

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

June 2023/2022 Report - HOSTEL

1.0 Introduction June 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering June 2023 and benchmarking against June 2022. 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 June 2023

The SOAS Report: June 2023 Hostel report continued to show growth in the Hostel sector in Scotland when compared to the same period in 2022. Hostel Bedspace Occupancy rates for June 2023 showed a percentage point increase of **7.20** when compared with June 2022.

Data from the Scottish Retail Consortium showed that retail sales figures increased by 11.3% year-on-year in June. Retail sales in Scotland held steady for June with a growth of 9%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% increase on the May 2023 survey). The survey recorded 46% of respondents (a 3% decrease on the May 2023 Survey) saying they were "...cautious - things are okay but I feel I have to be very careful".

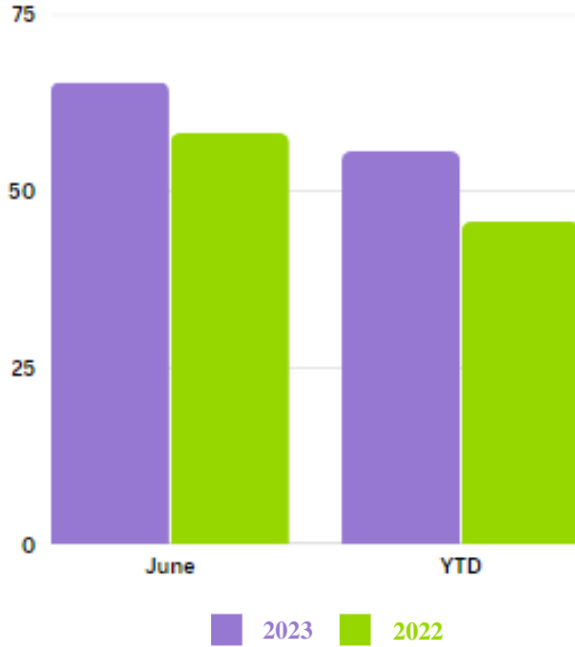
Despite consumer concern about the state of the economy, 11% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months remain the 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 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in June 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 0% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

3.0 Hostel Accommodation

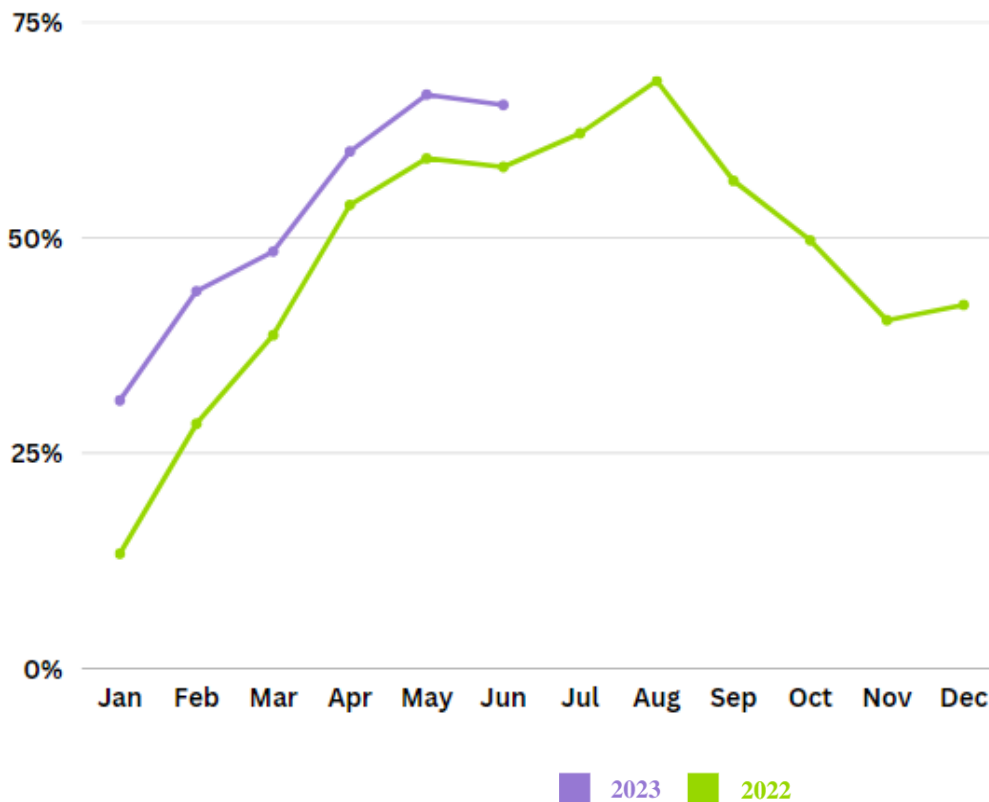
3.1 Performance by Hostel Category

Bed Space Occupancy – June 2023/2022



Hostel occupancy for June 2023 was 65.37% when compared to data from the previous year of 58.17%; this shows an overall percentage point increase of 7.20.

Bed Space Occupancy – Year to Date



Bed Space Occupancy Scotland – June 2023/2022

Hostels	June 23	June 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Bed Space Occupancy	65.37%	58.17%	7.20	107	55.57%	45.63%	9.94	110

Bed Occupancy by Type – June 2023/2022

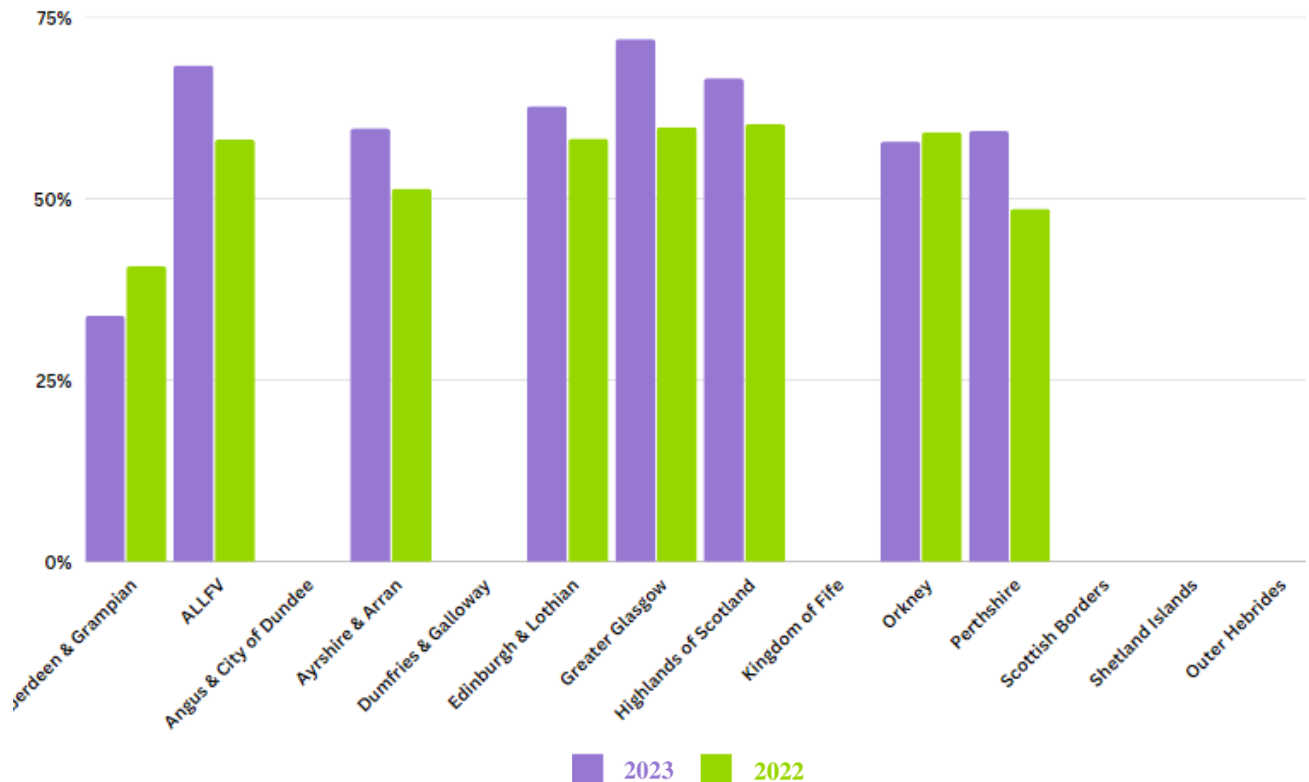
Type	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
SYHA	65.75%	60.62%	5.13	105	55.90%	48.09%	7.81	108
Independent	*	*	*	*	30.23%	11.16%	19.07	119
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by Grading – June 2023/2022

Grading	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 Star	*	*	*	*	51.09%	59.16%	-8.07	92
2 Stars	*	*	*	*	47.68%	52.32%	-4.64	95
3 Stars	64.57%	63.16%	1.41	101	58.29%	54.96%	3.33	103
4 Stars	68.13%	55.23%	12.90	113	57.01%	41.63%	15.38	115
5 Stars	*	*	*	*	51.26%	42.45%	8.81	109
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 – June 2023/2022



¹ 23/22 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.

