

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## *June 2023/2022 Report - TOURING*

### 1.0 Introduction June 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering June 2023 and benchmarking against June 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](mailto:hugh.sheridan@gcu.ac.uk)).

### 2.0 Executive Summary June 2023

The Scottish Accommodation Occupancy: June 2023 Touring report shows a drop in the Touring sector in Scotland when compared to the same period in 2022. Touring Pitch Occupancy rates within the Touring sector experienced an **8.98** percentage point decrease in June 2023 compared to last year.

Data from the Scottish Retail Consortium showed that retail sales figures increased by 11.3% year-on-year in June. Retail sales in Scotland held steady for June with a growth of 9%. Food sales continue to be the biggest growth area.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2023 found that 22% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% increase on the May 2023 survey). The survey recorded 46% of respondents (a 3% decrease on the May 2023 Survey) saying they were "...cautious - things are okay but I feel I have to be very careful".

Despite consumer concern about the state of the economy, 11% 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 remain 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.

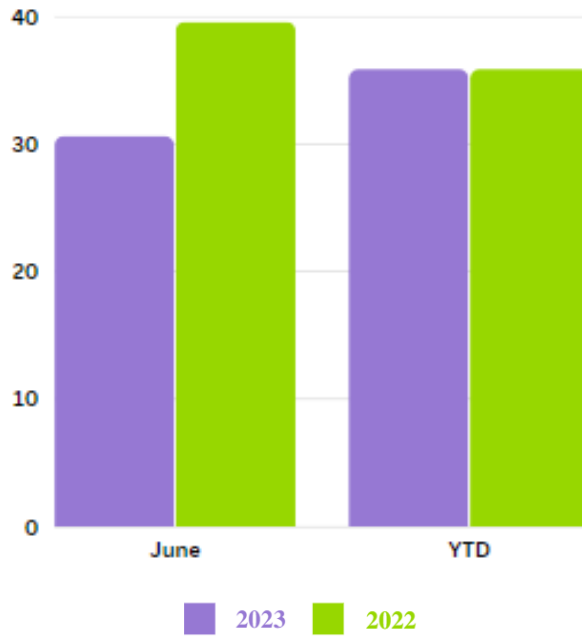
The recovery in international inbound visitation stalled in June 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 0% increase when compared to the same period in 2022, however, UK air connectivity had seen a 9% decrease in year-to-date flights compared to 2019.

### 3.0 Touring Accommodation

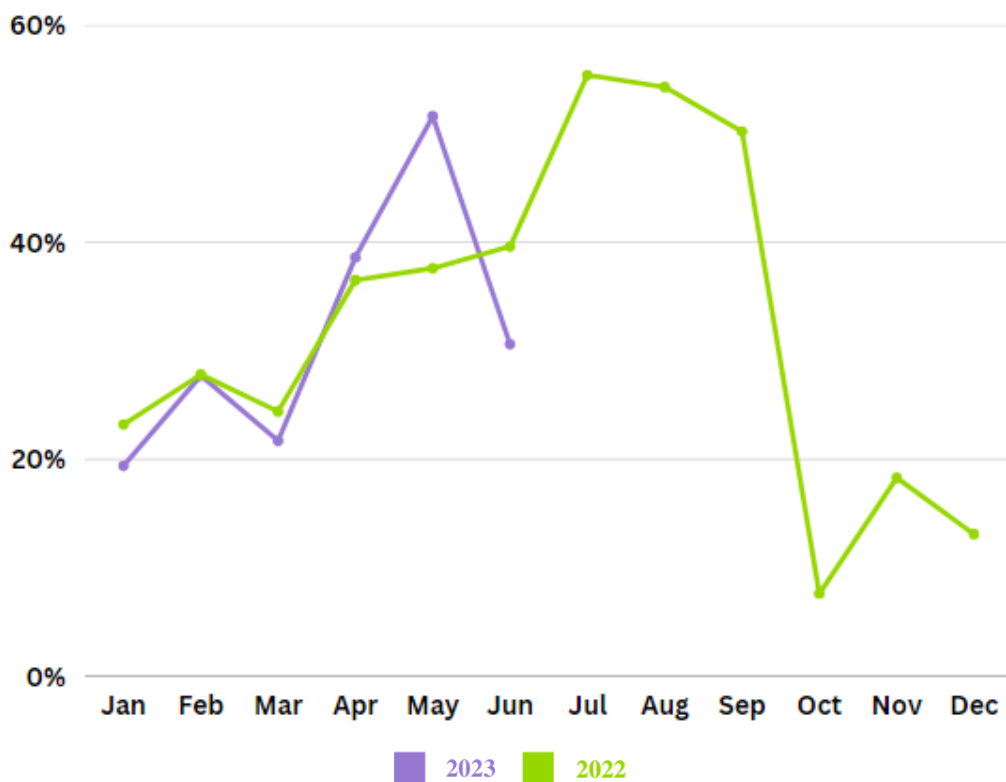
#### 3.1 Performance by Touring Category

##### Touring Pitch Occupancy – June 2023/2022

Touring Pitch Occupancy was 30.58% in June 2023 when compared to data from the previous year of a 39.56% occupancy rate; this shows an overall percentage point decrease of 8.98.

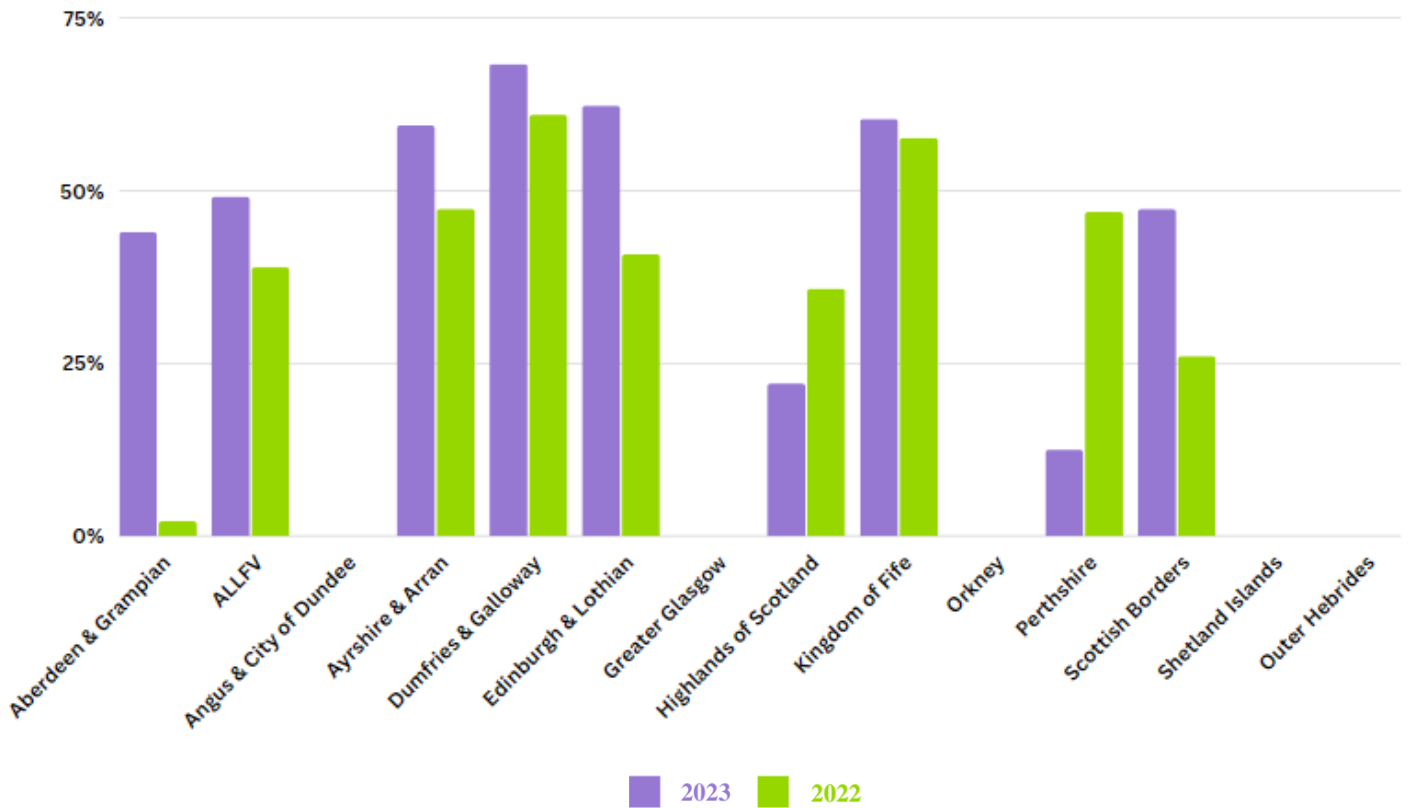


##### Touring Pitch Occupancy – Year to Date



## Room Occupancy by Former VisitScotland Area

### Touring Pitch Occupancy by Former VisitScotland Area – June 2023/2022



### Pitch by Occupancy Type – June 2023/2022

Occupancy Type	June 23	June 22	23/22 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy <sup>3</sup>	30.58%	39.56%	-8.98	91	35.82%	35.81%	0.01	100
Whole Park Occupancy	28.47%	37.07%	-8.60	91	35.43%	35.99%	-0.56	99
Caravan Pitch Occupancy	63.22%	56.66%	6.56	107	40.01%	42.87%	-2.86	97
Tent Pitch Occupancy	48.10%	31.99%	16.11	116	29.23%	17.09%	12.14	112

### Touring Pitch Occupancy by Former VS Area – June 2023/2022

Former VS Area	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	43.85%	2.16%	41.69%	142	23.34%	18.37%	4.97%	105
ALLFV	48.99%	*	10.18%	110	45.61%	38.37%	7.24%	107
Angus & City of Dundee	-	-	-	-	-	-	-	-
Ayrshire & Arran	*	*	*	*	54.42%	47.25%	7.17%	107
Dumfries & Galloway	68.23%	60.85%	7.38%	107	47.77%	49.17%	-1.40%	99
Edinburgh & Lothian	*	*	*	*	50.98%	28.65%	22.33%	122
Greater Glasgow	-	-	-	-	-	*	-	-
Highlands of Scotland	22.02%	35.72%	-13.70%	86	32.95%	35.72%	-2.77%	97
Kingdom of Fife	*	*	*	*	60.57%	55.31%	5.26%	105

<sup>1</sup> 23/22 Diff throughout this report is expressed by % Point Change

<sup>2</sup> 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.

<sup>3</sup> Touring Pitch Occupancy gives an overview of the sector and includes data from all types of touring parks: Whole Park, Caravan and Tent.

Orkney	-	-	-	-	-	-	-	-
Perthshire	*	46.78%	-34.34%	66	21.89%	38.52%	-16.63%	83
Scottish Borders	*	*	*	*	40.51%	25.99%	14.52%	115
Shetland Islands	-	-	-	-	-	-	-	-
Outer Hebrides	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	44.10%	45.01%	-0.91	99	31.62%	35.33%	-3.71	96
50-99 pitches	54.25%	33.17%	21.08	121	40.32%	31.09%	9.23	109
100-199 pitches	24.16%	43.09%	-18.93	81	34.99%	38.63%	-3.64	96
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Whole Park Occupancy by Size – June 2023/2022

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	32.07%	9.06%	23.01	123	26.36%	9.89%	16.47	116
50-99 pitches	54.14%	28.61%	25.53	126	41.03%	27.75%	13.28	113
100-199 pitches	22.77%	43.35%	-20.58	79	33.79%	41.21%	-7.42	93
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Caravan Pitch Occupancy by Size – June 2023/2022

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	60.15%	56.66%	3.49	103	34.83%	41.40%	-6.57	93
50-99 pitches	0.00%	59.99%	-59.99	40	20.48%	58.91%	-38.43	62
100-199 pitches	66.27%	54.02%	12.25	112	59.40%	34.79%	24.61	125
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Tent Pitch Occupancy by Size – June 2023/2022

Size	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	37.33%	33.24%	4.09	104	18.21%	20.84%	-2.63	97
50-99 pitches	55.66%	44.34%	11.32	111	39.75%	26.24%	13.51	114
100-199 pitches	0.00%	19.46%	-19.46	81	0.00%	8.61%	-8.61	91
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Touring Pitch Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	6.53%	54.42	154
£15 - £17.99	*	*	*	*	22.87%	42.48%	-19.61	80
£18 - £19.99	*	*	*	*	19.56%	11.08%	8.48	108
£20 +	29.62%	41.07%	-11.45	89	36.44%	37.03%	-0.59	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Whole Park Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	0.00%	0.00	100
£15 - £17.99	*	*	*	*	0.00%	0.00%	0.00	100
£18 -£19.99	*	*	*	*	19.56%	11.08%	8.48	108
£20 +	27.45%	39.10%	-11.65	88	35.69%	37.67%	-1.98	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Caravan Pitch Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	0.00%	60.95	161
£15 - £17.99	*	*	*	*	27.90%	44.13%	-16.23	84
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	63.22%	56.24%	6.98	107	29.24%	42.74%	-13.50	87
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Tent Pitch Occupancy by Tariff – June 2023/2022

Tariff	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	6.53%	54.42	154
£15 - £17.99	*	*	*	*	27.90%	36.93%	-9.03	91
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	45.49%	30.38%	15.11	115	29.24%	16.18%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Touring Pitch Occupancy by Location Type – June 2023/2022

Location Type	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	56.30%	38.34%	17.96	118	45.89%	36.31%	9.58	110
City – Large Town	*	*	*	*	12.93%	27.54%	-14.61	85
Small Town	*	*	*	*	50.73%	37.67%	13.06	113
Countryside - Villages	29.94%	40.76%	-10.82	89	33.05%	37.95%	-4.90	95
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Whole Park Occupancy by Location Type – June 2023/2022

Location Type	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	56.08%	36.13%	19.95	120	48.16%	36.13%	12.03	112
City – Large Town	*	*	*	*	12.93%	31.16%	-18.23	82
Small Town	*	*	*	*	50.73%	37.67%	13.06	113
Countryside - Villages	26.98%	38.03%	-11.05	89	34.08%	36.48%	-2.40	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Caravan Pitch Occupancy by Location Type – June 2023/2022

Location Type	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	64.37%	55.25%	9.12	109	37.74%	38.21%	-0.47	100
City – Large Town	*	*	*	*	0.00%	34.79%	-34.79	65
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
Countryside - Villages	62.30%	60.35%	1.95	102	41.80%	55.29%	-13.49	87
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

### Tent Pitch Occupancy by Location Type – June 2023/2022

Location Type	June 23	June 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Seaside - Coastal	39.59%	43.05%	-3.46	97	25.19%	29.03%	-3.84	96
City – Large Town	*	*	*	*	0.00%	8.61%	-8.61	91
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
Countryside - Villages	52.74%	40.38%	12.36	112	31.02%	23.73%	7.29	107
<b>- Sample Size = Nil</b>		<b>*Sample Size (between 1 and 4) too small to be included</b>						

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