

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.

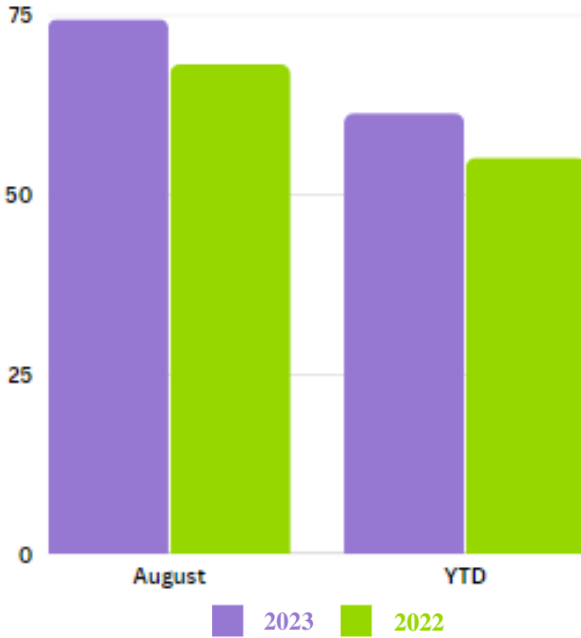
Domestic consumer sentiment provided by the GB National Tourist Boards for August 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the July 2023 survey). The survey recorded 45% of respondents (No change on the July 2023 Survey) 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 – Year-to-Date

