



### SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

September 2024/2023 Report - HOSTEL

#### 1.0 Introduction September 2024/2023

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

The SOAS Report: September 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 September 2024 showed a percentage point increase of **2.21** compared to September 2023.

The Visitor Levy (Scotland) Act 2024 came into force on the 20th of September 2024. The Bill aims to allow Scottish local authorities to charge a visitor levy, which is charged for overnight stays in certain types of accommodation (such as hotels, B&Bs or holiday cottages). Each local authority will be able to decide if they wish to introduce the levy and at what level the levy should be.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to September 2024 is 1.7%, down from 2.2% in August. The CPI 12-month rate (%) for September 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.8% down from 4.0% in August. Inflation rates for restaurants and cafes were 4.1% down from 4.3% in August.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in September, however, compared to the 6.1% increase in September 2023 this was disappointing growth in total sales. Total food sales decreased by -0.7% compared to the monthly performance of September 2023, when they had increased by 9.2%.

Domestic consumer sentiment provided by the GB National Tourist Boards for September 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 August 2024 survey). The survey recorded 47% of respondents (a 1% increase on the August 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, 37% of UK adults intended to take a domestic overnight trip in the final 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 (76%). 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.

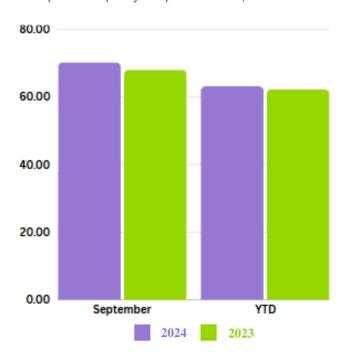
The recovery in international inbound visitation stalled in September 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% decrease when compared to the same period in 2023, also, UK air connectivity saw a 4% decrease in year-to-date flights compared to 2019.



### 3.0 Hostel Accommodation

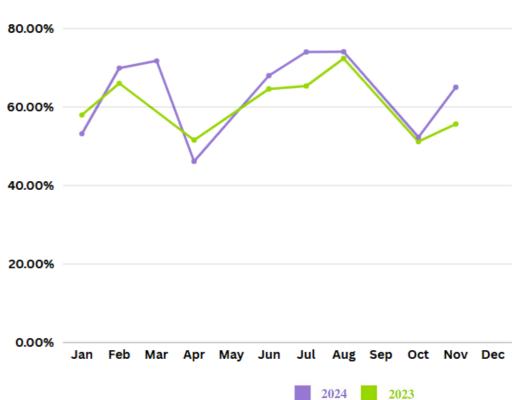
# 3.1 Performance by Hostel Category

Bed Space Occupancy - September 2024/2023



Hostel occupancy for September 2024 was **70.26**% when compared to data from the previous year of **68.05**%; this shows an overall percentage point increase of **2.21**.









### Bed Space Occupancy Scotland - September 2024/2023

Hostels	Sept 24	Sept 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
Bed Space Occupancy	70.26%	68.05%	2.21	102	63.20%	62.30%	0.90	101

### **Bed Occupancy by Type - September 2024/2023**

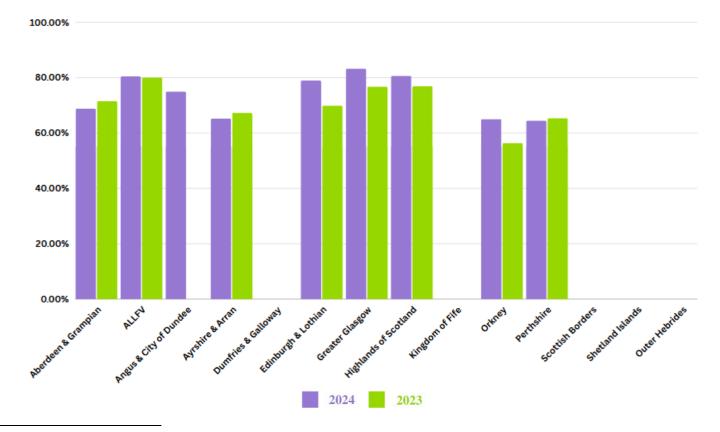
Туре	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change	
SYHA	69.30%	65.47%	3.83	104	65.04%	62.11%	2.93	103	
Independent	72.74%	83.61%	-10.42	90	58.58%	65.92%	-7.34	93	
- Sample Size = Nil			*San	*Sample Size (between 1 and 4) too small to be included					

### **Bed Occupancy by Grading - September 2024/2023**

Grading	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1 Star	*	*	*	*	51.42%	52.76%	-1.34	99
2 Stars	*	*	*	*	57.89%	53.74%	4.15	104
3 Stars	67.06%	63.12%	3.94	104	68.54%	63.36%	5.18	105
4 Stars	73.17%	68.62%	4.55	105	66.99%	64.24%	2.75	103
5 Stars	*	*	*	*	58.18%	58.11%	0.07	100
Unclassified	-	*	*	*	0.00%	0.00%	0.00	100
- 9	- Sample Size = Nil			Size (betwee	en 1 and 4) too	small to be in	cluded	

### Bed Occupancy by Former VisitScotland Area

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



<sup>&</sup>lt;sup>1</sup> 24/23 Diff throughout this report is expressed by % Point Change

<sup>&</sup>lt;sup>2</sup> 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 – September 2024/2023

Area	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Aberdeen & Grampian	*	*	*	*	48.55%	53.69%	-5.14	95
ALLFV	69.92%	66.03%	3.89	104	67.08%	67.51%	-0.43	100
Angus & City of Dundee	*	-	*	*	42.84%	-	42.84	143
Ayrshire & Arran	*	*	*	*	58.93%	59.09%	-0.16	100
Dumfries & Galloway	-	-	-	-	*	-	*	*
Edinburgh & Lothian	*	*	*	*	57.59%	57.85%	-0.26	100
Greater Glasgow	*	*	*	*	68.24%	57.39%	10.85	111
Highlands of Scotland	74.07%	72.38%	1.69	102	67.21%	63.93%	3.28	103
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	54.79%	49.28%	5.51	106
Perthshire	*	*	*	*	63.54%	62.21%	1.33	101
Scottish Borders	-	-	-	-	-	-	-	-
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

# **Bed Occupancy by Location - September 2024/2023**

Location accessibility/density	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Large Urban Areas	72.66%	68.09%	4.57	105	60.03%	61.46%	-1.43	99
Other Urban Areas	*	*	*	*	62.52%	58.37%	4.15	104
Accessible Small Towns	s *	*	*	*	63.18%	65.72%	-2.54	97
Remote Small Towns	*	*	*	*	54.70%	54.78%	-0.08	100
Accessible Rural	67.31%	*	0.16	100	62.75%	63.51%	-0.76	99
Remote Rural	69.37%	68.64%	0.73	101	70.02%	64.91%	5.11	105
- Sample		*Sample S	Size (betwee	n 1 and 4) too	small to be inc	luded		

# **Bed Occupancy by Location Type- September 2024/2023**

Location Type	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	73.57%	69.68%	3.89	104	60.45%	60.50%	-0.05	100
Countryside - Village	69.50%	68.21%	1.29	101	68.00%	64.52%	3.48	103
Seaside - Coastal	66.13%	65.06%	1.07	101	65.63%	64.74%	0.89	101
Small Town	*	*	*	*	56.19%	56.79%	-0.60	99
- Sample Size = Nil			*Sample :	Size (betwee	n 1 and 4) too	small to be in	luded	

<sup>-</sup> Sample Size = Nil \*Sample Size (between 1 and 4) too small to be included