

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

December 2020/2019 Report - TOURING

1.0 Introduction December 2020/2019

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey report covering December 2020 and benchmarking against December 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 December 2020

Touring Pitch Occupancy rates for the month of December 2020 demonstrated a % Point decrease of **16.82%** when comparing occupancy rates with December 2019. December, a typically a low occupancy month within the sector, demonstrated an even lower occupancy on last years figures with the increased restrictions related to COVID-19. The visitor attraction sector saw a decrease of **-65.1%** in visits numbers when comparing December 2020 with December 2019.

3.0 Touring Accommodation

3.1 Performance by Touring Category – December 2020/2019

Touring occupancy demonstrated a 2.77% occupancy rate in December 2020 compared with 19.59% in December 2019..

Pitch by Occupancy Type – December 2020/2019

Occupancy Type	Dec 20	Dec 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Touring Pitch Occupancy ³	2.77%	19.59%	-16.82%	83	30.47%	41.22%	-10.75%	89
Whole Park Occupancy	0.00%	18.13%	-18.13%	82	48.08%	43.23%	4.85%	105
Caravan Pitch Occupancy	3.77%	28.00%	-24.23%	76	20.01%	43.82%	-23.81%	76
Tent Pitch Occupancy	0.00%	0.27%	-0.27%	100	4.98%	19.72%	-14.74%	85

Touring Pitch Occupancy by Size – December 2020/2019

Size	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	0.57%	27.03%	-26.46%	74	21.41%	35.11%	-13.70%	86
50-99 pitches	0.00%	4.31%	-4.31%	96	30.03%	41.13%	-11.10%	89
100-199 pitches	3.69%	20.03%	-16.34%	84	33.69%	43.67%	-9.98%	90
200 or more	0.00%	0.00%	0.00%	100	0.00%	35.91%	-35.91%	64

Whole Park Occupancy by Size – December 2020/2019

Size	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	0.00%	37.20%	-37.20%	63	3.78%	24.35%	-20.57%	79
50-99 pitches	0.00%	4.31%	-4.31%	96	47.77%	40.64%	7.13%	107
100-199 pitches	0.00%	20.51%	-20.51%	79	52.01%	46.10%	5.91%	106
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 – December 2020/2019

Size	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	0.57%	27.46%	-26.89%	73	26.98%	43.03%	-16.05%	84
50-99 pitches	0.00%	0.00%	0.00%	100	25.80%	52.07%	-26.27%	74
100-199 pitches	5.77%	28.83%	-23.06%	77	9.51%	29.93%	-20.42%	80
200 or more	0.00%	0.00%	0.00%	100	0.00%	44.04%	-44.04%	56

Tent Pitch Occupancy by Size – December 2020/2019

Size	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	0.00%	0.22%	-0.22%	100	14.71%	19.34%	-4.63%	95
50-99 pitches	0.00%	0.00%	0.00%	100	0.00%	22.67%	-22.67%	77
100-199 pitches	0.00%	0.28%	-0.28%	100	2.70%	0.41%	2.29%	102
200 or more	0.00%	0.00%	0.00%	100	0.00%	23.57%	-23.57%	76

Touring Pitch Occupancy by Tariff – December 2020/2019

Tariff	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	0.00%	0.00%	0.00%	100	51.94%	30.76%	21.18%	121
£10 - £14.99	0.00%	0.00%	0.00%	100	5.86%	19.59%	-13.73%	86
£15 - £17.99	0.41%	33.67%	-33.26%	67	19.75%	32.25%	-12.50%	88
£18-£19.99	0.00%	0.22%	-0.22%	100	2.11%	20.90%	-18.79%	81
£20 +	2.98%	19.29%	-16.31%	84	33.01%	43.19%	-10.18%	90

Whole Park Occupancy by Tariff – December 2020/2019

Tariff	Dec 20	Dec 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	0.00%	0.00%	0.00%	100	4.81%	17.85%	-13.04%	87
£20 +	0.00%	18.13%	-18.13%	82	50.46%	44.85%	5.61%	106

Caravan Pitch Occupancy by Tariff – December 2020/2019

Tariff	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	0.00%	0.00%	0.00%	100	42.96%	27.19%	15.77%	116
£10 - £14.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£15 - £17.99	0.41%	33.67%	-33.26%	67	30.70%	37.77%	-7.07%	93
£18-£19.99	0.00%	0.00%	0.00%	100	0.00%	34.09%	-34.09%	66
£20 +	4.19%	27.23%	-23.04%	77	20.26%	44.89%	-24.63%	75

Tent Pitch Occupancy by Tariff – December 2020/2019

Tariff	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	0.00%	0.00%	0.00%	100	57.89%	31.90%	25.99%	126
£10 - £14.99	0.00%	0.00%	0.00%	100	15.42%	19.59%	-4.17%	96
£15 - £17.99	0.00%	0.00%	0.00%	100	8.58%	20.97%	-12.39%	88
£18 - £19.99	0.00%	0.22%	-0.22%	100	0.01%	17.52%	-17.51%	82
£20 +	0.00%	0.28%	-0.28%	100	2.79%	19.58%	0.00%	100

Touring Pitch Occupancy by Location Type – December 2020/2019

Location Type	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	0.09%	1.13%	-1.04%	99	31.22%	45.15%	-13.93%	86
City – Large Town	3.69%	20.95%	-17.26%	83	17.54%	34.03%	-16.49%	84
Small Town	0.00%	37.20%	-37.20%	63	0.00%	48.27%	-48.27%	52
Countryside - Villages	0.41%	21.02%	-20.61%	79	41.94%	40.65%	1.29%	101

Whole Park Occupancy by Location Type – December 2020/2019

Location Type	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	0.00%	0.00%	0.00%	100	54.78%	48.86%	5.92%	106
City – Large Town	0.00%	22.79%	-22.79%	77	54.95%	46.11%	8.84%	109
Small Town	0.00%	37.20%	-37.20%	63	0.00%	50.12%	-50.12%	50
Countryside - Villages	0.00%	15.95%	-15.95%	84	42.80%	38.77%	4.03%	104

Caravan Pitch Occupancy by Location Type – December 2020/2019

Location Type	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	0.09%	1.71%	-1.62%	98	11.81%	40.05%	-28.24%	72
City – Large Town	5.77%	28.83%	-23.06%	77	11.61%	33.86%	-22.25%	78
Small Town	0.00%	0.00%	0.00%	100	0.00%	54.05%	-54.05%	46
Countryside - Villages	0.41%	40.34%	-39.93%	60	44.12%	53.21%	-9.09%	91

Tent Pitch Occupancy by Location Type – December 2020/2019

Location Type	Dec 20	Dec 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	0.00%	0.00%	0.00%	100	8.63%	20.26%	-11.63%	88
City – Large Town	0.00%	0.28%	-0.28%	100	2.70%	12.40%	-9.70%	90
Small Town	0.00%	0.00%	0.00%	100	0.00%	0.73%	-0.73%	99
Countryside - Villages	0.00%	0.22%	-0.22%	100	13.70%	28.20%	-14.50%	86