

## SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

### *September 2023/2022 Report - GUEST HOUSE / B&Bs*

#### 1.0 Introduction September 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering September 2023 and benchmarking against September 2022. 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 September 2023

The SOAS Report: September 2023/2022 Guest House/B&Bs report showed a significant occupancy increase in the Guest House/B&Bs sector in Scotland compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for September 2023 experienced an **8.48** percentage point increase when comparing percentage room occupancy rates with September 2022. Occupancy rates within the Guest House/B&B sector experienced a **16.84** percentage point increase in September 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that the September retail sales figures in Scotland rose to 6.1% from 5.6% in August, however. Food sales continue to be the biggest growth area.

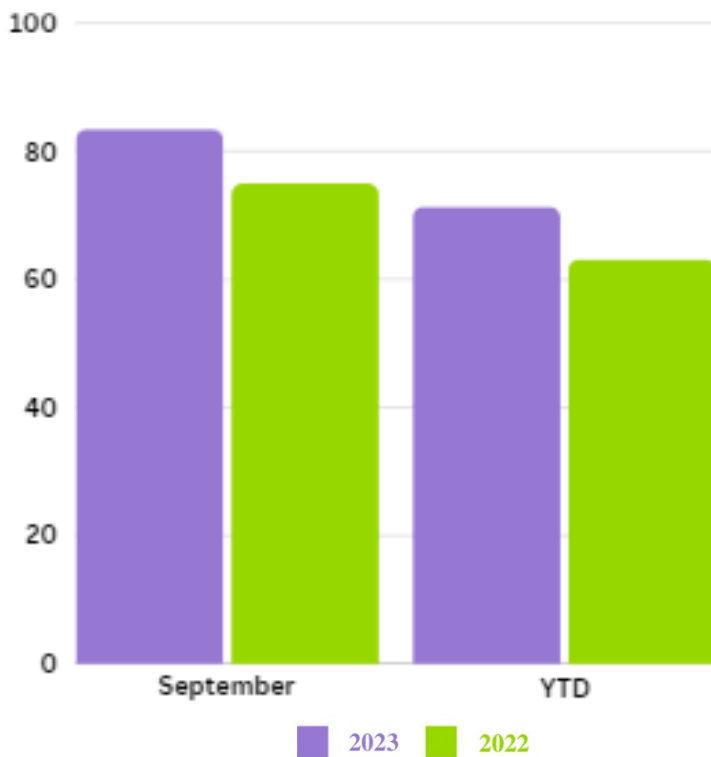
Domestic consumer sentiment provided by the GB National Tourist Boards for September 2023 found that 18% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% decrease on the August 2023 survey). The survey recorded 46% of respondents (a 1% increase on the August 2023 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 intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 76% 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, Personal finances and the UK weather. The figures above have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in September 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 10% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

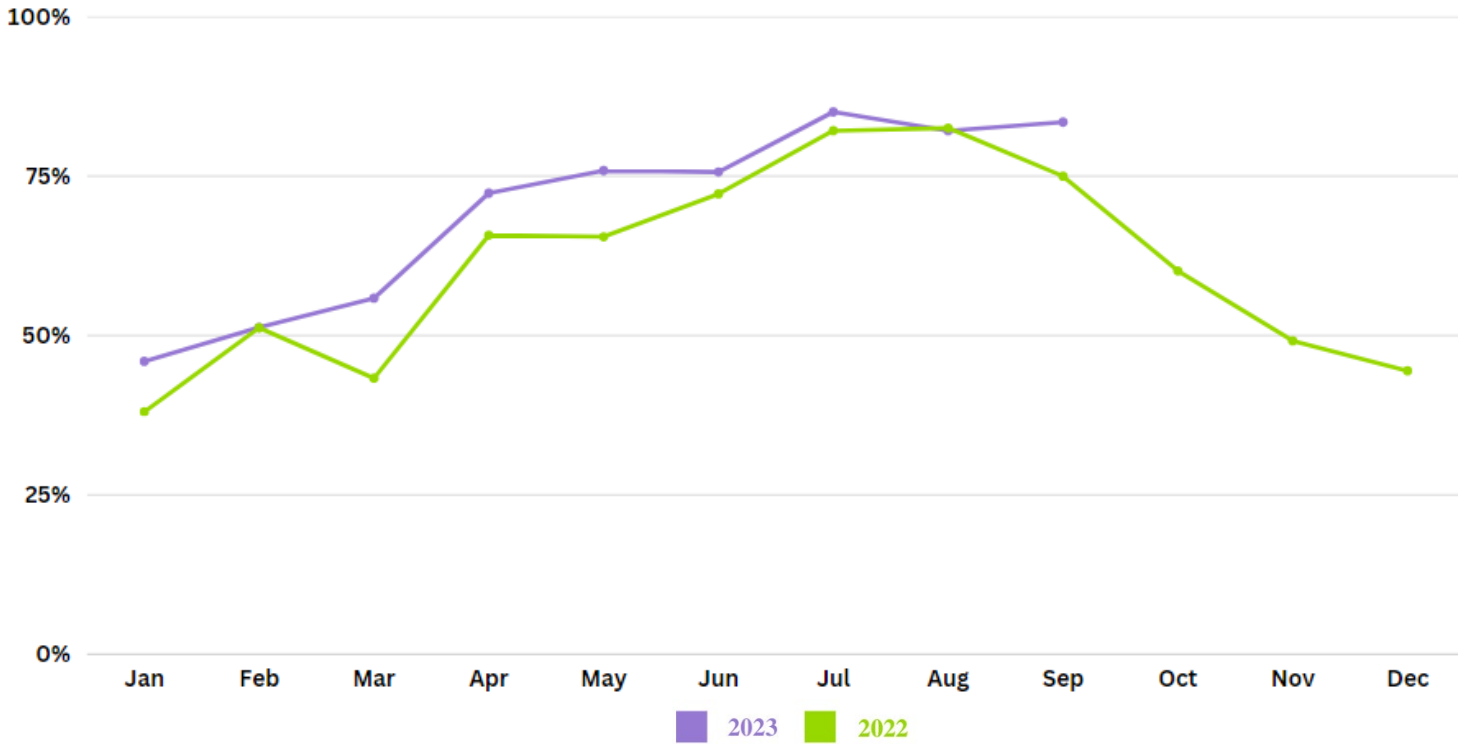
### All Serviced Accommodation

#### Room Occupancy – September 2023/2022

Scottish Serviced Accommodation room occupancy for September 2023 experienced a **8.48** percentage point decrease when comparing percentage room occupancy rates with September 2022.



#### Room Occupancy – Year-to-Date

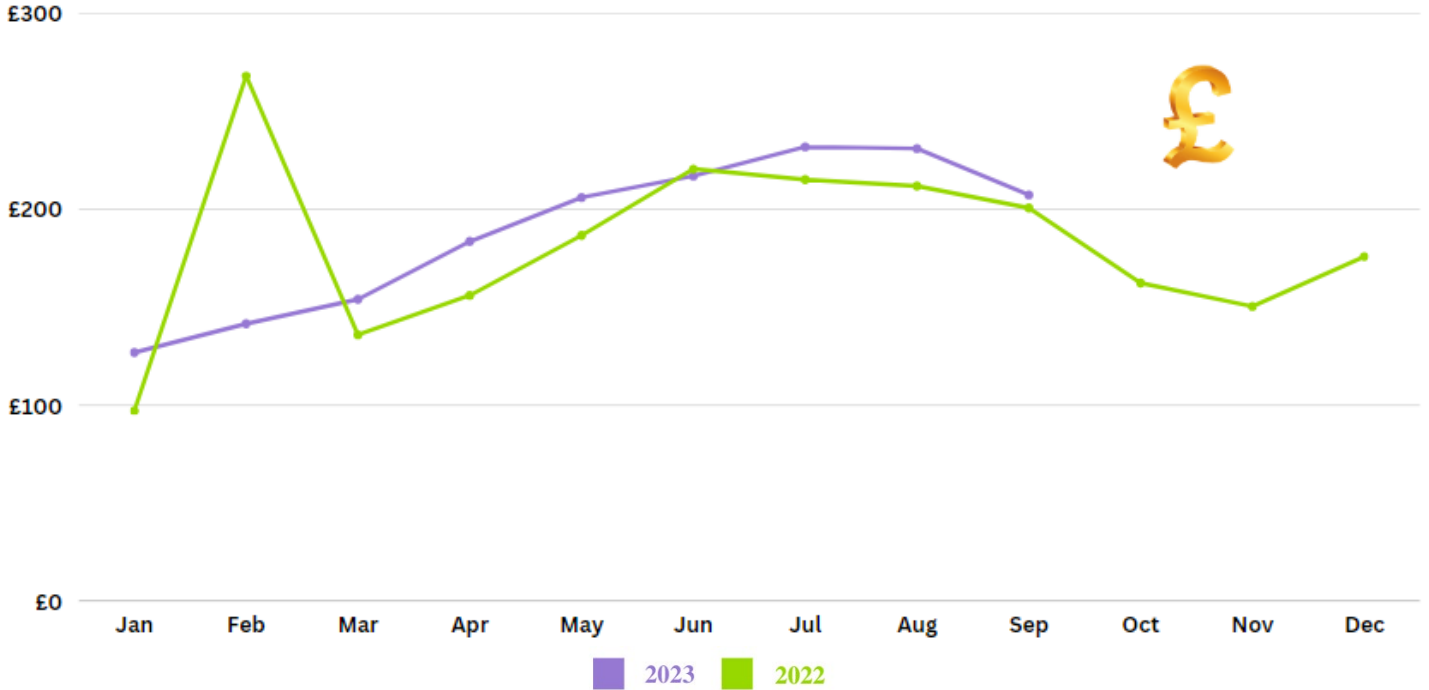


Room Occupancy	September 23	September 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	83.45%	74.97%	8.48	108	71.36%	63.14%	8.22	108
Bed Occupancy	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	73.58%	63.98%	9.60	110	62.17%	54.28%	7.89	108

The Revenue per available occupied room for September 2023 was **£207.47** compared with **£200.82** in September 2022. This figure is based solely on accommodation providers who provided financial information for either September 2023 and/or 2022.

<sup>1</sup> 23/22 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 2023/2022**

Room - Average RevPAR (£)	September 23	September 22
All Serviced Accommodation	£207.47	£200.82

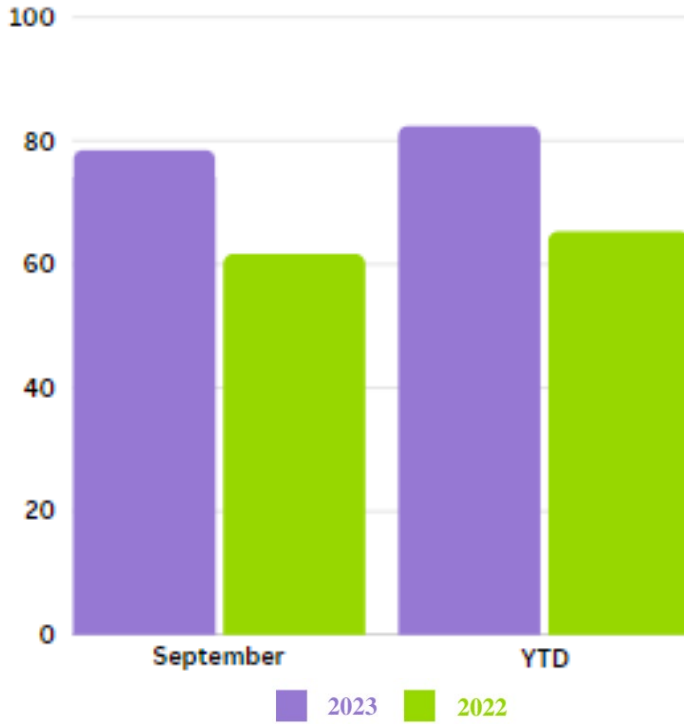
**RevPAR by Grading- September 2023/21**

Grading - Average RevPAR (£)	September 23	September 22
2 Stars	£185.98	£128.00
3 Stars	£201.00	£152.51
4 Stars	£214.67	£289.53
5 Stars	£431.09	£256.45
Unclassified	£0.00	£104.80

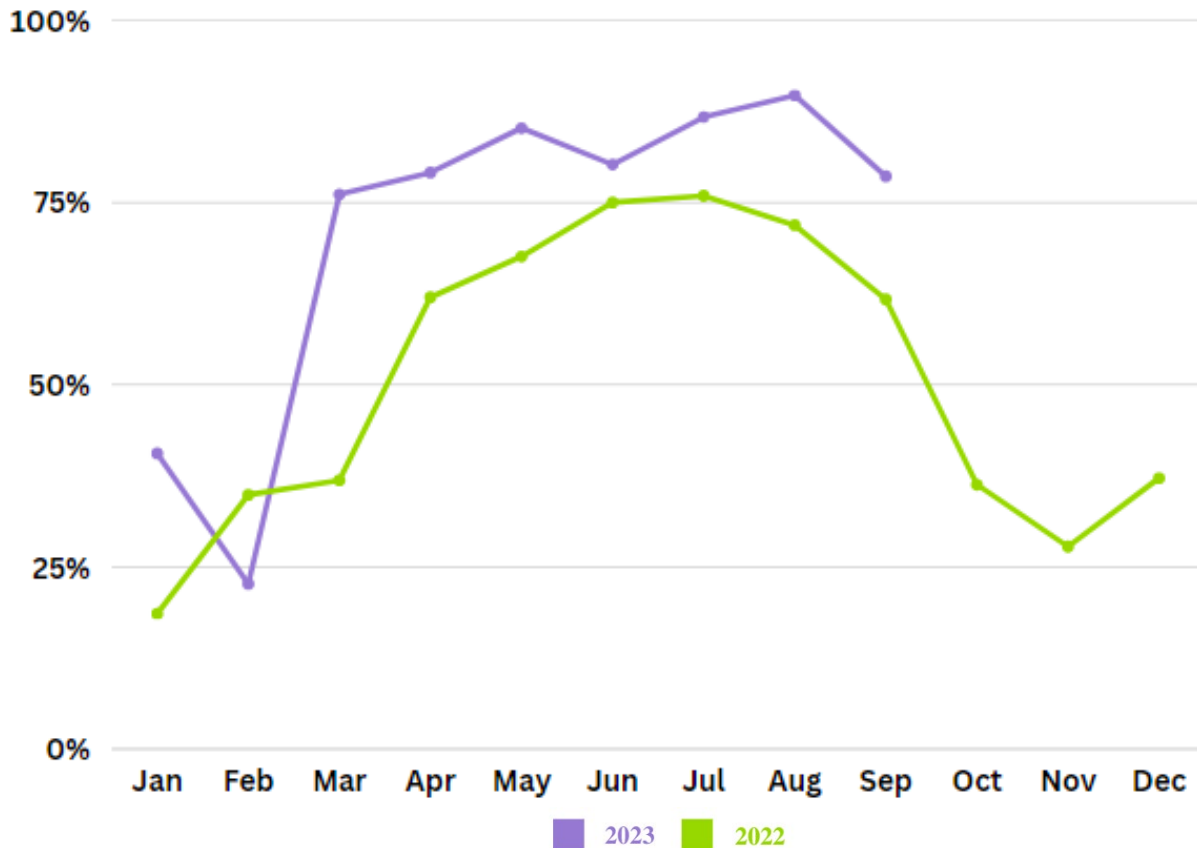
**3.0 Serviced Accommodation – Guest House/B&B Sector**

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

Guest House / B&B Room Occupancy – September 2023/2022



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



In the Guest House/B&B sector, the room occupancy rate for September 2023 was **78.58%** compared to data from the previous year of **61.74%** occupancy rate; this shows an overall percentage point increase of **16.48**.

Percentage room and bed occupancy rates for Guest House/B&Bs in the Argyll, Loch Lomond & Forth Valley (ALLV) were the highest in September 2023. Operators (sample size >4) in Remote Rural Areas, Inland locations and properties charging a tariff of over £70 fared best in room occupancy rates in September 2023.

The table below shows the **Room Occupancy** rate recorded for September 2023/2022 as well as the Change calculation for the **Guest House/B&B** sector.

Room Occupancy	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Guest House/B&amp;B</b>	<b>78.58%</b>	<b>61.74%</b>	<b>16.48</b>	<b>117</b>	<b>82.48%</b>	<b>65.41%</b>	<b>17.07</b>	<b>117</b>

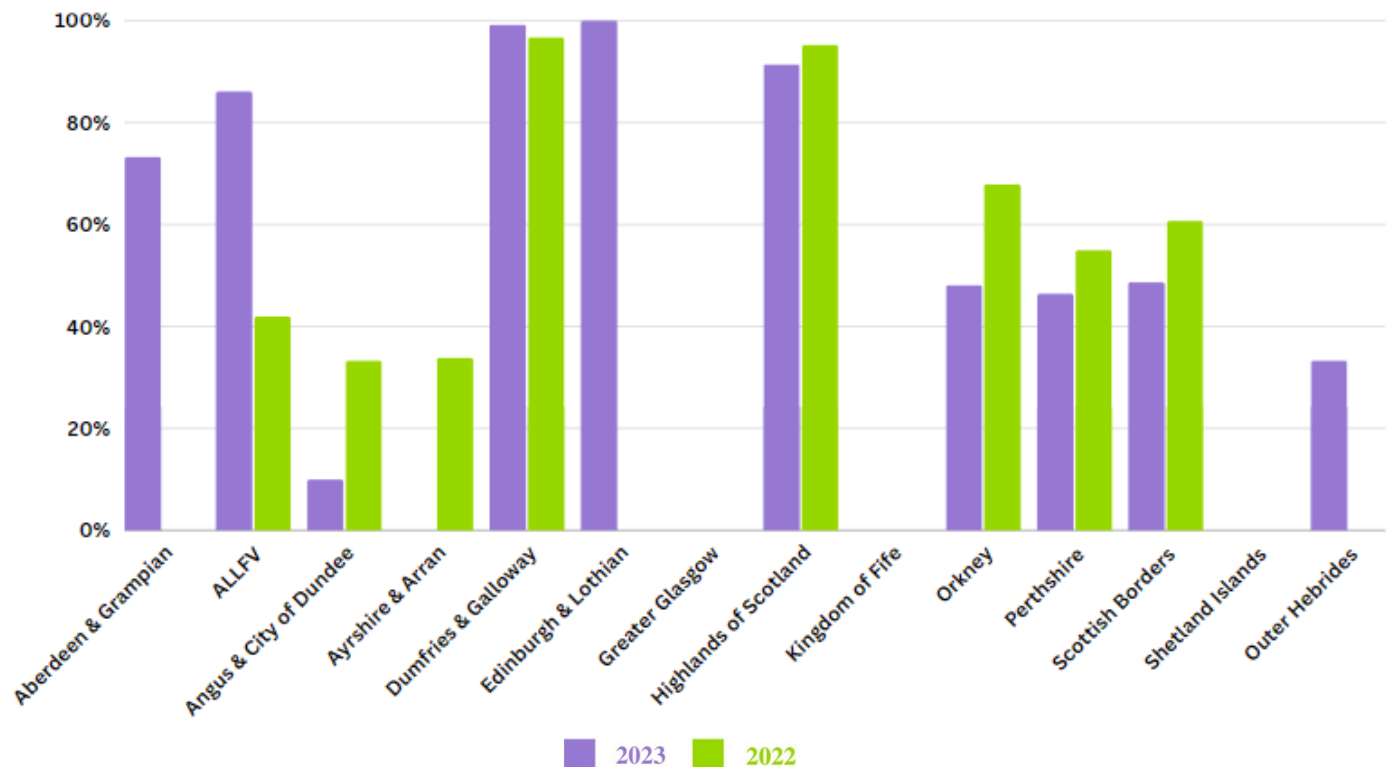
In the **Guest House/B&B** sector, the bed occupancy rate for September 2023 was **78.59%** compared to data from the previous year of **57.58%** occupancy rate; this shows an overall percentage point increase of **21.01**.

The table below shows the **Bed Occupancy** rate recorded for September 2023/2022 as well as the 23/22 Diff calculation for the **Guest House/B&B** sector.

Bed Occupancy	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
<b>Guest House/B&amp;B</b>	<b>78.59%</b>	<b>57.58%</b>	<b>21.01</b>	<b>121</b>	<b>79.09%</b>	<b>58.70%</b>	<b>20.39</b>	<b>120</b>

### Room Occupancy by Former Visit Scotland Area

Guest House / B&B Room Occupancy by Former VisitScotland Area – September 2023/2022





### Bed Occupancy by Location (Accessibility & Density) – September 2023/2022

Location accessibility/density	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	84.67%	*	24.24	124
Other Urban Areas	*	*	*	*	96.06%	70.45%	25.61	126
Accessible Small Towns	72.56%	*	72.56	173	69.25%	6.95%	62.30	162
Remote Small Towns	*	*	*	*	61.60%	61.66%	-0.06	100
Accessible Rural	*	*	*	*	79.13%	32.34%	46.79	147
Remote Rural	76.55%	47.64%	28.91	129	86.48%	61.48%	25.00	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Location (Geographic) – September 2023/2022

Location (Geographic)	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	81.71%	-	81.71	182
Inland	80.01%	65.82%	14.19	114	80.39%	63.16%	17.23	117
Island	78.50%	55.54%	22.96	123	86.71%	68.31%	18.40	118
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Location (Geographic) – September 2023/2022

Location (Geographic)	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	-	*	*	83.38%	-	83.38	183
Inland	79.75%	65.25%	14.50	115	75.35%	56.44%	18.91	119
Island	76.55%	47.64%	28.91	129	86.48%	61.48%	25.00	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Room Occupancy by Size– September 2023/2022

Size	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	70.99%	49.52%	21.47	121	78.24%	65.78%	12.46	112
4 to 10	83.97%	79.42%	4.55	105	86.03%	73.63%	12.40	112
11 to 25	-	*	*	*	-	40.06%	-40.06	60
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 – September 2023/2022

Size	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	72.67%	56.49%	16.18	116	78.90%	66.51%	12.39	112
4 to 10	82.23%	73.57%	8.66	109	79.28%	64.90%	14.38	114
11 to 25	-	*	*	*	-	27.83%	-27.83	72
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 – September 2023/2022

Tariff	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	39.93%	19.08%	20.85	121
£40 – 49.99	*	*	*	*	59.93%	64.27%	-4.34	96
£50 – 59.99	*	95.31%	4.69	105	95.08%	83.77%	11.31	111
£60 – £69.00	*	*	*	*	93.06%	83.10%	9.96	110
£70+	80.47%	*	39.73	140	81.52%	41.76%	39.76	140

- Sample Size = Nil

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

### Bed Occupancy by Tariff – September 2023/2022

Tariff	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 – 29.99	-	-	-	-	-	-	-	-
£30 – 39.99	*	*	*	*	34.31%	17.67%	16.64	117
£40 – 49.99	*	*	*	*	68.57%	69.56%	-0.99	99
£50 – 59.99	*	95.08%	4.92	105	94.39%	81.40%	12.99	113
£60 – £69.00	*	*	*	*	89.32%	68.31%	21.01	121
£70+	81.22%	*	49.52	150	75.86%	31.29%	44.57	145

- Sample Size = Nil

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

### Room Occupancy by Grading – September 2023/2022

Grading	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	76.20%	64.97%	11.23	111	76.87%	66.06%	10.81	111
4 Stars	*	*	*	*	59.65%	71.83%	-12.18	88
5 Stars	-	*	*	*	-	*	*	*
Unclassified	*	*	*	*	77.42%	37.07%	40.35	140

- Sample Size = Nil

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

**Bed Occupancy by Grading – September 2023/2022**

Grading	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	65.66%	55.89%	9.77	110	68.59%	57.87%	10.72	111
4 Stars	*	*	*	*	59.10%	84.23%	-25.13	75
5 Stars	-	*	*	*	-	*	*	*
Unclassified	*	*	*	*	77.21%	28.32%	48.89	149
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					