

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## *November 2023/2022 Report - TOURING*

### 1.0 Introduction November 2023/2022

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

The SOAS Report: November 2023/2022 Touring report shows an increase in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced a **2.80** percentage point increase in November 2023 compared to last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in November with growth of just 3.1% despite the Black Friday deals. Food and drink and health and beauty categories continued to drive sales. November's food and drink sales rose by 5.8%, which was still below the 3-month average.

Domestic consumer sentiment provided by the GB National Tourist Boards for November 2023 found that 20% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2023 survey). The survey recorded 52% of respondents (a 7% increase on the September 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, 14% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 77% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be 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.

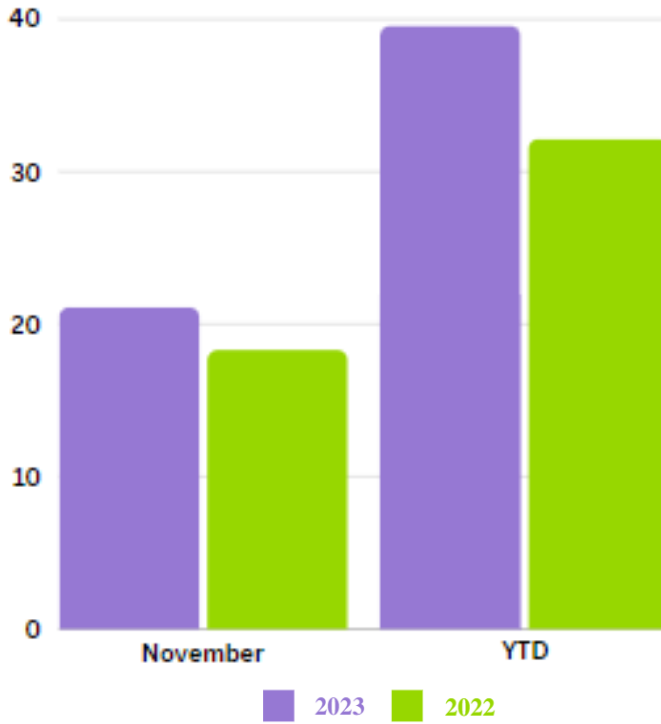
The recovery in international inbound visitation continued to stall in November 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 8% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

### 3.0 Touring Accommodation

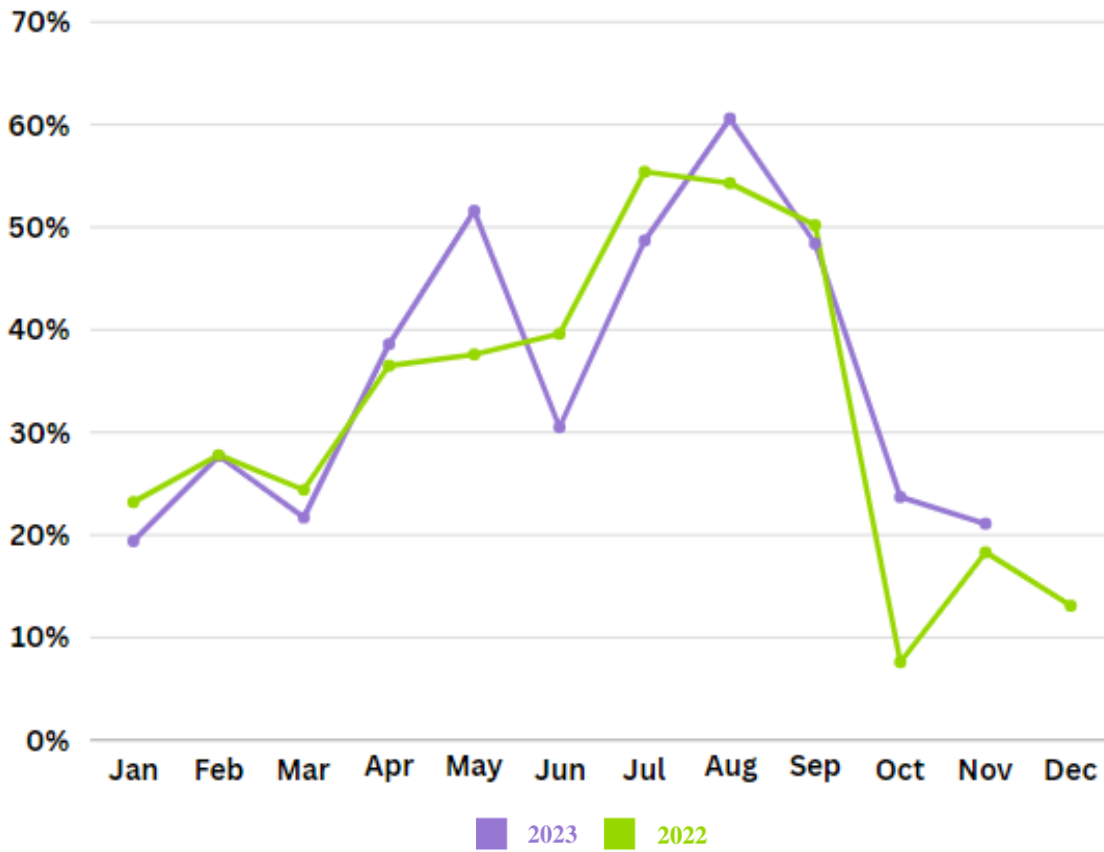
#### 3.1 Performance by Touring Category

### Touring Pitch Occupancy – November 2023/2022

Touring Pitch Occupancy was **21.12%** in November 2023 when compared to data from the previous year of a **18.32%** occupancy rate; this shows an overall percentage point increase of **2.80**.

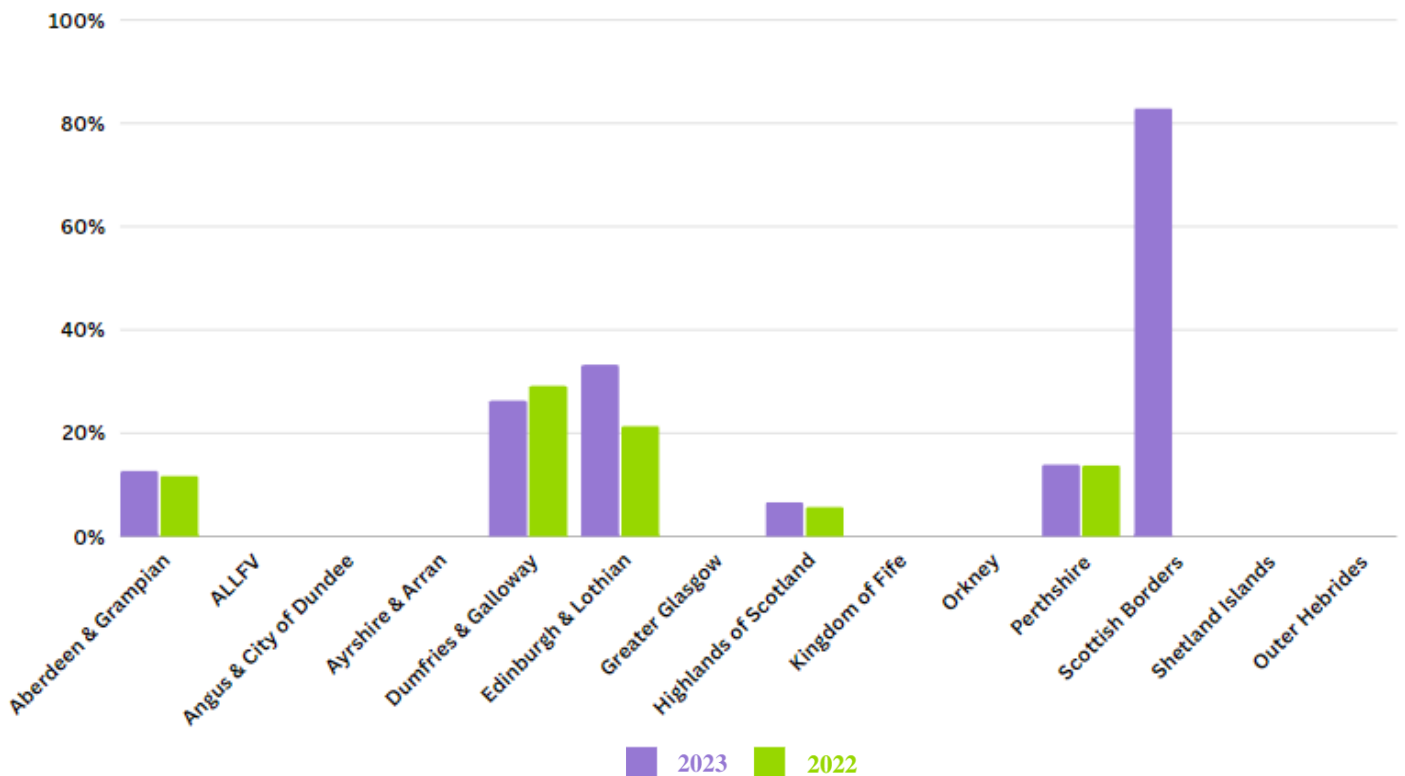


**Touring Pitch Occupancy – Year-to-Date**



**Room Occupancy by Former VisitScotland Area**

**Touring Pitch Occupancy by Former VisitScotland Area – November 2023/2022**



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

Occupancy Type	November 23	November 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>	21.12%	18.32%	2.80	103	39.59%	32.16%	7.43	107
Whole Park Occupancy	19.85%	18.28%	1.57	102	39.17%	29.99%	9.18	109
Caravan Pitch Occupancy	34.73%	24.24%	10.49	110	46.94%	48.79%	-1.85	98
Tent Pitch Occupancy	1.60%	0.44%	1.16	101	28.65%	26.15%	2.50	103

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

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	20.07%	11.38%	8.69%	109	34.11%	37.51%	-3.40%	97
50-99 pitches	45.90%	0.00%	45.90%	146	41.28%	21.32%	19.96%	120
100-199 pitches	16.94%	20.31%	-3.37%	97	39.95%	41.98%	-2.03%	98
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	37.04%	0.00%	37.04	137	27.63%	11.85%	15.78	116
50-99 pitches	0.00%	18.28%	-18.28	82	41.46%	17.75%	23.71	124
100-199 pitches	16.94%	0.00%	16.94	117	39.00%	43.80%	-4.80	95
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

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

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	24.70%	19.91%	4.79	105	40.84%	45.76%	-4.92	95
50-99 pitches	45.90%	0.00%	45.90	146	41.69%	63.54%	-21.85	78
100-199 pitches	0.00%	27.37%	-27.37	73	52.73%	39.78%	12.95	113
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

<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.

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

Size	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	1.60%	0.44%	1.16	101	19.76%	22.09%	-2.33	98
50-99 pitches	0.00%	0.00%	0.00	100	39.10%	37.84%	1.26	101
100-199 pitches	0.00%	0.00%	0.00	100	14.24%	12.76%	1.48	101
200 or more	-	-	-	-	*	*	*	*
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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

Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	*	-	*	*	21.24%	11.31%	9.93	110
£15 - £17.99	-	-	-	-	27.70%	49.03%	-21.33	79
£18 - £19.99	*	*	*	*	22.22%	15.80%	6.42	106
£20 +	22.14%	18.32%	3.82	104	40.22%	32.60%	7.62	108
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

### Whole Park Occupancy by Tariff – November 2023/2022

Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	*	-	*	*	17.12%	0.00%	17.12	117
£15 - £17.99	-	-	-	-	0.00%	0.00%	0.00	100
£18 - £19.99	*	*	*	*	22.18%	15.80%	6.38	106
£20 +	21.32%	18.28%	3.04	103	39.56%	30.65%	8.91	109
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

### Caravan Pitch Occupancy by Tariff – November 2023/2022

Tariff	November 23	November 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%	49.91%	-28.00	72
£18 - £19.99	*	*	*	*	37.09%	0.00%	37.09	137
£20 +	34.73%	24.24%	10.49	110	49.59%	48.71%	0.88	101
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

### Tent Pitch Occupancy by Tariff – November 2023/2022

Tariff	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	*	-	*	*	76.69%	11.31%	65.38	165
£15 - £17.99	-	-	-	-	44.16%	47.15%	-2.99	97
£18 - £19.99	*	*	*	*	11.26%	0.00%	11.26	111
£20 +	1.60%	0.44%	1.16	101	27.16%	25.07%	0.00	100

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

### Touring Pitch Occupancy by Location Type – November 2023/2022

Location Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	24.21%	35.27%	-11.06	89
Countryside - Village	20.69%	20.01%	0.68	101	39.47%	40.55%	-1.08	99
Seaside - Coastal	8.59%	12.35%	-3.76	96	45.02%	24.52%	20.50	121
Small Town	*	*	*	*	55.40%	45.17%	10.23	110

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

### Whole Park Occupancy by Location Type – November 2023/2022

Location Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	20.31%	37.14%	-16.83	83
Countryside - Village	22.43%	21.34%	1.09	101	38.39%	38.73%	-0.34	100
Seaside - Coastal	4.54%	0.00%	4.54	105	45.37%	22.62%	22.75	123
Small Town	*	*	*	*	55.40%	45.17%	10.23	110

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

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

Location Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	49.01%	43.55%	5.46	105
Countryside - Village	33.97%	26.67%	7.30	107	47.67%	58.14%	-10.47	90
Seaside - Coastal	15.87%	12.35%	3.52	104	44.87%	44.94%	-0.07	100
Small Town	*	*	*	*	0.00%	0.00%	0.00	100

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

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

Location Type	November 23	November 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	19.45%	17.45%	2.00	102
Countryside - Village	0.83%	0.86%	-0.03	100	34.74%	32.66%	2.08	102
Seaside - Coastal	13.33%	0.00%	13.33	113	33.53%	38.93%	-5.40	95
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil					*Sample Size (between 1 and 4) too small to be included			