

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: August 2020/2019 Report - HOSTEL

1.0 Introduction August 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering August 2020 and benchmarking against August 2019. The survey 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 Giancarlo Fedeli (E-mail: gfe2@gcu.ac.uk).

2.0 Executive Summary August 2020

Hostel Bedspace Occupancy rates for the month of August 2020 demonstrated a % Point decrease of **-45.80%** when comparing occupancy rates with August 2019. With August being a peak month for tourism, we would normally see a heightened occupancy rate amongst all sectors, however , with the continued effects and restrictions of COVID-19, there remains to be low occupancy in comparison to August 2019 figures. The visitor attraction sector saw a decrease of 72.2% in visits numbers when comparing August 2020 with August 2019.

3.0 Hostel Accommodation

3.1 Performance by Hostel Category – August 2020/2019

Hostel occupancy for August 2020 was 28.94% compared to 74.74% in August 2019. This shows a decrease of -45.80%.

Bed Space Occupancy Scotland – August 2020/2019

Hostels	August 20	August 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Bed Space Occupancy	28.94%	74.74%	-45.80%	54	25.68%	64.19%	-38.51%	61

Bed Occupancy by Type – August 2020/2019

Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
SYHA	29.55%	75.43%	-45.88%	54	25.81%	60.92%	-35.11%	65
Independent	13.42%	73.96%	-60.54%	39	22.82%	74.23%	-51.41%	49

Bed Occupancy by Grading – August 2020/2019

Grading	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1 Stars	0.00%	58.56%	-58.56%	41	0.00%	60.28%	-60.28%	40
2 Stars	0.00%	69.56%	-69.56%	30	0.00%	59.60%	-59.60%	40
3 Stars	42.03%	77.22%	-35.19%	65	40.78%	67.54%	-26.76%	73
4 Stars	38.50%	73.27%	-34.77%	65	29.58%	54.40%	-24.82%	75
5 Stars	13.67%	73.82%	-60.15%	40	24.64%	56.91%	-32.27%	68
Unclassified	0.00%	77.64%	-77.64%	22	4.28%	75.12%	-70.84%	29

¹ 20/19 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 – August 2020/2019

Area	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Aberdeen & Grampian	13.42%	48.59%	-35.17%	65	24.34%	37.27%	-12.93%	87
ALLFV	23.87%	72.06%	-48.19%	52	21.56%	53.17%	-31.61%	68
Angus & City of Dundee	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Ayrshire & Arran	0.00%	67.62%	-67.62%	32	40.25%	47.19%	-6.94%	93
Dumfries & Galloway	0.00%	75.00%	-75.00%	25	0.00%	68.43%	-68.43%	32
Edinburgh & Lothian	13.38%	74.96%	-61.58%	38	14.02%	75.63%	-61.61%	38
Greater Glasgow	0.00%	84.76%	-84.76%	15	39.56%	66.62%	-27.06%	73
Highlands of Scotland	45.85%	79.91%	-34.06%	66	37.52%	64.51%	-26.99%	73
Kingdom of Fife	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Orkney	0.00%	63.52%	-63.52%	36	0.00%	63.92%	-63.92%	36
Perthshire	47.05%	68.26%	-21.21%	79	47.17%	58.95%	-11.78%	88
Scottish Borders	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Shetland Islands	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Outer Hebrides	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100

Bed Occupancy by Location – August 2020/2019

Location accessibility/density	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Large Urban Areas	13.38%	73.97%	-60.59%	39	17.86%	68.65%	-50.79%	49
Other Urban Areas	0.00%	83.65%	-83.65%	16	19.95%	58.85%	-38.90%	61
Accessible Small Towns	27.95%	70.97%	-43.02%	57	42.33%	54.11%	-11.78%	88
Remote Small Towns	18.39%	66.58%	-48.19%	52	24.73%	47.32%	-22.59%	77
Accessible Rural	39.24%	77.23%	-37.99%	62	38.26%	70.27%	-32.01%	68
Remote Rural	43.74%	77.88%	-34.14%	66	43.09%	65.62%	-22.53%	77

Bed Occupancy by Location Type– August 2020/2019

Location Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	42.37%	73.86%	-31.49%	69	32.29%	55.38%	-23.09%	77
City – Large Town	13.38%	74.74%	-61.36%	39	18.15%	67.08%	-48.93%	51
Small Town	38.37%	73.62%	-35.25%	65	26.12%	58.77%	-32.65%	67
Countryside - Villages	39.13%	75.23%	-36.10%	64	42.44%	63.03%	-20.59%	79