

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

July 2023/2022 Report - TOURING

1.0 Introduction July 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering July 2023 and benchmarking against July 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 July 2023

The SOAS Report: July 2023/2022 Touring report shows a slight decrease in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced a **3.71** percentage point decrease in July 2023 compared to last year.

Data from the Scottish Retail Consortium showed that total retail sales figures decreased by 3% year-on-year in July. Retail sales in Scotland held steady for July with a growth of 4.6%. Food sales continue to be the biggest growth area, however, many customers were seeking more warming traditional foods instead of the seasonal specials.

Domestic consumer sentiment provided by the GB National Tourist Boards for July 2023 found that 23% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the June 2023 survey). The survey recorded 45% of respondents (a 1% decrease on the June 2023 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, 50% of UK adults intend to take a domestic overnight trip in the third quarter of 2023 although that figure rose to 75% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months were 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 of the GB National Tourist Survey (VisitBritain 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment..

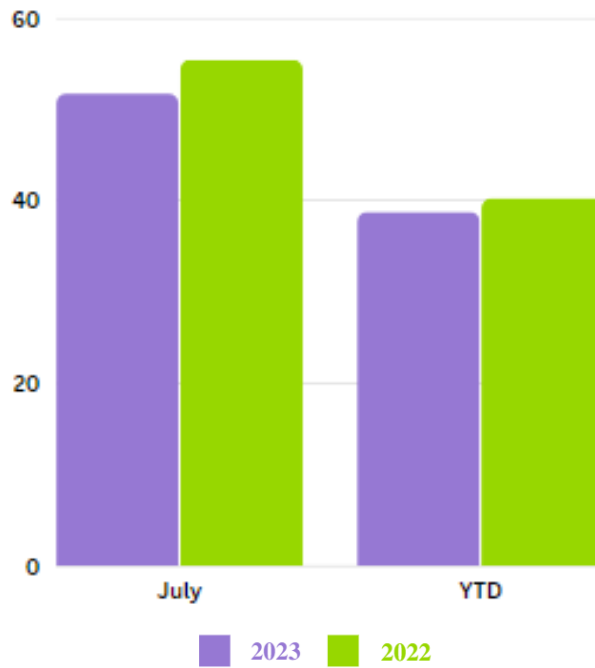
The recovery in international inbound visitation stalled in July 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 7% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

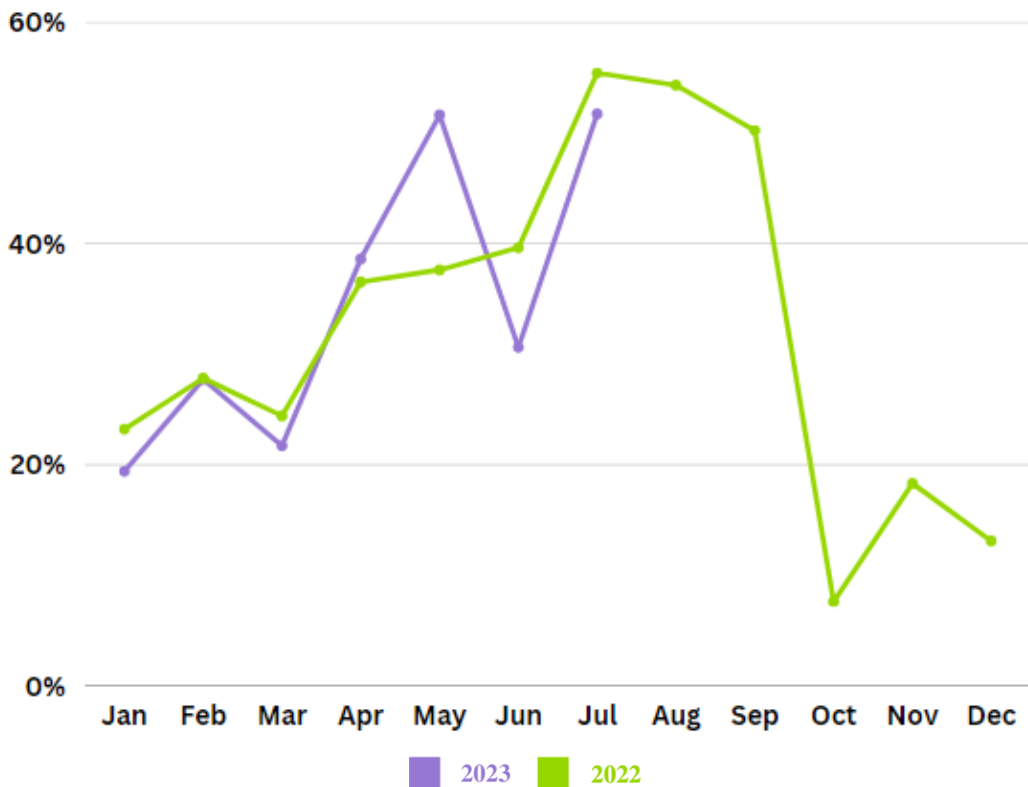
3.1 Performance by Touring Category

Touring Pitch Occupancy – July 2023/2022

Touring Pitch Occupancy was 51.66% in July 2023 when compared to data from the previous year of a 55.37% occupancy rate; this shows an overall percentage point decrease of 3.71.

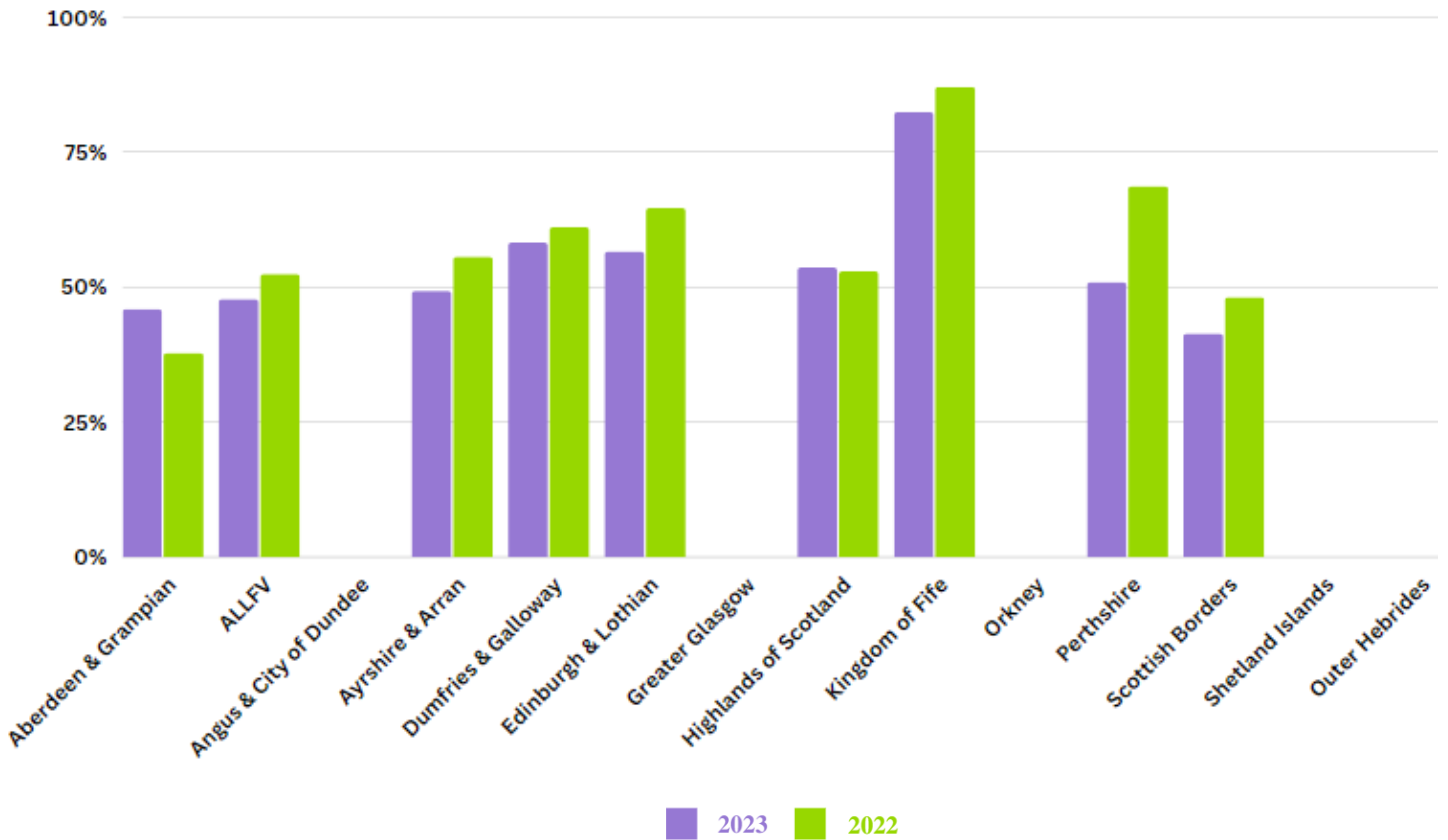


Touring Pitch Occupancy – Year to Date



Room Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – July 2023/2022

Occupancy Type	July 23	July 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	51.66%	55.37%	-3.71%	96	38.72%	40.23%	-1.51%	98
Whole Park Occupancy	49.80%	52.00%	-2.20%	98	38.27%	39.71%	-1.44%	99
Caravan Pitch Occupancy	83.99%	72.29%	11.70%	112	43.94%	48.62%	-4.68%	95
Tent Pitch Occupancy	50.08%	59.05%	-8.97%	91	31.45%	26.46%	4.99%	105

Touring Pitch Occupancy by Size – July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	57.99%	61.96%	-3.97%	96	36.53%	40.45%	-3.92%	96
50-99 pitches	46.32%	50.97%	-4.65%	95	41.64%	35.98%	5.66%	106
100-199 pitches	53.02%	57.40%	-4.38%	96	38.02%	42.73%	-4.71%	95
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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.

Whole Park Occupancy by Size – July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	32.41%	18.70%	13.71%	114	28.80%	12.13%	16.67%	117
50-99 pitches	46.32%	45.80%	0.52%	101	42.29%	32.23%	10.06%	110
100-199 pitches	53.02%	56.92%	-3.90%	96	37.15%	44.71%	-7.56%	92
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	83.99%	71.80%	12.19%	112	40.88%	46.75%	-5.87%	94
50-99 pitches	0.00%	73.84%	-73.84%	26	20.48%	62.31%	-41.83%	58
100-199 pitches	0.00%	71.67%	-71.67%	28	59.40%	42.10%	17.30%	117
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – July 2023/2022

Size	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	50.08%	66.58%	-16.50%	84	24.47%	31.35%	-6.88%	93
50-99 pitches	0.00%	74.09%	-74.09%	26	39.75%	38.21%	1.54%	102
100-199 pitches	0.00%	39.99%	-39.99%	60	0.00%	14.83%	-14.83%	85
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	68.07%	9.67%	58.40%	158
£15 - £17.99	*	*	*	*	24.75%	48.55%	-23.80%	76
£18 - £19.99	*	*	*	*	21.46%	13.86%	7.60%	108
£20 +	51.35%	57.10%	-5.75%	94	39.16%	41.56%	-2.40%	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	0.00%	0.00%	0.00%	100
£15 - £17.99	*	*	*	*	0.00%	0.00%	0.00%	100
£18 - £19.99	*	*	*	*	21.46%	13.86%	7.60%	108
£20 +	49.49%	54.32%	-4.83%	95	38.35%	41.51%	-3.16%	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	0.00%	0.00%	0.00%	100
£15 - £17.99	*	*	*	*	21.91%	48.07%	-26.16%	74
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00%	100
£20 +	83.99%	71.98%	12.01%	112	48.58%	48.66%	-0.08%	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – July 2023/2022

Tariff	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	68.07%	9.67%	58.40%	158
£15 - £17.99	*	*	*	*	37.31%	49.91%	-12.60%	87
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00%	100
£20 +	35.14%	57.56%	-22.42%	78	29.77%	25.42%	0.00%	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – July 2023/2022

Location Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	54.60%	57.32%	-2.72%	97	47.96%	41.53%	6.43%	106
City – Large Town	*	*	*	*	18.64%	34.06%	-15.42%	85
Small Town	*	*	*	*	50.18%	42.65%	7.53%	108
Countryside - Villages	48.60%	52.13%	-3.53%	96	37.00%	41.00%	-4.00%	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – July 2023/2022

Location Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	54.60%	54.91%	-0.31%	100	48.78%	40.98%	7.80%	108
City – Large Town	*	*	*	*	18.64%	37.02%	-18.38%	82
Small Town	*	*	*	*	50.18%	42.65%	7.53%	108
Countryside - Villages	48.47%	47.78%	0.69%	101	36.54%	38.92%	-2.38%	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – July 2023/2022

Location Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	87.65%	73.40%	14.25%	114	46.12%	44.87%	1.25%	101
City – Large Town	*	*	*	*	0.00%	42.10%	-42.10%	58
Small Town	*	*	*	*	0.00%	0.00%	0.00%	100
Countryside - Villages	48.70%	71.99%	-23.29%	77	41.91%	58.60%	-16.69%	83
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – July 2023/2022

Location Type	July 23	July 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	54.07%	74.03%	-19.96%	80	32.34%	41.55%	-9.21%	91
City – Large Town	*	*	*	*	0.00%	14.83%	-14.83%	85
Small Town	*	*	*	*	0.00%	0.00%	0.00%	100
Countryside - Villages	28.02%	71.59%	-43.57%	56	30.94%	35.04%	-4.10%	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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