

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

October 2023/2022 Report - TOURING

1.0 Introduction October 2023/2022

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

The SOAS Report: October 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 **1.81** percentage point decrease in October 2023 compared to last year.

Data from the Scottish Retail Consortium showed that retail sales remained weak in October with growth of just 2.5%. Food and drink and health and beauty categories continued to drive sales. October's food and drink sales enjoyed a slight increase in volume and value sales compared to last year, but value sales were slightly down on September's performance.

Domestic consumer sentiment provided by the GB National Tourist Boards for October 2023 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease on the September 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful". were "...been hit hard - no option but to cut back on spending" (a 3% increase on the September 2023 survey). The survey recorded 45% of respondents (a 1 % decrease on the September 2023 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

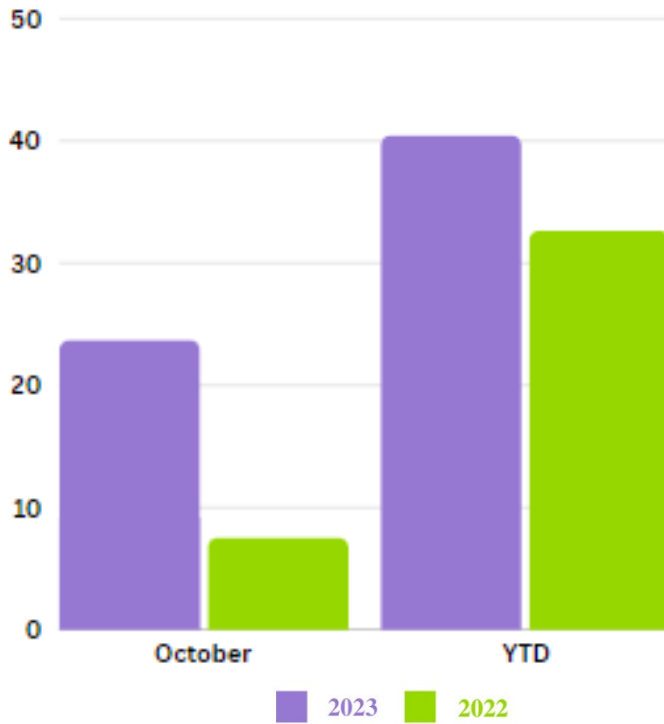
Despite consumer concern about the state of the economy, 21% of UK adults intend to take a domestic overnight trip in the fourth quarter of 2023, that figure rose to 78% in the following 12 months. However, the key three barriers to taking an overnight UK trip in the next six months contained to be the 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 2023) and evidence the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation stalled in October 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 10% increase when compared to the same period in 2022, however, UK air connectivity had seen a 7% decrease in year-to-date flights compared to 2019.

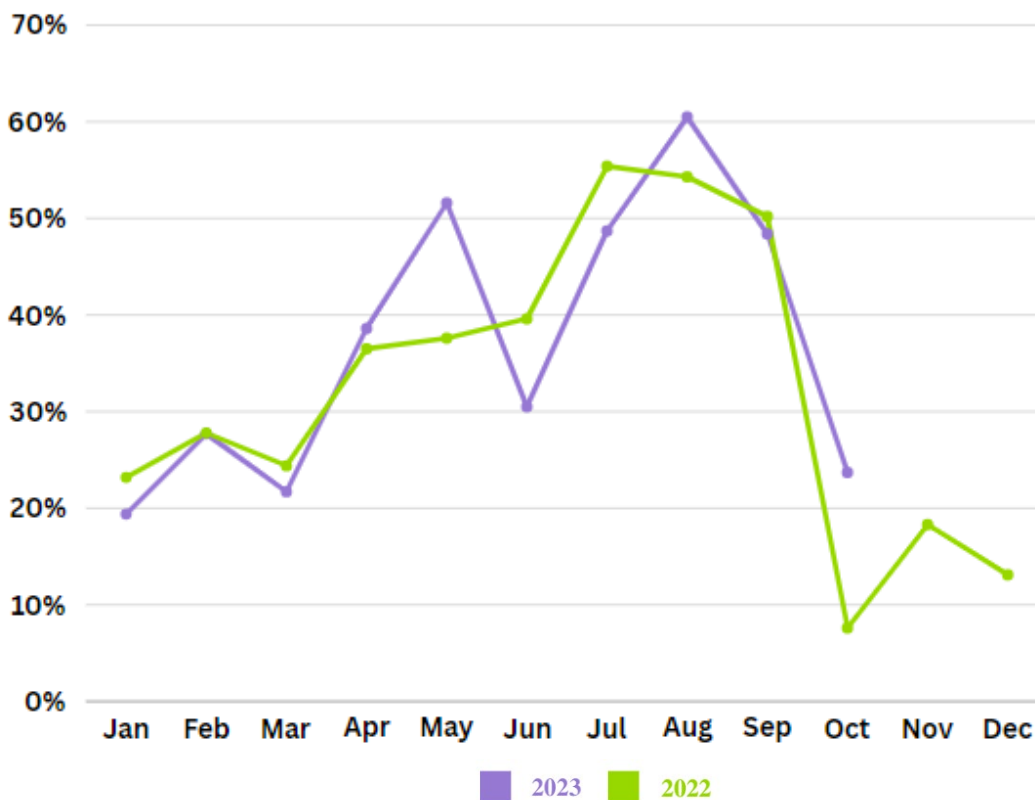
3.0 Touring Accommodation
3.1 Performance by Touring Category

Touring Pitch Occupancy – October 2023/2022

Touring Pitch Occupancy was **23.73%** in October 2023 when compared to data from the previous year of a **7.57%** occupancy rate; this shows an overall percentage point decrease of **16.16**.

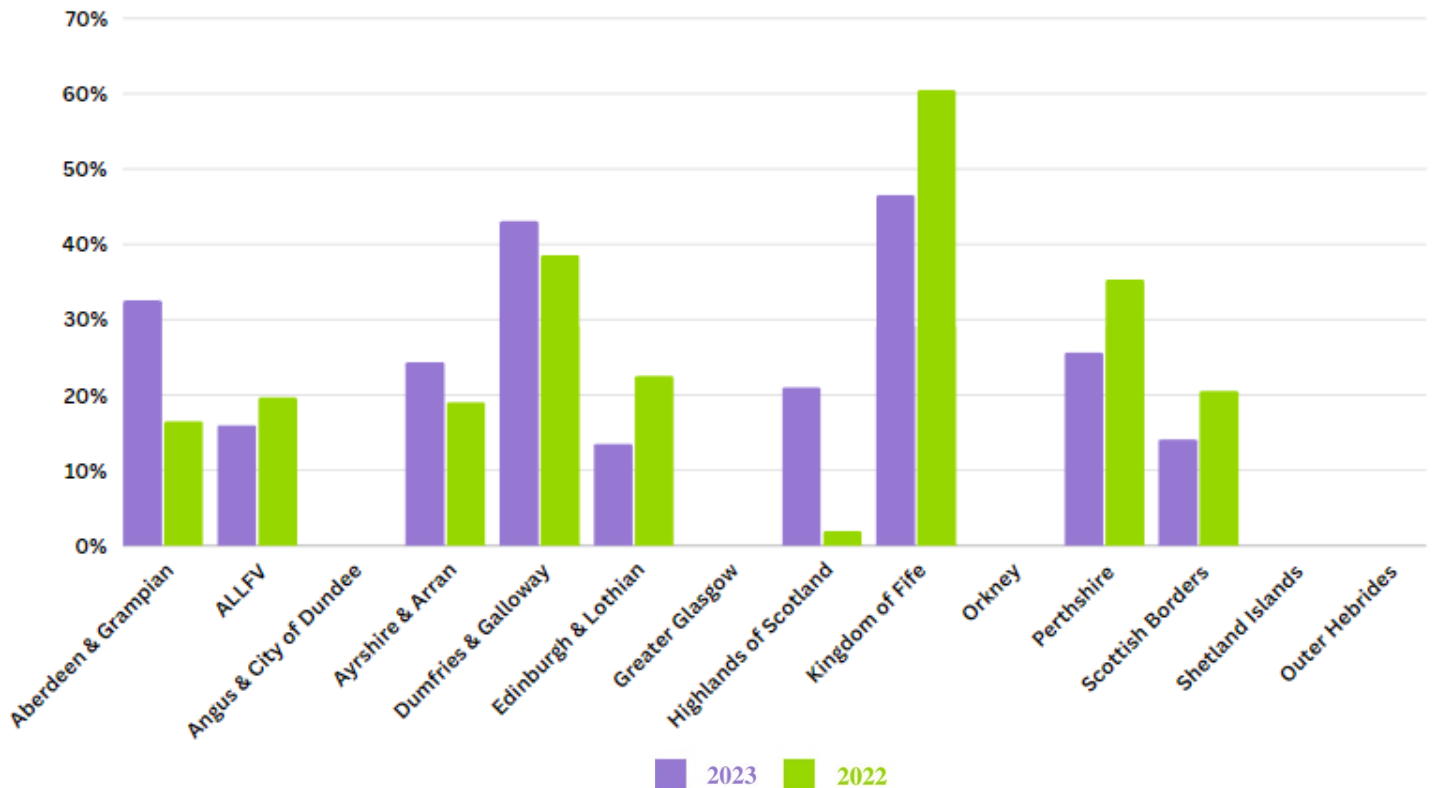


Touring Pitch Occupancy – Year-to-Date



Room Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – October 2023/2022

Occupancy Type	October 23	October 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	23.73%	7.57%	16.16	116	40.47%	32.67%	7.80	108
Whole Park Occupancy	22.59%	6.06%	16.53	117	39.90%	30.31%	9.59	110
Caravan Pitch Occupancy	37.43%	40.26%	-2.83	97	48.01%	51.06%	-3.05	97
Tent Pitch Occupancy	4.42%	6.80%	-2.38	98	31.54%	27.82%	3.72	104

Touring Pitch Occupancy by Size – October 2023/2022

Size	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	30.93%	24.62%	6.31	106	36.32%	40.75%	-4.43	96
50-99 pitches	20.21%	3.07%	17.14	117	41.19%	21.32%	19.87	120
100-199 pitches	25.07%	24.57%	0.50	101	40.96%	43.41%	-2.45	98
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 – October 2023/2022

Size	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	9.63%	4.00%	5.63	106	25.94%	11.85%	14.09	114
50-99 pitches	19.21%	2.21%	17.00	117	41.46%	17.75%	23.71	124
100-199 pitches	24.72%	24.87%	-0.15	100	40.05%	45.32%	-5.27	95
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – October 2023/2022

Size	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	51.10%	31.77%	19.33	119	42.32%	48.24%	-5.92	94
50-99 pitches	61.00%	64.99%	-3.99	96	38.54%	63.54%	-25.00	75
100-199 pitches	26.78%	33.97%	-7.19	93	52.73%	41.89%	10.84	111
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – October 2023/2022

Size	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	8.92%	14.34%	-5.42	95	27.53%	40.75%	-13.22	87
50-99 pitches	3.16%	8.97%	-5.81	94	39.10%	37.84%	1.26	101
100-199 pitches	0.00%	3.19%	-3.19	97	14.24%	12.76%	1.48	101
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – October 2023/2022

Tariff	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	40.64%	11.31%	29.33	129
£15 - £17.99	*	*	*	*	27.70%	49.03%	-21.33	79
£18 - £19.99	*	*	*	*	22.22%	15.80%	6.42	106
£20 +	23.68%	7.50%	16.18	116	41.08%	33.16%	7.92	108
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – October 2023/2022

Tariff	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	34.98%	0.00%	34.98	135
£15 - £17.99	*	*	*	*	0.00%	0.00%	0.00	100
£18 - £19.99	*	*	*	*	22.18%	15.80%	6.38	106
£20 +	22.41%	6.06%	16.35	116	40.32%	31.00%	9.32	109
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – October 2023/2022

Tariff	October 23	October 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 +	37.43%	40.38%	-2.95	97	51.03%	51.15%	-0.12	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – October 2023/2022

Tariff	October 23	October 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	*	*	*	*	44.16%	47.15%	-2.99	97
£18 -£19.99	*	*	*	*	11.26%		11.26	111
£20 +	3.99%	5.76%	-1.77	98	30.19%	26.84%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – October 2023/2022

Location Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	24.51%	37.94%	-13.43	87
Countryside - Village	30.03%	26.61%	3.42	103	40.31%	41.61%	-1.30	99
Seaside - Coastal	19.99%	3.36%	16.63	117	45.93%	24.57%	21.36	121
Small Town	*	*	*	*	53.36%	45.17%	8.19	108
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – October 2023/2022

Location Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	21.04%	41.91%	-20.87	79
Countryside - Village	27.22%	24.01%	3.21	103	39.02%	39.57%	-0.55	99
Seaside - Coastal	18.49%	2.84%	15.65	116	46.12%	22.62%	23.50	124
Small Town	*	*	*	*	53.36%	45.17%	8.19	108
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – October 2023/2022

Location Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	49.96%	45.99%	3.97	104
Countryside - Village	49.39%	60.08%	-10.69	89	48.25%	60.03%	-11.78	88
Seaside - Coastal	45.35%	30.80%	14.55	115	46.87%	46.93%	-0.06	100
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 – October 2023/2022

Location Type	October 23	October 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	21.30%	18.64%	2.66	103
Countryside - Village	6.32%	8.97%	-2.65	97	39.42%	35.17%	4.25	104
Seaside - Coastal	7.57%	14.34%	-6.77	93	34.45%	38.93%	-4.48	96
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil					*Sample Size (between 1 and 4) too small to be included			