

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT: August 2020/2019 Report - TOURING

1.0 Introduction August 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering August 2020 and benchmarking against August 2019. The survey 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 Giancarlo Fedeli (E-mail: gfe2@gcu.ac.uk).

2.0 Executive Summary August 2020

Touring Pitch Occupancy rates for the month of August 2020 demonstrated a % Point increase of **15.12%** when comparing occupancy rates with August 2019. Despite the continued restrictions on travel and tourism due to COVID-19, touring accommodation has proved to be a favourable choice for tourists within the month of August, showing a clear increase on last years figures. . The visitor attraction sector saw a decrease of 72.2% in visits numbers when comparing August 2020 with August 2019.

3.0 Touring Accommodation

3.1 Performance by Touring Category – August 2020/2019

Touring occupancy demonstrated a 13.22% occupancy rate in August 2020.

Pitch by Occupancy Type – August 2020/2019

Occupancy Type	August 20	August 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Touring Pitch Occupancy ³	72.23%	57.11%	15.12%	115	23.75%	45.76%	-22.01%	78
Whole Park Occupancy	75.96%	57.04%	18.92%	119	40.42%	48.55%	-8.13%	92
Caravan Pitch Occupancy	58.37%	62.22%	-3.85%	96	15.10%	47.17%	-32.07%	68
Tent Pitch Occupancy	58.26%	46.84%	11.42%	111	3.28%	23.81%	-20.53%	79

Touring Pitch Occupancy by Size – August 2020/2019

Size	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	50.86%	49.30%	1.56%	102	16.49%	36.48%	-19.99%	80
50-99 pitches	63.97%	54.43%	9.54%	110	23.16%	44.99%	-21.83%	78
100-199 pitches	80.17%	63.27%	16.90%	117	27.23%	50.35%	-23.12%	77
200 or more	0.00%	55.01%	-55.01%	45	0.00%	36.88%	-36.88%	63

Whole Park Occupancy by Size – August 2020/2019

Size	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	12.51%	26.30%	-13.79%	86	1.88%	23.78%	-21.90%	78
50-99 pitches	70.22%	51.37%	18.85%	119	41.58%	45.31%	-3.73%	96
100-199 pitches	80.17%	63.27%	16.90%	117	45.36%	52.55%	-7.19%	93
200 or more	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100

¹ 20/19 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.

Caravan Pitch Occupancy by Size – August 2020/2019

Size	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	63.08%	58.10%	4.98%	105	1.88%	45.59%	-43.71%	56
50-99 pitches	55.79%	62.77%	-6.98%	93	41.58%	55.92%	-14.34%	86
100-199 pitches	0.00%	0.00%	0.00%	100	45.36%	31.20%	14.16%	114
200 or more	0.00%	67.65%	-67.65%	32	0.00%	48.81%	-48.81%	51

Tent Pitch Occupancy by Size – August 2020/2019

Size	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	58.26%	44.61%	13.65%	114	12.88%	23.43%	-10.55%	89
50-99 pitches	0.00%	54.03%	-54.03%	46	0.00%	24.12%	-24.12%	76
100-199 pitches	0.00%	0.00%	0.00%	100	0.08%	0.00%	0.08%	100
200 or more	0.00%	40.76%	-40.76%	59	0.00%	23.57%	-23.57%	76

Touring Pitch Occupancy by Tariff – August 2020/2019

Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	71.69%	48.97%	22.72%	123	46.05%	33.87%	12.18%	112
£10 - £14.99	59.14%	37.87%	21.27%	121	4.08%	22.07%	-17.99%	82
£15 - £17.99	67.88%	48.40%	19.48%	119	19.87%	34.60%	-14.73%	85
£18 - £19.99	12.51%	31.63%	-19.12%	81	0.98%	22.38%	-21.40%	79
£20 +	74.03%	59.79%	14.24%	114	26.36%	48.38%	-22.02%	78

Whole Park Occupancy by Tariff – August 2020/2019

Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£10 - £14.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£15 - £17.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£18 - £19.99	12.51%	20.68%	-8.17%	92	2.58%	18.50%	-15.92%	84
£20 +	78.10%	60.13%	17.97%	118	43.36%	50.89%	-7.53%	92

Caravan Pitch Occupancy by Tariff – August 2020/2019

Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	95.18%	24.72%	70.46%	170	30.43%	31.16%	-0.73%	99
£10 - £14.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£15 - £17.99	78.24%	39.15%	39.09%	139	32.22%	41.98%	-9.76%	90
£18 - £19.99	0.00%	66.06%	-66.06%	34	0.00%	35.84%	-35.84%	64
£20 +	56.26%	63.36%	-7.10%	93	15.06%	48.32%	-33.26%	67

Tent Pitch Occupancy by Tariff – August 2020/2019

Tariff	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	64.97%	57.99%	6.98%	107	57.55%	34.70%	22.85%	123
£10 - £14.99	59.14%	37.87%	21.27%	121	12.77%	22.07%	-9.30%	91
£15 - £17.99	53.56%	63.54%	-9.98%	90	7.32%	23.34%	-16.02%	84
£18 -£19.99	0.00%	51.41%	-51.41%	49	0.02%	21.96%	-21.94%	78
£20 +	56.96%	46.13%	10.83%	111	0.57%	24.01%	-23.44%	77

Touring Pitch Occupancy by Location Type – August 2020/2019

Location Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	68.60%	58.61%	9.99%	110	25.55%	50.63%	-25.08%	75
City – Large Town	85.96%	58.85%	27.11%	127	12.82%	38.59%	-25.77%	74
Small Town	0.00%	68.92%	-68.92%	31	0.00%	51.49%	-51.49%	49
Countryside - Villages	72.91%	54.82%	18.09%	118	32.44%	44.25%	-11.81%	88

Whole Park Occupancy by Location Type – August 2020/2019

Location Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	76.32%	59.89%	16.43%	116	61.23%	54.04%	7.19%	107
City – Large Town	85.96%	68.81%	17.15%	117	45.68%	57.40%	-11.72%	88
Small Town	0.00%	68.92%	-68.92%	31	0.00%	56.63%	-56.63%	43
Countryside - Villages	73.42%	52.61%	20.81%	121	31.86%	43.26%	-11.40%	89

Caravan Pitch Occupancy by Location Type – August 2020/2019

Location Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	37.04%	56.68%	-19.64%	80	6.37%	46.56%	-40.19%	60
City – Large Town	0.00%	66.54%	-66.54%	33	6.09%	36.81%	-30.72%	69
Small Town	0.00%	0.00%	0.00%	100	0.00%	54.05%	-54.05%	46
Countryside - Villages	72.51%	64.97%	7.54%	108	37.78%	54.08%	-16.30%	84

Tent Pitch Occupancy by Location Type – August 2020/2019

Location Type	August 20	August 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	53.56%	48.46%	5.10%	105	6.91%	24.51%	-17.60%	82
City – Large Town	0.00%	39.24%	-39.24%	61	0.08%	16.39%	-16.31%	84
Small Town	0.00%	0.00%	0.00%	100	0.00%	0.73%	-0.73%	99
Countryside - Villages	61.88%	55.26%	6.62%	107	9.81%	32.13%	-22.32%	78