



Moffat Centre



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

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

1.0 Introduction September 2024/2023

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

The SOAS Report: September 2024/2023 Hotels report shows an increase in occupancy in the Serviced sector in Scotland compared to the same period in 2023. Scottish Serviced Accommodation occupancy rates for September 2024 experienced an **0.16** percentage point increase when comparing percentage room occupancy rates with September 2023. Occupancy rates within the Guest House/B&B sector experienced a **5.97** percentage point decrease in September 2024 when compared to the same period last year.

The Visitor Levy (Scotland) Act 2024 came into force on the 20th of September 2024. The Bill aims to allow Scottish local authorities to charge a visitor levy, which is charged for overnight stays in certain types of accommodation (such as hotels, B&Bs or holiday cottages). Each local authority will be able to decide if they wish to introduce the levy and at what level the levy should be.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to September 2024 is 1.7%, down from 2.2% in August. The CPI 12-month rate (%) for September 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.8% down from 4.0% in August. Inflation rates for restaurants and cafes were 4.1% down from 4.3% in August.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in September, however, compared to the 6.1% increase in September 2023 this was disappointing growth in total sales. Total food sales decreased by -0.7% compared to the monthly performance of September 2023, when they had increased by 9.2%.

Domestic consumer sentiment provided by the GB National Tourist Boards for September 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the August 2024 survey). The survey recorded 47% of respondents (a 1% increase on the August 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, 37% of UK adults intended to take a domestic overnight trip in the final 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 (76%). 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.

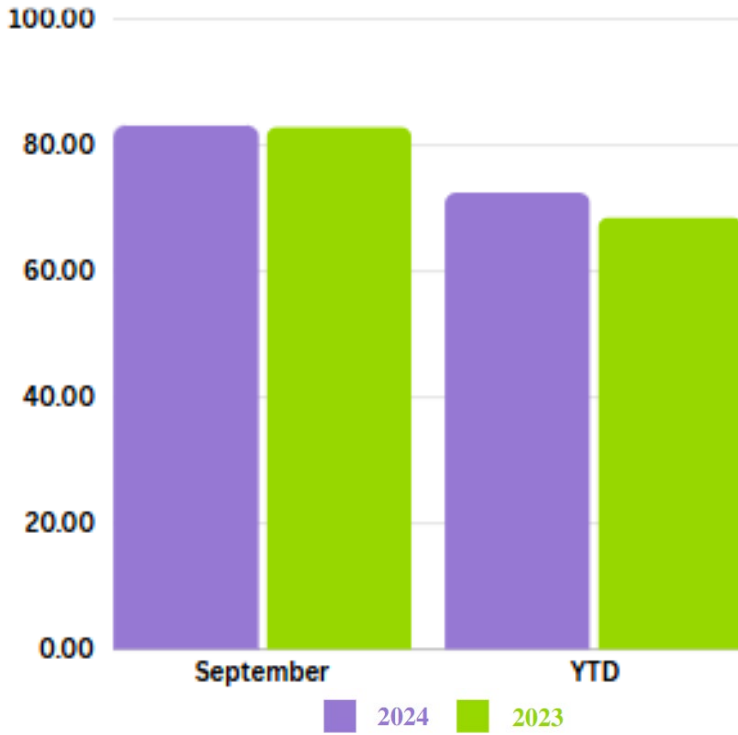
The recovery in international inbound visitation stalled in September 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% decrease when compared to the same period in 2023, also, UK air connectivity saw a 4% decrease in year-to-date flights compared to 2019.



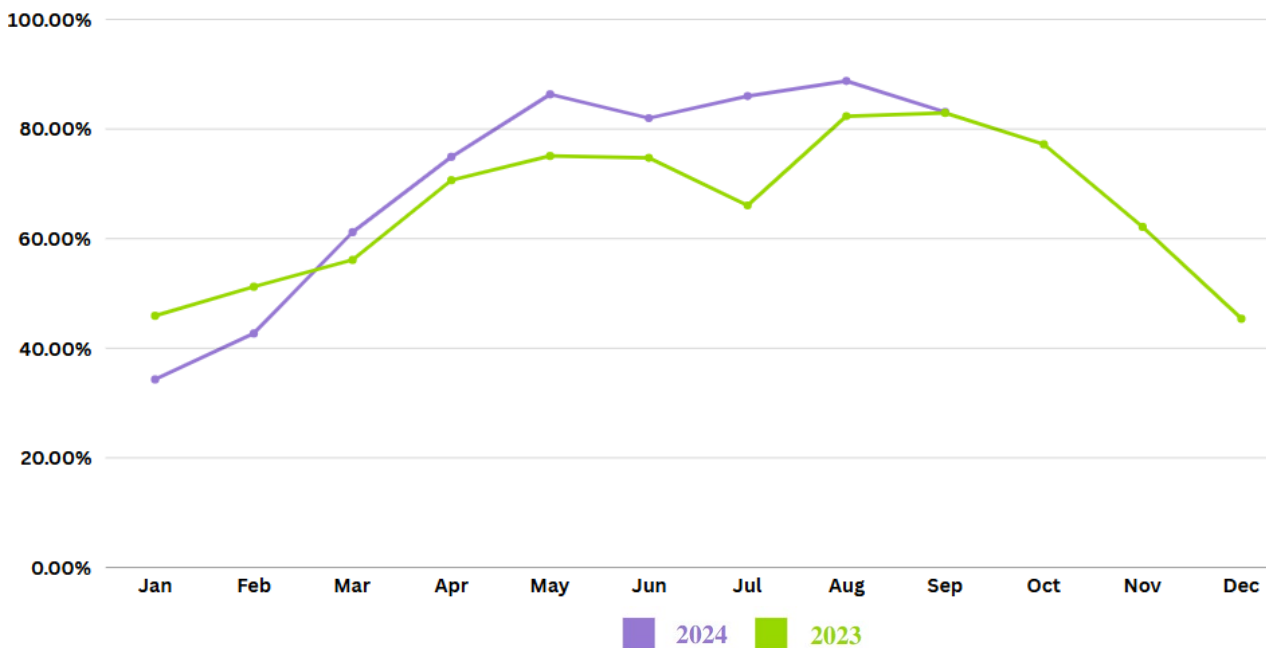
All Served Accommodation

Room Occupancy – September 2024/2023

Scottish Served Accommodation room occupancy for September 2024 experienced a **0.16** percentage point increase when comparing percentage room occupancy rates with September 2023.



Room Occupancy – Year-to-Date





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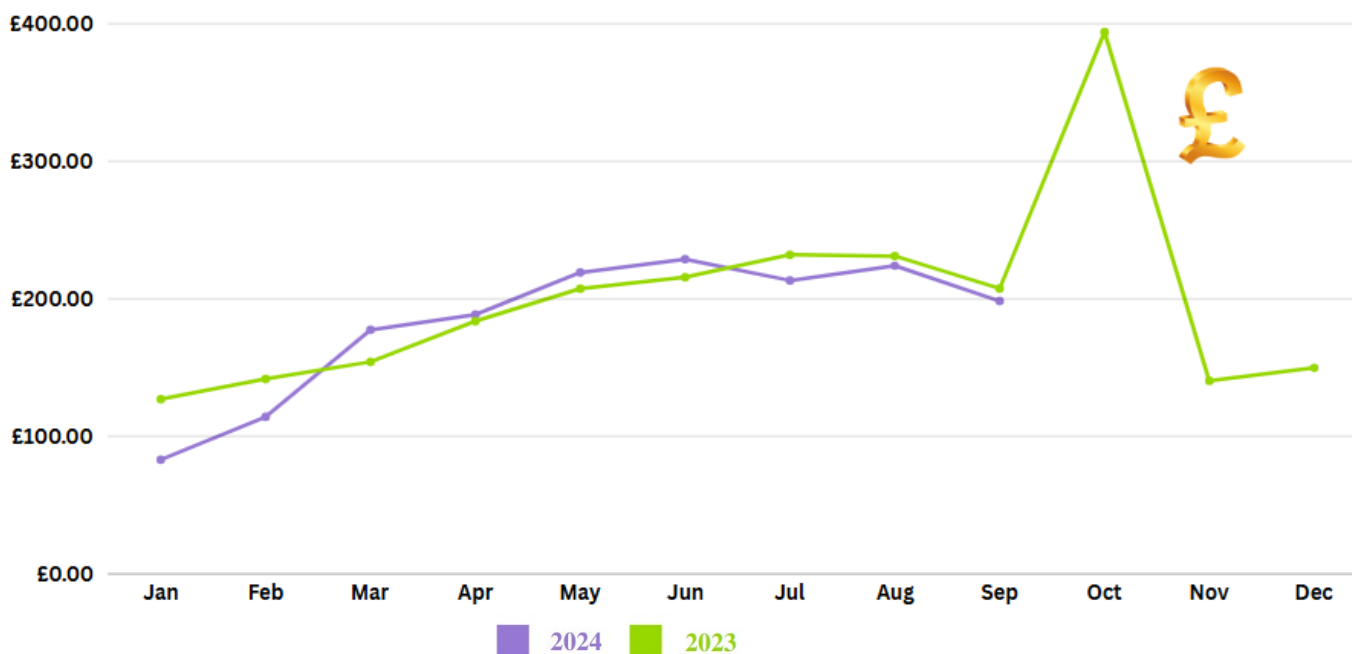


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| Room Occupancy | September 24 | September 23 | 24/23 Diff ¹ | Change ² | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------------------|--------------|--------------|-------------------------|---------------------|--------|--------|------------|--------|
| All Serviced Accommodation | 83.10% | 82.94% | 0.16 | 100 | 72.47% | 68.58% | 3.89 | 104 |

| Bed Occupancy | September 24 | September 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------------------|--------------|--------------|------------|--------|--------|--------|------------|--------|
| All Serviced Accommodation | 71.97% | 72.84% | -0.87 | 99 | 65.40% | 58.40% | 7.00 | 107 |

The Revenue per available occupied room for September 2024 was **£198.39** compared with **£207.47** in September 2023. This figure is based solely on accommodation providers who provided financial information for either September 2024 and/or 2023.



RevPAR Year to Date 2023/2023

| Room – Average RevPAR (£) | September 24 | September 23 |
|----------------------------|--------------|--------------|
| All Serviced Accommodation | £198.39 | £207.47 |

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.

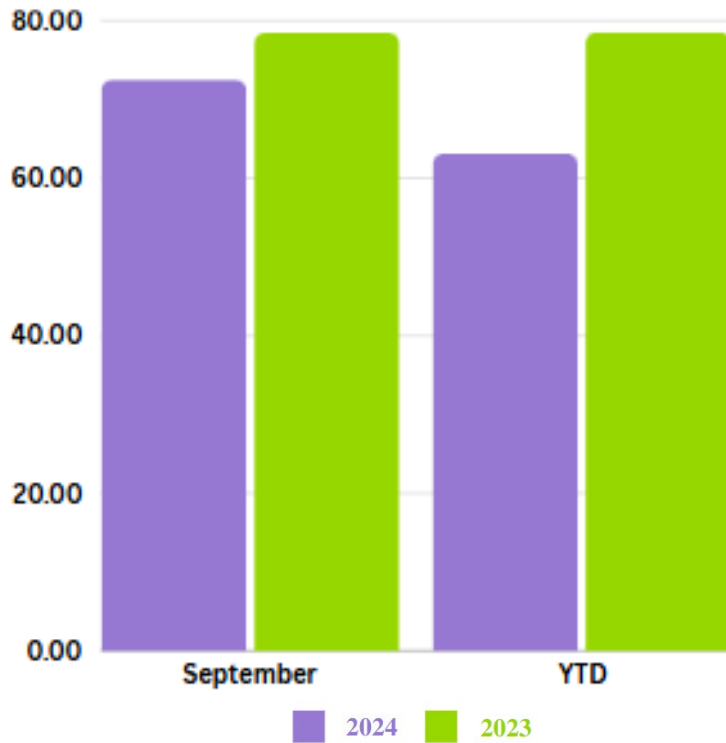


RevPAR by Grading- September 2024/21

| Grading – Average RevPAR (£) | September 24 | September 23 |
|------------------------------|--------------|--------------|
| 2 Stars | £191.20 | £185.98 |
| 3 Stars | £222.90 | £201.00 |
| 4 Stars | £174.62 | £214.67 |
| 5 Stars | £421.18 | £431.09 |
| Unclassified | £ | £ |

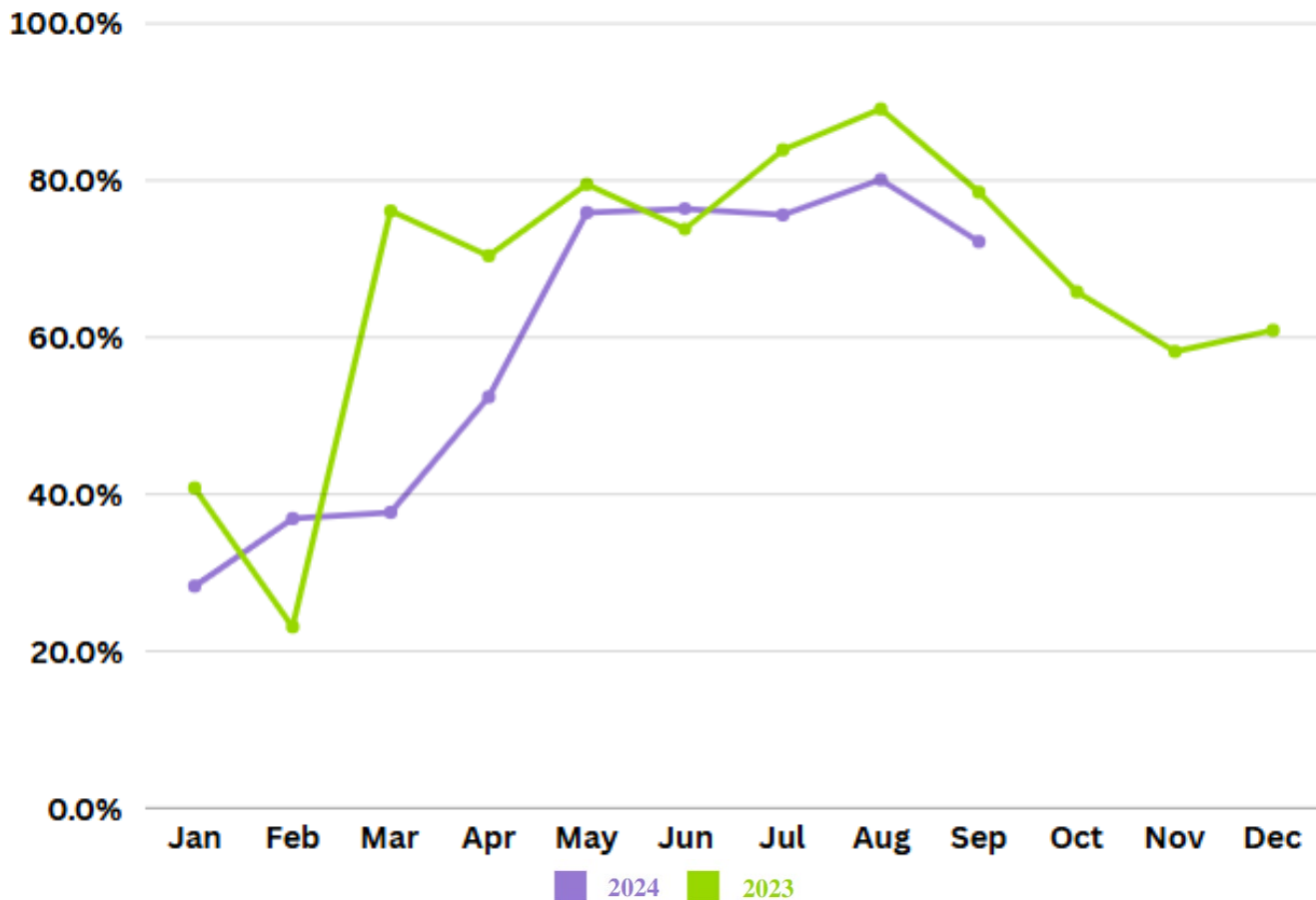
3.0 Serviced Accommodation – Guest House/B&B Sector 3.1 Performance by Guest House/B&B Category

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





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



In the **Guest House/B&B** sector, the room occupancy rate for September 2024 was **72.50%** compared to data from the previous year of **78.47%** occupancy rate; this shows an overall percentage point decrease of **5.97**.

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

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

| Room Occupancy | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|----------------------------|---------|---------|------------|--------|--------|--------|------------|--------|
| Guest House/B&B | 72.50% | 78.47% | -5.97 | 94 | 63.12% | 78.54% | -15.42 | 85 |

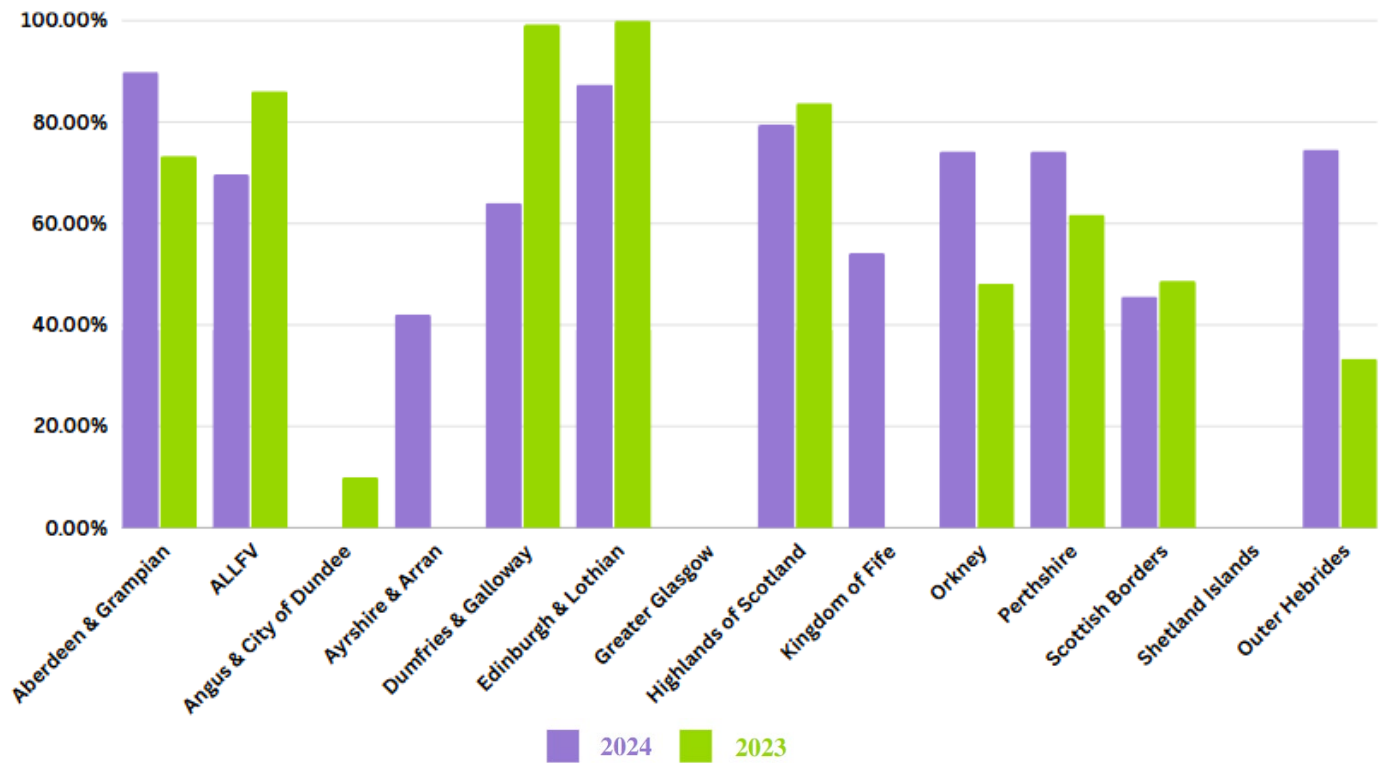
In the **Guest House/B&B** sector, the bed occupancy rate for September 2024 was **51.07%** compared to data from the previous year of **78.73%** occupancy rate; this shows an overall percentage point increase of **27.66**.

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

| Bed Occupancy | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|----------------------------|---------|---------|------------|--------|--------|--------|------------|--------|
| Guest House/B&B | 51.07% | 78.73% | -27.66 | 72 | 64.58% | 74.46% | -9.88 | 90 |

Room Occupancy by Former Visit Scotland Area

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



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

| Area | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|------------------------|---------|---------|------------|--------|--------|--------|------------|--------|
| Aberdeen & Grampian | 89.87% | * | 16.54 | 117 | 67.30% | 81.71% | -14.41 | 86 |
| ALLFV | 69.69% | 86.11% | -16.42 | 84 | 57.14% | 86.71% | -29.57 | 70 |
| Angus & City of Dundee | * | * | * | * | 14.48% | 15.12% | -0.64 | 99 |
| Ayrshire & Arran | * | - | * | * | 61.62% | - | 61.62 | 162 |
| Dumfries & Galloway | 64.07% | * | -35.17 | 65 | 45.14% | 90.13% | -44.99 | 55 |
| Edinburgh & Lothian | * | * | * | * | 86.67% | 96.20% | -9.53 | 90 |
| Greater Glasgow | - | - | - | - | - | - | - | - |
| Highlands of Scotland | 79.50% | * | -4.26 | 96 | 69.07% | 78.85% | -9.78 | 90 |
| Kingdom of Fife | * | - | * | * | 52.97% | - | 52.97 | 153 |
| Orkney | * | * | * | * | 54.97% | 44.68% | 10.29 | 110 |
| Perthshire | 74.25% | * | 12.49 | 112 | 58.52% | 65.64% | -7.12 | 93 |
| Scottish Borders | 45.60% | * | -3.06 | 97 | 36.12% | 48.25% | -12.13 | 88 |
| Shetland Islands | - | * | * | * | - | 0.00% | 0.00 | 100 |
| Outer Hebrides | * | * | * | * | 73.00% | 68.25% | 4.75 | 105 |

- Sample Size = Nil

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

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

| Area | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|------------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Aberdeen & Grampian | 82.67% | * | 6.91 | 107 | 57.40% | 83.38% | -25.98 | 74 |
| ALLFV | 0.00% | 86.61% | -86.61 | 13 | 54.13% | 86.82% | -32.69 | 67 |
| Angus & City of Dundee | * | * | * | * | 0.00% | 10.65% | -10.65 | 89 |
| Ayrshire & Arran | * | - | * | * | 2.78% | - | 2.78 | 103 |
| Dumfries & Galloway | 50.83% | * | -28.58 | 0 | 33.06% | 42.92% | -9.86 | 90 |
| Edinburgh & Lothian | * | * | * | * | 95.38% | 85.29% | 10.09 | 110 |
| Greater Glasgow | - | - | - | - | - | - | - | - |
| Highlands of Scotland | 94.44% | * | 12.18 | 112 | 76.35% | 76.96% | -0.61 | 99 |
| Kingdom of Fife | * | - | * | * | 39.99% | - | 39.99 | 140 |
| Orkney | * | * | * | * | 56.48% | 36.24% | 20.24 | 120 |
| Perthshire | 49.99% | * | 1.12 | 101 | 57.95% | 54.74% | 3.21 | 103 |
| Scottish Borders | 27.81% | * | -8.43 | 92 | 26.80% | 41.37% | -14.57 | 85 |
| Shetland Islands | - | * | * | * | - | 0.00% | 0.00 | 100 |
| Outer Hebrides | * | * | * | * | 87.91% | 31.86% | 56.05 | 156 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

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

| Location accessibility/density | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Large Urban Areas | 86.27% | * | -10.98 | 89 | 84.64% | 93.89% | -9.25 | 91 |
| Other Urban Areas | * | * | * | * | 66.46% | 96.91% | -30.45 | 70 |
| Accessible Small Towns | 67.70% | 67.55% | 0.15 | 100 | 59.49% | 65.95% | -6.46 | 94 |
| Remote Small Towns | 75.73% | * | -1.87 | 98 | 75.27% | 70.35% | 4.92 | 105 |
| Accessible Rural | 66.33% | * | -4.73 | 95 | 51.70% | 83.13% | -31.43 | 69 |
| Remote Rural | 76.78% | 71.30% | 5.48 | 105 | 63.10% | 71.87% | -8.77 | 91 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

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

| Location accessibility/density | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Large Urban Areas | 0.00% | * | -97.14 | 3 | 95.06% | 84.56% | 10.50 | 111 |
| Other Urban Areas | * | * | * | * | 20.44% | 96.01% | -75.57 | 24 |
| Accessible Small Towns | 26.67% | 72.56% | -45.89 | 54 | 60.18% | 69.25% | -9.07 | 91 |
| Remote Small Towns | 0.00% | * | -65.16 | 35 | 75.25% | 61.61% | 13.64 | 114 |
| Accessible Rural | 62.08% | * | -8.59 | 91 | 46.80% | 82.75% | -35.95 | 64 |
| Remote Rural | 91.05% | 68.05% | 23.00 | 123 | 64.13% | 69.12% | -4.99 | 95 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |



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

| Location (Geographic) | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Coastal | 68.12% | * | -2.15 | 98 | 56.26% | 64.54% | -8.28 | 92 |
| Inland | 69.88% | 82.14% | -12.26 | 88 | 62.41% | 81.22% | -18.81 | 81 |
| Island | 87.53% | 75.59% | 11.94 | 112 | 72.99% | 84.11% | -11.12 | 89 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

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

| Location (Geographic) | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Coastal | 3.33% | * | -66.80 | 33 | 41.86% | 62.80% | -20.94 | 79 |
| Inland | 56.97% | 82.78% | -25.81 | 74 | 65.60% | 75.80% | -10.20 | 90 |
| Island | 91.05% | 72.93% | 18.12 | 118 | 79.90% | 83.50% | -3.60 | 96 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Room Occupancy by Size – September 2024/2023

| Size | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| 1 to 3 | 65.77% | 68.07% | -2.30 | 98 | 56.57% | 69.93% | -13.36 | 87 |
| 4 to 10 | 76.24% | 86.53% | -10.29 | 90 | 67.66% | 86.49% | -18.83 | 81 |
| 11 to 25 | * | - | * | * | 77.35% | - | 77.35 | 177 |
| 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 2024/2023

| Size | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| 1 to 3 | 42.85% | 68.60% | -25.75 | 74 | 58.24% | 69.16% | -10.92 | 89 |
| 4 to 10 | 70.58% | 85.68% | -15.10 | 85 | 69.02% | 79.91% | -10.89 | 89 |
| 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 – September 2024/2023

| Tariff | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| £20 – 29.99 | * | - | * | * | 43.34% | - | 43.34 | 143 |
| £30 – 39.99 | * | * | * | * | 73.87% | 45.43% | 28.44 | 128 |
| £40 – 49.99 | 55.24% | * | 19.34 | 119 | 54.81% | 53.72% | 1.09 | 101 |
| £50 – 59.99 | 61.45% | * | -38.55 | 61 | 62.25% | 95.46% | -33.21 | 67 |
| £60 – £69.00 | * | * | * | * | 54.23% | 92.73% | -38.50 | 62 |
| £70+ | 77.54% | 78.95% | -1.41 | 99 | 65.61% | 76.87% | -11.26 | 89 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Bed Occupancy by Tariff – September 2024/2023

| Tariff | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------|---------------------|---------|---|--------|--------|--------|------------|--------|
| £20 – 29.99 | * | - | * | * | 46.73% | - | 46.73 | 147 |
| £30 – 39.99 | * | * | * | * | 86.31% | 39.70% | 46.61 | 147 |
| £40 – 49.99 | 50.67% | * | 8.88 | 109 | 53.43% | 62.80% | -9.37 | 91 |
| £50 – 59.99 | 0.00% | * | -100.00 | 0 | 76.20% | 94.49% | -18.29 | 82 |
| £60 – £69.00 | * | * | * | * | 48.97% | 88.33% | -39.36 | 61 |
| £70+ | 75.36% | 79.18% | -3.82 | 96 | 68.48% | 70.87% | -2.39 | 98 |
| | - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | |

Room Occupancy by Grading – September 2024/2023

| Grading | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------|---------------------|---------|---|--------|--------|--------|------------|--------|
| 2 Stars | - | - | - | - | - | - | - | - |
| 3 Stars | 79.82% | 76.20% | 3.62 | 104 | 70.76% | 76.87% | -6.11 | 94 |
| 4 Stars | 70.30% | * | 11.91 | 112 | 61.87% | 59.65% | 2.22 | 102 |
| 5 Stars | * | - | * | * | 39.44% | - | 39.44 | 139 |
| Unclassified | * | 72.63% | -7.30 | 93 | 64.09% | 64.85% | -0.76 | 99 |
| | - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | |

Bed Occupancy by Grading – September 2024/2023

| Grading | Sept 24 | Sept 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------|---------------------|---------|---|--------|--------|--------|------------|--------|
| 2 Stars | - | - | - | - | - | - | - | - |
| 3 Stars | 83.82% | 65.66% | 18.16 | 118 | 73.03% | 68.59% | 4.44 | 104 |
| 4 Stars | 24.99% | * | -36.95 | 63 | 69.35% | 59.10% | 10.25 | 110 |
| 5 Stars | * | - | * | * | 44.73% | - | 44.73 | 145 |
| Unclassified | * | 71.88% | -71.88 | 28 | 51.59% | 63.48% | -11.89 | 88 |
| | - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | |