

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: *February 2024/2023 Report - HOSTEL*

1.0 Introduction February 2024/2023

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

The SOAS Report: February 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 February 2024 showed a percentage point decrease of **1.49** compared to February 2023.

Data from the Scottish Retail Consortium showed that total sales remained weak in February with growth of just 1.4%, however when adjusted for inflation, the year-on-year decline was 1.1%. Total food sales continued to drive sales, with a 3% increase compared to the monthly performance of February 2023.

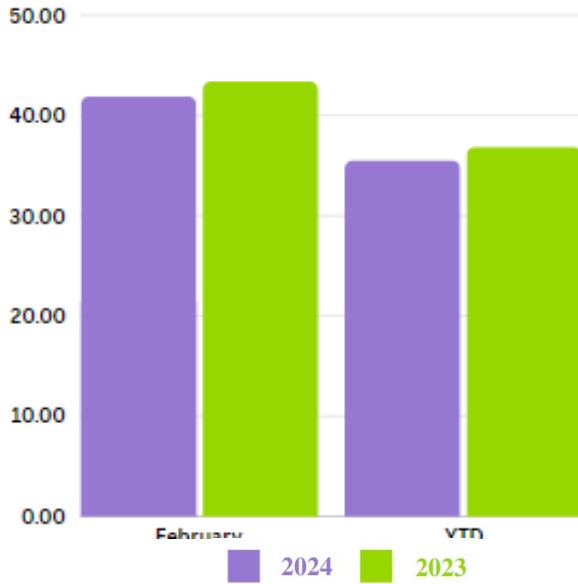
Domestic consumer sentiment provided by the GB National Tourist Boards for February 2024 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 2% increase on the February 2024 survey). The survey recorded 49% of respondents (a 1% increase on the February 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, 18% of UK adults intended to take a domestic overnight trip in the first quarter of 2024 and 81% in the following 12 months. These figures show a significant increase in those planning an overnight trip compared with February 2023 (11% and 72% respectively). 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 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 grow in February 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 6% increase when compared to the same period in 2023, however, UK air connectivity saw a 10% decrease in year-to-date flights compared to 2019.

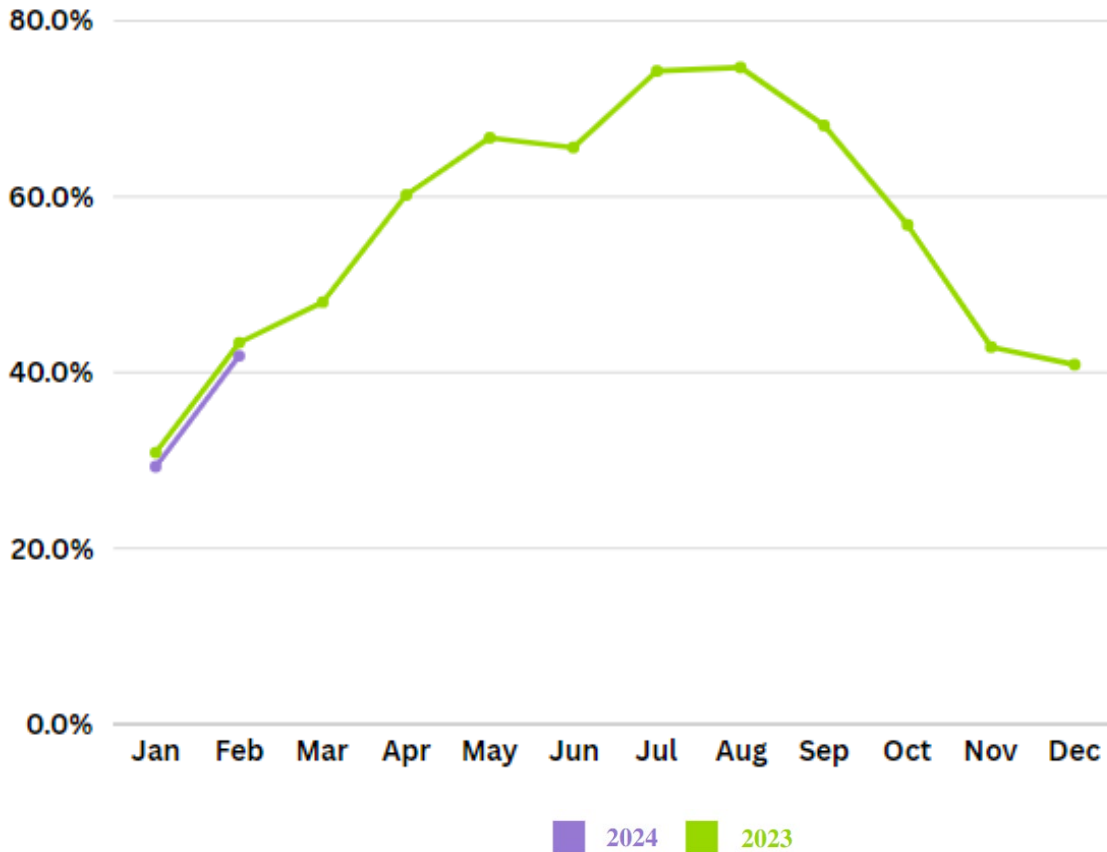
3.0 Hostel Accommodation
3.1 Performance by Hostel Category

Bed Space Occupancy – February 2024/2023



Hostel occupancy for February 2024 was 41.92% when compared to data from the previous year of 43.41%; this shows an overall percentage point decrease of 1.49.

Bed Space Occupancy – Year-to-Date



Bed Space Occupancy Scotland – February 2024/2023

Hostels	February 24	February 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	41.92%	43.41%	-1.49	99	35.54%	36.87%	-1.33	99

Bed Occupancy by Type – February 2024/2023

Type	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
SYHA	48.66%	44.21%	4.45	104	42.04%	37.29%	4.75	105
Independent	28.50%	*	4.61	105	18.74%	*	2.44	102

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

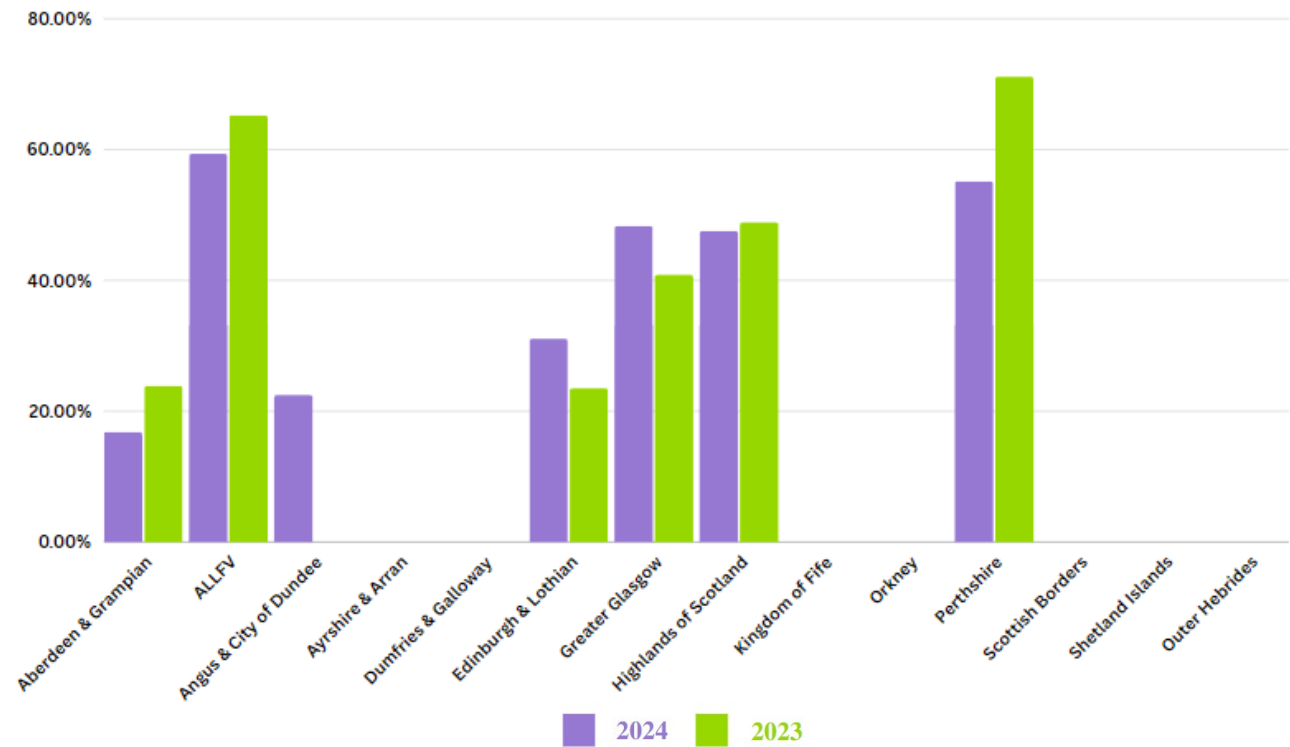
Bed Occupancy by Grading – February 2024/2023

Grading	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	*	*	*	*
2 Stars	*	*	*	*	*	*	*	*
3 Stars	53.47%	58.28%	-4.81	95	52.42%	48.41%	4.01	104
4 Stars	53.69%	48.97%	4.72	105	42.16%	38.18%	3.98	104
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 – February 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 – February 2024/2023

Area	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	*	20.94%	-6.01	94
ALLFV	59.36%	65.25%	-5.89	94	40.70%	49.75%	-9.05	91
Angus & City of Dundee	*	-	*	*	*	-	*	*
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	-	-	-	-	-	-	-
Edinburgh & Lothian	31.09%	*	7.57	108	27.79%	27.21%	0.58	101
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	47.58%	48.86%	-1.28	99	41.00%	41.04%	-0.04	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 – February 2024/2023

Location accessibility/density	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	37.02%	36.00%	1.02	101	32.63%	32.69%	-0.06	100
Other Urban Areas	*	*	*	*	27.18%	15.57%	11.61	112
Accessible Small Towns	60.83%	*	-2.77	97	51.96%	60.52%	-8.56	91
Remote Small Towns	*	*	*	*	25.01%	*	-13.83	86
Accessible Rural	36.83%	*	-15.13	85	35.98%	42.67%	-6.69	93
Remote Rural	56.08%	57.30%	-1.22	99	46.58%	45.76%	0.82	101

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

Bed Occupancy by Location Type- February 2024/2023

Location Type	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	36.64%	32.84%	3.80	104	31.79%	27.81%	3.98	104
Countryside - Village	59.47%	62.45%	-2.98	97	49.59%	50.83%	-1.24	99
Seaside - Coastal	30.34%	42.69%	-12.35	88	31.55%	44.27%	-12.72	87
Small Town	*	*	*	*	31.84%	39.43%	-7.59	92

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