



SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

July 2024/2023 Report - HOSTEL

1.0 Introduction July 2024/2023

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

The SOAS Report: July 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 July 2024 showed a percentage point decrease of **0.28** compared to July 2023.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to July 2024 is 2.2%. The inflation rate for July 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.7%. Inflation rates for restaurants and cafes were 4.9% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -1.2% in July, however, compared to the 4.6% increase in July 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of July 2023, when they had increased by 9.1%.

Domestic consumer sentiment provided by the GB National Tourist Boards for July 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 2% decrease on the June 2024 survey). The survey recorded 47% of respondents (a 3% increase on the June 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, 51% 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 (75%). 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 the last six 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 grew in July 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% 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

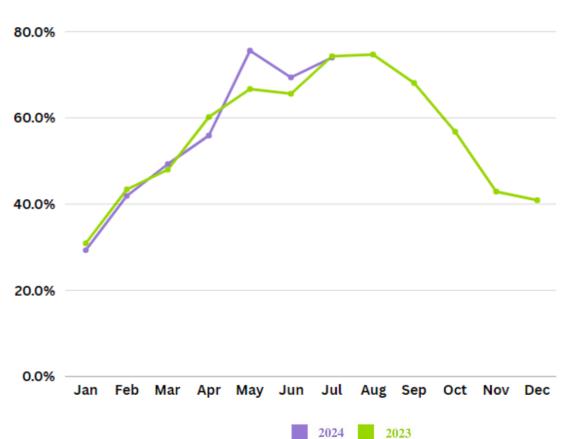
3.1 Performance by Hostel Category

Bed Space Occupancy – July 2024/2023



Hostel occupancy for July 2024 was **74.04**% when compared to data from the previous year of **74.32**%; this shows an overall percentage point decrease of **0.28**.

Bed Space Occupancy - Year-to-Date







Bed Space Occupancy Scotland - July 2024/2023

Hostels	July 24	July 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	74.04%	74.32%	-0.28	100	59.37%	58.99%	0.38	100

Bed Occupancy by Type - July 2024/2023

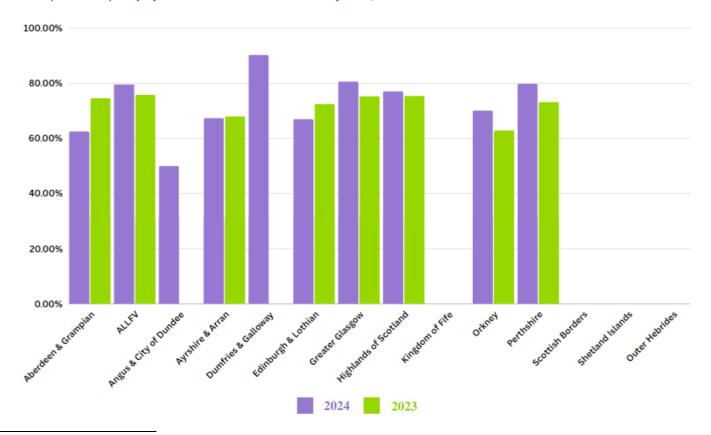
Туре	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
SYHA	75.70%	74.34%	1.36	101	62.23%	59.25%	2.98	103
Independent	68.83%	*	-5.82	94	52.40%	49.93%	2.47	102
- Sample Size = Nil *Sa			*San	nple Size (betw	een 1 and 4) to	o small to be in	cluded	

Bed Occupancy by Grading - July 2024/2023

Grading	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change	
1 Star	*	*	*	*	51.44%	51.24%	0.20	100	
2 Stars	*	*	*	*	53.68%	50.78%	2.90	103	
3 Stars	74.90%	72.62%	2.28	102	66.37%	61.07%	5.30	105	
4 Stars	80.86%	78.53%	2.33	102	63.90%	60.91%	2.99	103	
5 Stars	*	*	*	*	54.99%	54.92%	0.07	100	
Unclassified	*	*	*	*	0.00%	0.00%	0.00	100	
- Sample Size = Nil *S				*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Former VisitScotland Area

Bed Space Occupancy by Former VisitScotland Area – July 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 – July 2024/2023

Area	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	40.94%	49.93%	-8.99	91
ALLFV	79.59%	75.88%	3.71	104	63.97%	65.29%	-1.32	99
Angus & City of Dundee	*	-	*	*	34.09%	-	34.09	134
Ayrshire & Arran	*	*	*	*	60.42%	58.86%	1.56	102
Dumfries & Galloway	*	-	*	*	*	-	*	*
Edinburgh & Lothian	67.07%	*	-5.47	95	53.02%	55.03%	-2.01	98
Greater Glasgow	*	*	*	*	65.23%	53.43%	11.80	112
Highlands of Scotland	77.15%	75.47%	1.68	102	63.65%	59.86%	3.79	104
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	52.68%	47.26%	5.42	105
Perthshire	*	*	*	*	63.05%	62.08%	0.97	101
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

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

Bed Occupancy by Location - July 2024/2023

Location accessibility/density	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	71.55%	74.32%	-2.77	97	55.39%	58.20%	-2.81	97
Other Urban Areas	*	*	*	*	58.23%	52.90%	5.33	105
Accessible Small Towns	70.15%	*	-10.71	89	60.64%	64.06%	-3.42	97
Remote Small Towns	*	*	*	*	51.35%	51.12%	0.23	100
Accessible Rural	68.16%	*	1.27	101	60.09%	61.52%	-1.43	99
Remote Rural	76.93%	73.64%	3.29	103	67.42%	61.81%	5.61	106
- Sample Size = Nil			*Sample S	ze (between	1 and 4) too sm	all to be inclu	ded	

Bed Occupancy by Location Type- July 2024/2023

Location Type	July 24	July 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	74.09%	76.77%	-2.69	97	55.83%	56.52%	-0.69	99
Countryside - Village	74.52%	72.54%	1.98	102	65.23%	61.71%	3.52	104
Seaside - Coastal	74.11%	77.21%	-3.10	97	62.80%	62.54%	0.26	100
Small Town	71.35%	*	1.40	101	54.06%	53.77%	0.29	100
- Sample		*Sample :	Size (betwee	n 1 and 4) too	small to be inc	cluded		