

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

March 2023/2022 Report – TOURING - Revised

1.0 Introduction March 2023/2022

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

The SOAS Report: March 2023/2022 Touring report shows a slight decline in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced a **2.86** percentage point decrease in March 2023 when compared to the same period last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions footfall increased by 14.5% in March 2023 compared to March 2022. Both Edinburgh and Glasgow seeing noticeable increases (27.8% and 16.7% respectively). However, when comparing footfall in March 2023 with March 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending and the slower return to urban working for some.

Domestic consumer sentiment provided by the GB National Tourist Boards for March 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions with caution in discretionary leisure expenditure. Notably, some 23% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 29% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 73% for the following 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidenced the importance attached to holiday expenditure even in such 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 29% 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 14% decrease in year-to-date flights compared to 2019.

The United Nations World Tourism Organisations World Tourism Barometer found global international tourist arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 (-20% compared to the same quarter of 2019) boosted by strong results in Europe and the Middle East, compared to a 66% recovery level for the year 2022 overall. An estimated 235 million tourists travelled internationally in the first three months, more than double those in the same period of 2022. Europe reached 90% of pre-pandemic levels in Q1 2023, supported by robust intra-regional demand.

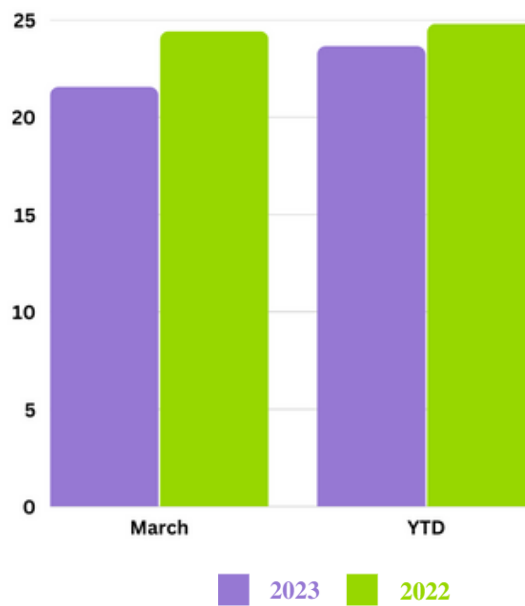
Looking ahead, the UNWTO Panel of Experts survey indicates that almost 70% of experts expect better performance in May-August 2023. Yet, most continue to believe international tourism will not return to 2019 levels until 2024 or later. The UNWTO also suggest strong results are expected in the coming Northern Hemisphere summer season backed by robust pent-up demand, the sustained recovery of air connectivity, and the recent reopening of China and other major Asian markets and destinations.
(Source: <https://www.unwto.org/news/tourism-on-track-for-full-recovery-as-new-data-shows-strong-start-to-2023>)

3.0 Touring Accommodation

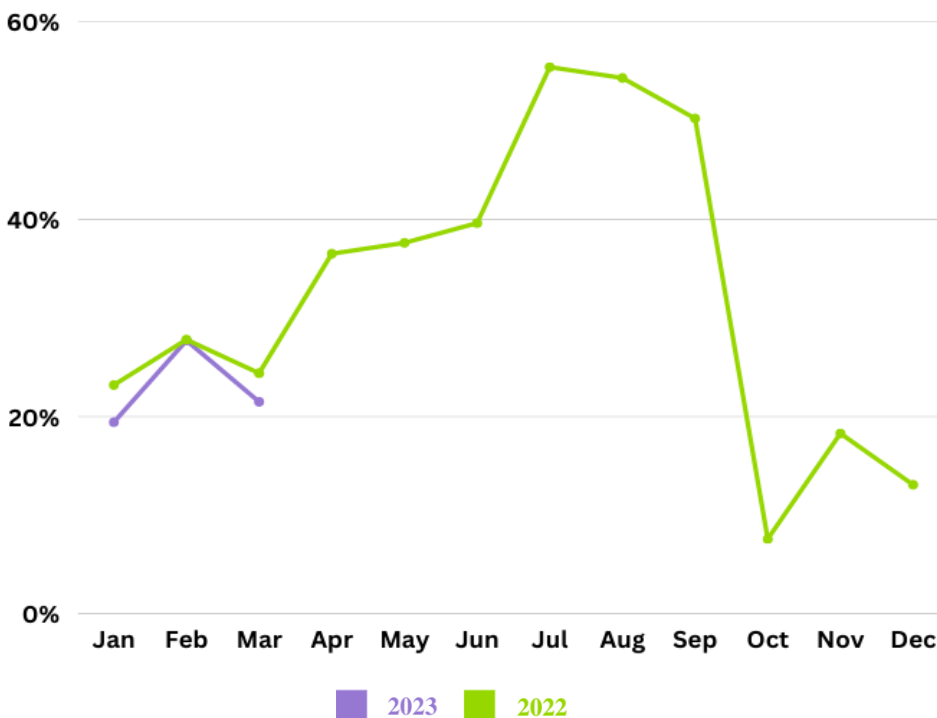
3.1 Performance by Touring Category

Touring Pitch Occupancy – March 2023/2022

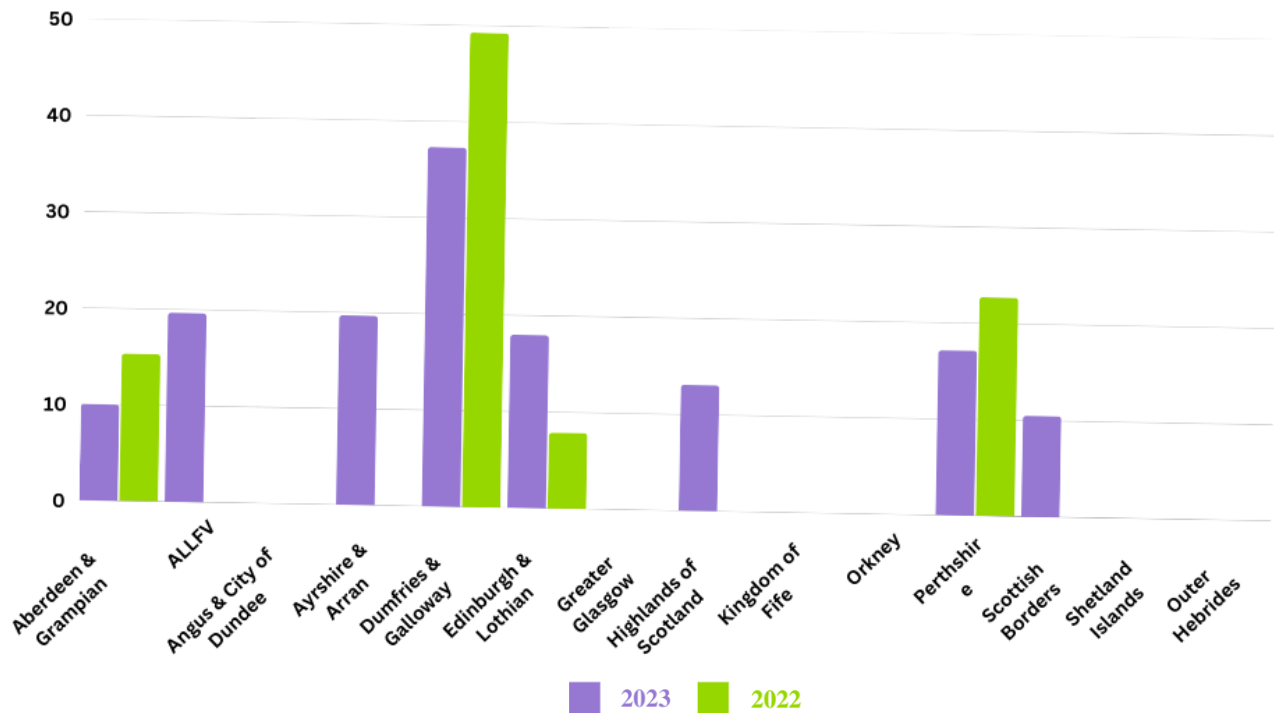
Touring Pitch Occupancy was 21.72% in March 2023 when compared to data from the previous year of a 24.40% occupancy rate; this shows an overall percentage point decrease of 2.68.



Touring Pitch Occupancy – Year to Date



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



Percentage Pitch occupancy rates for Touring in Dumfries & Galloway were the highest in March 2023 and in March 2022. Sites of 100-200 in size and pitches based in Countryside Villages fared best in pitch occupancy rates in March 2023.

Pitch by Occupancy Type – March 2023/2022

Occupancy Type	March 23	March 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	21.72%	24.40%	-2.68	97	23.70%	24.78%	-1.08	99
Whole Park Occupancy	21.66%	30.08%	-8.42	92	25.80%	28.50%	-2.70	97
Caravan Pitch Occupancy	26.80%	25.20%	1.60	101	22.11%	24.15%	-2.04	98
Tent Pitch Occupancy	3.49%	1.17%	2.32	102	2.62%	1.13%	1.49	101

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

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	*	*	*	*	12.45%	14.46%	-2.01%	98
ALLFV	*	*	*	*	19.50%	0.00%	19.50%	120
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	-	-	-	-	-	-	-	-
Dumfries & Galloway	37.25%	49.24%	-11.99%	88	33.13%	35.05%	-1.92%	98
Edinburgh & Lothian	*	*	*	*	*	7.84%	*	*
Greater Glasgow	-	*	*	*	-	*	*	*
Highlands of Scotland	12.98%	0.00%	12.98%	113	15.08%	0.00%	15.08%	115

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.

Kingdom of Fife	*	-	-	-	*	-	-	-
Orkney	-	-	-	-	-	-	-	-
Perthshire	17.10%	22.66%	-5.56%	94	19.02%	24.67%	-5.65%	94
Scottish Borders	*	*	*	*	*	*	*	*
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Touring Pitch Occupancy by Size – March 2023/2022

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	21.70%	40.45%	-17.75	82	20.56%	27.40%	-6.84	93
50-99 pitches	11.74%	15.04%	-3.30	97	11.74%	15.04%	-3.30	97
100-199 pitches	26.29%	24.84%	1.45	101	28.30%	25.76%	2.54	103
200 or more	-	-	-	-	-	-	-	-

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Whole Park Occupancy by Size – March 2023/2022

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
50-99 pitches	6.36%	8.77%	-2.41	98	6.36%	8.77%	-2.41	98
100-199 pitches	26.29%	36.90%	-10.61	89	28.30%	31.20%	-2.90	97
200 or more	-	-	-	-	-	-	-	-

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Caravan Pitch Occupancy by Size – March 2023/2022

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	32.374%	41.04%	-8.67%	91	22.32%	28.58%	-6.26%	94
50-99 pitches	20.48%	42.48%	-22.00%	78	20.48%	42.48%	-22.00%	78
100-199 pitches	0.00%	11.92%	-11.92%	88	0.00%	11.92%	-11.92%	88
200 or more	-	-	-	-	-	-	-	-

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Tent Pitch Occupancy by Size – March 2023/2022

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	3.49%	6.43%	-2.94%	97	2.62%	1.43%	1.19%	101
50-99 pitches	0.00%	2.48%	-2.48%	78	0.00%	2.48%	-2.48%	98
100-199 pitches	0.00%	0.61%	-0.61%	88	0.00%	0.61%	-0.61%	99
200 or more	-	-	-	-	-	-	-	-

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Touring Pitch Occupancy by Tariff – March 2023/2022

Tariff	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	20.75%	*	-15.28%	85
£18 - £19.99	*	*	*	*	*	*	*	*

£20 +	21.71%	24.14%	-2.43%	98	24.27%	24.24%	-0.03%	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – March 2023/2022

Tariff	March 23	March 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%	100
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	21.78%	30.08%	-8.30%	92	25.88%	28.50%	-2.62	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – March 2023/2022

Tariff	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	21.91%	*	-14.12%	86
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	26.96%	24.42%	2.54%	103	22.23%	21.28%	0.95%	101
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – March 2023/2022

Tariff	March 23	March 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%	100
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	3.49%	1.17%	2.32%	102	3.49%	1.17%	2.32%	102
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – March 2023/2022

Location Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	16.63%	27.89%	-11.26%	89	14.84%	18.44%	-3.60%	96
City – Large Town	*	*	*	*	*	12.44%	5.51%	106
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	23.67%	34.66%	-10.99%	89	26.88%	31.10%	-4.22%	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – March 2023/2022

Location Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	14.64%	0.00%	14.64%	115	14.84%	0.00%	14.84%	115
City – Large Town	*	*	*	*	*	19.66%	-1.71%	98
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	24.47%	34.04%	-9.57%	90	26.88%	30.31%	-3.43%	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – March 2023/2022

Location Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	19.35%	28.49%	-9.14%	91	15.65%	18.55%	-2.90%	97
City – Large Town	*	*	*	*	*	11.92%	-11.92%	88
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	29.34%	51.14%	-21.80%	78	26.53%	43.59%	-17.06%	83
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – March 2023/2022

Location Type	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	0.00%	6.43%	-6.43%	94	14.84%	6.43%	8.41%	108
City – Large Town	*	*	*	*	*	0.61%	17.34%	117
Small Town	*	*	*	*	*	*	*	*
Countryside - Villages	3.50%	2.49%	1.01%	101	26.88%	2.03%	24.85%	125
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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