

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

January 2024/2023 Report - HOSTEL

1.0 Introduction January 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering January 2024 and benchmarking against January 2023. 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 January 2024

The SOAS Report: January 2024/2023 Hostel report showed a decline in the Hostel sector in Scotland when compared to the same period in 2023. Hostel Bedspace Occupancy rates for January 2024 showed a percentage point decrease of **1.61** compared to January 2023.

Data from the Scottish Retail Consortium showed that total sales remained weak in January with growth of just 1.9%. Total food sales continued to drive sales, with a 5.4% increase when compared with monthly performance in January 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 19% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 2% decrease on the December 2023 survey). The survey recorded 48% of respondents (a 1% decrease on the December 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

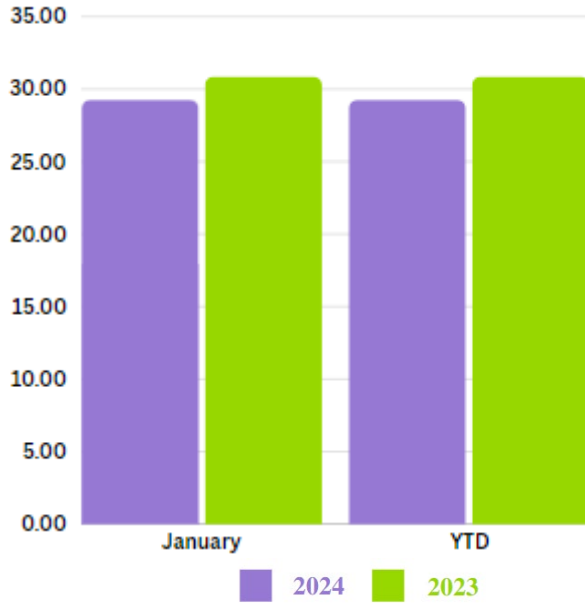
Despite consumer concern about the state of the economy, 21% of UK adults intended to take a domestic overnight trip in the first quarter of 2024 and 79% in the following 12 months. These figures show a significant increase in those planning an overnight trip compared with January 2023 (16% and 70% respectively). 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 2024), this continues to show 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 3% increase when compared to the same period in 2023, however, UK air connectivity had seen a 11% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation

3.1 Performance by Hostel Category

Bed Space Occupancy – January 2024/2023



Hostel occupancy for January 2024 was 29.26% when compared to data from the previous year of 30.87%; this shows an overall percentage point decrease of 1.61.

Bed Occupancy by Grading – January 2024/2023

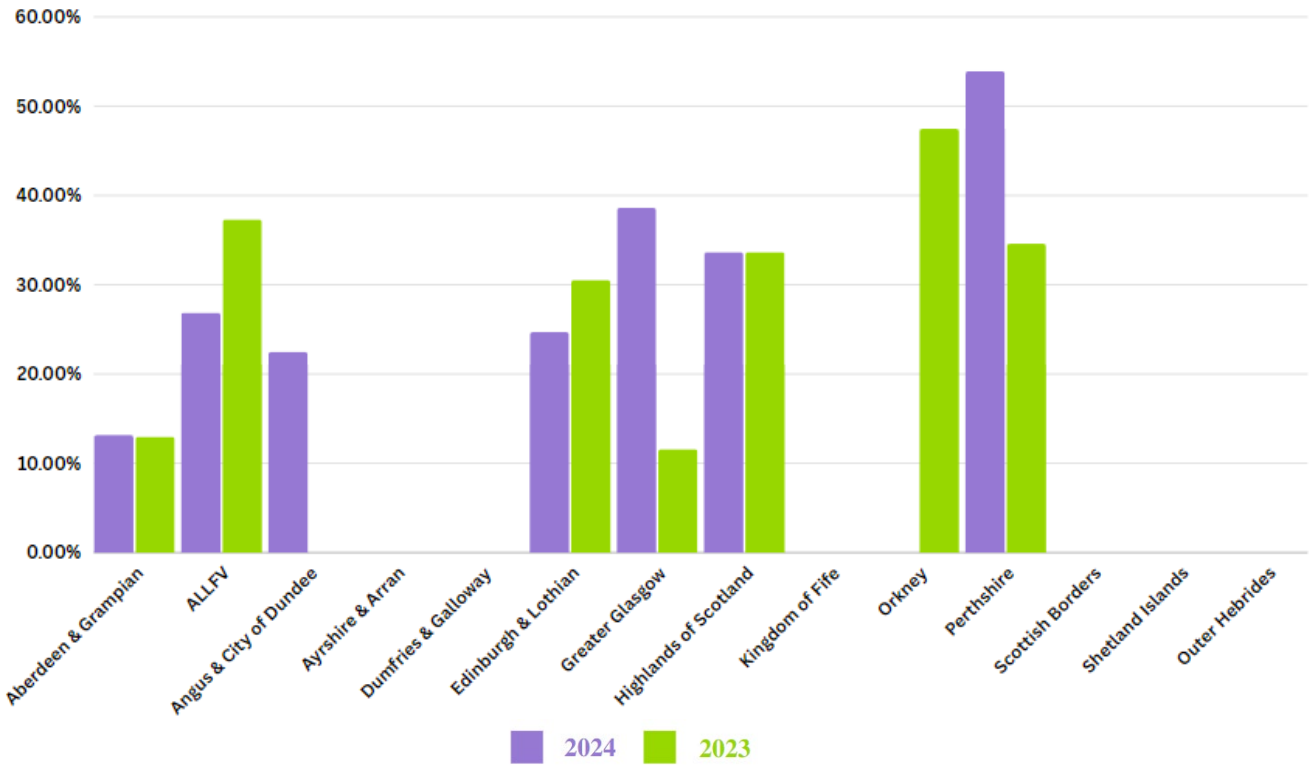
| Grading | January 24 | January 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------|------------|------------|------------|--------|--------|--------|------------|--------|
| 1 Star | * | * | * | * | * | * | * | * |
| 2 Stars | * | * | * | * | * | * | * | * |
| 3 Stars | 48.87% | 39.39% | 9.48 | 109 | 48.87% | 39.39% | 9.48 | 109 |
| 4 Stars | 34.18% | 28.29% | 5.89 | 106 | 34.18% | 28.29% | 5.89 | 106 |
| 5 Stars | * | * | * | * | * | * | * | * |
| Unclassified | * | * | * | * | * | * | * | * |

- 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 – January 2024/2023



Bed Occupancy by Former VisitScotland Area – January 2024/2023

| Area | January 24 | January 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|------------------------|---------------------|------------|---|--------|--------|--------|------------|--------|
| Aberdeen & Grampian | * | * | * | * | * | * | * | * |
| ALLFV | 26.87% | 37.32% | -10.45 | 90 | 26.87% | 37.32% | -10.45 | 90 |
| Angus & City of Dundee | * | - | * | * | * | - | * | * |
| Ayrshire & Arran | * | * | * | * | * | * | * | * |
| Dumfries & Galloway | - | - | - | - | - | - | - | - |
| Edinburgh & Lothian | 24.70% | * | -5.84 | 94 | 24.70% | * | -5.84 | 94 |
| Greater Glasgow | * | * | * | * | * | * | * | * |
| Highlands of Scotland | 33.66% | 33.66% | 0.00 | 100 | 33.66% | 33.66% | 0.00 | 100 |
| Kingdom of Fife | - | - | - | - | - | - | - | - |
| Orkney | * | * | * | * | * | * | * | * |
| Perthshire | * | * | * | * | * | * | * | * |
| Scottish Borders | - | - | - | - | - | - | - | - |
| Shetland Islands | - | - | - | - | - | - | - | - |
| Outer Hebrides | - | - | - | - | - | - | - | - |
| | - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | |

Bed Occupancy by Location – January 2024/2023

| Location accessibility/density | January 24 | January 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------------------------|---------------------|------------|---|--------|--------|--------|------------|--------|
| Large Urban Areas | 28.54% | 29.53% | -0.99 | 99 | 28.54% | 29.53% | -0.99 | 99 |
| Other Urban Areas | * | * | * | * | * | * | * | * |
| Accessible Small Towns | 43.82% | * | -13.41 | 87 | 43.82% | * | -13.41 | 87 |
| Remote Small Towns | * | * | * | * | * | * | * | * |
| Accessible Rural | * | * | * | * | * | * | * | * |
| Remote Rural | 37.23% | 35.89% | 1.34 | 101 | 37.23% | 35.89% | 1.34 | 101 |
| | - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | |

Bed Occupancy by Location Type– January 2024/2023

| Location Type | January 24 | January 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------------------|------------|---|--------|--------|--------|------------|--------|
| City - Large Town | 27.27% | 23.17% | 4.10 | 104 | 27.27% | 23.17% | 4.10 | 104 |
| Countryside - Village | 38.48% | 40.76% | -2.28 | 98 | 38.48% | 40.76% | -2.28 | 98 |
| Seaside - Coastal | 33.04% | 46.20% | -13.16 | 87 | 33.04% | 46.20% | -13.16 | 87 |
| Small Town | * | * | * | * | * | * | * | * |
| | - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | |