

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

April 2023/2022 Report – TOURING - Revised

1.0 Introduction April 2023/2022

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

The SOAS Report: April 2023/2022 Touring report shows a slight rise in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced a **2.06** percentage point increase in April 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that Easter provided a slender but nonetheless welcome uplift to retail sales in Scotland last month. The real terms value of retail sales edged back into positive territory after the decline witnessed in March. Retail sales in Scotland held steady in April with decent growth of 9.1%. Food sales are the biggest growth area, aided by the Easter weekend and family gatherings. From the Visitor Attraction Barometer, Scottish Retail Attractions footfall increased by 2% in April 2023 compared to April 2022. This was indicative of the continued pressures on consumer spending as a result of levels of inflation and the broader cost of living rises.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions and showing caution in discretionary leisure expenditure.

Notably, some 21% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 34% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 77% in the following 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

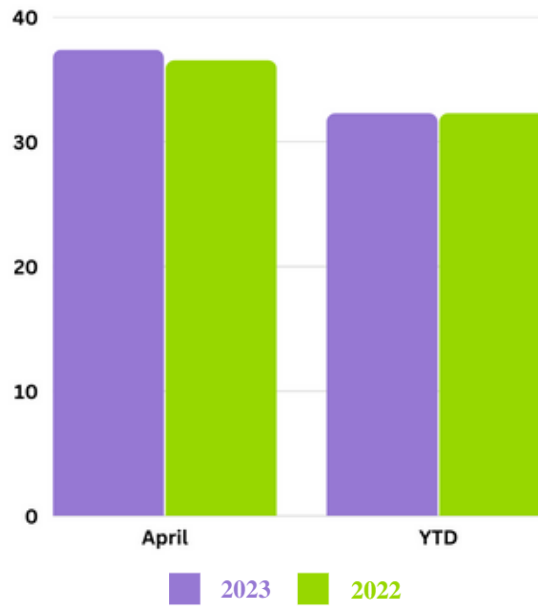
The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 continues to restrain growth. A highlight in air transport was from Scotlands Regional Carrier, Loganair which saw a year-to-date growth of 16% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a 12% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

3.1 Performance by Touring Category

Touring Pitch Occupancy – April 2023/2022

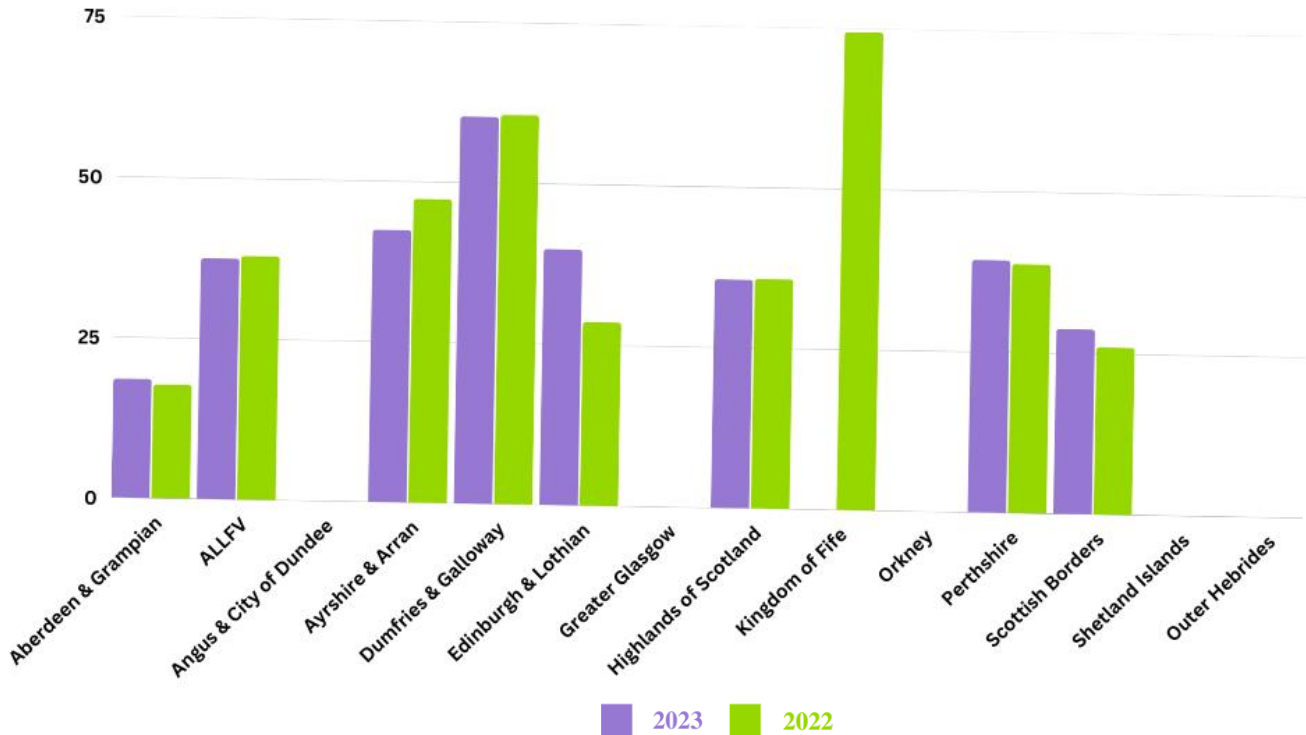
Touring Pitch Occupancy was 38.56% in April 2023 when compared to data from the previous year of a 36.50% occupancy rate; this shows an overall percentage point increase of 2.06.



Touring Pitch Occupancy – Year to Date



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



Percentage Pitch occupancy rates for Touring in Dumfries & Galloway were the highest in April 2023 versus the Kingdom of Fife in April 2022. Smaller sites of 1-49 in size and pitches based in Coastal Seaside areas fared best in pitch occupancy rates in April 2023.

Pitch by Occupancy Type – April 2023/2022

Occupancy Type	April 23	April 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	38.56%	36.50%	2.06	102	32.02%	32.26%	-0.24	100
Whole Park Occupancy	37.05%	37.01%	0.04	100	33.10%	34.43%	-1.33	--
Caravan Pitch Occupancy	56.90%	45.70%	11.20	111	30.99%	33.80%	-2.81	97
Tent Pitch Occupancy	21.73%	11.00%	10.73	111	13.10%	6.80%	6.30	106

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

Size	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	17.56%	17.66%	-0.10%	100	14.52%	16.26%	-1.74%	98
ALLFV	*	*	*	*	36.98%	37.90%	-0.92%	99
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	*	*	*	*
Dumfries & Galloway	*	*	*	*	*	42.25%	*	*
Edinburgh & Lothian	-	-	-	-	-	19.43%	-	-
Greater Glasgow	0.00%	0.00%	0.00%	100	0.00%	0.00%	0.00%	100
Highlands of Scotland	35.57%	35.72%	-0.15%	100	33.46%	35.72%	-2.26%	98

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.

£10 - £14.99	-	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	20.83%	36.88%	-16.05%	84
£18 - £19.99	*	*	*	*	*	10.06%	-0.84%	99
£20 +	40.36%	38.14%	2.22%	102	33.69%	33.09%	0.60%	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – April 2023/2022

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	-	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	0.00%	0.00%	0.00%	100
£18 - £19.99	*	*	*	*	*	10.06%	-0.84%	99
£20 +	38.96%	39.10%	-0.14%	100	34.17%	35.72%	-1.55%	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – April 2023/2022

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	-	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	21.91%	38.34%	-16.43%	84
£18 - £19.99	*	*	*	*	*	0.00%	0.00%	100
£20 +	56.90%	45.47%	11.43%	111	34.62%	33.13%	1.49%	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – April 2023/2022

Tariff	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	-	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	10.49%	25.99%	-15.50%	85
£18 - £19.99	*	*	*	*	*	0.00%	0.00%	100
£20 +	21.53%	9.62%	11.91%	112	13.79%	5.95%	0.00%	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – April 2023/2022

Location Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	38.96%	37.02%	1.94%	102	32.93%	34.48%	-1.55%	98
City – Large Town	*	*	*	*	*	19.78%	7.05%	107
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	38.03%	38.26%	-0.23%	100	31.89%	35.11%	-3.22%	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – April 2023/2022

Location Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	36.86%	36.13%	0.73%	101	35.37%	36.13%	-0.76%	99
City – Large Town	*	*	*	*	*	26.94%	-0.11%	100

Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	36.81%	37.91%	-1.10%	99	32.56%	34.62%	-2.06%	98
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Caravan Pitch Occupancy by Location Type – April 2023/2022

Location Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	60.10%	46.53%	13.57%	114	28.15%	29.70%	-1.55%	98
City – Large Town	*	*	*	*	*	22.51%	-22.51%	77
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	54.10%	56.36%	-2.26%	98	33.19%	49.69%	-16.50%	84
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Tent Pitch Occupancy by Location Type – April 2023/2022

Location Type	April 23	April 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	21.49%	24.68%	-3.19%	97	10.47%	23.21%	-12.74%	87
City – Large Town	*	*	*	*	*	2.65%	-2.65%	97
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	21.79%	13.67%	8.12%	108	13.83%	9.78%	4.05%	104
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

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