

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

October 2023/2022 Report - HOSTEL

1.0 Introduction October 2023/2022

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

The SOAS Report: October 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 October 2023 showed a percentage point increase of **7.60** compared to October 2022.

Data from the Scottish Retail Consortium showed that retail sales remained weak in October with growth of just 2.5%. Food and drink and health and beauty categories continued to drive sales. October's food and drink sales enjoyed a slight increase in volume and value sales compared to last year, but value sales were slightly down on September's performance.

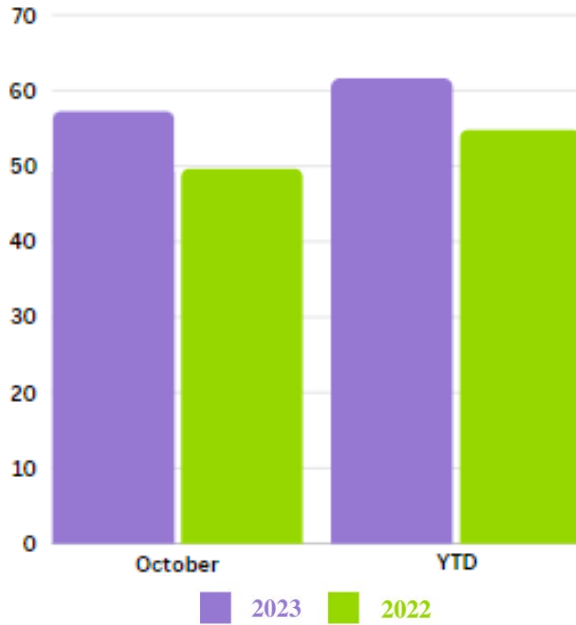
Domestic consumer sentiment provided by the GB National Tourist Boards for October 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease on the September 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful". were "...been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease 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, 21% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue 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 stalled in October 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 10% 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.

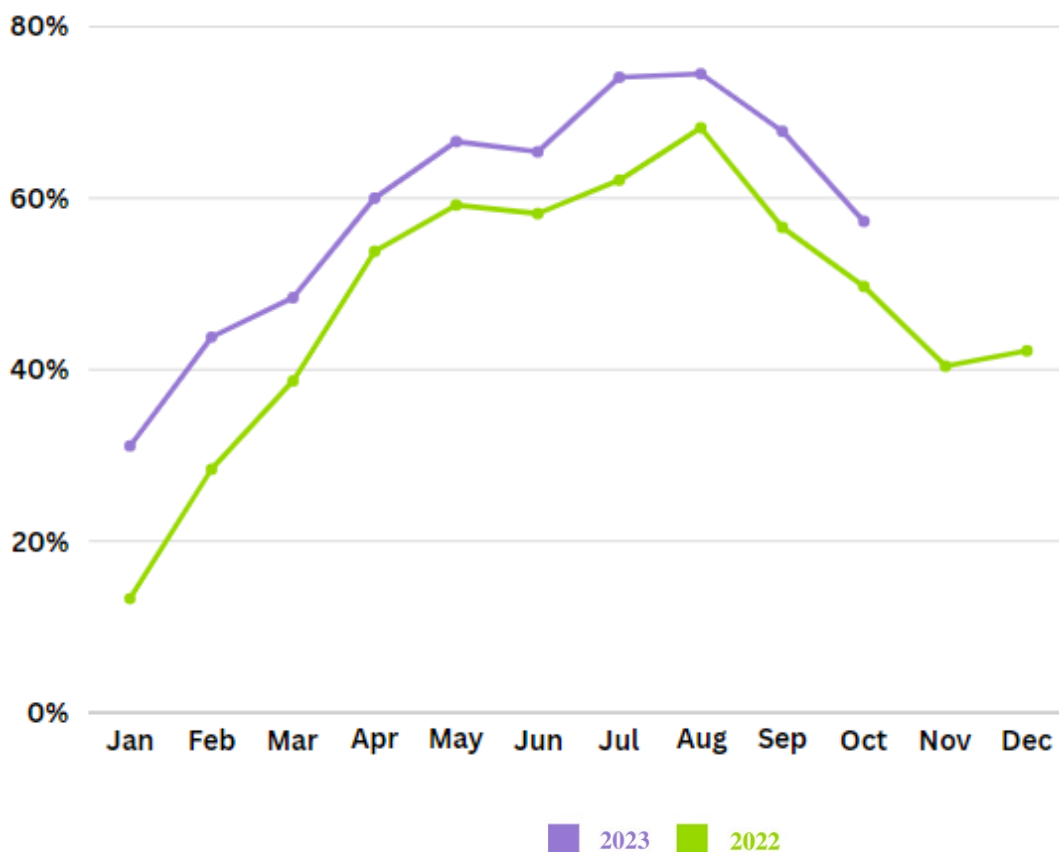
3.0 Hostel Accommodation
3.1 Performance by Hostel Category

Bed Space Occupancy – October 2023/2022



Hostel occupancy for October 2023 was 57.32% when compared to data from the previous year of 49.72%; this shows an overall percentage point increase of 7.60.

Bed Space Occupancy – Year-to-Date



Bed Space Occupancy Scotland – October 2023/2022

Hostels	October 23	October 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	57.32%	49.72%	7.60	108	61.65%	54.87%	6.78	107

Bed Occupancy by Type – October 2023/2022

Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	56.50%	52.05%	4.45	104	61.59%	56.71%	4.88	105
Independent	59.57%	*	44.05	144	62.32%	14.76%	47.56	148

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

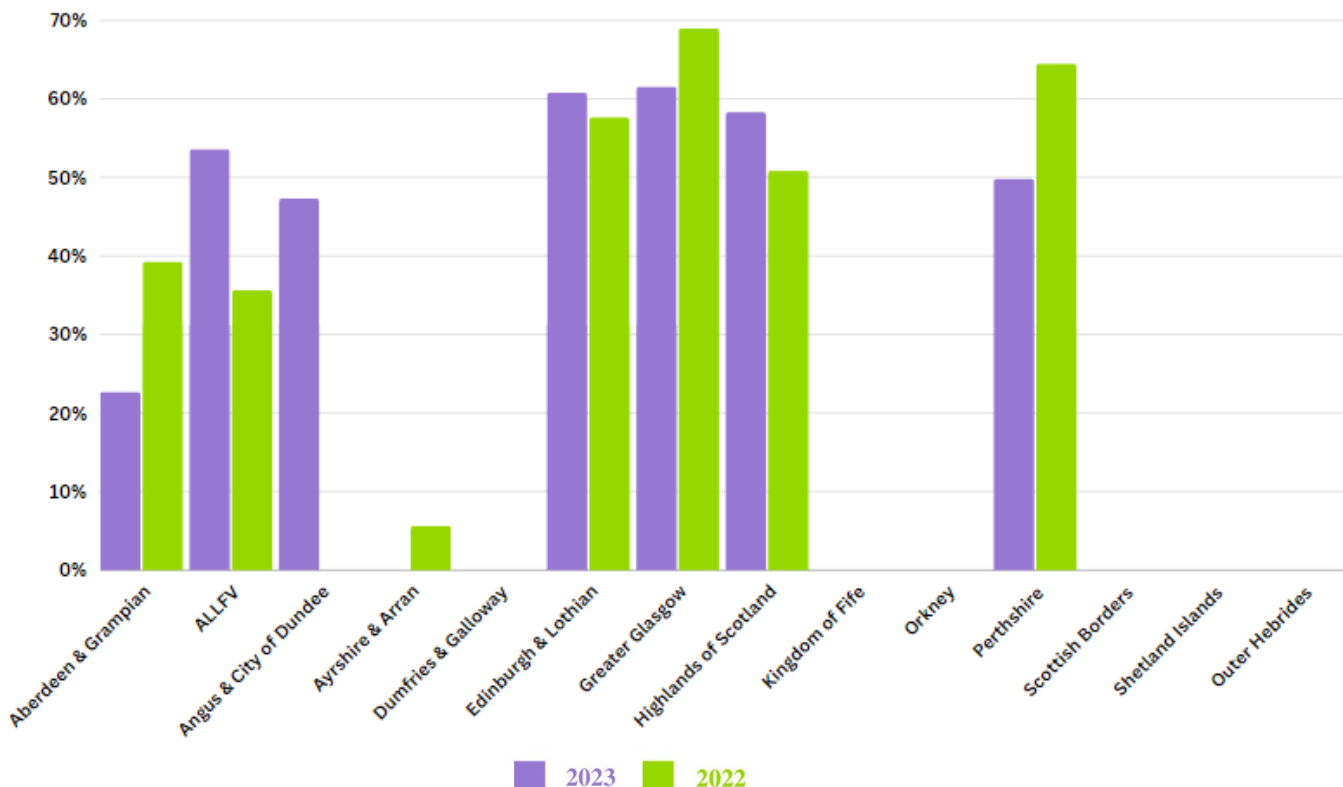
Bed Occupancy by Grading – October 2023/2022

Grading	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	52.76%	65.56%	-12.80	87
2 Stars	*	*	*	*	54.14%	66.54%	-12.40	88
3 Stars	56.16%	53.50%	2.66	103	62.65%	44.95%	17.70	118
4 Stars	56.81%	46.84%	9.97	110	63.53%	60.23%	3.30	103
5 Stars	*	*	*	*	57.31%	60.25%	-2.94	97
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 – October 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 – October 2023/2022

Area	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	35.21%	44.76%	-9.55	90
ALLFV	53.61%	35.67%	17.94	118	66.20%	34.70%	31.50	132
Angus & City of Dundee	*	-	*	*	*	-	*	*
Ayrshire & Arran	*	*	*	*	59.09%	67.68%	-8.59	91
Dumfries & Galloway	-	*	*	*	-	0.00%	0.00	100
Edinburgh & Lothian	60.79%	*	3.14	103	58.38%	60.56%	-2.18	98
Greater Glasgow	*	*	*	*	57.82%	65.85%	-8.03	92
Highlands of Scotland	58.30%	50.82%	7.48	107	63.33%	66.54%	-3.21	97
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	49.28%	61.17%	-11.89	88
Perthshire	*	*	*	*	61.14%	68.72%	-7.58	92
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

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

Bed Occupancy by Location – October 2023/2022

Location accessibility/density	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	60.49%	57.57%	2.92	103	61.29%	62.24%	-0.95	99
Other Urban Areas	*	*	*	*	57.99%	58.20%	-0.21	100
Accessible Small Towns	*	*	*	*	63.80%	60.16%	3.64	104
Remote Small Towns	*	*	*	*	54.41%	43.28%	11.13	111
Accessible Rural	*	*	*	*	62.87%	69.58%	-6.71	93
Remote Rural	57.16%	52.29%	4.87	105	64.10%	48.40%	15.70	116

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

Bed Occupancy by Location Type– October 2023/2022

Location Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	59.45%	55.81%	3.64	104	60.34%	60.73%	-0.39	100
Countryside - Village	53.97%	49.37%	4.60	105	63.45%	50.59%	12.86	113
Seaside - Coastal	59.42%	39.66%	19.76	120	64.29%	52.01%	12.28	112
Small Town	*	*	*	*	56.51%	61.93%	-5.42	95

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