

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## January 2023/2022 Report – HOSTEL - Revised

### 1.0 Introduction January 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering January 2023 and benchmarking against January 2022. The report reviews Accommodation performance throughout Scotland, highlighting trends across various sectors and categories of the industry. 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)).

Please note that this report was revised from a previous version published earlier in the year and therefore any previous versions should be discarded.

### 2.0 Executive Summary January 2023

The SOAS Report: January 2023/2022 Hostel report continued to show growth in the Hostel sector in Scotland when compared to the same period in 2022. Hostel Bedspace Occupancy rates for January 2023 showed a percentage point increase of **17.82** when compared with January 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 12.2% footfall increase in visitors for January 2023 compared to the same period in 2022.

Domestic consumer sentiment provided by the GB National Tourist Boards for January 2023 found that 52% of respondents stated (a 5% increase on the December 2022 Survey) saying they were “cautious - things are OK but I feel I have to be very careful”.

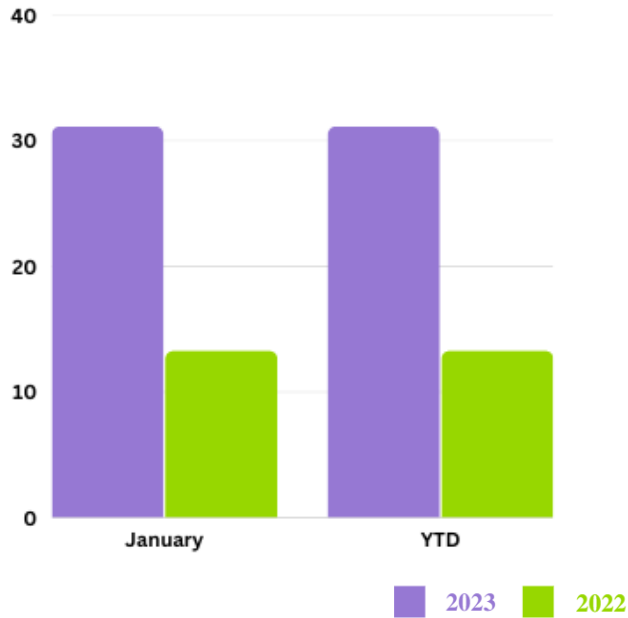
The survey also recorded 21% of respondents (a 1% decrease on the December 2022 Survey) saying they are “...been hit hard - no option but to cut back on spending”. Despite consumer concern about the state of the economy, 16% of UK adults intend to take a domestic overnight trip in the first quarter of 2023 and 70% in the next 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023).

The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 remained the major barrier to growth. One highlight in air transport is from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 42% in daily flights compared to 2019. Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a 17% decrease in year-to-date flights when compared to the same time in 2019, however, the UK was the busiest state within the network in 2023, with an average of 4,044 flights per day this is a 69% increase compared to the same time in 2022 (Eurocontrol, 2023), however, the start of 2023 saw Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.

### 3.0 Hostel Accommodation

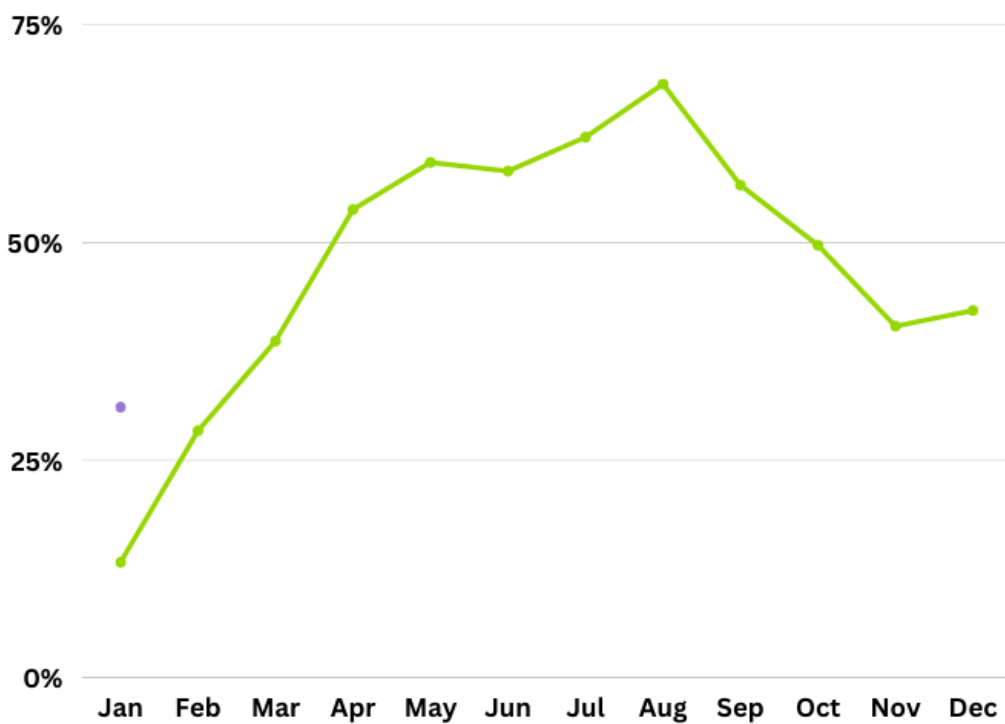
#### 3.1 Performance by Hostel Category

Bed Space Occupancy – January 2023/2022



Hostel occupancy for January 2023 was 31.11% when compared to data from the previous year of 13.29%; this shows an overall percentage point increase of 17.82.

Bed Space Occupancy – Year to Date





2023 2022

### Bed Occupancy by Former VisitScotland Area – January 2023/2022

Area	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	*	*	*	*
ALLFV	37.32%	10.08%	27.24	127	37.32%	10.08%	27.24	127
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	*	*	*	-	*	*	*
Edinburgh & Lothian	*	*	*	*	*	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	33.66%	16.21%	17.45	117	33.66%	16.21%	17.45	117
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

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

### Bed Occupancy by Location – January 2023/2022

Location accessibility/density	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	29.53%	10.89%	18.64	119	29.53%	10.89%	18.64	119
Other Urban Areas	*	*	*	*	*	*	*	*
Accessible Small Towns	*	*	*	*	*	*	*	*
Remote Small Towns	*	*	*	*	*	*	*	*
Accessible Rural	*	*	*	*	*	*	*	*
Remote Rural	37.51%	26.23%	11.28	111	37.51%	26.23%	11.28	111

- Sample Size = Nil

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

### Bed Occupancy by Location Type– January 2023/2022

Location Type	January 23	January 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	46.20%	7.18%	39.02	139	46.20%	7.18%	39.02	139
City – Large Town	23.17%	8.88%	14.29	114	23.17%	8.88%	14.29	114
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	42.00%	25.29%	16.71	117	42.00%	25.29%	16.71	117

- Sample Size = Nil

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

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