

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

December 2024/2023 Report - HOSTEL

1.0 Introduction December 2024/2023

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

The SOAS Report: December 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 December 2024 showed a percentage point increase of **2.68** compared to December 2023.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to December 2024 is 2.5%, up from 2.6% in November. The CPI 12-month rate (%) for December 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.4% down from 3.6% in November. Inflation rates for restaurants and cafes were 3.4% down from 4.0% in November.

Data from the Scottish Retail Consortium showed that total sales in Scotland increased by 0.8% in December compared to the same period in 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering December 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (no change on the November 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the November 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

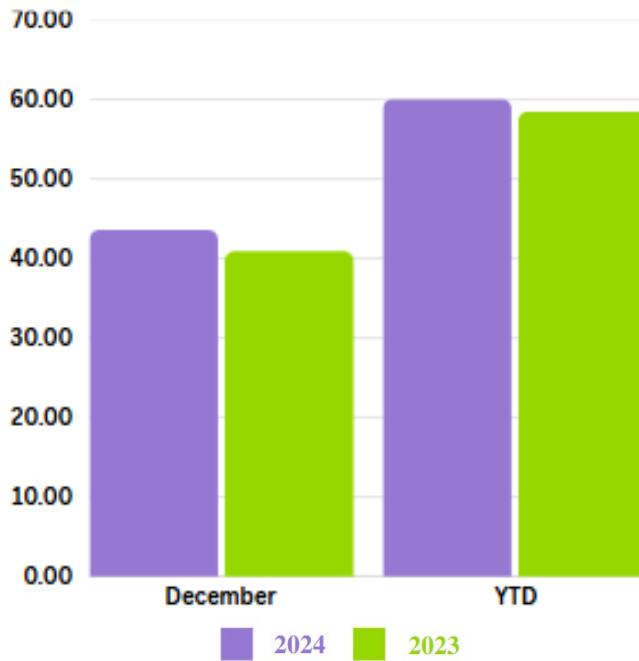
Despite consumer concern about the state of the economy, 26% of UK adults intended to take a domestic overnight trip in the first quarter of 2025 and 80% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (78%). However, the three key barriers to taking an overnight UK trip in the next six months continue to be the UK weather, rising cost of living, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

Eurocontrol (European Air Traffic Agency) indicated in December 2024 that UK air connectivity saw a 1% decrease when compared to the same period in 2023, also, UK air connectivity saw a 9% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for December 2024 global air passenger demand, measured by revenue per kilometer, was up 8.6% compared to December 2023. International demand rose 10.6% over the same period with domestic demand increasing 5.5%. Asia-Pacific region was the biggest global air passenger growth driver in December 2024 at 16.9% when compared to Europe at 8.7%.

3.0 Hostel Accommodation

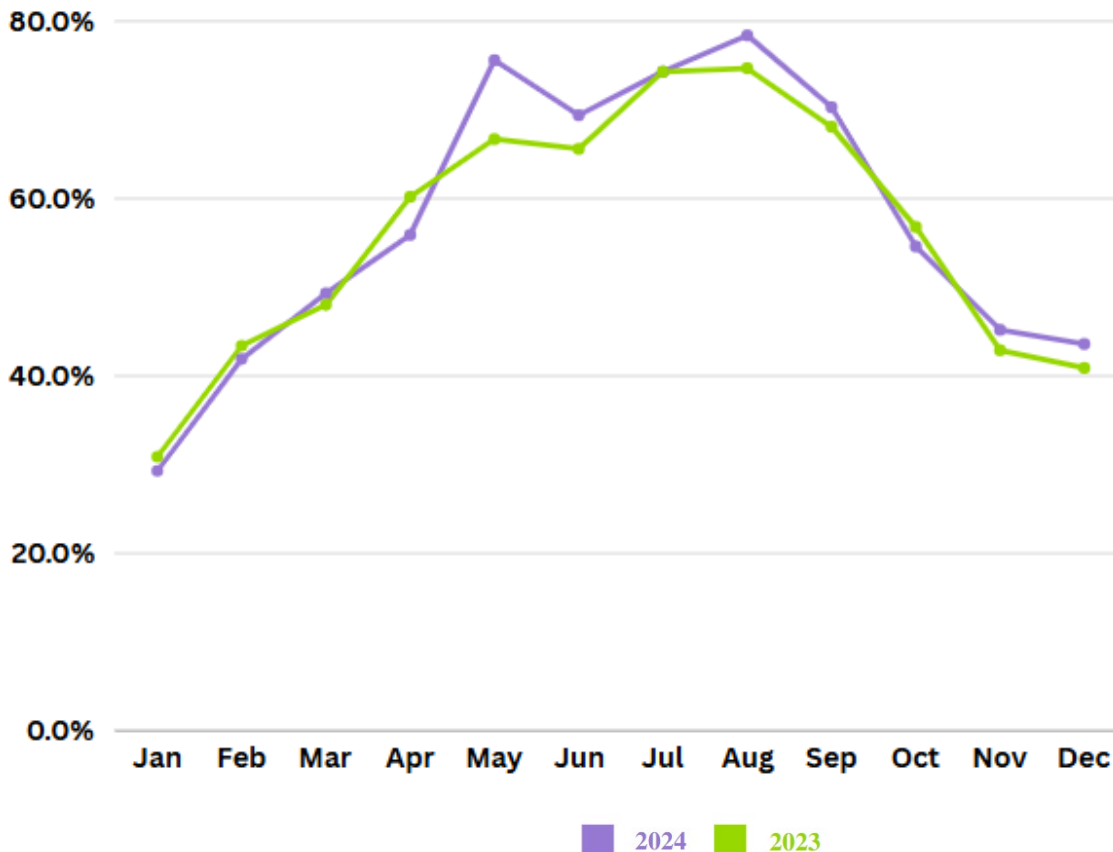
3.1 Performance by Hostel Category

Bed Space Occupancy – December 2024/2023



Hostel occupancy for December 2024 was **43.61%** when compared to data from the previous year of **40.93%**; this shows an overall percentage point increase of **2.68**.

Bed Space Occupancy – Year-to-Date



Bed Space Occupancy Scotland – December 2024/2023

Hostels	Dec 24	Dec 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	43.61%	40.93%	2.68	103	60.07%	58.50%	1.57	102

Bed Occupancy by Type – December 2024/2023

Type	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
SYHA	52.39%	45.68%	6.71	107	62.27%	59.63%	2.64	103
Independent	28.80%	32.21%	-3.41	97	54.75%	49.81%	4.94	105

- Sample Size = Nil

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

Bed Occupancy by Grading – December 2024/2023

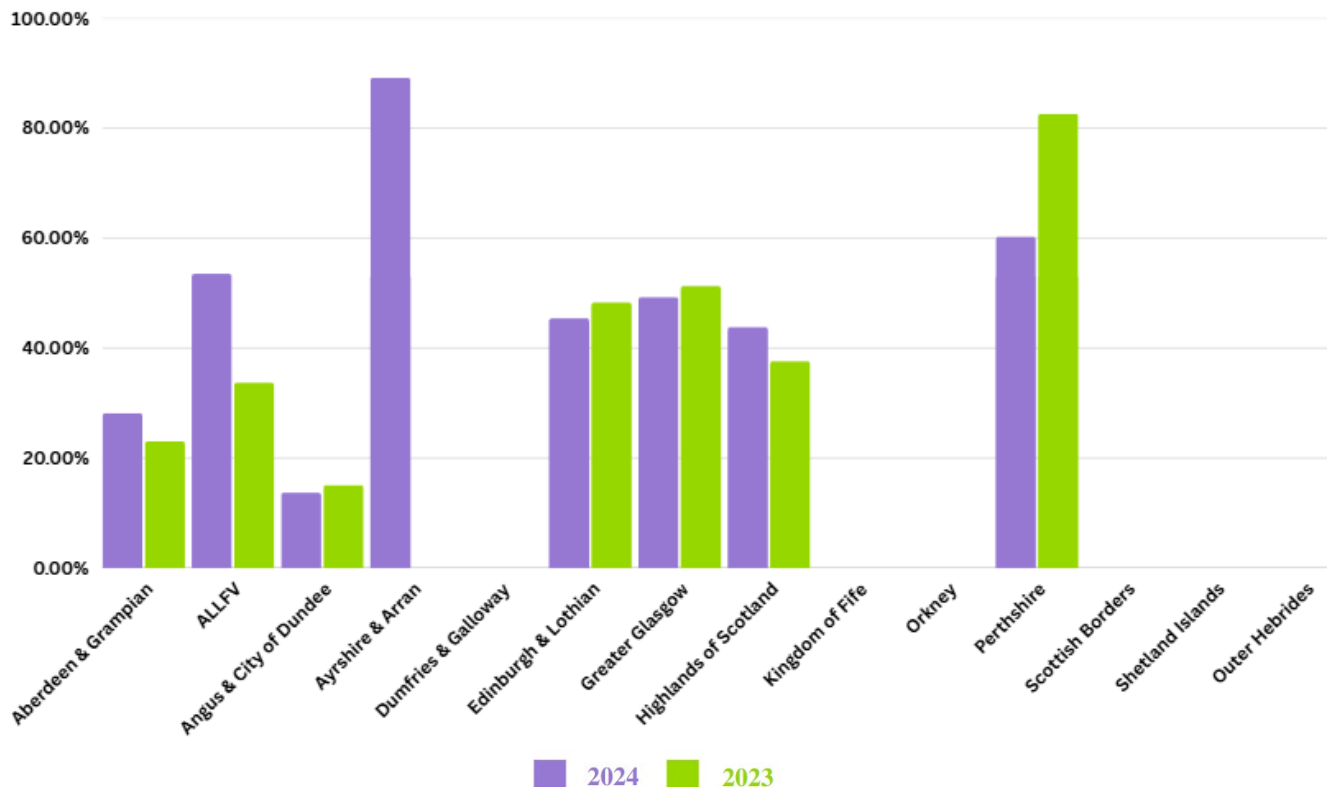
Grading	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	-	*	*	*	48.32%	52.76%	-4.44	96
2 Stars	-	*	*	*	57.89%	54.14%	3.75	104
3 Stars	66.97%	44.90%	22.07	122	65.89%	61.23%	4.66	105
4 Stars	43.52%	42.36%	1.16	101	62.74%	60.63%	2.11	102
5 Stars	*	*	*	*	57.35%	55.72%	1.63	102
Unclassified	-	*	*	*	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 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 – December 2024/2023

Area	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	43.32%	45.30%	-1.98	98
ALLFV	*	33.74%	19.78	120	63.80%	64.40%	-0.60	99
Angus & City of Dundee	*	*	*	*	38.90%	*	6.45	106
Ayrshire & Arran	*	-	*	*	53.83%	59.09%	-5.26	95
Dumfries & Galloway	-	-	-	-	*	-	*	*
Edinburgh & Lothian	*	48.29%	-2.88	97	56.31%	55.58%	0.73	101
Greater Glasgow	*	*	*	*	65.08%	56.90%	8.18	108
Highlands of Scotland	43.79%	37.63%	6.16	106	63.36%	59.57%	3.79	104
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	-	-	-	-	54.79%	49.28%	5.51	106
Perthshire	*	*	*	*	63.44%	63.18%	0.26	100
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 2024/2023

Location accessibility/density	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	42.61%	43.91%	-1.30	99	57.87%	57.69%	0.18	100
Other Urban Areas	*	*	*	*	57.04%	53.42%	3.62	104
Accessible Small Towns	*	*	*	*	57.28%	58.58%	-1.30	99
Remote Small Towns	*	*	*	*	51.60%	51.60%	0.00	100
Accessible Rural	*	*	*	*	59.84%	57.96%	1.88	102
Remote Rural	63.34%	53.72%	9.62	110	67.60%	62.93%	4.67	105

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

Bed Occupancy by Location Type– December 2024/2023

Location Type	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	40.51%	40.73%	-0.22%	100	57.75%	56.51%	1.24	101
Countryside - Village	56.01%	44.40%	11.61%	112	64.50%	61.32%	3.18	103
Seaside - Coastal	37.26%	*	-9.52%	90	61.58%	61.58%	0.00	100
Small Town	*	*	*	*	53.86%	52.62%	1.24	101

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