SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:
December 2023/2022 Report - HOSTEL

1.0   Introduction December 2023/2022

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

The SOAS Report: December 2023/2022 Hostel report showed a decline in the Hostel sector in Scotland when compared to the same period in 2022. Hostel Bedspace Occupancy rates for December 2023 showed a percentage point decrease of **1.27** compared to December 2022.

Data from the Scottish Retail Consortium showed that retail sales remained weak in December with growth of just 1.9%. Food and drink and health and beauty categories continued to drive sales, however, food sales in December were the weakest monthly performance in 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 21% of respondents said they were "…been hit hard - no option but to cut back on spending" (a 1% increase on the December 2023 survey). The survey recorded 47% of respondents (a 5% decrease on the December 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, 28% of UK adults intend to take a domestic overnight trip in the first quarter of 2024, 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 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 2024) and evidence the importance attached to holiday expenditure even in a challenging economic environment.
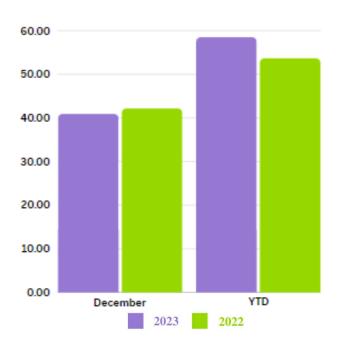
The recovery in international inbound visitation continued to stall in December 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 6% decrease in year-to-date flights compared to 2019.
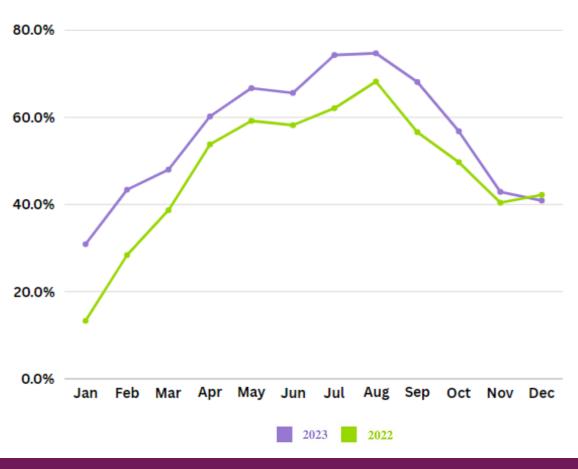
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3.0 Hostel Accommodation
3.1 Performance by Hostel Category

Bed Space Occupancy – December 2023/2022

Hostel occupancy for December 2023 was 40.93% when compared to data from the previous year of 42.20%; this shows an overall percentage point decrease of 1.27.

Bed Space Occupancy – Year-to-Date

Bed Space Occupancy Scotland – December 2023/2022

Hostels	December 23	December 22	23/22 Diff[1]	Change[2]	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	40.93%	42.20%	-1.27	99	58.50%	53.67%	4.83	105

Bed Occupancy by Type – December 2023/2022

Type	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	45.68%	42.95%	2.73	103	59.63%	55.39%	4.24	104
Independent	32.21%	*	21.24	121	49.81%	14.50%	35.31	135

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

Bed Occupancy by Grading – December 2023/2022

Grading	December 23	December 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	44.90%	39.25%	5.65	106	61.23%	44.37%	16.86	117
4 Stars	42.36%	36.68%	5.68	106	60.63%	58.20%	2.43	102
5 Stars	*	*	*	*	55.72%	58.69%	-2.97	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 – December 2023/2022

Bed Occupancy by Former VisitScotland Area – December 2023/2022

Area	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	45.30%	41.98%	3.32	103
ALLFV	33.74%	47.25%	-13.51	86	64.40%	35.27%	29.13	129
Angus & City of Dundee	*	-	*	*	*	-	*	*
Ayrshire & Arran	-	*	*	*	59.09%	68.05%	-8.96	91
Dumfries & Galloway	-	-	-	-	-	0.00%	0.00	100
Edinburgh & Lothian	48.29%	*	-7.45	93	55.58%	59.56%	-3.98	96
Greater Glasgow	*	*	*	*	56.90%	63.34%	-6.44	94
Highlands of Scotland	37.63%	35.32%	2.31	102	59.57%	62.85%	-3.28	97
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	-	-	-	-	49.28%	61.17%	-11.89	88
Perthshire	*	*	*	*	63.18%	67.89%	-4.71	95
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

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

Bed Occupancy by Location – December 2023/2022

Location accessibility/density	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	43.91%	*	-6.69	93	57.69%	61.06%	-3.37	97
Other Urban Areas	*	*	*	*	53.42%	53.32%	0.10	100
Accessible Small Towns	*	*	*	*	58.58%	56.98%	1.60	102
Remote Small Towns	*	*	*	*	51.60%	42.72%	8.88	109
Accessible Rural	*	*	*	*	57.96%	66.15%	-8.19	92
Remote Rural	53.72%	50.09%	3.63	104	62.93%	48.25%	14.68	115

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

Bed Occupancy by Location Type– December 2023/2022

Location Type	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	40.73%	*	-0.08	100	56.51%	58.51%	-2.00	98
Countryside - Village	44.40%	44.05%	0.35	100	61.32%	49.85%	11.47	111
Seaside - Coastal	*	*	*	*	61.58%	51.53%	10.05	110
Small Town	*	*	*	*	52.62%	59.12%	-6.50	94

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