

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

December 2023/2022 Report - TOURING

1.0 Introduction December 2023/2022

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

The SOAS Report: December 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 **0.51** percentage point increase in December 2023 compared to last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in December with growth of just 1.9%. Food and drink and health and beauty categories continued to drive sales, however, food sales in December were the weakest monthly performance in 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 1% increase on the December 2023 survey). The survey recorded 47% of respondents (a 5% decrease on the December 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, 28% of UK adults intend to take a domestic overnight trip in the first quarter of 2024, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months continue to be 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 2024) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

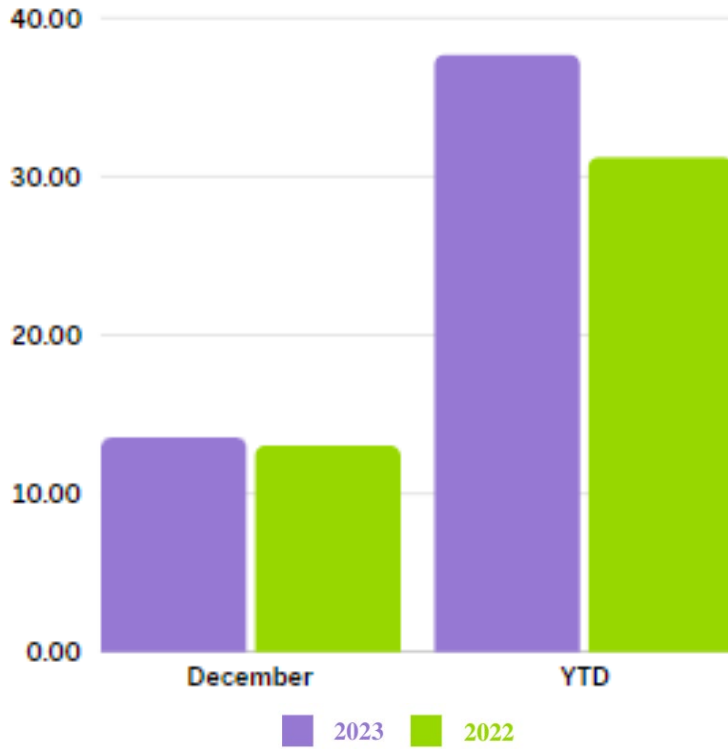
The recovery in international inbound visitation continued to stall in December 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 9% increase when compared to the same period in 2022, however, UK air connectivity had seen a 6% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

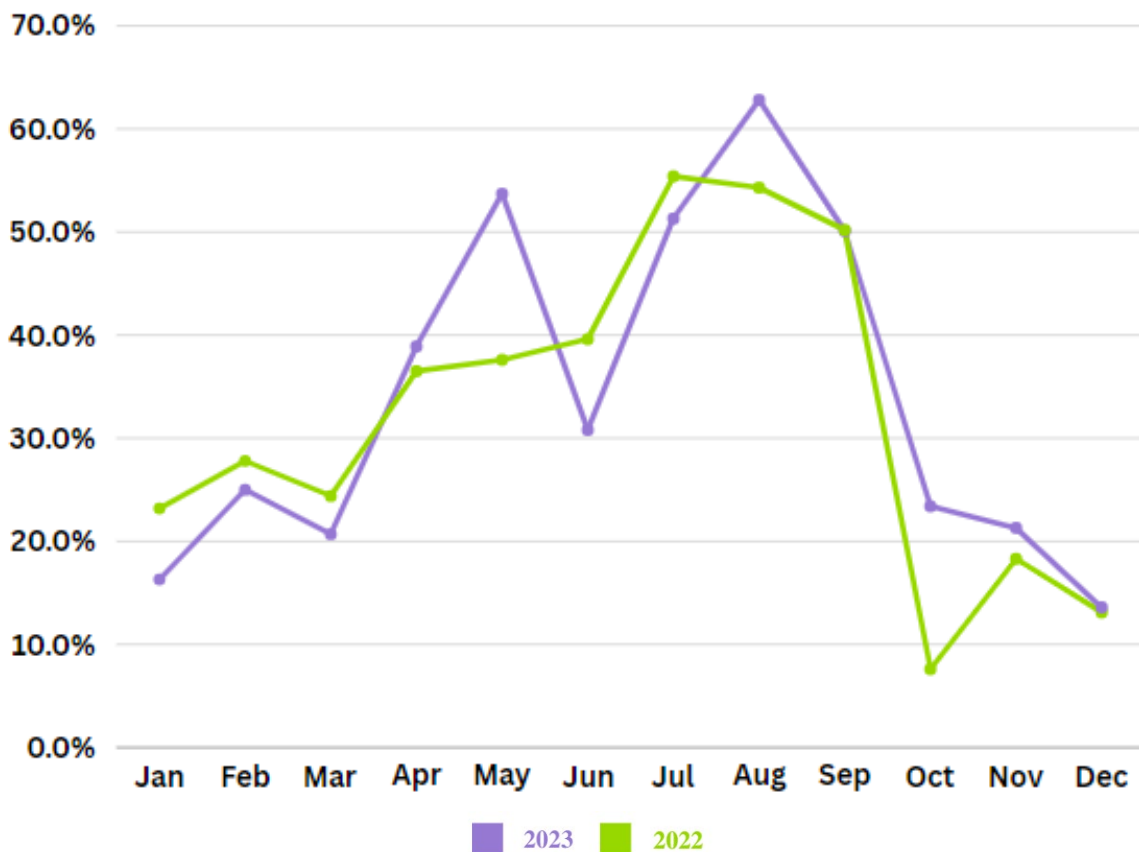
3.1 Performance by Touring Category

Touring Pitch Occupancy – December 2023/2022

Touring Pitch Occupancy was **13.56%** in December 2023 when compared to data from the previous year of a **13.05%** occupancy rate; this shows an overall percentage point increase of **0.51**.



Touring Pitch Occupancy – Year-to-Date



Whole Park Occupancy by Size – December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	7.09%	0.00%	7.09	107	25.08%	11.85%	13.23	113
50-99 pitches	*	*	*	*	42.20%	17.75%	24.45	124
100-199 pitches	*	*	*	*	36.21%	40.93%	-4.72	95
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	12.99%	7.86%	5.13	105	33.83%	39.93%	-6.10	94
50-99 pitches	*	*	*	*	47.12%	63.54%	-16.42	84
100-199 pitches	*	*	*	*	56.02%	39.78%	16.24	116
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – December 2023/2022

Size	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	2.25%	0.00%	2.25	102	26.35%	22.09%	4.26	104
50-99 pitches	*	*	*	*	26.06%	37.84%	-11.78	88
100-199 pitches	*	*	*	*	2.51%	12.76%	-10.25	90
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – December 2023/2022

Tariff	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	*	-	*	*	19.84%	11.31%	8.53	109
£15 - £17.99	-	*	*	*	26.49%	49.03%	-22.54	77
£18 -£19.99	*	-	*	*	22.48%	15.80%	6.68	107
£20 +	13.52%	13.05%	0.47	100	38.14%	31.61%	6.53	107
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – December 2023/2022

Tariff	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	*	-	*	*	16.62%	0.00%	16.62	117
£15 - £17.99	-	*	*	*	0.00%	0.00%	0.00	100
£18 -£19.99	*	-	*	*	22.42%	15.80%	6.62	107
£20 +	11.10%	14.24%	-3.14	97	37.58%	29.82%	7.76	108
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – December 2023/2022

Tariff	December 23	December 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%	49.91%	-28.00	72
£18 -£19.99	*	-	*	*	37.09%	0.00%	37.09	137
£20 +	24.85%	7.86%	16.99	117	48.58%	45.72%	2.86	103
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – December 2023/2022

Tariff	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	*	-	*	*	76.69%	11.31%	65.38	165
£15 - £17.99	-	*	*	*	47.33%	47.15%	0.18	100
£18 -£19.99	*	-	*	*	11.26%	0.00%	11.26	111
£20 +	0.60%	0.00%	0.60	101	20.80%	25.07%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – December 2023/2022

Location Type	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	25.45%	32.91%	-7.46	93
Countryside - Village	17.29%	*	1.16	101	40.09%	38.71%	1.38	101
Seaside - Coastal	8.20%	7.96%	0.24	100	41.12%	24.23%	16.89	117
Small Town	*	*	*	*	55.40%	45.17%	10.23	110
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – December 2023/2022

Location Type	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	18.91%	31.43%	-12.52	87
Countryside - Village	17.80%	*	1.41	101	37.95%	36.76%	1.19	101
Seaside - Coastal	4.72%	0.00%	4.72	105	42.14%	22.62%	19.52	120
Small Town	*	*	*	*	55.40%	45.17%	10.23	110
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – December 2023/2022

Location Type	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	50.77%	43.55%	7.22	107
Countryside - Village	9.96%	*	3.22	103	49.31%	57.18%	-7.87	92
Seaside - Coastal	13.22%	1.96%	11.26	111	35.05%	37.99%	-2.94	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 – December 2023/2022

Location Type	December 23	December 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	10.51%	17.45%	-6.94	93
Countryside - Village	0.00%	*	0.00	100	37.14%	32.66%	4.48	104
Seaside - Coastal	3.22%	0.00%	3.22	103	30.95%	38.93%	-7.98	92
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil								
								*Sample Size (between 1 and 4) too small to be included