

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2024/2023 Report - HOSTEL

1.0 Introduction November 2024/2023

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

The SOAS Report: November 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 November 2024 showed a percentage point increase of 2.35 compared to November 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 November 2024 is 2.6%, up from 2.3% in October. The CPI 12-month rate (%) for November 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.6% up from 3.0% in October. Inflation rates for restaurants and cafes were 4.0% down from 4.3% in October.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.3% in November. However, this was disappointing growth compared to the 2.6% increase in November 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering November 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the October 2024 survey). The survey recorded 47% of respondents (a 2% increase on the October 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

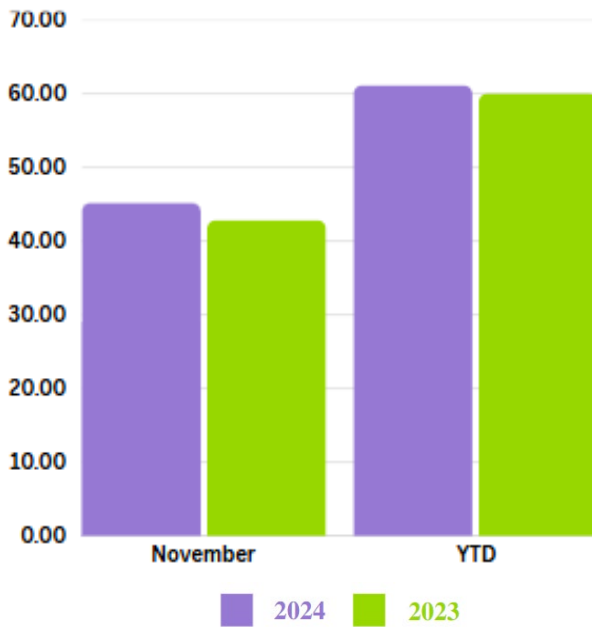
Despite consumer concern about the state of the economy, 19% of UK adults intended to take a domestic overnight trip in the two months of 2024 and 78% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (77%). However, the three 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 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 November 2024 that UK air connectivity saw a 3% decrease when compared to the same period in 2023, also, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for November 2024 global air passenger demand, measured by revenue per kilometer, was up 8.1% compared to November 2023. International demand rose 11.6% over the same period with domestic demand increasing 3.1%. Asia-Pacific region was the biggest global air passenger growth driver in November 2024 at 19.9% when compared to Europe at 9.4%.

3.0 Hostel Accommodation

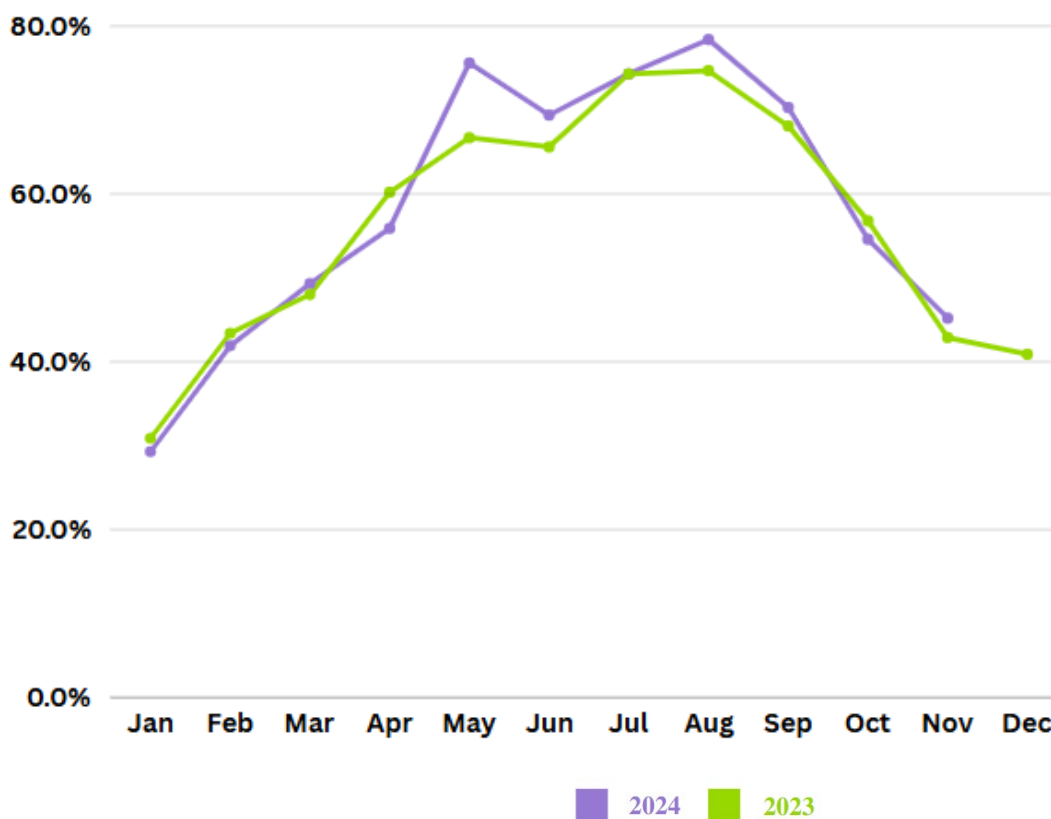
3.1 Performance by Hostel Category

Bed Space Occupancy – November 2024/2023



Hostel occupancy for November 2024 was **45.20%** when compared to data from the previous year of **42.85%**; this shows an overall percentage point increase of **2.35**.

Bed Space Occupancy – Year-to-Date



Bed Space Occupancy Scotland – November 2024/2023

Hostels	Nov 24	Nov 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	45.20%	42.85%	2.35	102	61.15%	60.04%	1.11	101

Bed Occupancy by Type – November 2024/2023

Type	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
SYHA	46.99%	44.60%	2.39	102	62.84%	60.50%	2.34	102
Independent	41.53%	39.15%	2.38	102	56.96%	55.53%	1.43	101

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

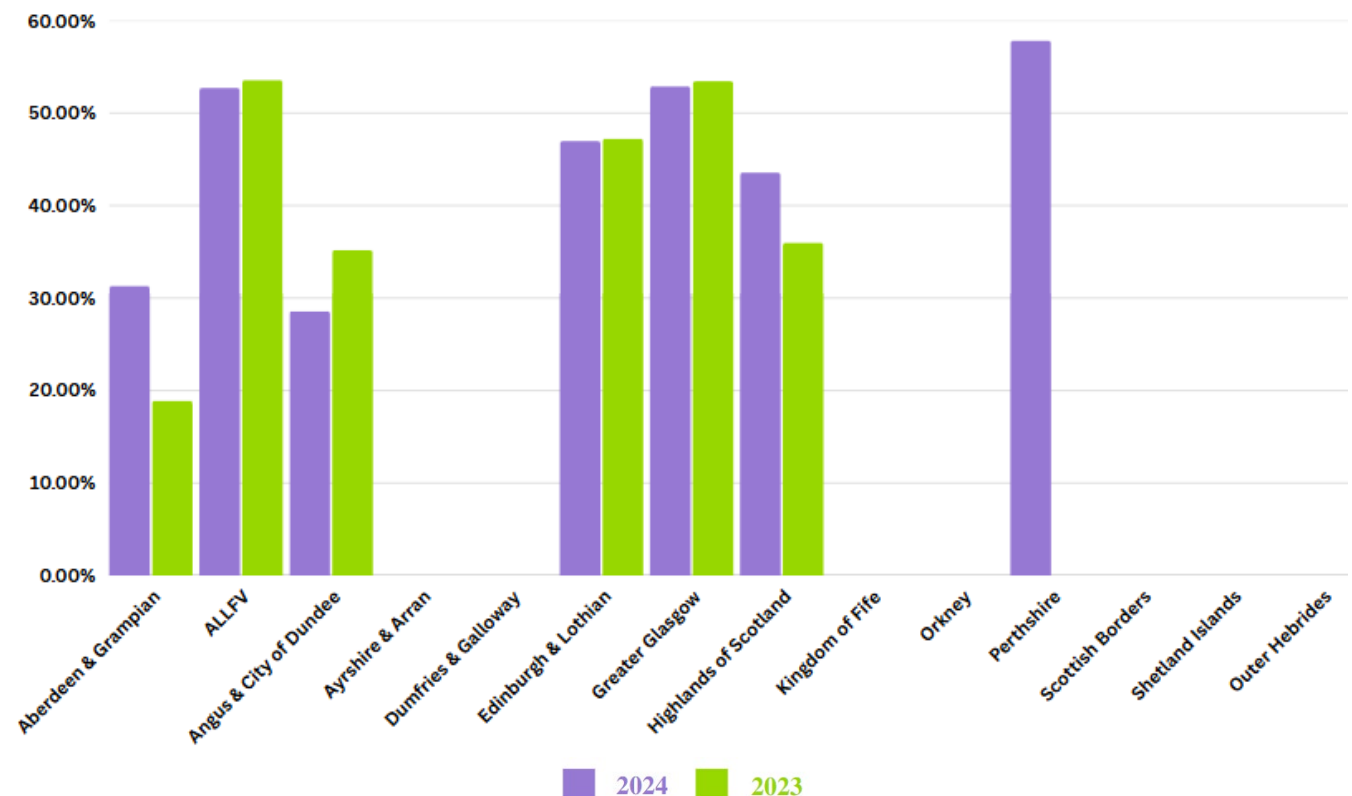
Bed Occupancy by Grading – November 2024/2023

Grading	Nov 24	Nov 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	45.69%	48.01%	-2.41	98	65.86%	62.00%	3.86	104
4 Stars	48.62%	42.49%	6.31	106	64.12%	61.92%	2.20	102
5 Stars	*	*	*	*	57.69%	56.42%	1.27	101
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 – November 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.

