

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## May 2024/2023 Report - HOSTEL

### 1.0 Introduction May 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering May 2024 and benchmarking against May 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](mailto:hugh.sheridan@gcu.ac.uk)).

### 2.0 Executive Summary May 2024

The SOAS Report: May 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 May 2024 showed a percentage point increase of **8.87** compared to May 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to May 2024 is 2.0%, down from 2.3% in April. The inflation rate for May 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.1%. Inflation rates for restaurants and cafes were 5.8% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in May showed a 0.5% year-on-year decrease, it should be noted that May 2023 saw the King's Coronation and two Bank Holidays. With food inflation stabilising (lowest grocery inflation since October 2021), May 2024 saw total food sales increase by just under 1.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for May 2024 found that 20% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the April 2024 survey). The survey recorded 46% of respondents (a 2% decrease on the April 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

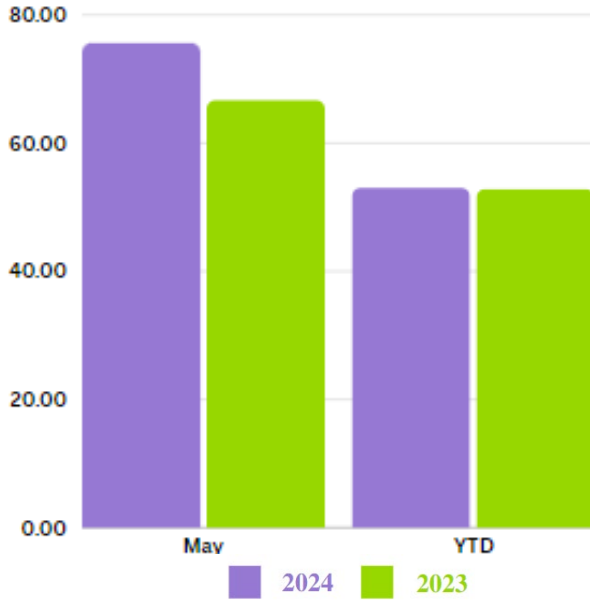
Despite consumer concern about the state of the economy, 25% of UK adults intended to take a domestic overnight trip in the second quarter of 2024, this is an increase compared with May 2023, with 76% of UK adults intending to take a domestic overnight trip in the following 12 months. However, the key 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 recovery in international inbound visitation continued to grow in May 2024; 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 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 – May 2024/2023



Hostel occupancy for May 2024 was 75.61% when compared to data from the previous year of 66.74%; this shows an overall percentage point increase of 8.87.

Bed Space Occupancy – Year-to-Date

