

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

February 2023/2022 Report – TOURING - Revised

1.0 Introduction February 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering February 2023 and benchmarking against February 2022. The report reviews Accommodation performance throughout Scotland, highlighting trends across various sectors and categories of the industry. 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).

Please note that this report was revised from a previous version published earlier in the year and therefore any previous versions should be discarded.

2.0 Executive Summary February 2023

The SOAS Report: February 2023/2022 Touring report shows a marginal decline in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced an **0.10** percentage point decrease in February 2023 when comparing the same period last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 14.5% footfall increase in visitors for February 2023 compared to February 2022, with both Edinburgh and Glasgow seeing significant increases (27.8% and 16.7% respectively). However, when comparing footfall in February 2023 with February 2019 there remained an 11.1% decrease. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the wider cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for February 2023 evidenced similar findings with 47% of respondents Undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

Notably, some 25% of respondents Recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 11% of UK adults intended to take a domestic overnight trip in the first quarter of 2023 although that figure rose to 72% in the following 12 months. These figures 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.

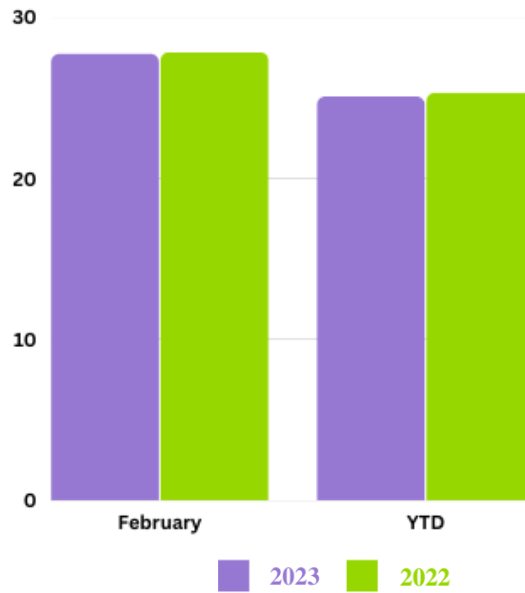
The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 continues to be restrain growth. A highlight in air transport was from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 17% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a 15% decrease in year-to-date flights when compared to 2019.

3.0 Touring Accommodation

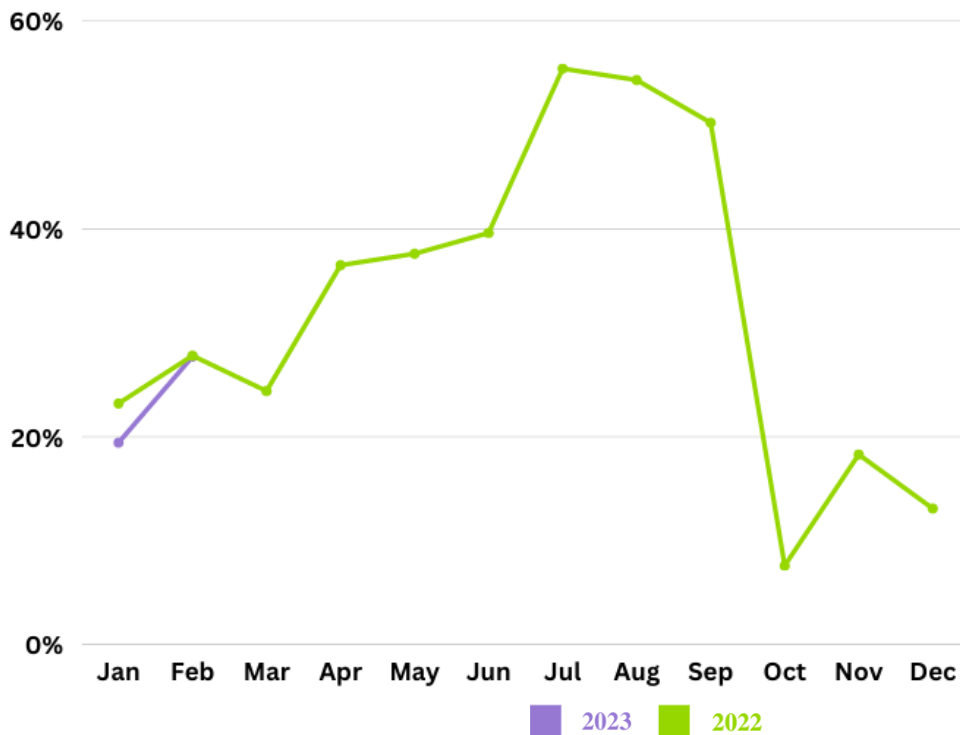
3.1 Performance by Touring Category

Touring Pitch Occupancy – February 2023/2022

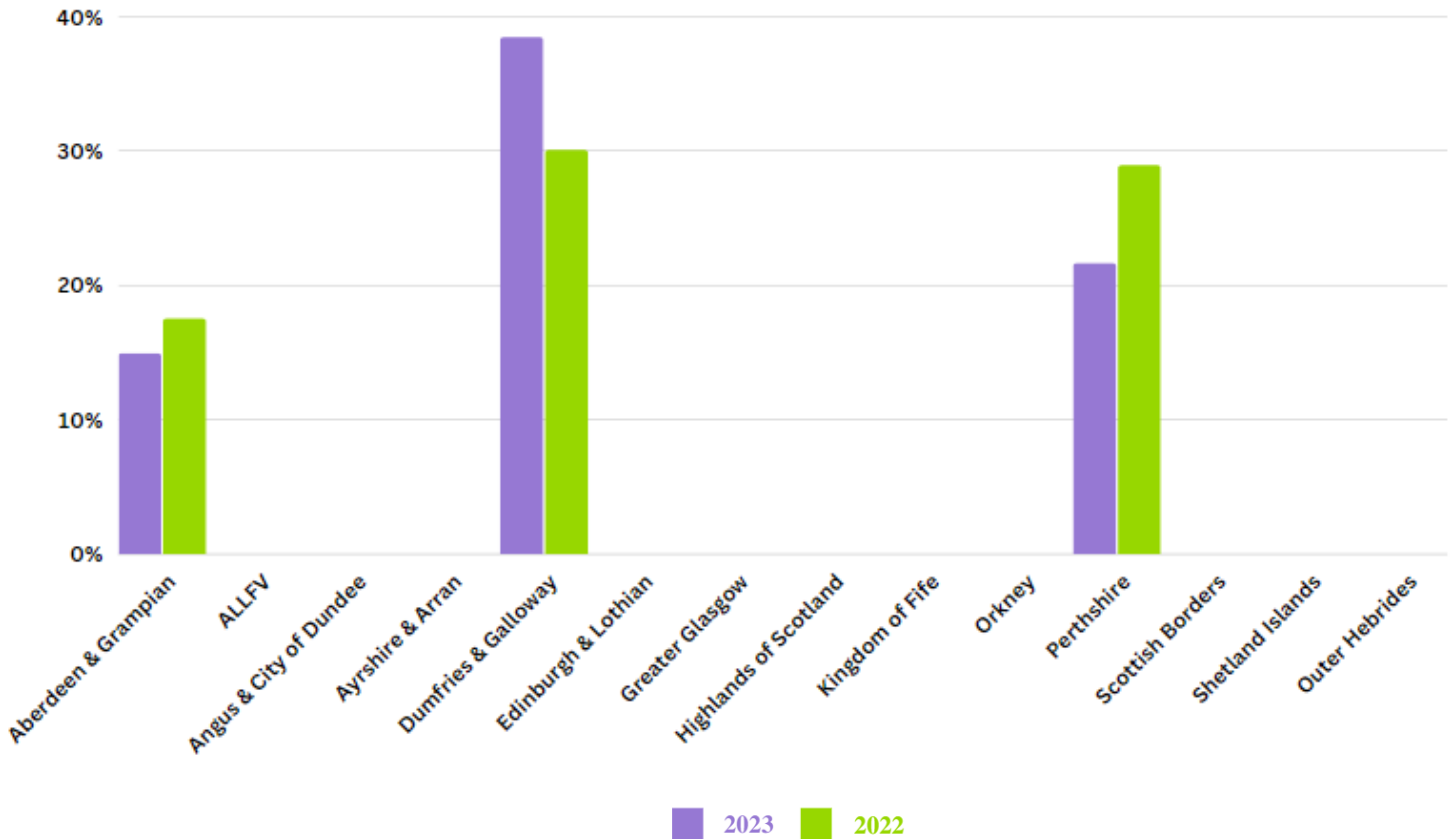
Touring Pitch Occupancy was 27.71% in February 2023 when compared to data from the previous year of a 27.81% occupancy rate; this shows an overall percentage point decrease of 0.10.



Touring Pitch Occupancy – Year to Date



Touring Pitch Occupancy by Former VisitScotland Area – February 2023/2022



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

Pitch by Occupancy Type – February 2023/2022

Occupancy Type	February 23	February 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	27.71%	27.81%	-0.10	100	25.06%	25.28%	-0.22	100
Whole Park Occupancy	36.75%	30.05%	6.70	107	29.79%	26.94%	2.85	103
Caravan Pitch Occupancy	21.88%	25.80%	-3.92	96	20.60%	22.50%	-1.90	98
Tent Pitch Occupancy	0.00%	0.68%	-0.68	99	0.00%	0.68%	-0.68	99

Touring Pitch Occupancy by Former VisitScotland Area – February 2023/2022

Region	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	14.04%	13.67%	0.37%	100
ALLFV	*	*	*	*	*	*	*	*
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	-	*	-	-	*	*	*	*
Dumfries & Galloway	38.43%	30.05%	8.38%	108	31.47%	27.23%	4.24%	104
Edinburgh & Lothian	-	*	-	-	*	*	*	*
Greater Glasgow	-	*	-	-	-	*	-	-

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.

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

£15 - £17.99	*	*	*	*	*	*	*	*
£18 -£19.99	-	*	*	*	*	*	*	*
£20 +	30.92%	27.61%	3.31	103	26.49%	24.40%	2.09	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – February 2023/2022

Tariff	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 -£19.99	-	*	*	*	*	*	*	*
£20 +	36.75%	30.05%	6.70	107	29.79%	26.94%	2.85	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – February 2023/2022

Tariff	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 -£19.99	-	*	*	*	*	*	*	*
£20 +	22.11%	17.50%	4.61	105	19.70%	13.55%	6.15	106
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – February 2023/2022

Tariff	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 -£19.99	-	*	*	*	*	*	*	*
£20 +			0.00	100			0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – February 2023/2022

Location Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	14.78%	17.50%	-2.72	97	13.94%	13.55%	0.39	100
City – Large Town	-	*	*	*	*	*	*	*
Small Town	-	*	*	*	*	*	*	*
Countryside - Villages	32.43%	29.85%	2.58	103	28.81%	28.05%	0.76	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – February 2023/2022

Location Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside – Coastal			0.00	100			0.00	100
City – Large Town	-	*	*	*	*	*	*	*
Small Town	-	*	*	*	*	*	*	*

Countryside - Villages 36.75% 30.05% 6.70 107 30.60% 27.41% 3.19 103
- Sample Size = Nil *Sample Size (between 1 and 4) too small to be included

Caravan Pitch Occupancy by Location Type – February 2023/2022

Location Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	15.95%	17.50%	-1.55	98	14.82%	13.55%	1.27	101
City – Large Town	-	*	*	*	*	*	*	*
Small Town	-	*	*	*	*	*	*	*
Countryside - Villages	26.58%	37.73%	-11.15	89	25.42%	35.91%	-10.49	90
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Tent Pitch Occupancy by Location Type – February 2023/2022

Location Type	February 23	February 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside – Coastal			0.00	100			0.00	100
City – Large Town	-	*	*	*	*	*	*	*
Small Town	-	*	*	*	*	*	*	*
Countryside - Villages	0.00%	0.68%	-0.68	99	0.00%	0.68%	-0.68	99
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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