

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

February 2023/2022 Report – HOSTEL - Revised

1.0 Introduction February 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering February 2023 and benchmarking against February 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 February 2023

The SOAS Report: February 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 February 2023 showed a percentage point increase of **15.39** when compared with February 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 14.5% footfall increase in visitors for February 2023 compared to February 2022, with both Edinburgh and Glasgow seeing significant increases (27.8% and 16.7% respectively). However, when comparing footfall in February 2023 with February 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the wider cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for February 2023 evidenced similar findings with 47% of respondents Undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

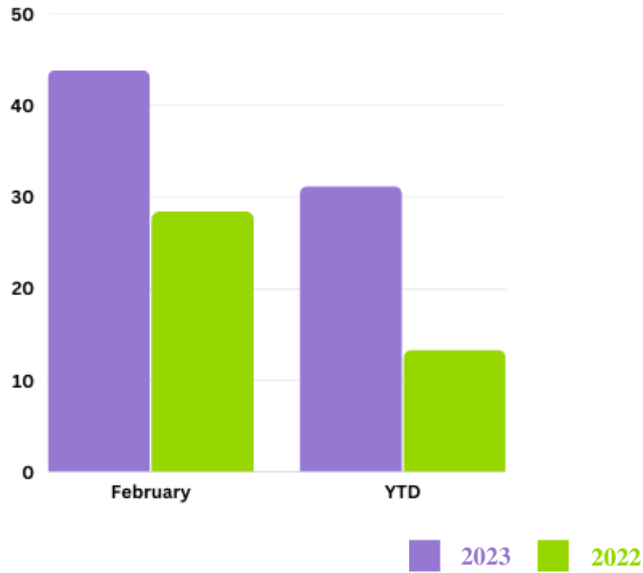
Notably, some 25% of respondents Recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 11% of UK adults intended to take a domestic overnight trip in the first quarter of 2023 although that figure rose to 72% in the following 12 months. These figures have 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 be restrain growth. A highlight in air transport was from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 17% 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 15% decrease in year-to-date flights when compared to in 2019.

3.0 Hostel Accommodation

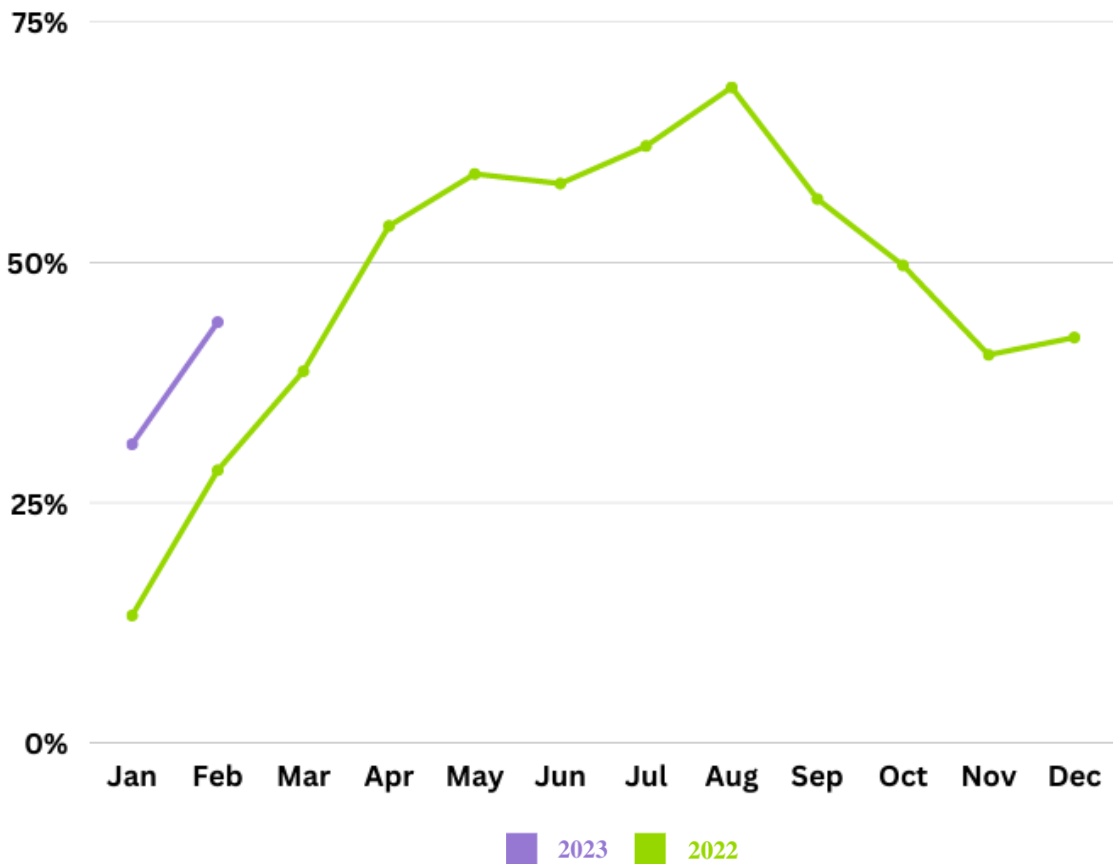
3.1 Performance by Hostel Category

Bed Space Occupancy – February 2023/2022



Hostel occupancy for February 2023 was 43.81% when compared to data from the previous year of 28.42%; this shows an overall percentage point increase of 15.39.

Bed Space Occupancy – Year to Date



Bed Space Occupancy Scotland – February 2023/2022

Hostels	February 23	February 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	43.81%	28.42%	15.39	115	37.15%	21.05%	16.10	116

Bed Occupancy by Type – February 2023/2022

Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	44.21%	30.88%	13.33	113	37.29%	22.90%	14.39	114
Independent	*	*	*	*	*	*	*	*

- Sample Size = Nil

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

Bed Occupancy by Grading – February 2023/2022

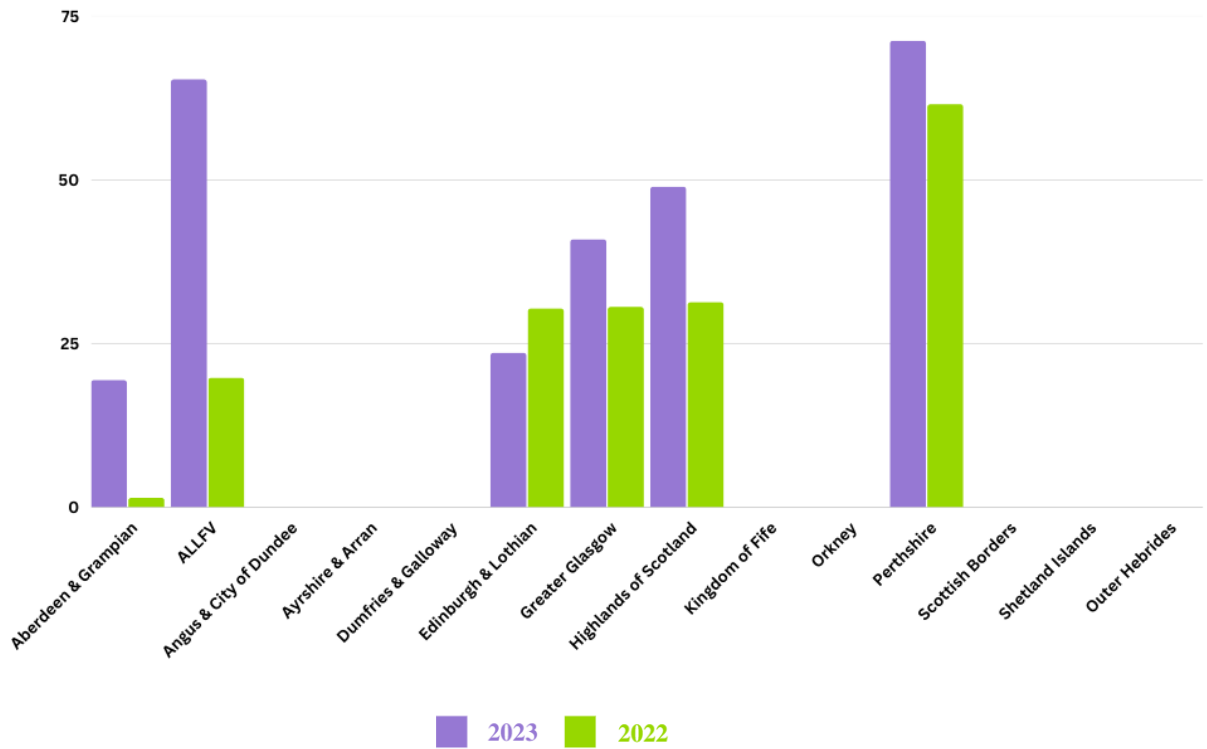
Grading	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	*	*	*	*
2 Stars	*	*	*	*	*	0.00%	*	*
3 Stars	58.28%	33.29%	24.99	125	48.41%	30.15%	18.26	118
4 Stars	48.97%	25.64%	23.33	123	38.18%	18.23%	19.95	120
5 Stars	*	*	*	*	*	*	*	*
Unclassified	*	*	*	*	*	*	*	*

Bed Occupancy by Former VisitScotland Area

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 Space Occupancy by Former VisitScotland Area – February 2023/2022



Bed Occupancy by Former VisitScotland Area – February 2023/2022

Area	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	*	0.95%	*	*
ALLFV	65.25%	19.75%	45.50	146	49.75%	15.75%	34.00	134
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	*	*	*	-	*	*	*
Edinburgh & Lothian	*	*	*	*	27.21%	19.71%	7.50	108
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	48.86%	31.28%	17.58	118	41.04%	23.96%	17.08	117
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

Bed Occupancy by Location – February 2023/2022

Location accessibility/density	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	36.00%	30.38%	5.62	106	32.69%	20.14%	12.55	113
Other Urban Areas	*	*	*	*	15.57%	7.58%	7.99	108
Accessible Small Towns	*	*	*	*	60.52%	32.65%	27.87	128
Remote Small Towns	*	*	*	*	*	12.03%	26.81	127
Accessible Rural	*	*	*	*	42.67%	23.90%	18.77	119

Remote Rural 61.62% 39.43% 22.19 122 48.24% 34.24% 14.00 114

Bed Occupancy by Location Type– February 2023/2022

Location Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	42.69%	12.28%	30.41	130	44.27%	9.70%	34.57	135
City – Large Town	32.84%	24.83%	8.01	108	27.81%	16.41%	11.40	111
Small Town	*	*	*	*	39.43%	23.62%	15.81	116
Countryside - Villages	65.52%	40.37%	25.15	125	52.69%	34.32%	18.37	118

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