SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2023/2022 Report - HOSTEL

1.0   Introduction November 2023/2022

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

The SOAS Report: November 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 November 2023 showed a percentage point increase of **2.79** compared to November 2022.

Data from the Scottish Retail Consortium showed that retail sales remained weak in November with growth of just 3.1% despite the Black Friday deals. Food and drink and health and beauty categories continued to drive sales. November's food and drink sales rose by 5.8%, which was still below the 3-month average.

Domestic consumer sentiment provided by the GB National Tourist Boards for November 2023 found that 20% of respondents said they have "…been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2023 survey). The survey recorded 52% of respondents (a 7% increase on the September 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, 14% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 77% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months container to be 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 continued to stall in November 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw an 8% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation
3.1 Performance by Hostel Category
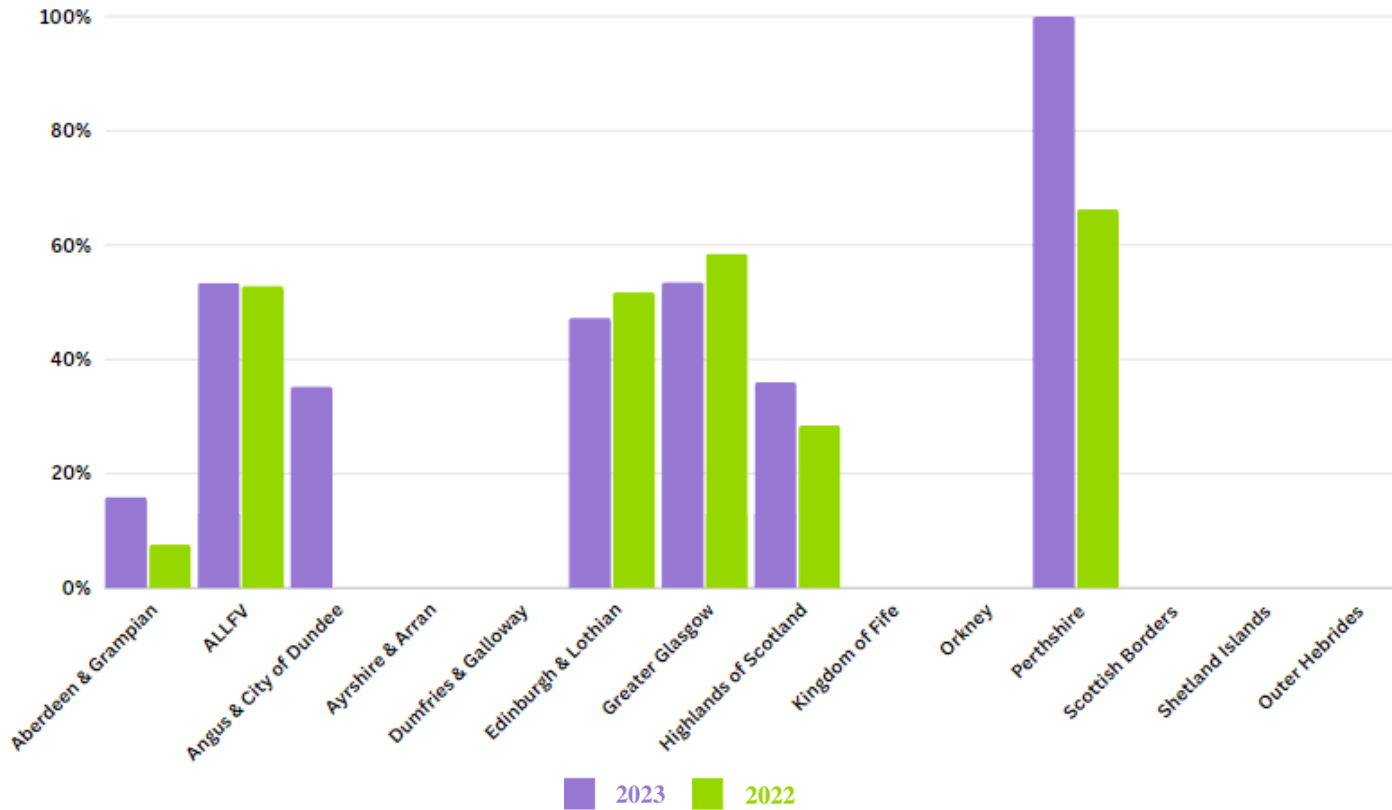
Bed Space Occupancy – November 2023/2022
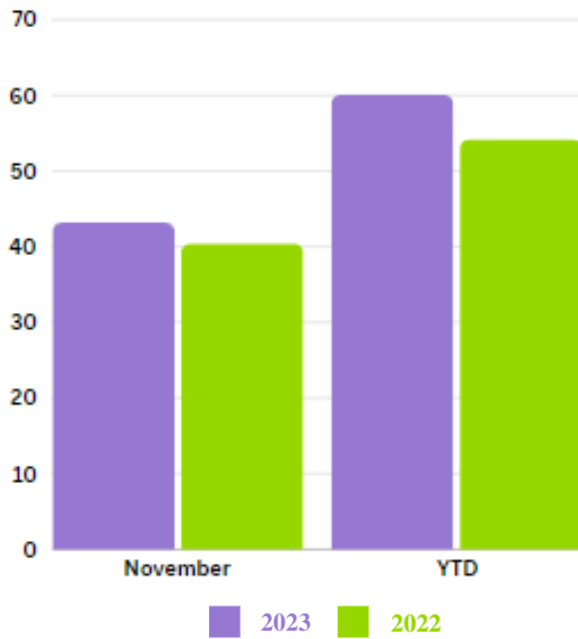
Hostel occupancy for November 2023 was 43.20% when compared to data from the previous year of 40.41%; this shows an overall percentage point increase of 2.79.

Bed Space Occupancy – Year-to-Date

Bed Space Occupancy Scotland – November 2023/2022

Hostels	November 23	November 22	23/22 Diff[1]	Change[2]	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	43.20%	40.41%	2.79	103	60.07%	54.20%	5.87	106

Bed Occupancy by Type – November 2023/2022

Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	44.60%	41.16%	3.44	103	60.50%	55.97%	4.53	105
Independent	40.09%	*	32.49	132	54.86%	14.58%	40.28	140

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

Bed Occupancy by Grading – November 2023/2022

Grading	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	52.76%	65.45%	-12.69	87
2 Stars	*	*	*	*	54.14%	66.54%	-12.40	88
3 Stars	48.10%	30.94%	17.16	117	62.00%	44.53%	17.47	117
4 Stars	42.49%	40.19%	2.30	102	61.92%	59.21%	2.71	103
5 Stars	*	*	*	*	56.25%	59.26%	-3.01	97
Unclassified	*	*	*	*	0.00%	0.00%	0.00	100

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

---

[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

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

Bed Occupancy by Former VisitScotland Area – November 2023/2022

Area	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	33.23%	43.27%	-10.04	90
ALLFV	53.39%	52.81%	0.58	101	65.57%	35.08%	30.49	130
Angus & City of Dundee	*	-	*	*	*	-	*	*
Ayrshire & Arran	*	*	*	*	59.09%	67.68%	-8.59	91
Dumfries & Galloway	-	-	-	-	-	0.00%	0.00	100
Edinburgh & Lothian	47.24%	*	-4.49	96	56.71%	59.87%	-3.16	97
Greater Glasgow	*	*	*	*	57.42%	65.30%	-7.88	92
Highlands of Scotland	36.00%	28.43%	7.57	108	61.30%	64.38%	-3.08	97
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	49.28%	61.17%	-11.89	88
Perthshire	*	*	*	*	62.44%	68.66%	-6.22	94
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

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

Bed Occupancy by Location – November 2023/2022

Location accessibility/density	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	49.40%	55.43%	-6.03	94	59.69%	61.75%	-2.06	98
Other Urban Areas	*	*	*	*	55.68%	55.70%	-0.02	100
Accessible Small Towns	32.12%	*	6.63	107	60.67%	58.02%	2.65	103
Remote Small Towns	*	*	*	*	53.04%	42.94%	10.10	110
Accessible Rural	*	*	*	*	60.08%	67.67%	-7.59	92
Remote Rural	51.24%	34.52%	16.72	117	63.58%	48.20%	15.38	115

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

Bed Occupancy by Location Type– November 2023/2022

Location Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	45.66%	46.15%	-0.49	100	58.56%	59.68%	-1.12	99
Countryside - Village	42.47%	32.49%	9.98	110	62.35%	50.04%	12.31	112
Seaside - Coastal	35.65%	45.13%	-9.48	91	62.40%	51.79%	10.61	111
Small Town	*	*	*	*	54.65%	60.07%	-5.42	95

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