

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## March 2023/2022 Report – HOSTEL - Revised

### 1.0 Introduction March 2023/2022

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

The SOAS Report: March 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 March 2023 showed a percentage point increase of **9.71** when compared with March 2022.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions footfall increased by 14.5% in March 2023 compared to March 2022. Both Edinburgh and Glasgow seeing noticeable increases (27.8% and 16.7% respectively). However, when comparing footfall in March 2023 with March 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending and the slower return to urban working for some.

Domestic consumer sentiment provided by the GB National Tourist Boards for March 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions with caution in discretionary leisure expenditure. Notably, some 23% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 29% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 73% for the following 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidenced the importance attached to holiday expenditure even in such 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 29% 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 14% decrease in year-to-date flights compared to 2019.

The United Nations World Tourism Organisations World Tourism Barometer found global international tourist arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 (-20% compared to the same quarter of 2019) boosted by strong results in Europe and the Middle East, compared to a 66% recovery level for the year 2022 overall. An estimated 235 million tourists travelled internationally in the first three months, more than double those in the same period of 2022. Europe reached 90% of pre-pandemic levels in Q1 2023, supported by robust intra-regional demand.

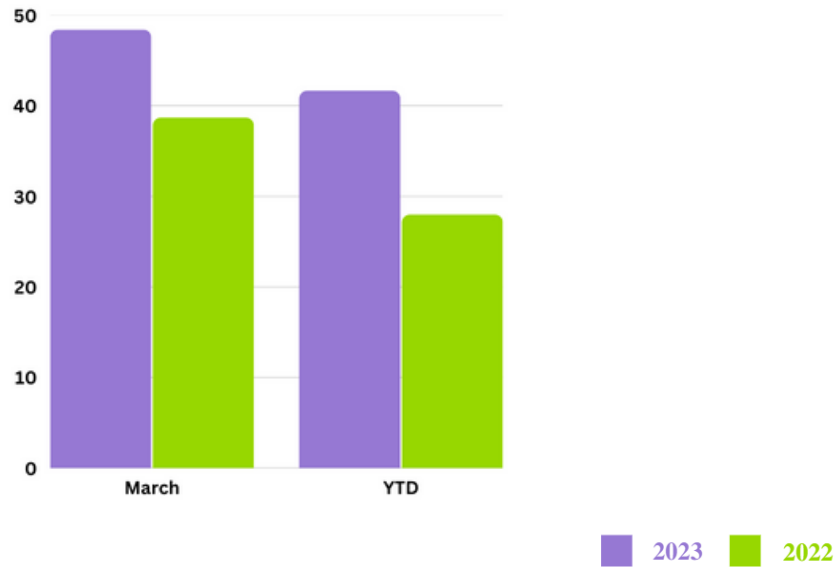
Looking ahead, the UNWTO Panel of Experts survey indicates that almost 70% of experts expect better performance in May-August 2023. Yet, most continue to believe international tourism will not return to 2019 levels until 2024 or later. The UNWTO also suggest strong results are expected in the coming Northern Hemisphere summer season backed by robust pent-up demand, the sustained recovery of air connectivity, and the recent reopening of China and other major Asian markets and destinations.

(Source: <https://www.unwto.org/news/tourism-on-track-for-full-recovery-as-new-data-shows-strong-start-to-2023>)

### 3.0 Hostel Accommodation

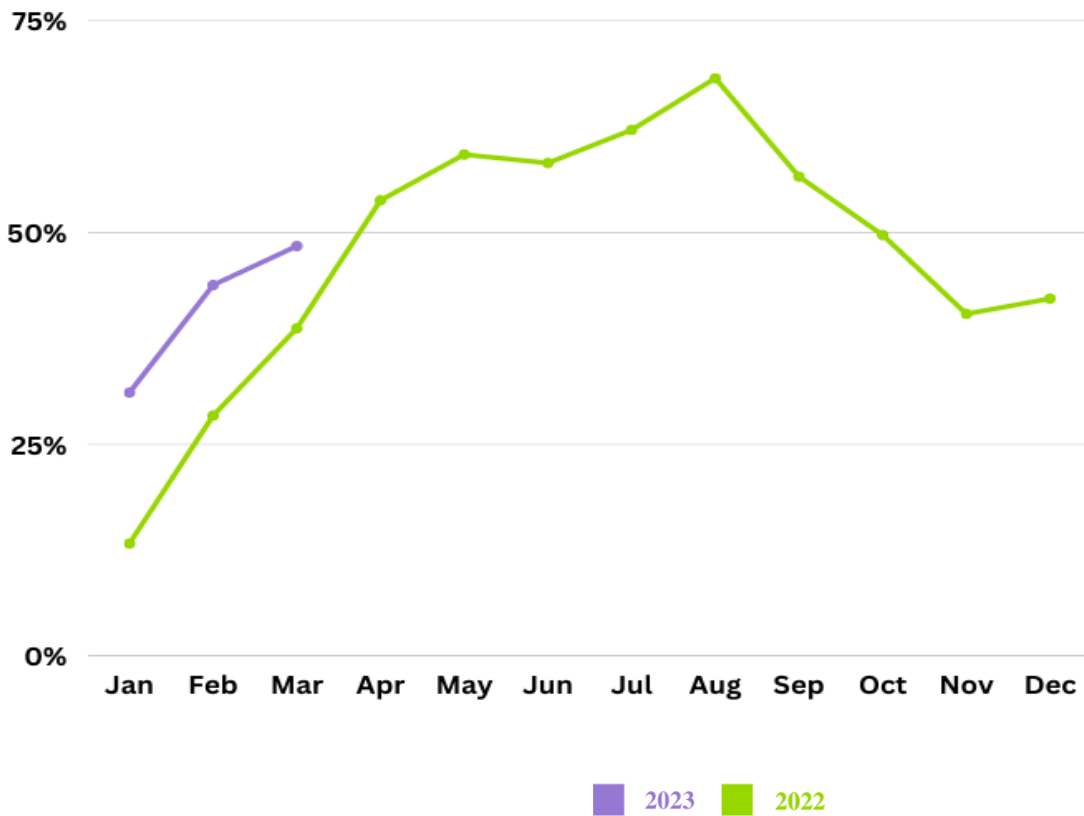
#### 3.1 Performance by Hostel Category

Bed Space Occupancy – March 2023/2022



Hostel occupancy for March 2023 was 48.37% when compared to data from the previous year of 38.66%; this shows an overall percentage point increase of 9.71.

Bed Space Occupancy – Year to Date



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

Hostels	March 23	March 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	48.37%	38.66%	9.71	110	41.61%	27.95%	13.66	114

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

Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	49.05%	41.31%	7.74	108	41.92%	30.18%	11.74	112
Independent	*	*	*	*	*	3.42%	13.31	113
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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

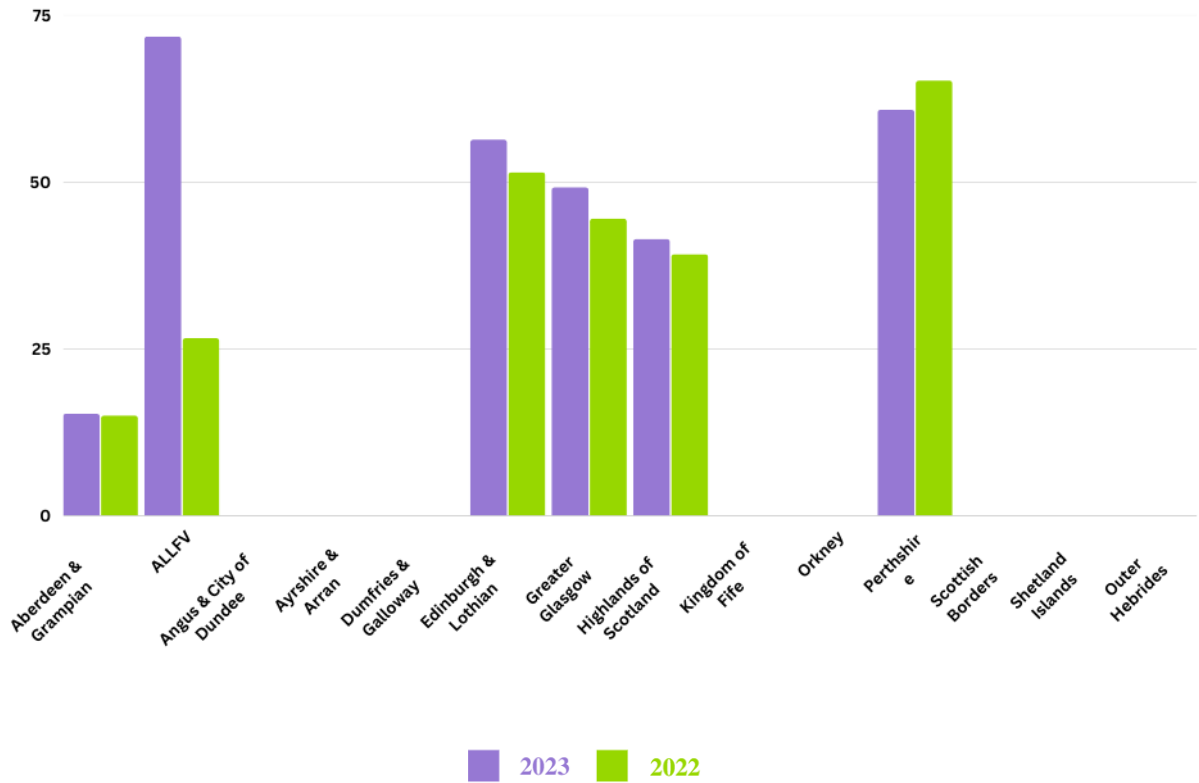
Grading	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	23.46%	0.00%	23.46	123
2 Stars	*	*	*	*	47.46%	0.00%	47.46	147
3 Stars	35.69%	45.72%	-10.03	90	41.89%	36.84%	5.05	105
4 Stars	55.58%	30.47%	25.11	125	44.46%	23.17%	21.29	121
5 Stars	*	*	*	*	37.49%	29.68%	7.81	108
Unclassified	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Bed Occupancy by Former VisitScotland Area

<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 Space Occupancy by Former VisitScotland Area – March 2023/2022



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

Area	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	16.73%	6.09%	10.64	111
ALLFV	71.72%	26.56%	45.16	145	57.16%	20.97%	36.19	136
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	*	*	*	-	*	*	*
Edinburgh & Lothian	*	*	*	*	37.77%	30.62%	7.15	107
Greater Glasgow	*	*	*	*	33.62%	29.22%	4.40	104
Highlands of Scotland	41.40%	39.12%	2.28	102	41.20%	29.80%	11.40	111
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	51.41%	65.53%	-14.12	86
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

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

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

Location accessibility/density	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	64.00%	43.46%	20.54	121	43.82%	29.34%	14.48	114
Other Urban Areas	*	*	*	*	24.95%	12.45%	12.50	113
Accessible Small Towns	*	*	*	*	56.68%	35.77%	20.91	121
Remote Small Towns	*	*	*	*	36.77%	15.66%	21.11	121
Accessible Rural	*	*	*	*	47.18%	30.08%	17.10	117
Remote Rural	35.55%	48.30%	-12.75	87	41.82%	40.86%	0.96	101

- Sample Size = Nil

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

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

Location Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	36.45%	25.72%	10.73	111	40.19%	15.58%	24.61	125
City – Large Town	58.18%	38.06%	20.12	120	38.51%	24.63%	13.88	114
Small Town	*	*	*	*	38.74%	28.73%	10.01	110
Countryside - Villages	41.73%	44.76%	-3.03	97	47.77%	38.83%	8.94	109

- Sample Size = Nil

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

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