

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

May 2023/2022 Report – HOSTEL - Revised

1.0 Introduction May 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering May 2023 and benchmarking against May 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).

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 May 2023

The SOAS Report: May 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 May 2023 showed a percentage point increase of **7.38** when compared with May 2022.

Data from the Scottish Retail Consortium showed that the additional Bank Holiday, the King's Coronation and dry, warm weather saw total retail sales figures increase by 10.9% year-on-year in May. Retail sales in Scotland held steady for May with a growth of 7.7%. Food sales continue to be the biggest growth area.

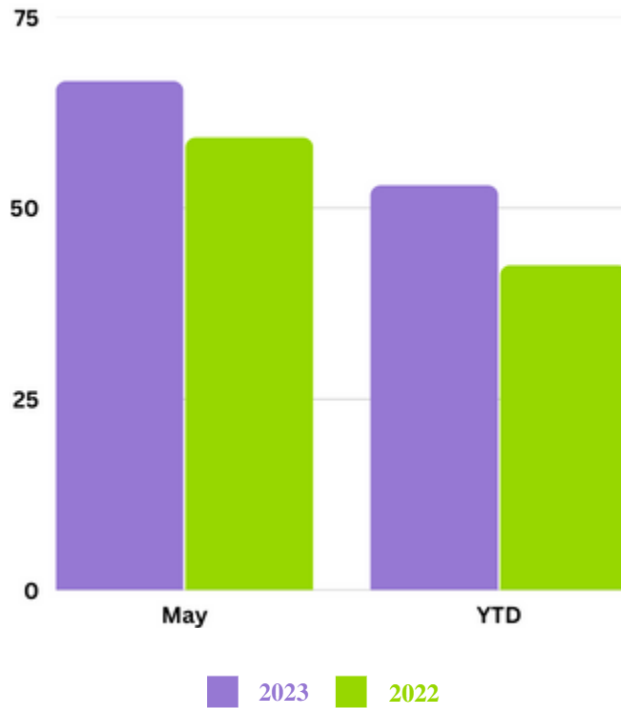
Domestic consumer sentiment provided by the GB National Tourist Boards for May 2023 found that 49% of respondents were cautious about demand and were concerned with cost escalation. The survey recorded 18% of respondents (a 3% decrease on the April 2023 Survey) saying they were "...been hit hard - no option but to cut back on spending". Despite consumer concern about the state of the economy, 20% of UK adults intend to take a domestic overnight trip in the second 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 were; Rising cost of living, UK weather and Personal finances. 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 continues in May 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2022, however, UK air connectivity had seen a 10% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation

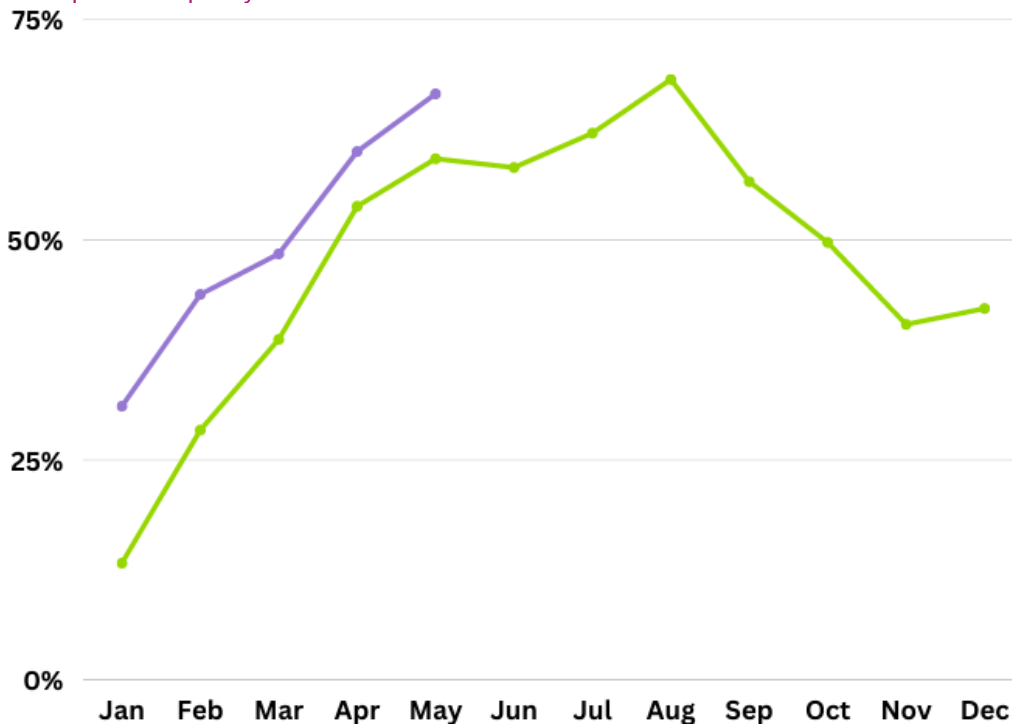
3.1 Performance by Hostel Category

Bed Space Occupancy – May 2023/2022



Hostel occupancy for May 2023 was 66.56% when compared to data from the previous year of 59.18%; this shows an overall percentage point increase of 7.38.

Bed Space Occupancy – Year to Date



2023 2022

Bed Space Occupancy Scotland – May 2023/2022

Hostels	May 23	May 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	66.56%	59.18%	7.38	107	52.93%	42.47%	10.46	110

Bed Occupancy by Type – May 2023/2022

Type	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	66.90%	61.13%	5.77	106	53.25%	44.88%	8.37	108
Independent	*	*	*	*	29.24%	10.15%	19.09	119
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading – May 2023/2022

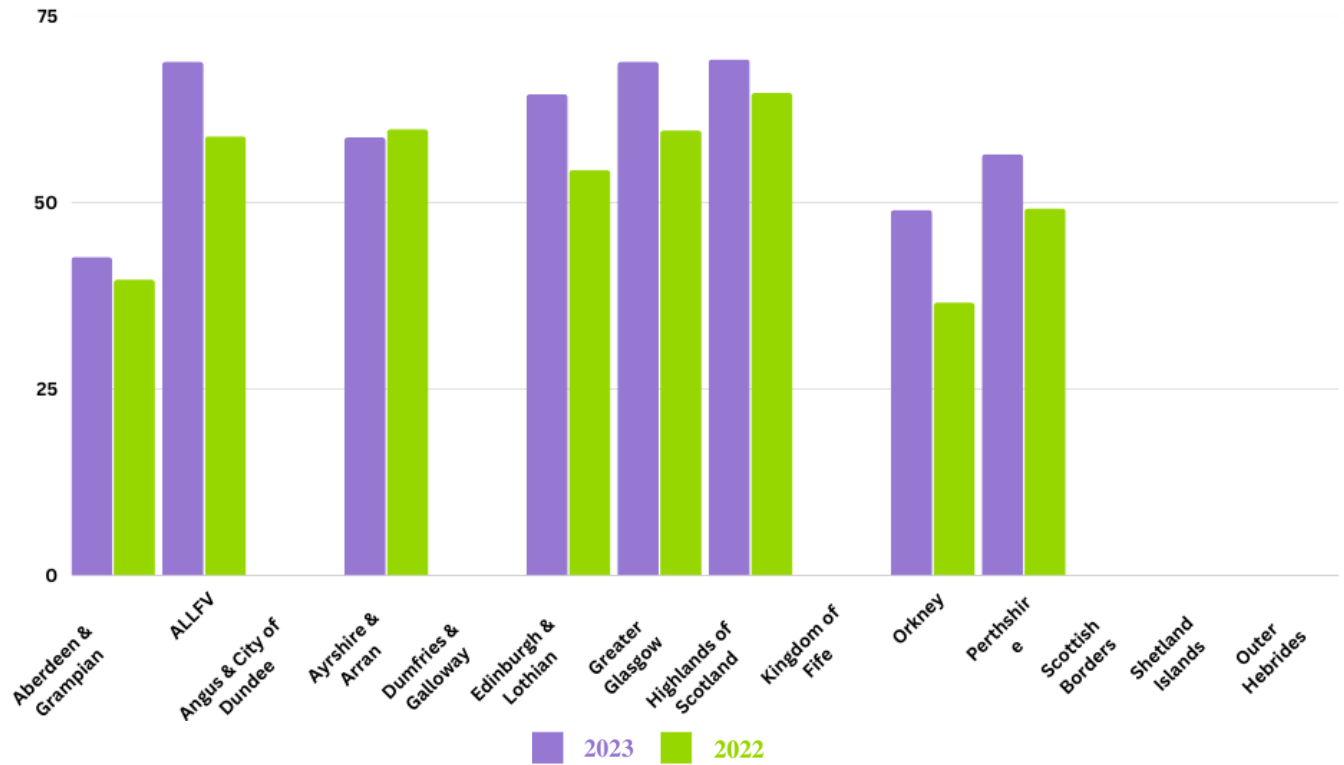
Grading	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	48.96%	71.64%	-22.68	77
2 Stars	*	*	*	*	41.82%	46.24%	-4.42	96
3 Stars	67.35%	65.56%	1.79	102	56.37%	52.60%	3.77	104
4 Stars	59.35%	57.52%	1.83	102	54.06%	38.31%	15.75	116
5 Stars	*	*	*	*	48.91%	39.16%	9.75	110
Unclassified	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Former VisitScotland Area

Bed Space Occupancy by Former VisitScotland Area – May 2023/2022

¹ 23/22 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.



Bed Occupancy by Former VisitScotland Area – May 2023/2022

Area	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	29.24%	28.37%	0.87	101
ALLFV	68.77%	58.77%	10.00	110	60.85%	38.15%	22.70	123
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	53.79%	54.41%	0.00	100
Dumfries & Galloway	-	*	*	*	-	0.00%	0.00	100
Edinburgh & Lothian	*	*	*	*	49.65%	39.32%	10.33	110
Greater Glasgow	*	*	*	*	45.24%	40.53%	4.71	105
Highlands of Scotland	69.09%	64.56%	4.53	105	53.98%	46.57%	7.41	107
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	34.62%	35.69%	-1.07	99
Perthshire	*	*	*	*	55.66%	52.66%	3.00	103
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

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

Bed Occupancy by Location – May 2023/2022

Location accessibility/density	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	66.92%	54.96	11.96	112	52.77%	39.32%	13.45	113
Other Urban Areas	*	*	*	*	40.51%	31.26%	9.25	109
Accessible Small Towns	*	*	*	*	60.85%	45.03%	15.82	116
Remote Small Towns	*	*	*	*	43.85%	25.74%	18.11	118
Accessible Rural	*	*	*	*	58.50%	50.30%	8.20	108
Remote Rural	67.68%	65.98	1.70	102	56.81%	55.47%	1.34	101

- Sample Size = Nil

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

Bed Occupancy by Location Type– May 2023/2022

Location Type	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	68.65%	54.56	14.09	114	55.71%	34.40%	21.31	121
City – Large Town	66.89%	54.52	12.37	112	49.21%	36.42%	12.79	113
Small Town	*	*	*	*	47.23%	41.00%	6.23	106
Countryside - Villages	66.96%	65.65	1.31	101	57.89%	52.79%	5.10	105
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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