

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## May 2023/2022 Report – TOURING

### 1.0 Introduction May 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering May 2023 and benchmarking against May 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](mailto:hugh.sheridan@gcu.ac.uk)).

### 2.0 Executive Summary May 2023

The SOAS Report: May 2023/2022 Touring report shows a slight rise in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced a **13.97** percentage point increase in May 2023 compared to last year.

Data from the Scottish Retail Consortium showed that the additional Bank Holiday, the King's Coronation and dry, warm weather saw total retail sales figures increase by 10.9% year-on-year in May. Retail sales in Scotland held steady for May with a growth of 7.7%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for May 2023 found that 49% of respondents were cautious about demand and were concerned with cost escalation. The survey recorded 18% of respondents (a 3% decrease on the April 2023 Survey) saying they were "...been hit hard - no option but to cut back on spending". Despite consumer concern about the state of the economy, 20% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 76% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were; 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.

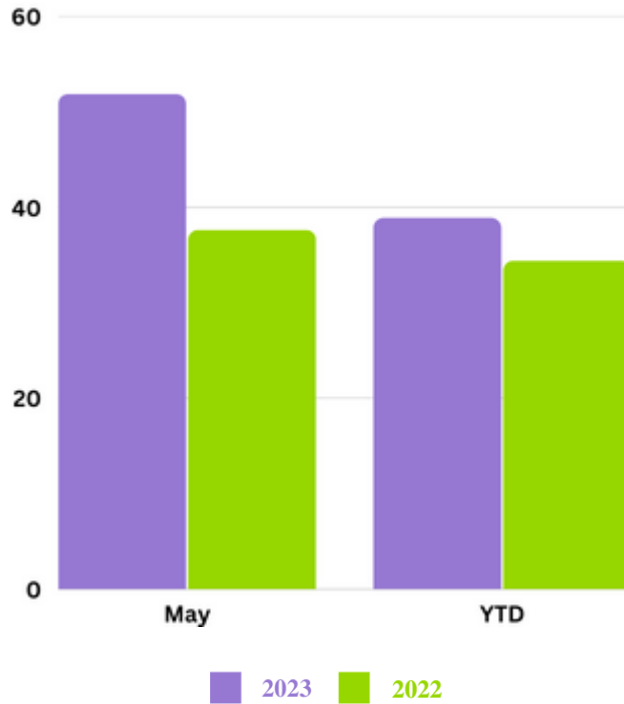
The recovery in international inbound visitation continues in May 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2022, however, UK air connectivity had seen a 10% decrease in year-to-date flights compared to 2019.

### 3.0 Touring Accommodation

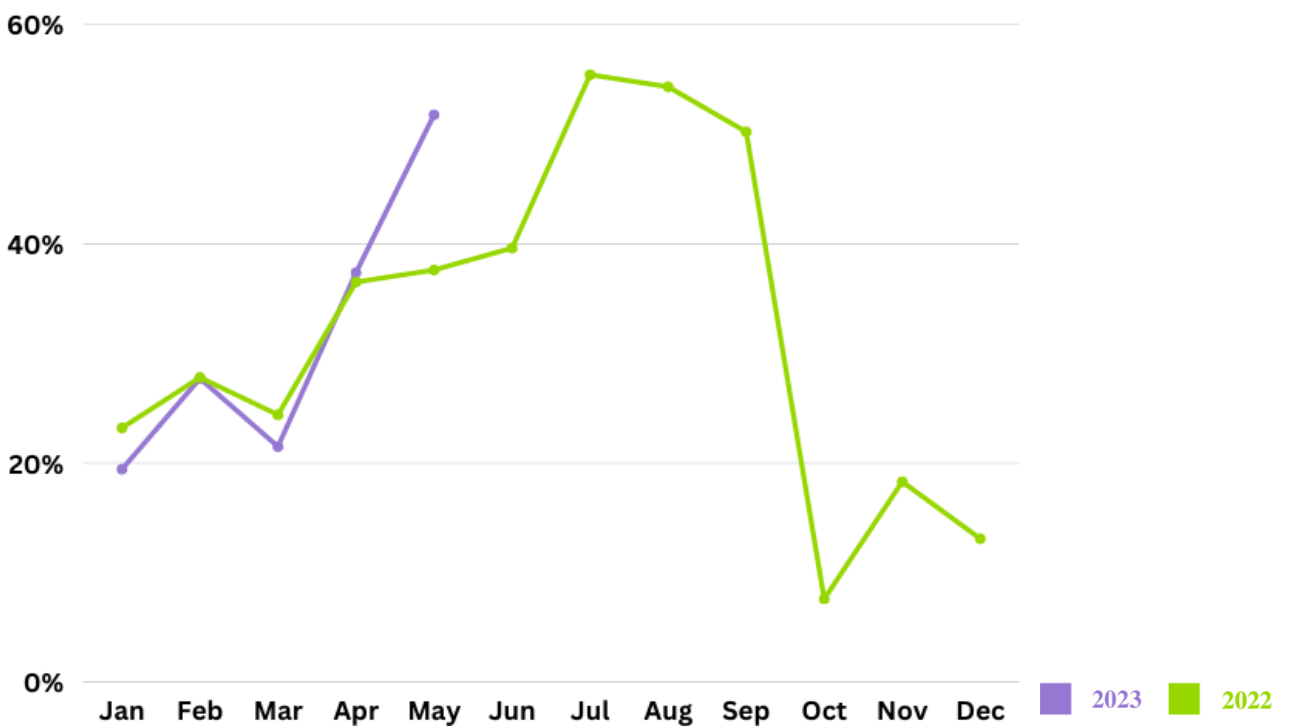
#### 3.1 Performance by Touring Category

##### Touring Pitch Occupancy – May 2023/2022

Touring Pitch Occupancy was 51.58% in May 2023 when compared to data from the previous year of a 37.61% occupancy rate; this shows an overall percentage point increase of 13.97.

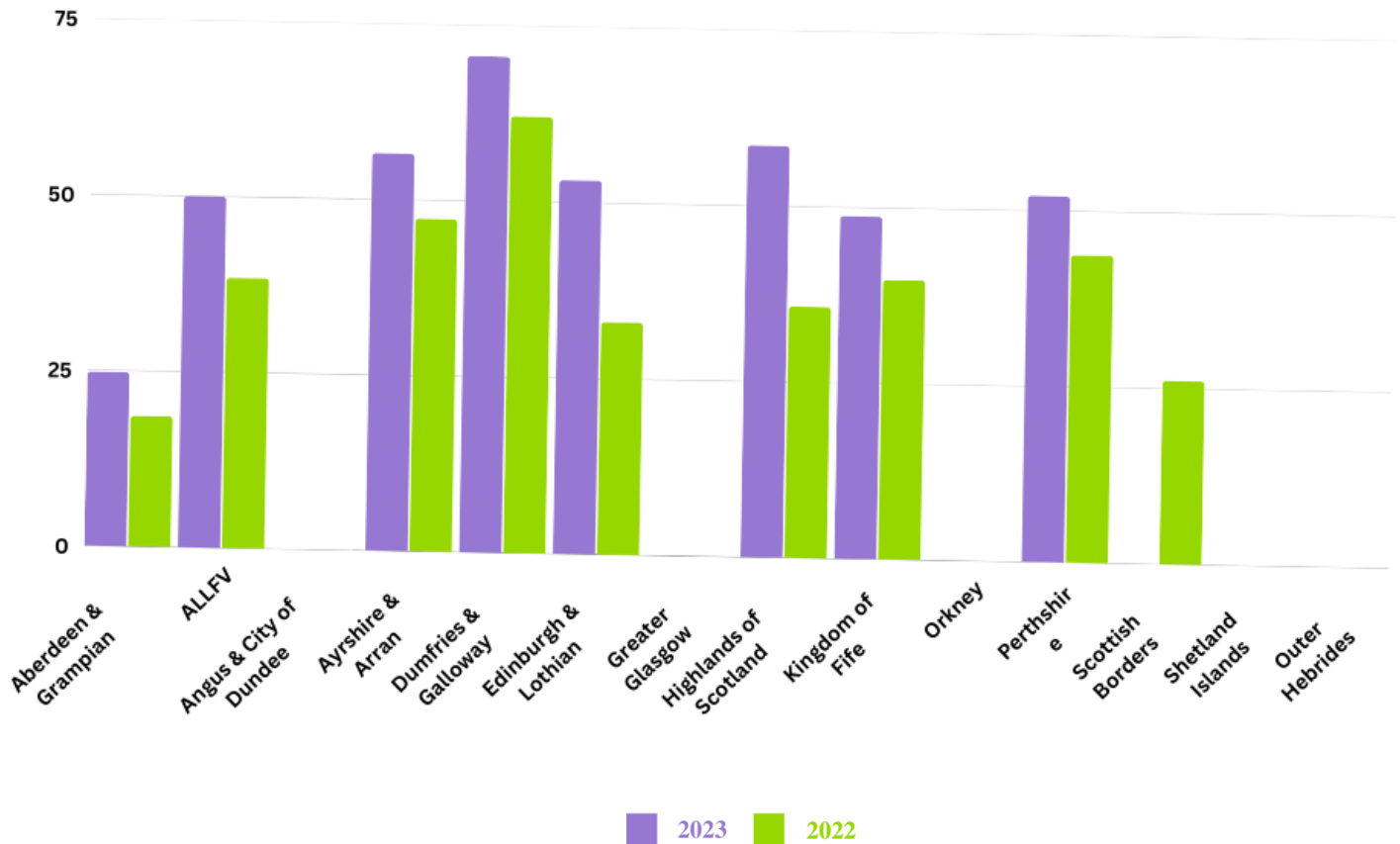


##### Touring Pitch Occupancy – Year to Date



## Room Occupancy by Former VisitScotland Area

### Touring Pitch Occupancy by Former VisitScotland Area – May 2023/2022



Percentage Pitch occupancy rates for Touring in Dumfries & Galloway were the highest in May 2023 and May 2022. Sites of 100-200 in size and pitches based in Small Towns fared best in pitch occupancy rates in May 2023.

### Pitch by Occupancy Type – May 2023/2022

Occupancy Type	May 23	May 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy <sup>3</sup>	51.58%	37.61%	13.97	114	39.23%	34.35%	4.88	105
Whole Park Occupancy	52.16%	37.15%	15.01	115	40.76%	35.55%	5.21	105
Caravan Pitch Occupancy	53.90%	48.63%	5.27	105	35.73%	38.53%	-2.80	97
Tent Pitch Occupancy	33.16%	19.47%	13.69	114	21.63%	11.56%	10.07	110

### Total Pitch Occupancy by Former VS Region – May 2023/2022

Former VS Region	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	24.71%	18.55%	6.16%	106	17.54%	17.06%	0.48%	100
ALLFV	*	*	*	*	43.66%	38.15%	5.51%	106
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	47.25%	*	*
Dumfries & Galloway	67.89%	62.00%	5.89%	106	44.52%	46.56%	-2.04%	98

<sup>1</sup> 23/22 Diff throughout this report is expressed by % Point Change

<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.

<sup>3</sup> Touring Pitch Occupancy gives an overview of the sector and includes data from all types of touring parks: Whole Park, Caravan and Tent.

Edinburgh & Lothian	*	*	*	*	*	24.37%	*	*
Greater Glasgow	-	-	-	-	-	-	-	*
Highlands of Scotland	58.45%	35.72%	22.73%	123		35.72%	-35.72%	64
Kingdom of Fife	*	*	*	*	*	*	*	*
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	43.70%	*	*	33.32%	35.72%	-2.40%	98
Scottish Borders	*	*	*	*	36.79%	25.99%	10.80%	111
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Touring Pitch Occupancy by Size – May 2023/2022

Size	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	38.80%	35.95%	2.85	103	28.42%	32.37%	-3.95	96
50-99 pitches	45.74%	32.30%	13.44	113	34.44%	30.13%	4.31	104
100-199 pitches	56.52%	41.42%	15.10	115	44.36%	36.98%	7.38	107
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Whole Park Occupancy by Size – May 2023/2022

Size	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	20.51%	14.84%	5.67	106	15.67%	10.29%	5.38	105
50-99 pitches	46.14%	28.61%	17.53	118	35.29%	27.35%	7.94	108
100-199 pitches	56.28%	43.34%	12.94	113	43.62%	40.40%	3.22	103
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Caravan Pitch Occupancy by Size – May 2023/2022

Size	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	48.78%	44.85%	3.93	104	31.66%	37.44%	-5.78	94
50-99 pitches	0.00%	63.48%	-63.48	37	20.48%	58.43%	-37.95	62
100-199 pitches	59.35%	41.73%	17.62	118	56.17%	28.75%	27.42	127
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Tent Pitch Occupancy by Size – May 2023/2022

Size	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	23.45%	17.58%	5.87	106	12.10%	14.95%	-2.85	97
50-99 pitches	40.35%	29.44%	10.91	111	31.92%	18.82%	13.10	113
100-199 pitches	0.00%	10.50%	-10.50	90	0.00%	5.20%	-5.20	95
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Touring Pitch Occupancy by Tariff – May 2023/2022

Tariff	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
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City – Large Town	*	*	*	*	*	29.71%	4.23%	104
Small Town	*	*	*	*	*	37.67%	9.24%	109
Countryside - Villages	50.59%	38.20%	12.39%	112	38.74%	35.91%	2.83%	103
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Caravan Pitch Occupancy by Location Type – May 2023/2022

Location Type	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	49.71%	41.62%	8.09%	108	32.77%	21.44%	11.33%	111
City – Large Town	*	*	*	*	*	5.20%	-5.20%	95
Small Town	*	*	*	*	*	0.00%	0.00%	100
Countryside - Villages	57.38%	61.45%	-4.07%	96	38.06%	17.00%	21.06%	121
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Tent Pitch Occupancy by Location Type – May 2023/2022

Location Type	May 23	May 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	24.01%	20.04%	3.97%	104	18.12%	21.44%	-3.32%	97
City – Large Town	*	*	*	*	*	5.20%	-5.20%	95
Small Town	*	*	*	*	*	0.00%	0.00%	100
Countryside - Villages	38.87%	27.95%	10.92%	111	23.06%	17.00%	6.06%	106
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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