83	64.06%	79.47%	-15.41	85
Island	60.66%	67.32%	-6.66	93	71.96%	83.27%	-11.31	89
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Location (Geographic)	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Coastal	0.00%	*	-48.81	51	46.55%	60.91%	-14.36	86
Inland	44.56%	81.31%	-36.75	63	69.05%	75.42%	-6.37	94
Island	0.00%	73.35%	-73.35	27	83.57%	83.01%	0.56	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

Size	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	41.34%	53.56%	-12.22	88	56.47%	64.82%	-8.35	92
4 to 10	65.87%	77.47%	-11.60	88	69.82%	85.50%	-15.68	84
11 to 25	*	-	*	*	77.81%	-	77.81	178
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 2024/2023

Size	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 to 3	17.64%	52.71%	-35.07	65	62.04%	64.34%	-2.30	98
4 to 10	57.14%	89.72%	-32.58	67	73.13%	81.53%	-8.40	92
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						



### Room Occupancy by Tariff – October 2024/2023

Tariff	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	64.00%	45.43%	18.57	119
£40 – 49.99	*	*	*	*	56.71%	42.23%	14.48	114
£50 – 59.99	*	*	*	*	66.30%	94.70%	-28.40	72
£60 – £69.00	*	*	*	*	50.37%	92.08%	-41.71	58
£70+	57.93%	66.07%	-8.14	92	65.04%	74.10%	-9.06	91
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Tariff	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	67.39%	39.70%	27.69	128
£40 – 49.99	*	*	*	*	62.14%	61.41%	0.73	101
£50 – 59.99	*	*	*	*	52.78%	93.80%	-41.02	59
£60 – £69.00	*	*	*	*	60.54%	8.55%	51.99	152
£70+	44.56%	71.26%	-26.70	73	68.66%	69.31%	-0.65	99
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Grading	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	54.26%	*	-23.07	77	68.09%	76.58%	-8.49	92
4 Stars	74.77%	*	41.10	141	65.79%	57.46%	8.33	108
5 Stars	*	-	*	*	32.61%	-	32.61	133
Unclassified	*	48.80%	-0.38	100	61.03%	62.23%	-1.20	99
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Grading	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	0.00%	*	-71.67	28	71.12%	69.62%	1.50	102
4 Stars	17.64%	*	-25.80	74	64.70%	58.01%	6.69	107
5 Stars	*	-	*	*	34.10%	-	34.10	134
Unclassified	*	49.97%	-49.97	50	51.18%	61.86%	-10.68	89
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					