



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2023/2022 Report - HOSTEL

1.0 Introduction August 2023/2022

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

2.0 Executive Summary August 2023

The SOAS Report: August 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 August 2023 showed a percentage point increase of **6.28** when compared with August 2022.

Data from the Scottish Retail Consortium showed that the retail sales figures in Scotland improved by 5.6% year-on-year in August, however, this is well below the three-month average of 7.5%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the July 2023 survey). The survey recorded 45% of respondents (No change on the July 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful". Despite consumer concern about the state of the economy, 33% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months are the 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 stalled in August 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 8% decrease in year-to-date flights compared to 2019.

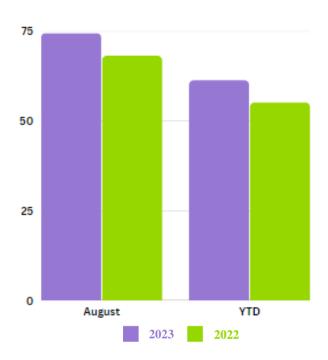




3.0 Hostel Accommodation

3.1 Performance by Hostel Category

Bed Space Occupancy - August 2023/2022



Hostel occupancy for August 2023 was 74.46% when compared to data from the previous year of 68.18%; this shows an overall percentage point increase of 6.28.









Bed Space Occupancy Scotland - August 2023/2022

Hostels	August 23	August 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	74.46%	68.18%	6.28	106	61.34%	55.14%	6.20	106

Bed Occupancy by Type - August 2023/2022

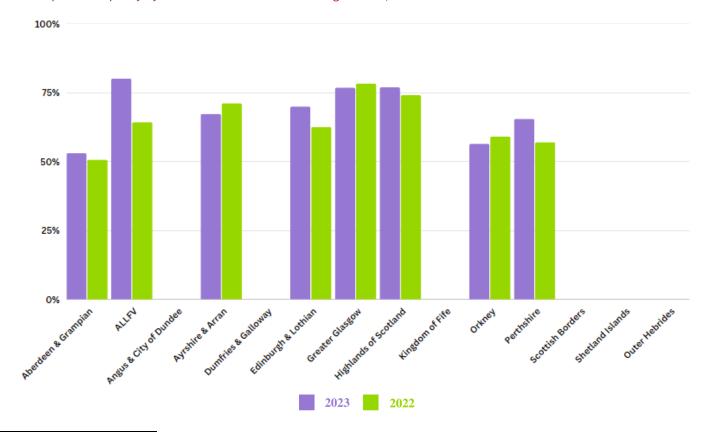
Туре	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
SYHA	74.76%	70.49%	4.27	104	61.64%	56.92%	4.72	105	
Independent	*	*	*	*	38.12%	13.78%	24.34	124	
- Sample Size = Nil			*San	*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading - August 2023/2022

Grading	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change	
1 Star	*	*	*	*	52.69%	71.11%	-18.42	82	
2 Stars	*	*	*	*	52.29%	69.98%	-17.69	82	
3 Stars	75.38%	72.82%	2.56	103	63.40%	43.38%	20.02	120	
4 Stars	78.24%	68.85%	9.39	109	63.58%	61.79%	1.79	102	
5 Stars	*	*	*	*	56.57%	61.77%	-5.20	95	
Unclassified	*	*	*	*	0.00%	0.00%	0.00	100	
- Sample Size = Nil			*Sample	*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Former VisitScotland Area

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

Area	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	38.12%	45.42%	-7.30	93
ALLFV	80.07%	64.25%	15.82	116	67.74%	33.53%	34.21	134
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	60.56%	71.09%	-10.53	89
Dumfries & Galloway	-	-	-	-	-	0.00%	0.00	100
Edinburgh & Lothian	*	*	*	*	56.99%	61.50%	-4.51	95
Greater Glasgow	*	*	*	*	56.41%	64.92%	-8.51	91
Highlands of Scotland	76.91%	74.09%	2.82	103	62.41%	68.85%	-6.44	94
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	49.08%	65.34%	-16.26	84
Perthshire	*	*	*	*	62.87%	70.56%	-7.69	92
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-
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⁻ Sample Size = Nil

Bed Occupancy by Location – August 2023/2022

Location accessibility/density	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	74.91%	67.75%	7.16	107	60.48%	63.14%	-2.66	97
Other Urban Areas	*	*	*	*	56.74%	58.39%	-1.65	98
Accessible Small Towns	*	*	*	*	65.87%	62.04%	3.83	104
Remote Small Towns	*	*	*	*	53.37%	45.88%	7.49	107
Accessible Rural	*	*	*	*	62.88%	71.91%	-9.03	91
Remote Rural	75.63%	74.48%	1.15	101	64.21%	47.38%	16.83	117
- Sample S		*Sample S	ize (between	1 and 4) too sm	all to be include	ed		

Bed Occupancy by Location Type- August 2023/2022

Location Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	75.62%	68.07%	7.55	108	59.24%	61.31%	-2.07	98
Countryside - Village	74.34%	72.22%	2.12	102	63.83%	50.02%	13.81	114
Seaside - Coastal	76.00%	56.94%	19.06	119	64.69%	53.89%	10.80	111
Small Town	*	*	*	*	55.99%	65.28%	-9.29	91
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⁻ Sample Size = Nil

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

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