

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

January 2023/2022 Report – TOURING - Revised

1.0 Introduction January 2023/2022

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

The SOAS Report: January 2023/2022 Touring report continued to show a 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 **3.73** percentage point decrease in January 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions evidenced a 12.2% footfall increase in visitors for January 2023 compared to the same period in 2022

Domestic consumer sentiment provided by the GB National Tourist Boards for January 2023 found that 52% of respondents stated (a 5% increase on the December 2022 Survey) saying they were “cautious - things are OK but I feel I have to be very careful”.

The survey also recorded 21% of respondents (a 1% decrease on the December 2022 Survey) saying they are “...been hit hard - no option but to cut back on spending”. Despite consumer concern about the state of the economy, 16% of UK adults intend to take a domestic overnight trip in the first quarter of 2023 and 70% in the next 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023).

The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 remained the major barrier to growth. One highlight in air transport is from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 42% in daily flights compared to 2019. Eurocontrol (European Air Traffic agency) indicated that UK air connectivity had seen a 17% decrease in year-to-date flights when compared to the same time in 2019, however, the UK was the busiest state within the network in 2023, with an average of 4,044 flights per day this is a 69% increase compared to the same time in 2022 (Eurocontrol, 2023), however, the start of 2023 saw Flybe, which operated scheduled services from Belfast City, Birmingham and Heathrow to airports across the United Kingdom and to Amsterdam and Geneva entered into administration.

3.0 Touring Accommodation

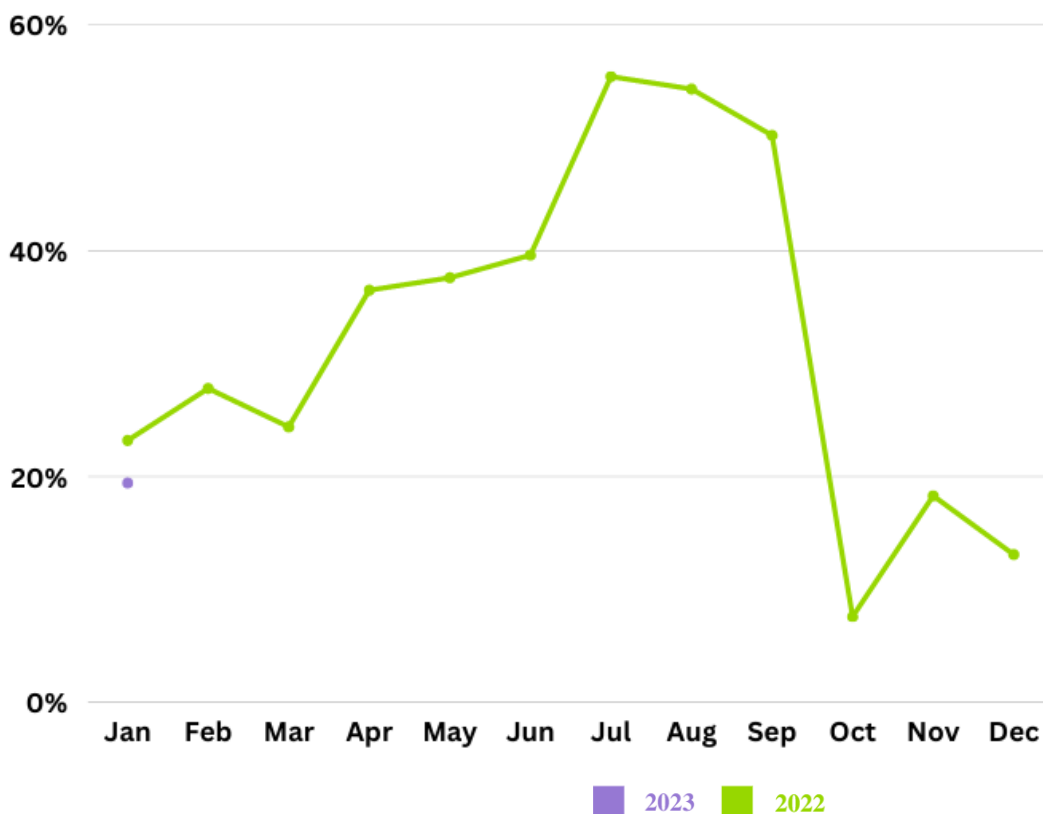
3.1 Performance by Touring Category

Touring Pitch Occupancy – January 2023/2022

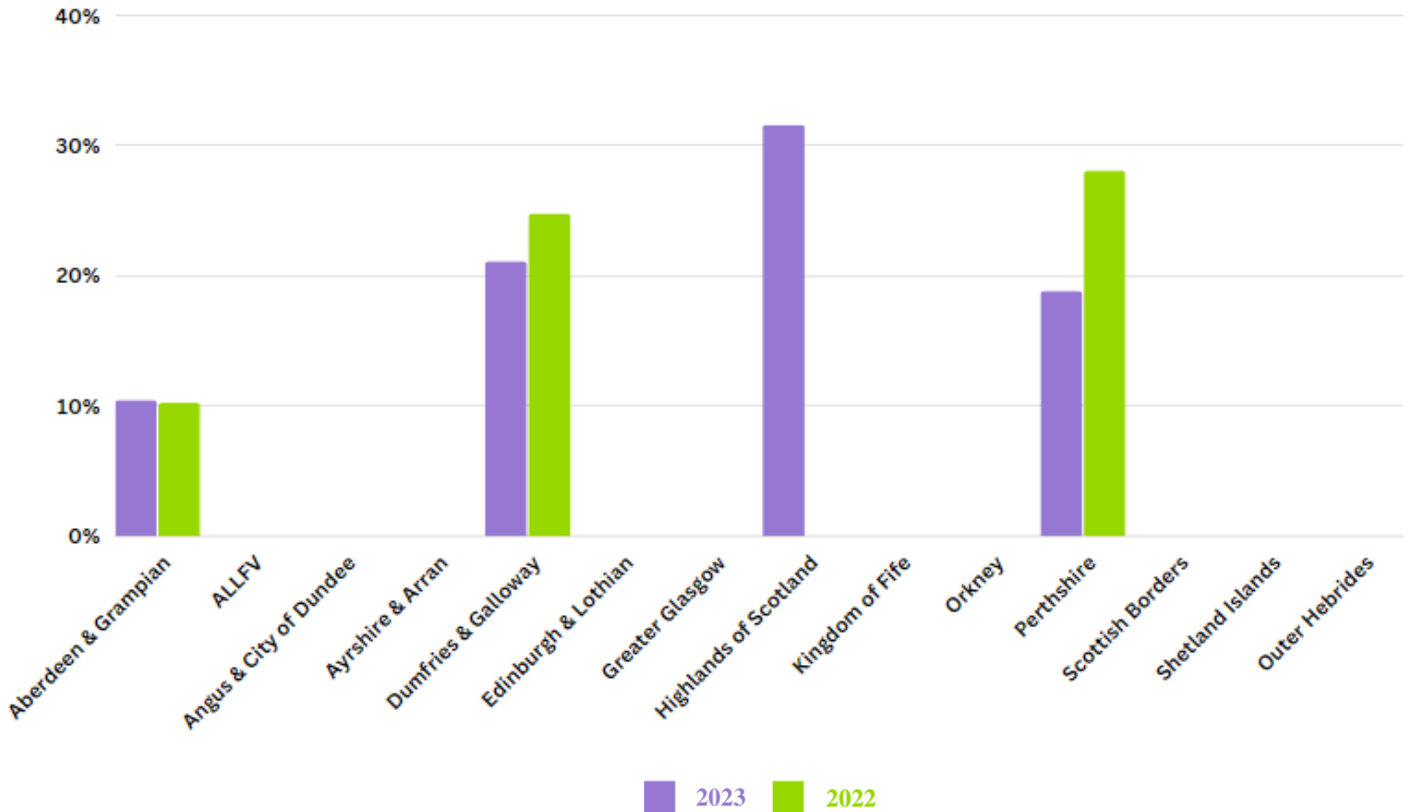
Touring Pitch Occupancy was 19.43% in January 2023 when compared to data from the previous year of a 23.16% occupancy rate; this shows an overall percentage point decrease of 3.73.



Touring Pitch Occupancy – Year to Date



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



Percentage Pitch occupancy rates for Touring in the Highlands were the highest in Jan 2023, versus Perthshire in Jan 2022. Sites of 100-200 in size and pitches based in Countryside Villages fared best in pitch occupancy rates in Jan 2023.

Pitch by Occupancy Type – January 2023/2022

Occupancy Type	Jan 23	Jan 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	19.43%	23.16%	-3.73	96	19.43%	23.16%	-3.73	96
Whole Park Occupancy	21.09%	24.48%	-3.39	97	21.09%	24.48%	-3.39	97
Caravan Pitch Occupancy	15.24%	19.65%	-4.41	96	15.24%	19.65%	-4.41	96
Tent Pitch Occupancy	-	-	-	-	-	-	-	-
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	*	*	*	*
ALLFV	*	*	*	*	*	*	*	*
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	21.07%	24.73%	-3.66%	96	21.07%	24.73%	-3.66%	96
Edinburgh & Lothian	*	*	*	*	*	*	*	*

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.

Greater Glasgow	-	*	-	-	-	*	-	-
Highlands of Scotland	31.53%	0.00%	31.53%	132	31.53%	0.00%	31.53%	132
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	-	-	-	-	-	-	-	-
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	*	*	*	*	*	*	*	*
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Size – January 2023/2022

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	15.243%	19.65%	-4.41	96	15.24%	19.65%	-4.41	96
50-99 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
100-199 pitches	21.09%	24.48%	-3.39	97	21.09%	24.48%	-3.39	97
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be include						

Whole Park Occupancy by Size – January 2023/2022

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
50-99 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
100-199 pitches	21.09%	24.48%	-3.39	97	21.09%	24.48%	-3.39	97
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – January 2023/2022

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	15.24%	19.65%	-4.41	96	15.24%	19.65%	-4.41	96
50-99 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
100-199 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – January 2023/2022

Size	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
50-99 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
100-199 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – January 2023/2022

Tariff	Jan 23	Jan 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 +	19.22%	21.83%	-2.61	97	19.22%	21.83%	-2.61	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – January 2023/2022

Tariff	Jan 23	Jan 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 +	21.09%	24.48%	-3.39	97	21.09%	24.48%	-3.39	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – January 2023/2022

Tariff	Jan 23	Jan 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 +	12.16%	10.26%	1.90	102	12.16%	10.26%	1.90	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – January 2023/2022

Tariff	Jan 23	Jan 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%	0.00%	0.00	100	0.00%	0.00%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – January 2023/2022

Location Type	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	10.65%	10.26%	0.39	100	10.65%	10.26%	0.39	100
City – Large Town	*	*	*	*	*	*	*	*
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	21.46%	26.35%	-4.89	95	21.46%	26.35%	-4.89	95
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – January 2023/2022

Location Type	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside – Coastal	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
City – Large Town	*	*	*	*	*	*	*	*
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	21.80%	25.02%	-3.22	97	21.80%	25.02%	-3.22	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – January 2023/2022

Location Type	Jan 23	Jan 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	10.65%	10.26%	0.39	100	10.65%	10.26%	0.39	100
City – Large Town	*	*	*	*	*	*	*	*
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	19.92%	34.27%	-14.35	86	19.92%	34.27%	-14.35	86
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – January 2023/2022

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

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