

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

June 2024/2023 Report - HOSTEL

1.0 Introduction June 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering June 2024 and benchmarking against June 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 June 2024

The SOAS Report: June 2024/2023 Hostel report showed an increase in the Hostel sector in Scotland when compared to the same period in 2023. Hostel Bedspace Occupancy rates for June 2024 showed a percentage point increase of **3.63** compared to June 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to June 2024 is 2.0%. The inflation rate for June 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.9%. Inflation rates for restaurants and cafes were 6.2% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.6% in June, however, compared to the 8.8% increase in June 2023 this was disappointing growth in total sales. Total food sales decreased by 1.1% compared to the monthly performance of June 2023, when they had increased by 15.8%.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the May 2024 survey). The survey recorded 44% of respondents (a 2% decrease on the May 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

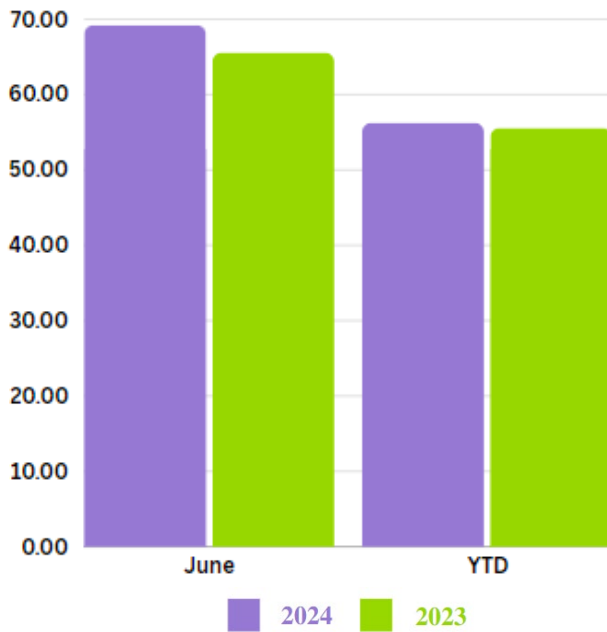
Despite consumer concern about the state of the economy, 55% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather and Personal finances. The figures above have been consistent across the last five 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 stalled in June 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw no increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation

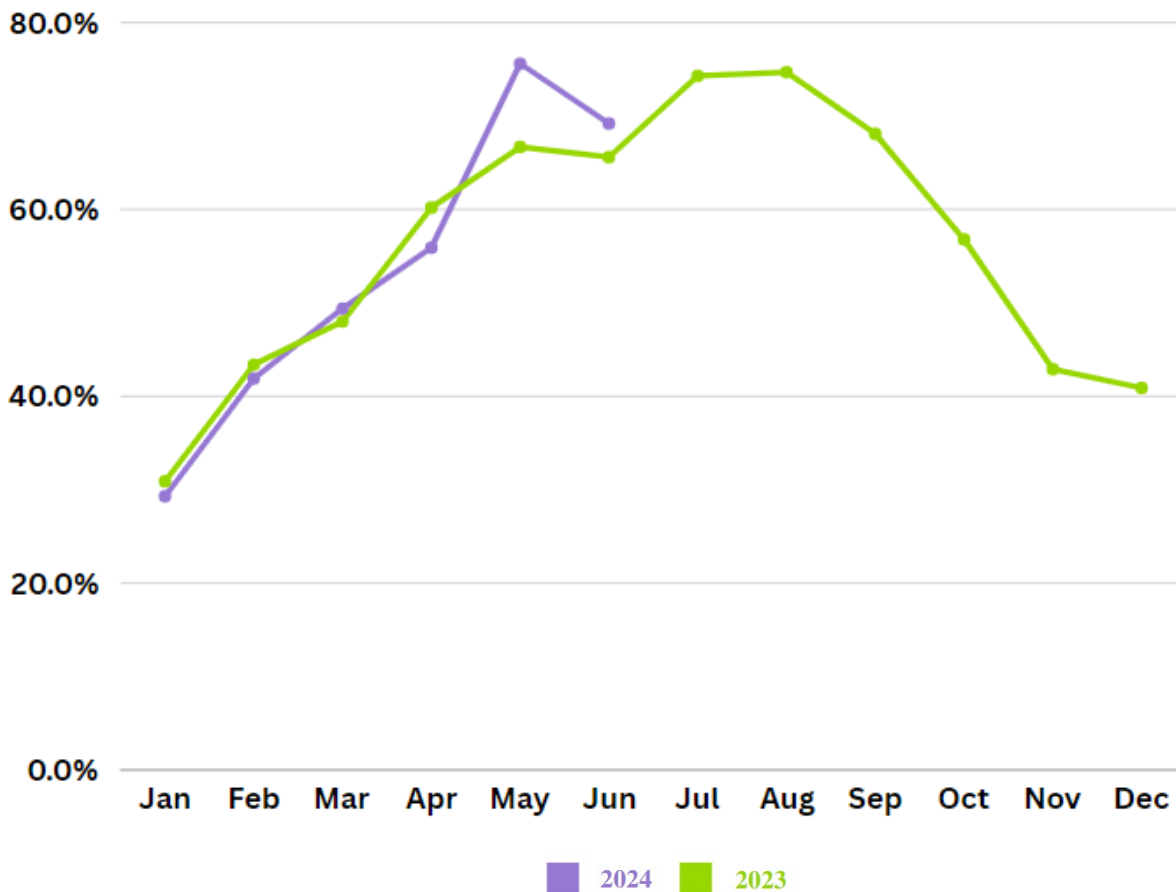
3.1 Performance by Hostel Category

Bed Space Occupancy – June 2024/2023



Hostel occupancy for June 2024 was **69.22%** when compared to data from the previous year of **65.59%**; this shows an overall percentage point increase of **3.63**.

Bed Space Occupancy – Year-to-Date



Bed Space Occupancy Scotland – June 2024/2023

Hostels	June 24	June 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	69.22%	65.59%	3.63	104	56.27%	55.57%	0.70	101

Bed Occupancy by Type – June 2024/2023

Type	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
SYHA	68.78%	65.75%	3.03	103	59.19%	55.90%	3.29	103
Independent	70.55%	*	11.95	112	49.41%	44.62%	4.79	105

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

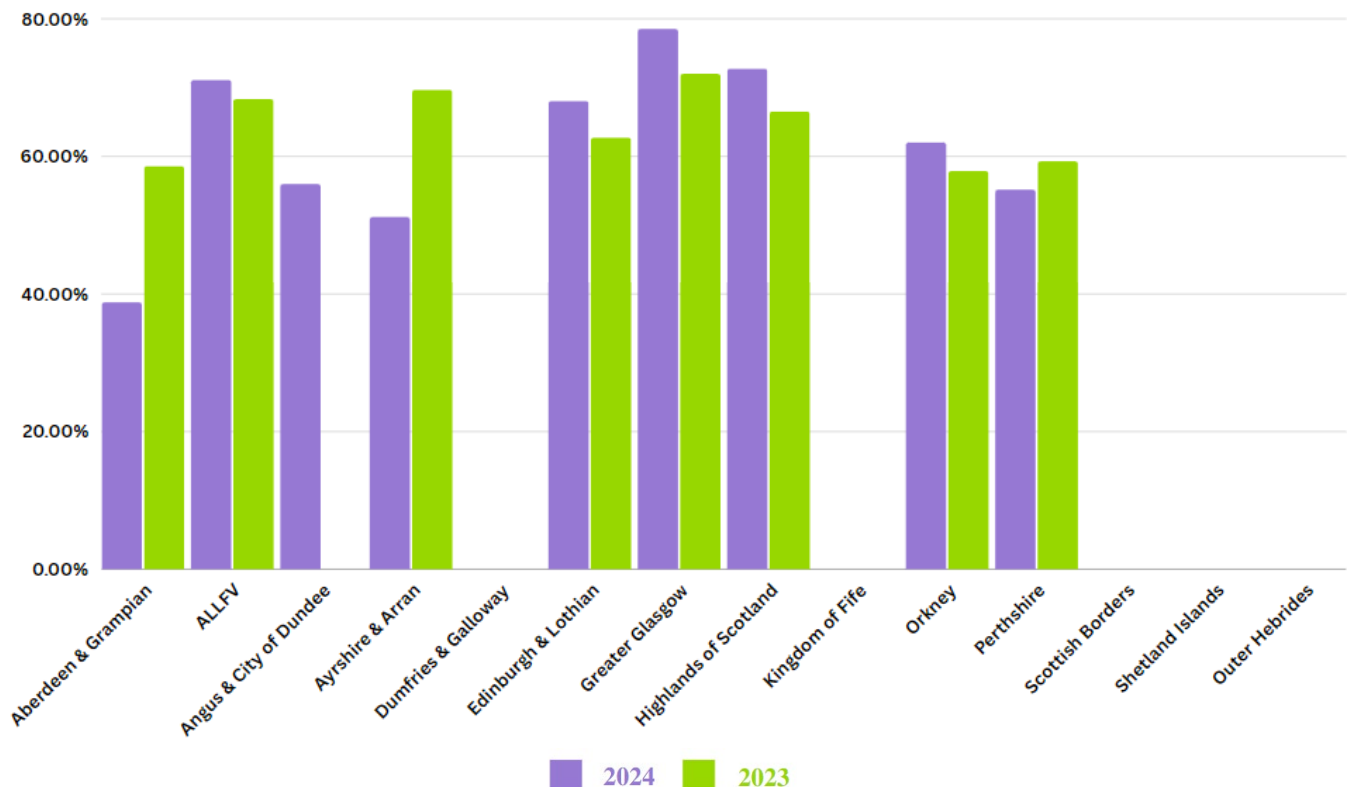
Bed Occupancy by Grading – June 2024/2023

Grading	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	49.65%	51.09%	-1.44	99
2 Stars	*	*	*	*	48.07%	47.68%	0.39	100
3 Stars	69.47%	64.57%	4.90	105	63.71%	58.29%	5.42	105
4 Stars	70.60%	68.13%	2.47	102	60.71%	57.01%	3.70	104
5 Stars	*	*	*	*	52.60%	51.54%	1.06	101
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 – June 2024/2023



¹ 24/23 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 – June 2024/2023

Area	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	31.38%	44.62%	-13.24	87
ALLFV	71.08%	68.34%	2.74	103	60.22%	62.65%	-2.43	98
Angus & City of Dundee	*	-	*	*	31.38%	-	31.38	131
Ayrshire & Arran	*	*	*	*	58.11%	55.73%	2.38	102
Dumfries & Galloway	-	-	-	-	*	-	*	*
Edinburgh & Lothian	68.06%	*	5.32	105	50.62%	51.91%	-1.29	99
Greater Glasgow	*	*	*	*	62.56%	49.68%	12.88	113
Highlands of Scotland	72.76%	66.54%	6.22	106	60.86%	56.54%	4.32	104
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	46.90%	42.08%	4.82	105
Perthshire	*	*	*	*	55.61%	56.99%	-1.38	99
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

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

Bed Occupancy by Location – June 2024/2023

Location accessibility/density	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	70.08%	66.17%	3.91	104	52.52%	55.19%	-2.67	97
Other Urban Areas	*	*	*	*	52.38%	46.17%	6.21	106
Accessible Small Towns	63.91%	*	2.11	102	58.52%	61.01%	-2.49	98
Remote Small Towns	*	*	*	*	47.67%	47.31%	0.36	100
Accessible Rural	65.84%	*	-0.25	100	57.85%	60.21%	-2.36	98
Remote Rural	70.89%	66.11%	4.78	105	65.06%	58.79%	6.27	106

- Sample Size = Nil

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

Bed Occupancy by Location Type– June 2024/2023

Location Type	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	69.92%	66.62%	3.30	103	52.46%	52.47%	-0.01	100
Countryside - Village	69.85%	64.27%	5.58	106	62.95%	59.08%	3.87	104
Seaside - Coastal	67.96%	70.63%	-2.67	97	60.18%	59.09%	1.09	101
Small Town	*	*	*	*	50.32%	50.26%	0.06	100

- Sample Size = Nil

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