

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

July 2023/2022 Report - HOSTEL

1.0 Introduction July 2023/2022

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

The SOAS Report: July 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 July 2023 showed a percentage point increase of **12.00** when compared with July 2022.

Data from the Scottish Retail Consortium showed that total retail sales figures decreased by 3% year-on-year in July. Retail sales in Scotland held steady for July with a growth of 4.6%. Food sales continue to be the biggest growth area, however, many customers were seeking more warming traditional foods instead of the seasonal specials.

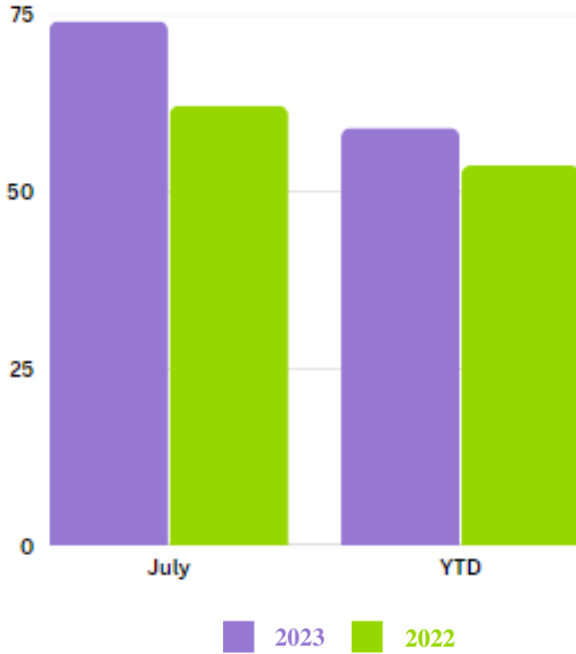
Domestic consumer sentiment provided by the GB National Tourist Boards for July 2023 found that 23% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the June 2023 survey). The survey recorded 45% of respondents (a 1% decrease on the June 2023 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, 50% of UK adults intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 75% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were 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 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 July 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 7% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation

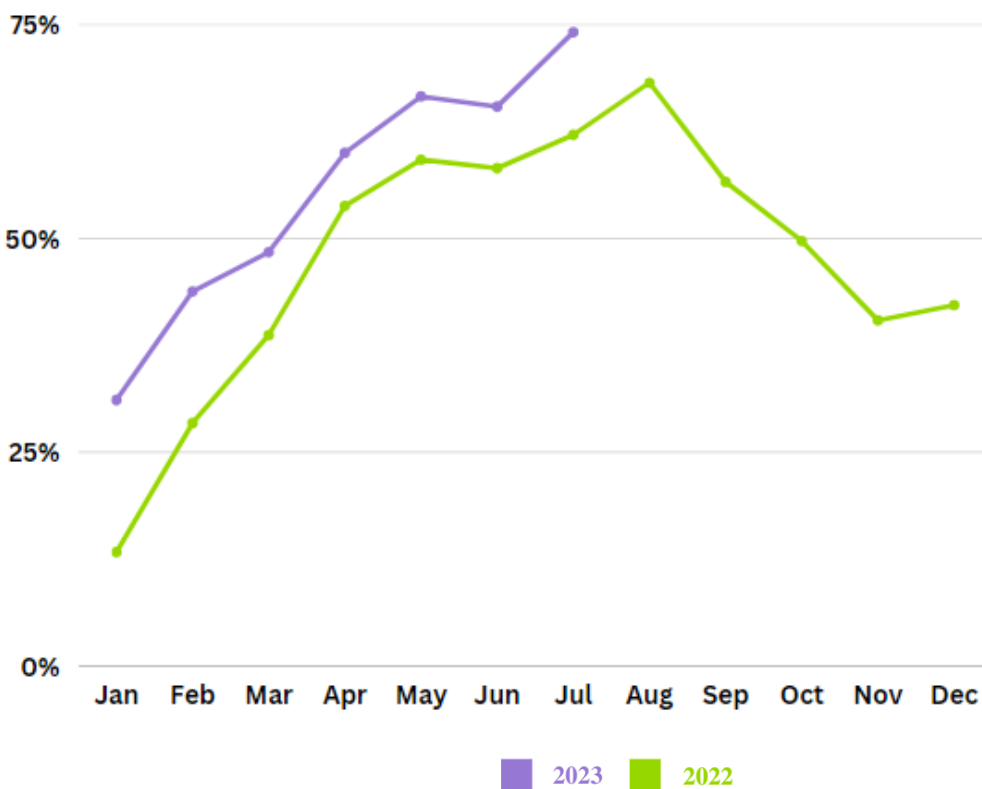
3.1 Performance by Hostel Category

Bed Space Occupancy – July 2023/2022



Hostel occupancy for July 2023 was 74.10% when compared to data from the previous year of 62.10%; this shows an overall percentage point increase of 12.00%.

Bed Space Occupancy – Year to Date



Bed Space Occupancy Scotland – July 2023/2022

Hostels	July 23	July 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	74.10%	62.10%	12.00	112	58.95%	53.63%	5.32	105

Bed Occupancy by Type – July 2023/2022

Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	74.34%	62.65%	11.69	112	59.25%	55.36%	3.89	104
Independent	*	*	*	*	35.42%	12.11%	23.31	123

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

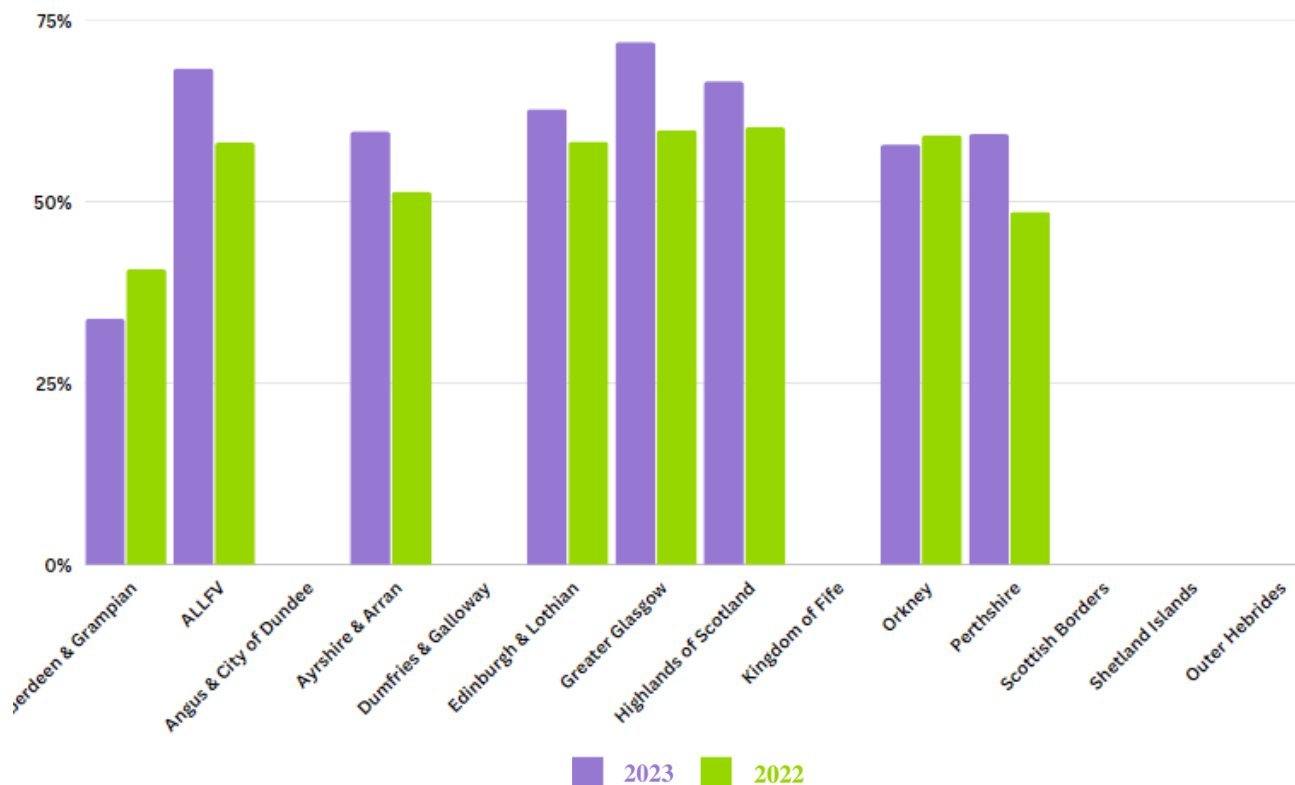
Bed Occupancy by Grading – July 2023/2022

Grading	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	51.24%	75.52%	-24.28	76
2 Stars	*	*	*	*	50.78%	71.71%	-20.93	79
3 Stars	72.62%	34.22%	38.40	138	61.07%	40.99%	20.08	120
4 Stars	48.53%	93.82%	-45.29	55	60.91%	60.80%	0.11	100
5 Stars	*	*	*	*	54.47%	61.61%	-7.14	93
Unclassified	*	*	*	*	0.00%	0.00%	0.00	100

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

Bed Occupancy by Former VisitScotland Area

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

Area	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	35.42%	44.54%	-9.12	91
ALLFV	75.88%	26.09%	49.79	150	65.29%	31.30%	33.99	134
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	58.86%	71.09%	-12.23	100
Dumfries & Galloway	-	-	-	-	-	0.00%	0.00	100
Edinburgh & Lothian	*	*	*	*	55.03%	61.38%	-6.35	94
Greater Glasgow	*	*	*	*	53.43%	63.44%	-10.01	90
Highlands of Scotland	75.47%	97.15%	-21.68	78	59.86%	68.15%	-8.29	92
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	47.26%	66.73%	-19.47	81
Perthshire	*	*	*	*	62.08%	75.03%	-12.95	87
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Location – July 2023/2022

Location accessibility/density	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	74.32%	99.33%	-25.01	75	58.20%	62.58%	-4.38	96
Other Urban Areas	*	*	*	*	52.90%	56.72%	-3.82	96
Accessible Small Towns	*	*	*	*	64.06%	61.32%	2.74	103
Remote Small Towns	*	*	*	*	51.12%	45.46%	5.66	106
Accessible Rural	*	*	*	*	61.52%	72.28%	-10.76	89
Remote Rural	73.01%	38.39%	34.62	135	61.87%	44.85%	17.02	117
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Location Type– July 2023/2022

Location Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	77.21%	85.12%	-7.91	92	62.54%	53.46%	9.08	109
City – Large Town	76.77%	99.17%	-22.40	78	56.52%	60.42%	-3.90	96
Small Town	*	*	*	*	53.77%	65.21%	-11.44	89
Countryside - Villages	71.96%	43.56%	28.40	128	61.76%	47.86%	13.90	114
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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