

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

1.0 Introduction September 2020/2019

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

Touring Pitch Occupancy rates for the month of September 2020 demonstrated a % Point increase of **14.90%** when comparing occupancy rates with September 2019. With the continuing effects and restrictions of COVID-19, there remains to be low occupancy in most accommodation categories, however, within the touring category, there has been an increase on September 2019 figures as documented below. The visitor attraction sector saw a decrease of -57.5% in visits numbers when comparing September 2020 with September 2019.

3.0 Touring Accommodation

3.1 Performance by Touring Category – September 2020/2019

Touring occupancy demonstrated a 60.87% occupancy rate in September 2020 compared with 45.97% in September 2019..

Pitch by Occupancy Type – September 2020/2019

Occupancy Type	September 20	September 19	20/19 Diff ¹	Change ²	YTD 20	YTD 19	20/19 Diff	Change
Touring Pitch Occupancy ³	60.87%	45.97%	14.90%	115	31.98%	45.79%	-13.81%	86
Whole Park Occupancy	69.35%	48.27%	21.08%	121	49.28%	48.50%	0.78%	101
Caravan Pitch Occupancy	49.24%	46.92%	2.32%	102	20.23%	47.14%	-26.91%	73
Tent Pitch Occupancy	20.30%	17.84%	2.46%	102	5.28%	23.23%	-17.95%	82

Touring Pitch Occupancy by Size – September 2020/2019

Size	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	49.50%	37.39%	12.11%	112	21.61%	36.58%	-14.97%	85
50-99 pitches	64.00%	42.92%	21.08%	121	31.60%	44.67%	-13.07%	87
100-199 pitches	61.58%	53.60%	7.98%	108	35.82%	50.77%	-14.95%	85
200 or more	0.00%	30.85%	-30.85%	69	0.00%	35.91%	-35.91%	64

Whole Park Occupancy by Size – September 2020/2019

Size	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	14.27%	24.80%	-10.53%	89	3.45%	23.89%	-20.44%	80
50-99 pitches	70.43%	43.28%	27.15%	127	51.22%	44.99%	6.23%	106
100-199 pitches	71.39%	53.60%	17.79%	118	53.66%	52.70%	0.96%	101
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 – September 2020/2019

Size	September 2020	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	60.70%	47.18%	13.52%	114	27.30%	45.77%	-18.47%	82
50-99 pitches	56.32%	53.35%	2.97%	103	27.84%	55.52%	-27.68%	72
100-199 pitches	31.17%	0.00%	31.17%	131	7.47%	31.20%	-23.73%	76
200 or more	0.00%	30.85%	-30.85%	69	0.00%	44.04%	-44.04%	56

Tent Pitch Occupancy by Size – September 2020/2019

Size	September 2020	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
1-49 pitches	52.47%	16.38%	36.09%	136	19.51%	22.83%	-3.32%	97
50-99 pitches	0.00%	18.41%	-18.41%	82	0.00%	23.38%	-23.38%	77
100-199 pitches	6.01%	0.00%	6.01%	106	1.08%	0.00%	1.08%	101
200 or more	0.00%	0.00%	0.00%	100	0.00%	23.57%	-23.57%	76

Touring Pitch Occupancy by Tariff – September 2020/2019

Tariff	September 2020	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	66.34%	12.34%	54.00%	154	53.07%	30.76%	22.31%	122
£10 - £14.99	42.20%	16.03%	26.17%	126	5.83%	21.86%	-16.03%	84
£15 - £17.99	67.82%	25.74%	42.08%	142	24.15%	33.68%	-9.53%	90
£18 - £19.99	14.27%	20.84%	-6.57%	93	1.90%	22.15%	-20.25%	80
£20 +	61.79%	48.87%	12.92%	113	35.02%	48.45%	-13.43%	87

Whole Park Occupancy by Tariff – September 2020/2019

Tariff	September 2020	September 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	14.27%	17.34%	-3.07%	97	4.52%	18.31%	-13.79%	86
£20 +	71.20%	50.76%	20.44%	120	52.14%	50.87%	1.27%	101

Caravan Pitch Occupancy by Tariff – September 2020/2019

Tariff	September 2020	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	84.74%	8.93%	75.81%	176	45.25%	27.19%	18.06%	118
£10 - £14.99	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
£15 - £17.99	72.09%	33.03%	39.06%	139	36.40%	41.01%	-4.61%	95
£18 - £19.99	0.00%	40.41%	-40.41%	60	0.00%	36.51%	-36.51%	63
£20 +	47.57%	48.46%	-0.89%	99	20.48%	48.34%	-27.86%	72

Tent Pitch Occupancy by Tariff – September 2020/2019

Tariff	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Under £10	58.42%	13.80%	44.62%	145	57.89%	31.90%	25.99%	126
£10 - £14.99	42.20%	16.03%	26.17%	126	16.64%	21.86%	-5.22%	95
£15 - £17.99	61.33%	13.33%	48.00%	148	11.24%	22.35%	-11.11%	89
£18 -£19.99	0.00%	14.63%	-14.63%	85	0.02%	20.98%	-20.96%	79
£20 +	7.41%	19.96%	-12.55%	87	1.56%	23.62%	-22.06%	78

Touring Pitch Occupancy by Location Type – September 2020/2019

Location Type	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	58.59%	45.43%	13.16%	113	35.66%	49.78%	-14.12%	86
City – Large Town	42.65%	43.97%	-1.32%	99	18.74%	39.13%	-20.39%	80
Small Town	0.00%	61.36%	-61.36%	39	0.00%	52.51%	-52.51%	47
Countryside - Villages	71.62%	46.06%	25.56%	126	40.72%	44.49%	-3.77%	96

Whole Park Occupancy by Location Type – September 2020/2019

Location Type	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	63.89%	48.95%	14.94%	115	62.41%	53.21%	9.20%	109
City – Large Town	78.11%	65.46%	12.65%	113	55.39%	58.46%	-3.07%	97
Small Town	0.00%	61.36%	-61.36%	39	0.00%	57.40%	-57.40%	43
Countryside - Villages	72.25%	44.60%	27.65%	128	41.55%	43.45%	-1.90%	98

Caravan Pitch Occupancy by Location Type – September 2020/2019

Location Type	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	37.01%	41.79%	-4.78%	95	11.16%	45.79%	-34.63%	65
City – Large Town	31.17%	30.85%	0.32%	100	10.22%	36.21%	-25.99%	74
Small Town	0.00%	0.00%	0.00%	100	0.00%	54.05%	-54.05%	46
Countryside - Villages	72.29%	61.65%	10.64%	111	43.58%	55.03%	-11.45%	89

Tent Pitch Occupancy by Location Type – September 2020/2019

Location Type	September 20	September 19	20/19 Diff	Change	YTD 20	YTD 19	20/19 Diff	Change
Seaside - Coastal	57.96%	11.69%	46.27%	146	11.72%	22.63%	-10.91%	89
City – Large Town	6.01%	10.45%	-4.44%	96	1.08%	16.04%	-14.96%	85
Small Town	0.00%	0.00%	0.00%	100	0.00%	0.73%	-0.73%	99
Countryside - Villages	47.74%	25.22%	22.52%	123	13.85%	31.35%	-17.50%	83