

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2023/2022 Report - TOURING

1.0 Introduction August 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2023 and benchmarking against August 2022. The report reviews Accommodation performance throughout Scotland, highlighting trends across various industry sectors and categories. 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).

2.0 Executive Summary August 2023

The SOAS Report: August 2023/2022 Touring report shows an increase in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced a **6.28** percentage point increase in August 2023 compared to last year.

Data from the Scottish Retail Consortium showed that the retail sales figures in Scotland improved by 5.6% year-on-year in August, however, this is well below the three-month average of 7.5%. Food sales continue to be the biggest growth area.

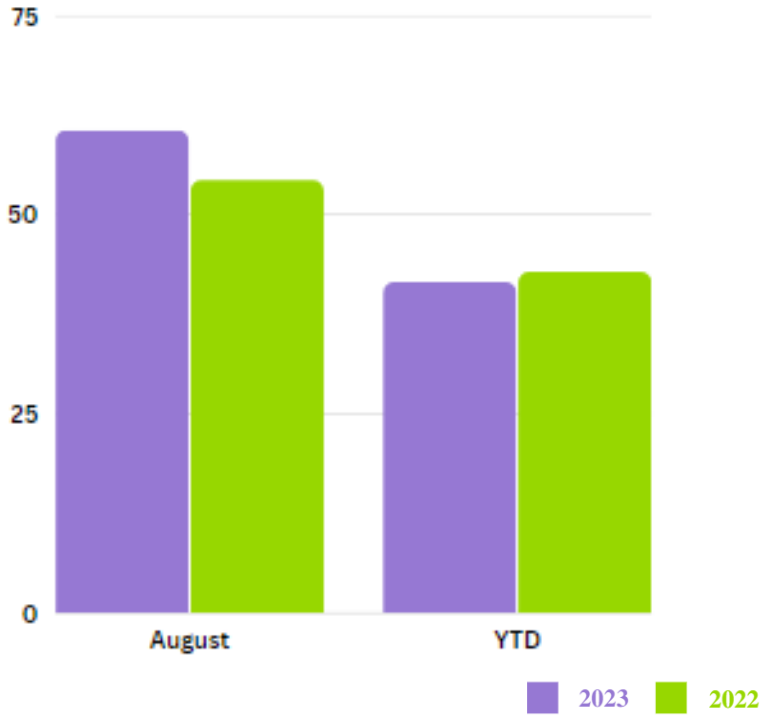
Domestic consumer sentiment provided by the GB National Tourist Boards for August 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the August 2023 survey). The survey recorded 45% of respondents (No change on the August 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful". Despite consumer concern about the state of the economy, 33% of UK adults intend to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 74% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather and Personal finances. The figures above 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 stalled in August 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 8% decrease in year-to-date flights compared to 2019.

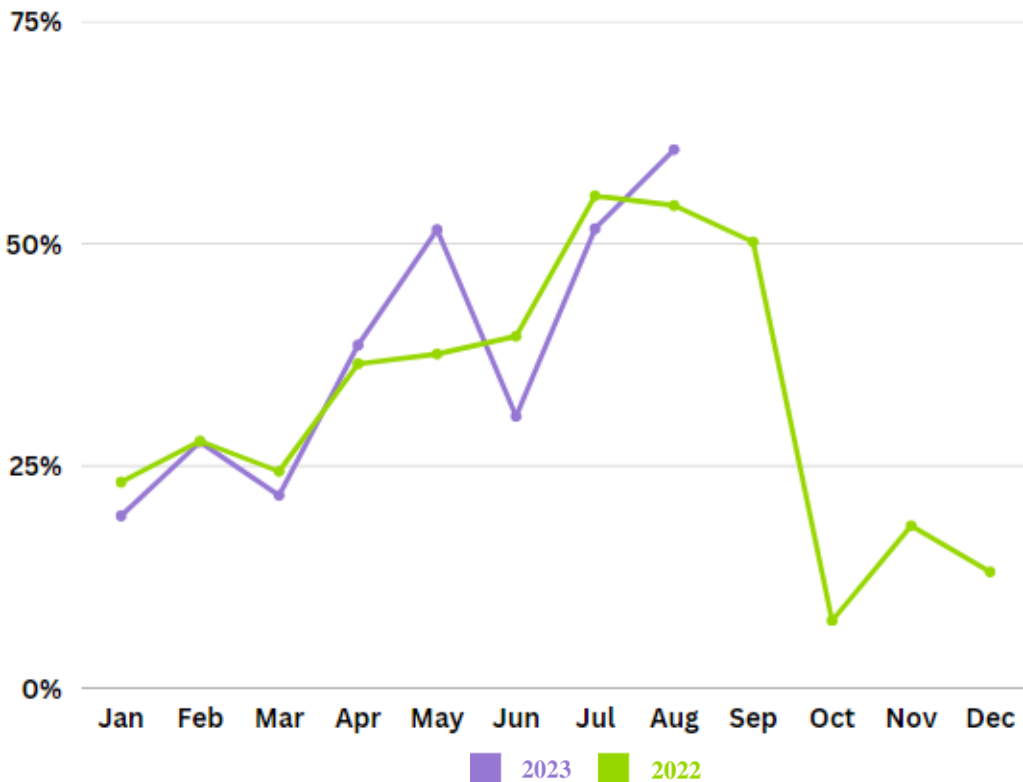
3.0 Touring Accommodation
3.1 Performance by Touring Category

Touring Pitch Occupancy – August 2023/2022

Touring Pitch Occupancy was 60.57% in August 2023 when compared to data from the previous year of a 54.29% occupancy rate; this shows an overall percentage point decrease of 6.28.

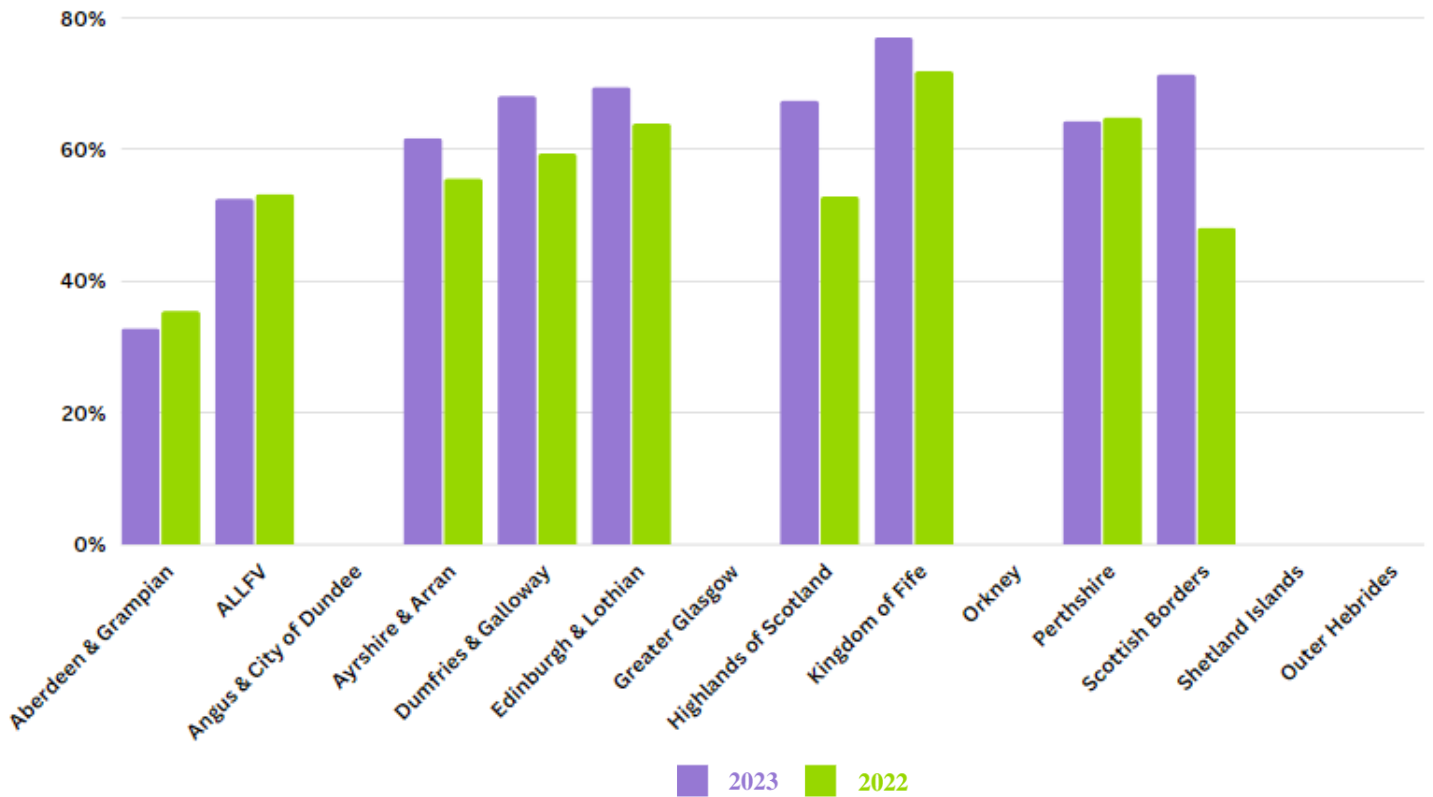


Touring Pitch Occupancy – Year-to-Date



Room Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – August 2023/2022

Occupancy Type	August 23	August 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	60.57%	54.29%	6.28	106	41.46%	42.81%	-1.35	99
Whole Park Occupancy	59.62%	51.69%	7.93	108	41.37%	41.94%	-0.57	99
Caravan Pitch Occupancy	76.14%	70.44%	5.70	106	46.38%	52.01%	-5.63	94
Tent Pitch Occupancy	54.16%	52.75%	1.41	101	30.85%	32.17%	-1.32	99

Touring Pitch Occupancy by Size – August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	48.27%	53.95%	-5.68	94	36.49%	42.59%	-6.10	94
50-99 pitches	53.54%	49.89%	3.65	104	43.82%	38.71%	5.11	105
100-199 pitches	65.29%	56.53%	8.76	109	41.33%	44.87%	-3.54	96
200 or more	*	*	*	*	*	*	*	*

- Sample Size = Nil

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

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.

Whole Park Occupancy by Size – August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	27.01%	18.19%	8.82	109	28.40%	13.36%	15.04	115
50-99 pitches	53.54%	45.80%	7.74	108	44.48%	34.92%	9.56	110
100-199 pitches	65.29%	56.53%	8.76	109	40.69%	46.82%	-6.13	94
200 or more	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	67.79%	63.38%	4.41	104	40.82%	49.10%	-8.28	92
50-99 pitches	0.00%	70.97%	-70.97	29	20.48%	63.92%	-43.44	57
100-199 pitches	0.00%	0.00%	0.00	100	59.40%	42.10%	17.30	117
200 or more	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – August 2023/2022

Size	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	63.85%	54.25%	9.60	110	28.45%	36.22%	-7.77	92
50-99 pitches	0.00%	65.45%	-65.45	35	39.75%	43.37%	-3.62	96
100-199 pitches	0.00%	0.00%	0.00	100	0.00%	14.83%	-14.83	85
200 or more	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – August 2023/2022

Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	76.69%	12.43%	64.26	164
£15 - £17.99	*	*	*	*	27.23%	51.61%	-24.38	76
£18 - £19.99	*	*	*	*	23.17%	15.49%	7.68	108
£20 +	62.28%	56.09%	6.19	106	42.07%	44.23%	-2.16	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – August 2023/2022

Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	0.00%	0.00%	0.00	100
£15 - £17.99	*	*	*	*	0.00%	0.00%	0.00	100
£18 - £19.99	*	*	*	*	23.17%	15.49%	7.68	108
£20 +	61.75%	54.03%	7.72	108	41.73%	43.82%	-2.09	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – August 2023/2022

Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	0.00%	0.00%	0.00	100
£15 - £17.99	*	*	*	*	21.91%	49.69%	-27.78	72
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	76.14%	70.77%	5.37	105	50.97%	52.20%	-1.23	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – August 2023/2022

Tariff	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	76.69%	12.43%	64.26	164
£15 - £17.99	*	*	*	*	46.46%	56.40%	-9.94	90
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	49.84%	51.40%	-1.56	98	28.38%	31.15%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – August 2023/2022

Location Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	27.37%	38.87%	-11.50	89
Countryside - Village	55.48%	50.68%	4.80	105	39.35%	42.71%	-3.36	97
Seaside - Coastal	59.98%	55.92%	4.06	104	49.40%	44.32%	5.08	105
Small Town	*	*	*	*	59.31%	45.59%	13.72	114
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – August 2023/2022

Location Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	24.61%	40.96%	-16.35	84
Countryside - Village	55.71%	47.75%	7.96	108	39.31%	40.48%	-1.17	99
Seaside - Coastal	58.81%	54.30%	4.51	105	50.32%	43.64%	6.68	107
Small Town	*	*	*	*	59.31%	45.59%	13.72	114
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – August 2023/2022

Location Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	81.76%	47.52%	34.24	134
Countryside - Village	48.72%	66.59%	-17.87	82	42.03%	59.77%	-17.74	82
Seaside - Coastal	71.96%	67.95%	4.01	104	45.72%	48.26%	-2.54	97
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – August 2023/2022

Location Type	August 23	August 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	27.46%	21.95%	5.51	106
Countryside - Village	35.96%	61.24%	-25.28	75	31.08%	40.03%	-8.95	91
Seaside - Coastal	72.76%	64.59%	8.17	108	37.43%	46.63%	-9.20	91
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil								*Sample Size (between 1 and 4) too small to be included