

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## April 2023/2022 Report – HOSTEL - Revised

### 1.0 Introduction April 2023/2022

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

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 April 2023

The SOAS Report: April 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 April 2023 showed a percentage point increase of **6.21** when compared with April 2022.

Data from the Scottish Retail Consortium showed that Easter provided a slender but nonetheless welcome uplift to retail sales in Scotland last month. The real terms value of retail sales edged back into positive territory after the decline witnessed in March. Retail sales in Scotland held steady in April with decent growth of 9.1%. Food sales are the biggest growth area, aided by the Easter weekend and family gatherings. From the Visitor Attraction Barometer, Scottish Retail Attractions footfall increased by 2% in April 2023 compared to April 2022. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the broader cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

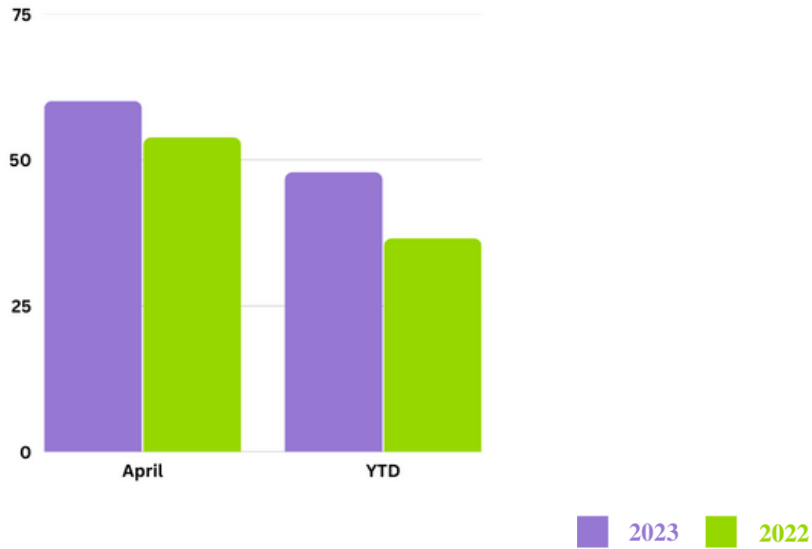
Notably, some 21% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 34% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 77% in the following 12 months. These figures have 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 2023; however, the reduced availability of flights and routes when compared with 2019 continues to restrain growth. A highlight in air transport was from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 16% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a 12% decrease in year-to-date flights compared to 2019.

### 3.0 Hostel Accommodation

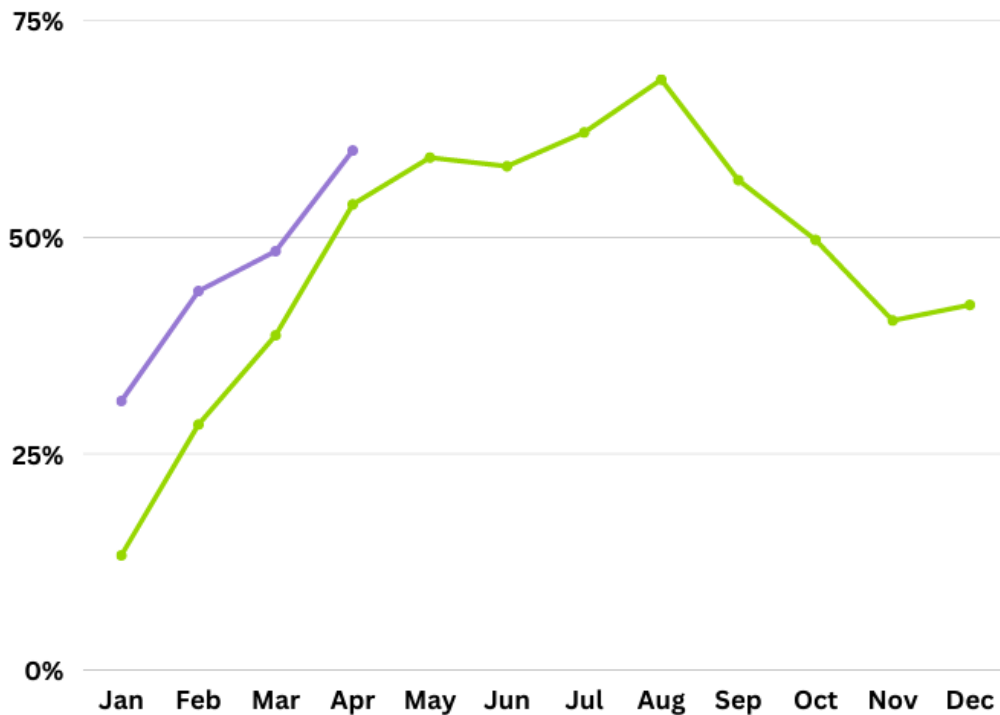
#### 3.1 Performance by Hostel Category

##### Bed Space Occupancy – April 2023/2022



Hostel occupancy for April 2023 was 60.02% when compared to data from the previous year of 53.81%; this shows an overall percentage point increase of 6.21.

##### Bed Space Occupancy – Year to Date



2023 2022

### Bed Space Occupancy Scotland – April 2023/2022

Hostels	April 23	April 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	60.02%	53.81%	6.21	106	47.85%	36.52%	11.33	111

### Bed Occupancy by Type – April 2023/2022

Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	60.38%	56.21%	4.17	104	48.17%	38.97%	9.20	109
Independent	*	14.00%	21.87	122	*	6.10%	17.90	118
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

### Bed Occupancy by Grading – April 2023/2022

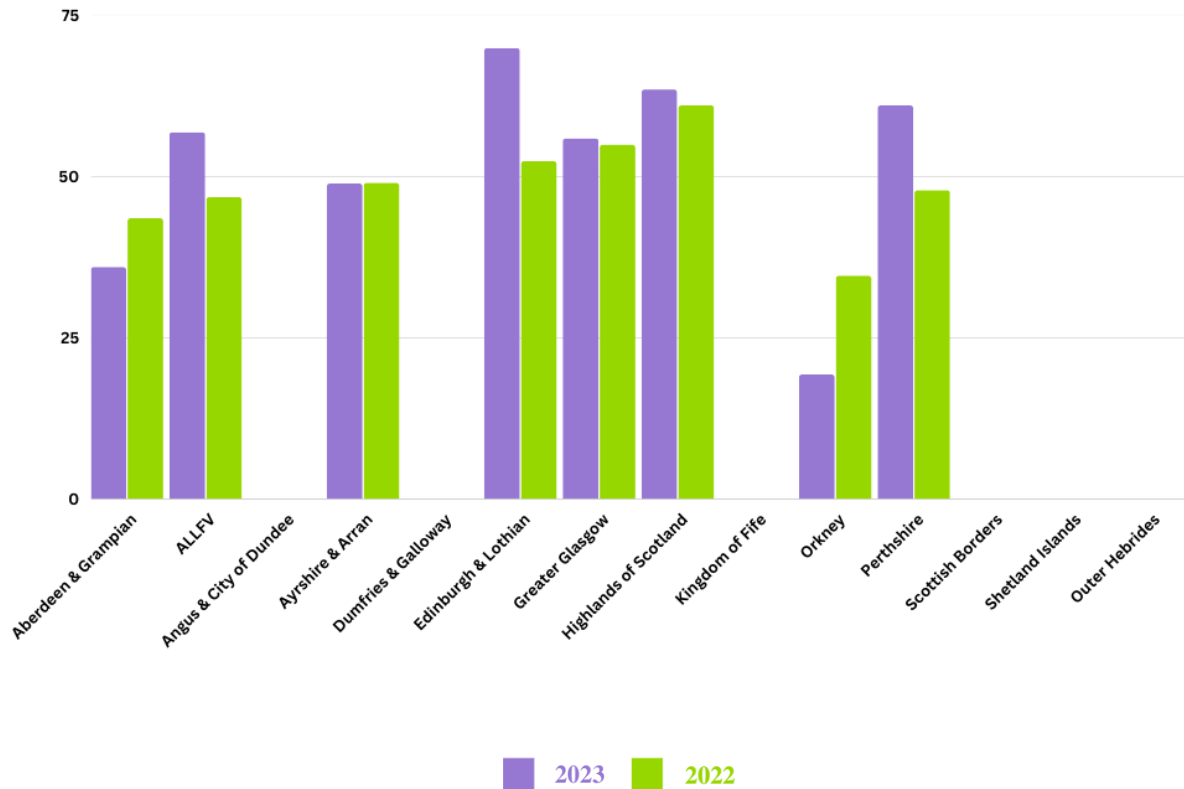
Grading	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	40.13%	62.01%	-21.88	78
2 Stars	*	*	*	*	28.03%	48.90%	-20.87	79
3 Stars	64.93%	62.92%	2.64	103	51.32%	46.95%	4.37	104
4 Stars	57.26%	49.32%	7.94	108	48.74%	31.85%	16.89	117
5 Stars	*	*	*	*	44.81%	35.33%	9.48	109
Unclassified	-	*	*	*	*	*	*	*
- 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 – April 2023/2022

<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.



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

Area	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	24.00%	23.11%	0.89	101
ALLFV	56.77%	46.73%	10.04	110	56.99%	30.59%	26.40	126
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	*	*	*	-	*	*	*
Edinburgh & Lothian	*	*	*	*	45.60%	35.70%	9.90	110
Greater Glasgow	*	*	*	*	39.17%	35.62%	3.55	104
Highlands of Scotland	63.36%	60.93%	2.43	102	48.46%	39.93%	8.53	109
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	55.34%	54.87%	0.47	100
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

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

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

Location accessibility/density	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	61.27%	50.42%	10.85	111	48.60%	34.99%	13.61	114
Other Urban Areas	*	*	*	*	32.87%	23.37%	9.50	110
Accessible Small Towns	*	*	*	*	59.63%	42.48%	17.15	117
Remote Small Towns	*	*	*	*	38.86%	21.24%	17.62	118
Accessible Rural	*	*	*	*	53.86%	41.55%	12.31	112
Remote Rural	61.99%	58.36%	3.63	104	51.11%	49.62%	1.49	101

- Sample Size = Nil

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

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

Location Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	63.73%	48.93%	14.80	115	50.06%	27.02%	23.04	123
City – Large Town	59.57%	50.60%	8.97	109	44.17%	31.49%	12.68	113
Small Town	*	*	*	*	41.99%	36.76%	5.23	105
Countryside - Villages	62.12%	58.38%	3.74	104	53.62%	46.91%	6.71	107
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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