

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

March 2024/2023 Report - HOSTEL

1.0 Introduction March 2024/2023

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

The SOAS Report: March 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 March 2024 showed a percentage point increase of **1.37** compared to March 2023.

Data from the Scottish Retail Consortium showed that an early Easter saw total sales in Scotland increased by 2.8% in March, however, compared to the 8.8% increase in March 2023 this was disappointing growth in total sales. Total food sales and health and beauty continued to drive sales when compared to the monthly performance of March 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for March 2024 found that 22% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the February 2024 survey). The survey recorded 44% of respondents (a 5% decrease on the February 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

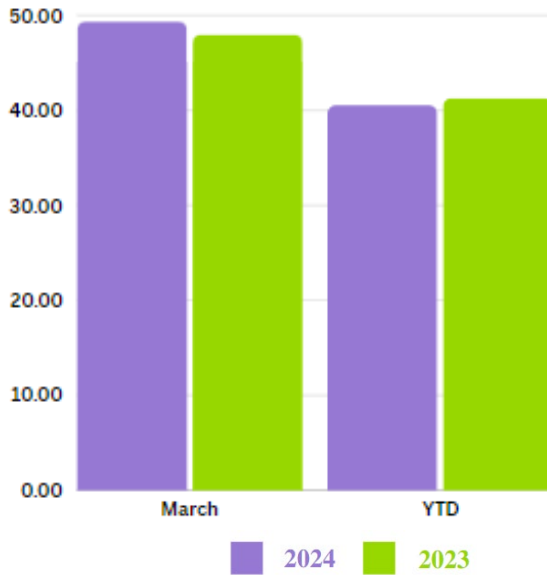
Despite consumer concern about the state of the economy, 35% of UK adults intended to take a domestic overnight trip in the second quarter of 2024 and 76% in the following 12 months. These figures show an increase in those planning an overnight trip compared with March 2023 (29% and 73% respectively). 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 four 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 March 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 7% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation

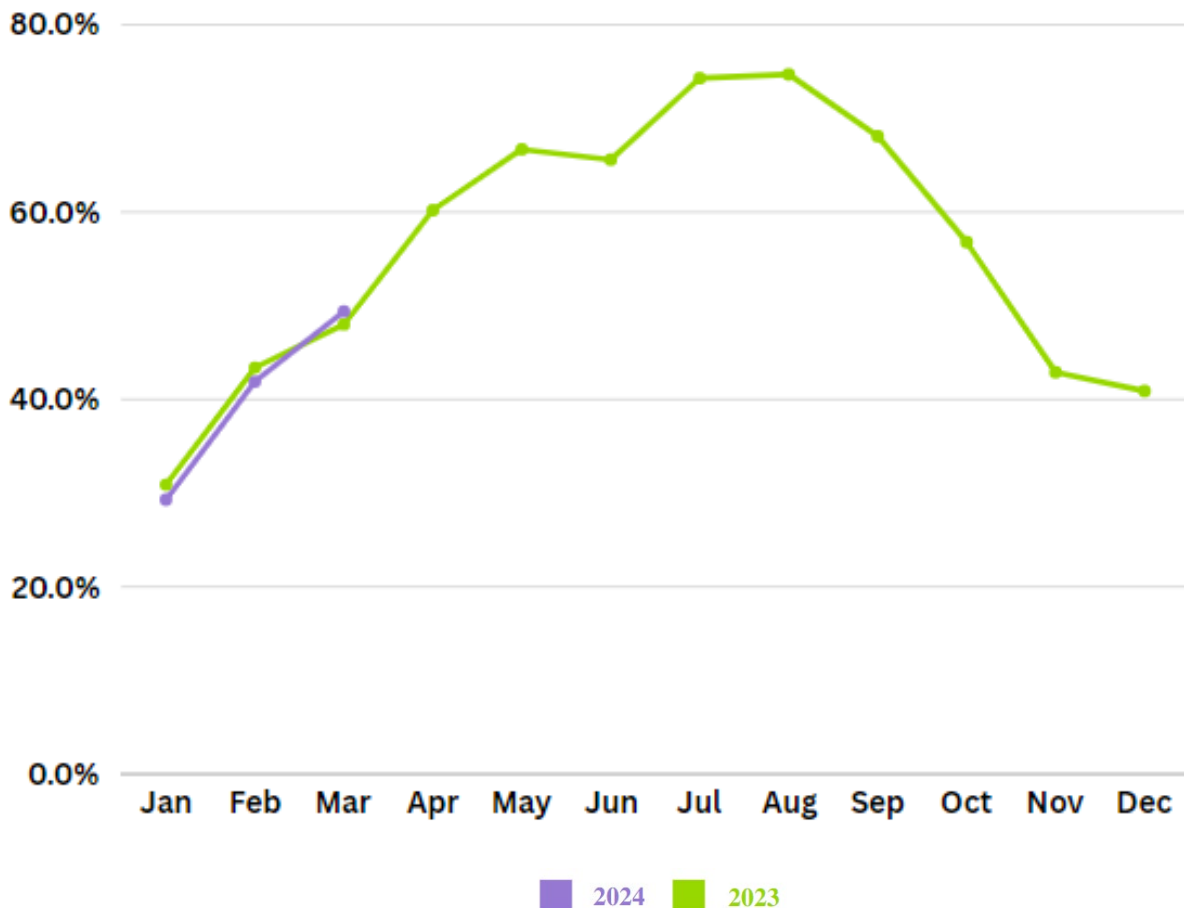
3.1 Performance by Hostel Category

Bed Space Occupancy – March 2024/2023



Hostel occupancy for March 2024 was 49.36% when compared to data from the previous year of 47.99%; this shows an overall percentage point decrease of 1.37.

Bed Space Occupancy – Year-to-Date



Bed Space Occupancy Scotland – March 2024/2023

Hostels	March 24	March 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	49.36%	47.99%	1.37	101	40.56%	41.29%	-0.73	99

Bed Occupancy by Type – March 2024/2023

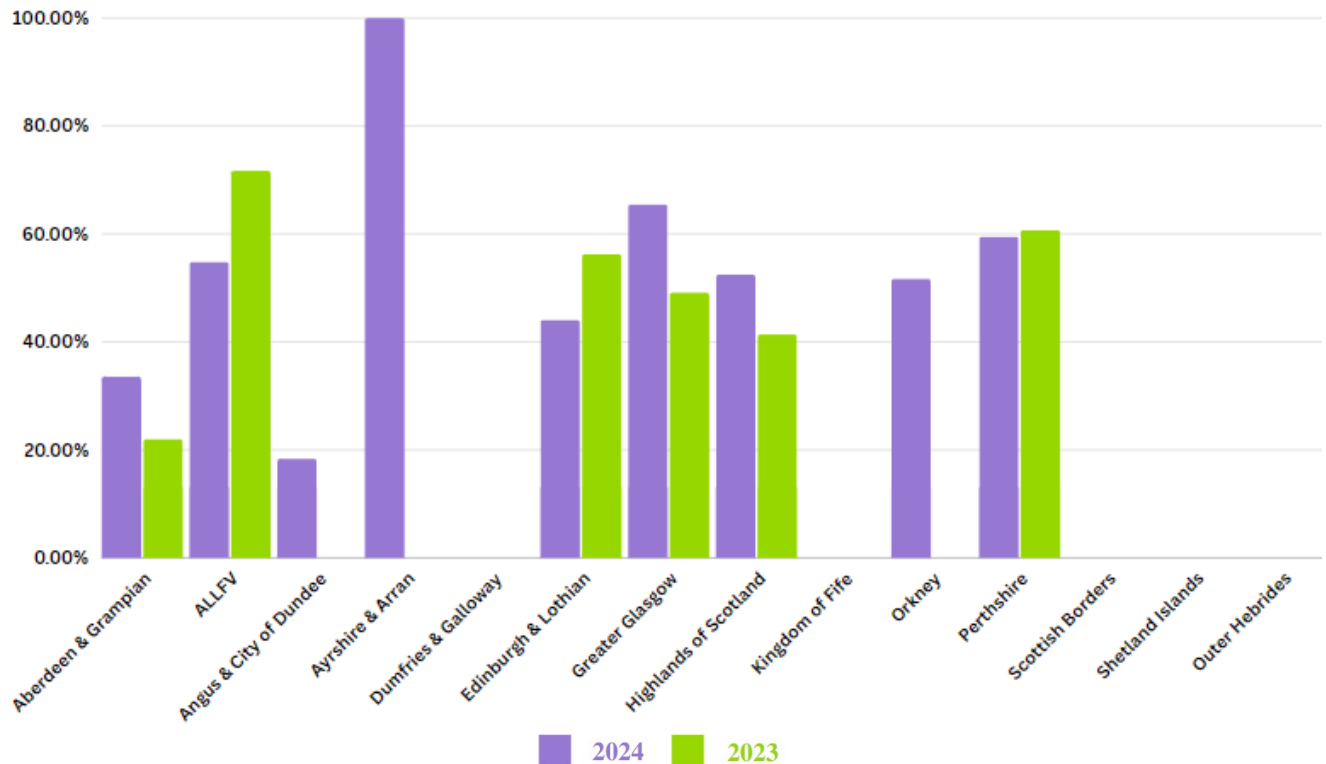
Type	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
SYHA	54.81%	49.05%	5.76	106	46.73%	41.92%	4.81	105
Independent	38.65%	*	16.62	117	28.81%	21.49%	7.32	107
			- Sample Size = Nil					
			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Grading – March 2024/2023

Grading	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	77.27%	23.46%	53.81	154
2 Stars	*	*	*	*	57.79%	47.46%	10.33	110
3 Stars	57.14%	35.69%	21.45	121	54.19%	41.89%	12.30	112
4 Stars	56.28%	55.58%	0.70	101	47.47%	44.46%	3.01	103
5 Stars	*	*	*	*	38.84%	36.75%	2.09	102
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 – March 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 – March 2024/2023

Area	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	21.27%	21.49%	-0.22	100
ALLFV	54.84%	71.72%	-16.88	83	45.32%	57.16%	-11.84	88
Angus & City of Dundee	*	-	*	*	*	-	*	*
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	-	-	-	-	-	-	-	-
Edinburgh & Lothian	44.10%	*	-12.16	88	33.34%	37.77%	-4.43	96
Greater Glasgow	*	*	*	*	50.86%	33.62%	17.24	117
Highlands of Scotland	52.47%	41.40%	11.07	111	45.52%	41.20%	4.32	104
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	56.42%	51.41%	5.01	105
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

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

Bed Occupancy by Location – March 2024/2023

Location accessibility/density	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	45.92%	64.00%	-18.08	82	37.10%	43.82%	-6.72	93
Other Urban Areas	*	*	*	*	33.82%	24.95%	8.87	109
Accessible Small Towns	*	*	*	*	53.40%	56.68%	-3.28	97
Remote Small Towns	*	*	*	*	30.88%	36.77%	-5.89	94
Accessible Rural	45.51%	*	-8.55	91	40.79%	47.18%	-6.39	94
Remote Rural	61.62%	35.11%	26.51	127	53.11%	40.45%	12.66	113

- Sample Size = Nil

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

Bed Occupancy by Location Type – March 2024/2023

Location Type	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	45.95%	58.18%	-12.23	88	36.56%	38.51%	-1.95	98
Countryside - Village	57.02%	41.06%	15.96	116	52.73%	46.47%	6.26	106
Seaside - Coastal	48.92%	36.45%	12.47	112	39.37%	40.19%	-0.82	99
Small Town	*	*	*	*	37.05%	38.74%	-1.69	98

- Sample Size = Nil

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