



#### SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2024/2023 Report - HOSTEL

#### 1.0 Introduction August 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2024 and benchmarking against August 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: <a href="https://hugh.sheridan@gcu.ac.uk">hugh.sheridan@gcu.ac.uk</a>).

#### 2.0 Executive Summary August 2024

The SOAS Report: August 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 August 2024 showed a percentage point increase of **3.72** compared to August 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to August 2024 is 2.2%, unchanged from July. The inflation 12-month rate (%) for August 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.0%. Inflation rates for restaurants and cafes were 4.3% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in August, however, compared to the 5.6% increase in August 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of August 2023, when they had increased by 8.6%.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the July 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the July 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, 33% of UK adults intended to take a domestic overnight trip in the August to September sector of 2024 and 79% 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 three key 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 as mentioned earlier have been consistent across previously published GB National Tourist Survey s(VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation grew in August 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 1% increase when compared to the same period in 2023, however, UK air connectivity saw a 5% decrease in year-to-date flights compared to 2019.





### 3.0 Hostel Accommodation

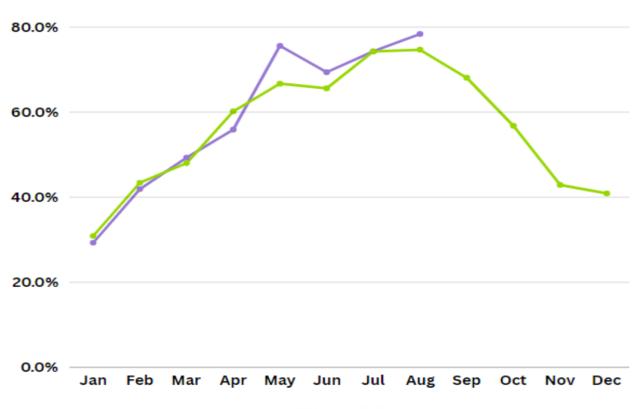
## 3.1 Performance by Hostel Category

### Bed Space Occupancy - August 2024/2023



Hostel occupancy for August 2024 was **78.38**% when compared to data from the previous year of **74.66**%; this shows an overall percentage point increase of **3.72**.

## Bed Space Occupancy - Year-to-Date



2024

2023





### Bed Space Occupancy Scotland - August 2024/2023

Hostels	August 24	August 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	78.38%	74.66%	3.72	104	62.24%	61.39%	0.85	101

### **Bed Occupancy by Type - August 2024/2023**

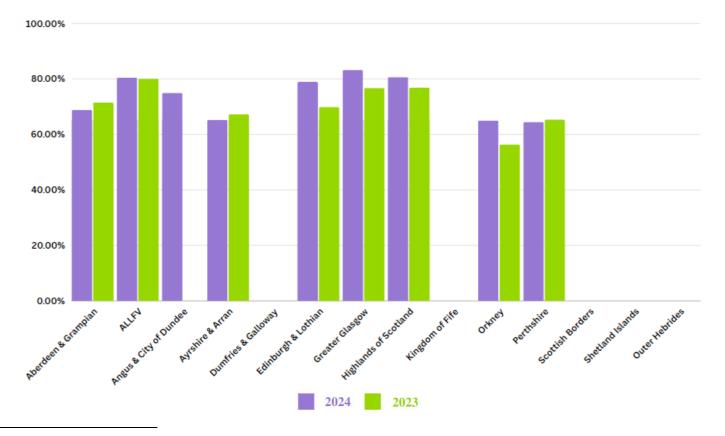
Туре	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change	
SYHA	76.49%	74.76%	1.73	102	64.45%	61.64%	2.81	103	
Independent	84.33%	*	12.81	113	56.68%	53.07%	3.61	104	
- Sample Size = Nil			*San	*Sample Size (between 1 and 4) too small to be included					

### **Bed Occupancy by Grading - August 2024/2023**

Grading	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change	
1 Star	*	*	*	*	51.53%	52.69%	-1.16	99	
2 Stars	*	*	*	*	57.05%	52.29%	4.76	105	
3 Stars	78.77%	75.38%	3.39	103	68.75%	63.40%	5.35	105	
4 Stars	80.02%	78.24%	1.78	102	66.11%	63.58%	2.53	103	
5 Stars	*	*	*	*	57.06%	57.14%	-0.08	100	
Unclassified	*	*	*	*	0.00%	0.00%	0.00	100	
- Sample Size = Nil			*Sample	*Sample Size (between 1 and 4) too small to be included					

### Bed Occupancy by Former VisitScotland Area

### Bed Space Occupancy by Former VisitScotland Area – August 2024/2023



<sup>&</sup>lt;sup>1</sup> 24/23 Diff throughout this report is expressed by % Point Change

<sup>&</sup>lt;sup>2</sup> 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 – August 2024/2023

Area	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	47.49%	53.07%	-5.58	94
ALLFV	80.46%	80.07%	0.39	100	66.64%	67.74%	-1.10	99
Angus & City of Dundee	*	-	*	*	39.28%	-	39.28	139
Ayrshire & Arran	*	*	*	*	61.38%	60.56%	0.82	101
<b>Dumfries &amp; Galloway</b>	-	-	-	-	*	-	*	*
Edinburgh & Lothian	78.96%	*	9.06	109	56.31%	56.99%	-0.68	99
<b>Greater Glasgow</b>	*	*	*	*	67.54%	56.41%	11.13	111
Highlands of Scotland	80.66%	76.91%	3.75	104	66.25%	62.41%	3.84	104
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	55.13%	49.08%	6.05	106
Perthshire	*	*	*	*	63.39%	62.87%	0.52	101
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

<sup>-</sup> Sample Size = Nil

## **Bed Occupancy by Location – August 2024/2023**

Location	August	August	24/23 Diff	Chango	YTD 24	YTD 23	24/23	Chango
accessibility/density	24	23	24/23 DIII	Change	110 24	110 23	Diff	Change
Large Urban Areas	80.34%	74.91%	5.43	105	58.43%	60.48%	-2.05	98
Other Urban Areas	*	*	*	*	60.95%	56.74%	4.21	104
Accessible Small Towns	s 74.10%	*	-3.56	96	62.79%	65.87%	-3.08	97
Remote Small Towns	*	*	*	*	53.67%	53.37%	0.30	100
Accessible Rural	70.62%	*	0.77	101	61.98%	62.88%	-0.90	99
Remote Rural	82.06%	76.11%	5.95	106	70.13%	64.22%	5.91	106
- Sample		*Sample	Size (betwee	n 1 and 4) too	small to be inc	luded		

## **Bed Occupancy by Location Type- August 2024/2023**

Location Type	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	79.30%	75.62%	3.68	104	58.83%	59.24%	-0.41	100
Countryside - Village	78.80%	74.80%	4.00	104	67.75%	63.85%	3.90	104
Seaside - Coastal	80.20%	76.00%	4.20	104	65.56%	64.69%	0.87	101
Small Town	68.24%	*	-0.17	100	56.12%	55.99%	0.13	100
- Sample		*Sample S	Size (betwee	n 1 and 4) too	small to be in	luded		

<sup>\*</sup>Sample Size (between 1 and 4) too small to be included