

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

1.0 Introduction July 2020/2019

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

Touring Pitch Occupancy rates for the month of July 2020 demonstrated a % Point decrease of **-41.28%** when comparing occupancy rates with July 2019. With July being a peak month for tourism, we would normally see a heightened occupancy rate amongst all sectors, however, with the continued effects and restrictions of COVID-19, there remains to be low occupancy in comparison to July 2019 figures. The visitor attraction sector saw a decrease of 81.7% in visits numbers when comparing July 2020 with July 2019.

3.0 Touring Accommodation

3.1 Performance by Touring Category – July 2020/2019

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

Pitch by Occupancy Type – July 2020/2019

Occupancy Type	July 20	July 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Touring Pitch Occupancy ³	13.22%	54.50%	-41.28%	59	8.79%	43.41%	-34.62%	65
Whole Park Occupancy	0.00%	55.57%	-55.57%	44	10.78%	46.73%	-35.95%	64
Caravan Pitch Occupancy	18.02%	56.79%	-38.77%	61	10.34%	44.36%	-34.02%	66
Tent Pitch Occupancy	4.18%	42.82%	-38.64%	61	1.06%	18.97%	-17.91%	82

Touring Pitch Occupancy by Size – July 2020/2019

Size	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	11.84%	49.79%	-37.95%	62	11.87%	34.40%	-22.53%	77
50-99 pitches	24.17%	53.09%	-28.92%	71	8.14%	42.78%	-34.64%	65
100-199 pitches	0.00%	62.19%	-62.19%	38	7.45%	48.07%	-40.62%	59
200 or more	0.00%	31.68%	-31.68%	68	0.00%	27.56%	-27.56%	72

Whole Park Occupancy by Size – July 2020/2019

Size	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	0.00%	15.61%	-15.61%	84	0.00%	23.43%	-23.43%	77
50-99 pitches	0.00%	49.47%	-49.47%	51	7.98%	43.86%	-35.88%	64
100-199 pitches	0.00%	62.19%	-62.19%	38	13.71%	50.40%	-36.69%	63
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 – July 2020/2019

Size	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	0.00%	60.47%	-60.47%	40	0.00%	43.65%	-43.65%	56
50-99 pitches	0.00%	59.32%	-59.32%	41	7.98%	54.03%	-46.05%	54
100-199 pitches	0.00%	0.00%	0.00%	100	13.71%	31.20%	-17.49%	83
200 or more	0.00%	43.24%	-43.24%	57	0.00%	39.06%	-39.06%	61

Tent Pitch Occupancy by Size – July 2020/2019

Size	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	10.45%	44.13%	-33.68%	66	4.61%	19.18%	-14.57%	85
50-99 pitches	0.00%	64.01%	-64.01%	36	0.00%	19.87%	-19.87%	80
100-199 pitches	0.00%	0.00%	0.00%	100	0.08%	0.00%	0.08%	100
200 or more	0.00%	18.63%	-18.63%	81	0.00%	14.82%	-14.82%	85

Touring Pitch Occupancy by Tariff – July 2020/2019

Tariff	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	39.37%	47.81%	-8.44%	92	18.85%	30.21%	-11.36%	89
£10 - £14.99	7.15%	32.22%	-25.07%	75	1.46%	16.68%	-15.22%	85
£15 - £17.99	22.03%	65.25%	-43.22%	57	14.81%	32.76%	-17.95%	82
£18 - £19.99	0.00%	31.29%	-31.29%	69	0.00%	20.39%	-20.39%	80
£20 +	14.61%	56.77%	-42.16%	58	9.40%	46.01%	-36.61%	63

Whole Park Occupancy by Tariff – July 2020/2019

Tariff	July 20	July 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%	23.08%	-23.08%	77	0.00%	17.93%	-17.93%	82
£20 +	0.00%	58.37%	-58.37%	42	12.04%	48.92%	-36.88%	63

Caravan Pitch Occupancy by Tariff – July 2020/2019

Tariff	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	35.57%	36.32%	-0.75%	99	6.49%	33.04%	-26.55%	73
£10 - £14.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£15 - £17.99	58.60%	67.53%	-8.93%	91	26.54%	42.37%	-15.83%	84
£18 - £19.99	0.00%	51.85%	-51.85%	48	0.00%	30.94%	-30.94%	69
£20 +	18.87%	56.83%	-37.96%	62	10.15%	45.45%	-35.30%	65

Tent Pitch Occupancy by Tariff – July 2020/2019

Tariff	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	40.60%	50.65%	-10.05%	90	40.63%	29.38%	11.25%	111
£10 - £14.99	62.69%	32.22%	30.47%	130	1.46%	16.68%	-15.22%	85
£15 - £17.99	11.31%	62.57%	-51.26%	49	14.81%	18.22%	-3.41%	97
£18 - £19.99	0.00%	50.20%	-50.20%	50	0.00%	17.69%	-17.69%	82
£20 +	0.00%	41.85%	-41.85%	58	9.40%	19.19%	-9.79%	90

Touring Pitch Occupancy by Location Type – July 2020/2019

Location Type	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	7.64%	57.90%	-50.26%	50	2.50%	48.79%	-46.29%	54
City – Large Town	0.00%	49.15%	-49.15%	51	5.68%	34.41%	-28.73%	71
Small Town	0.00%	65.64%	-65.64%	34	0.00%	49.21%	-49.21%	51
Countryside - Villages	30.97%	53.14%	-22.17%	78	16.70%	42.16%	-25.46%	75

Whole Park Occupancy by Location Type – July 2020/2019

Location Type	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	0.00%	59.77%	-59.77%	40	3.31%	52.67%	-49.36%	51
City – Large Town	0.00%	75.35%	-75.35%	25	16.64%	55.28%	-38.64%	61
Small Town	0.00%	65.64%	-65.64%	34	0.00%	53.66%	-53.66%	46
Countryside - Villages	0.00%	49.33%	-49.33%	51	10.71%	41.37%	-30.66%	69

Caravan Pitch Occupancy by Location Type – July 2020/2019

Location Type	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	7.49%	53.87%	-46.38%	54	2.25%	44.26%	-42.01%	58
City – Large Town	0.00%	50.19%	-50.19%	50	6.09%	31.10%	-25.01%	75
Small Town	0.00%	0.00%	0.00%	100	0.00%	54.05%	-54.05%	46
Countryside - Villages	46.78%	65.14%	-18.36%	82	29.27%	52.13%	-22.86%	77

Tent Pitch Occupancy by Location Type – July 2020/2019

Location Type	July 20	July 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	10.64%	48.79%	-38.15%	62	3.06%	20.01%	-16.95%	83
City – Large Town	0.00%	22.16%	-22.16%	78	0.08%	10.50%	-10.42%	90
Small Town	0.00%	0.00%	0.00%	100	0.00%	0.73%	-0.73%	99
Countryside - Villages	4.94%	64.69%	-59.75%	40	2.33%	27.64%	-25.31%	75

