

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

September 2023/2022 Report - TOURING

1.0 Introduction September 2023/2022

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

The SOAS Report: September 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 September 2023 compared to last year.

Data from the Scottish Retail Consortium showed that the September retail sales figures in Scotland rose to 6.1% from 5.6% in August, however. Food sales continue to be the biggest growth area.

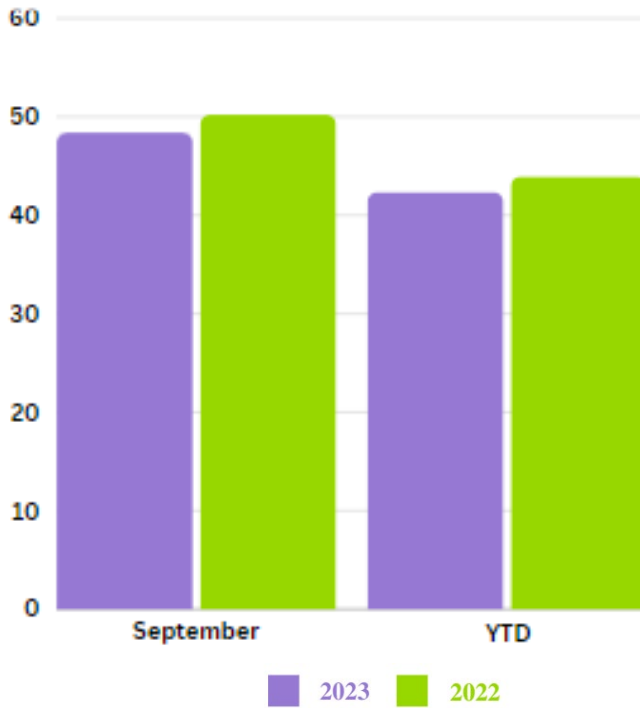
Domestic consumer sentiment provided by the GB National Tourist Boards for September 2023 found that 18% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 4% decrease on the August 2023 survey). The survey recorded 46% of respondents (a 1 % increase on the August 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 third quarter of 2023 although that figure rose to 76% 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, Personal finances and the UK weather. 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 September 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 9% decrease in year-to-date flights compared to 2019.

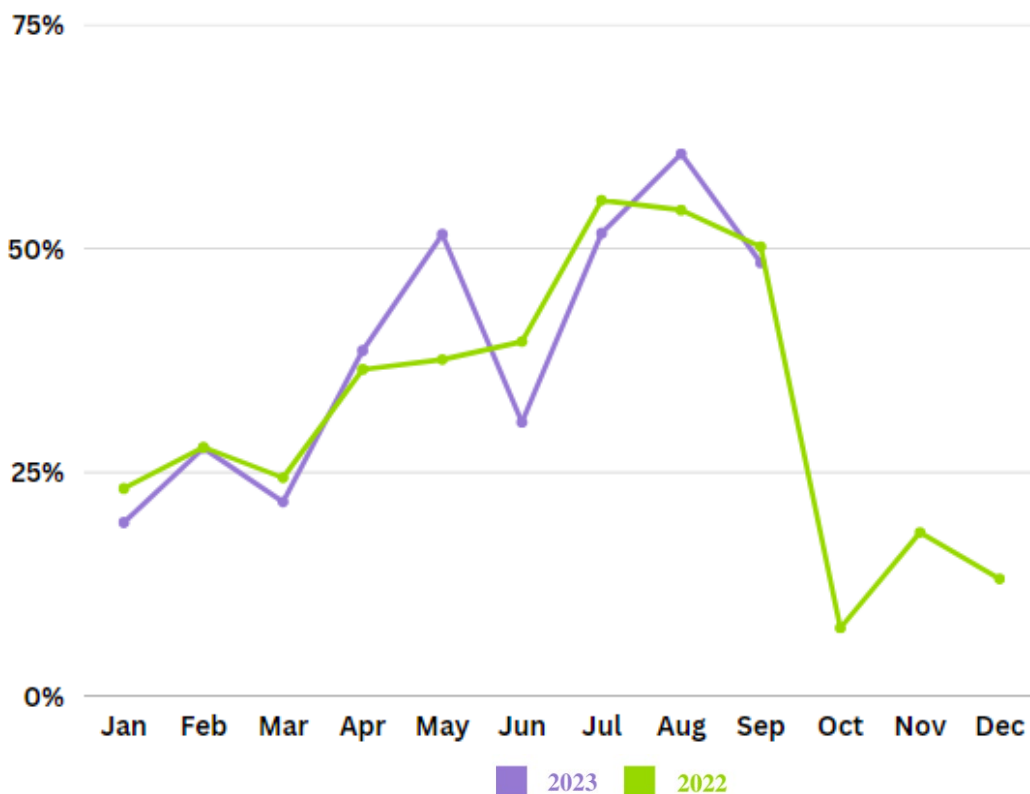
3.0 Touring Accommodation
3.1 Performance by Touring Category

Touring Pitch Occupancy – September 2023/2022

Touring Pitch Occupancy was 48.41% in September 2023 when compared to data from the previous year of a 50.22% occupancy rate; this shows an overall percentage point decrease of 1.81.

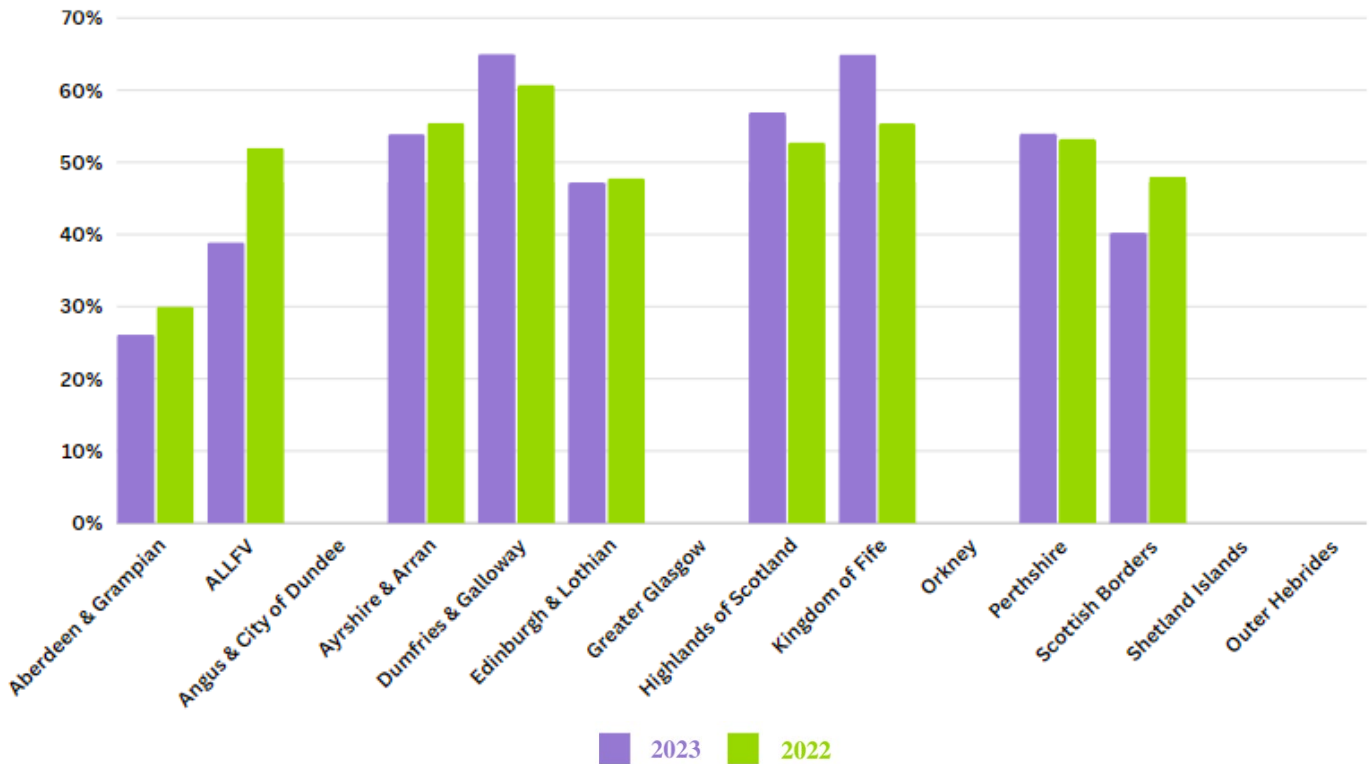


Touring Pitch Occupancy – Year-to-Date



Room Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – September 2023/2022

Occupancy Type	September 23	September 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
Touring Pitch Occupancy ³	48.41%	50.22%	-1.81	98	42.37%	43.95%	-1.58	98
Whole Park Occupancy	48.89%	51.90%	-3.01	97	42.37%	43.52%	-1.15	99
Caravan Pitch Occupancy	55.25%	55.13%	0.12	100	47.35%	52.44%	-5.09	95
Tent Pitch Occupancy	23.15%	19.40%	3.75	104	29.87%	30.40%	-0.53	99

Touring Pitch Occupancy by Size – September 2023/2022

Size	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	43.68%	43.26%	0.42	100	37.12%	42.68%	-5.56	94
50-99 pitches	40.86%	46.08%	-5.22	95	43.36%	39.90%	3.46	103
100-199 pitches	53.26%	53.94%	-0.68	99	42.88%	46.28%	-3.40	97
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 – September 2023/2022

Size	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	23.97%	11.73%	12.24	112	27.87%	13.09%	14.78	115
50-99 pitches	40.86%	45.80%	-4.94	95	43.89%	36.72%	7.17	107
100-199 pitches	55.17%	56.92%	-1.75	98	42.41%	48.38%	-5.97	94
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – September 2023/2022

Size	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	55.70%	57.42%	-1.72	98	41.86%	50.14%	-8.28	92
50-99 pitches	0.00%	60.25%	-60.25	40	20.48%	63.36%	-42.88	57
100-199 pitches	54.93%	48.95%	5.98	106	58.22%	43.20%	15.02	115
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – September 2023/2022

Size	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1-49 pitches	45.12%	17.37%	27.75	128	30.39%	33.07%	-2.68	97
50-99 pitches	0.00%	28.75%	-28.75	71	39.75%	41.32%	-1.57	98
100-199 pitches	14.24%	11.89%	2.35	102	14.24%	14.36%	-0.12	100
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – September 2023/2022

Tariff	September 23	September 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	*	*	*	*	28.30%	51.42%	-23.12	77
£18 - £19.99	*	*	*	*	22.81%	16.31%	6.50	107
£20 +	49.80%	52.13%	-2.33	98	43.09%	45.45%	-2.36	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – September 2023/2022

Tariff	September 23	September 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	*	*	*	*	22.81%	16.31%	6.50	107
£20 +	50.54%	54.32%	-3.78	96	42.90%	45.48%	-2.58	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – September 2023/2022

Tariff	September 23	September 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%	51.00%	-29.09	71
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	55.25%	54.68%	0.57	101	51.52%	52.55%	-1.03	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – September 2023/2022

Tariff	September 23	September 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	*	*	*	*	47.55%	52.39%	-4.84	95
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	17.76%	18.72%	-0.96	99	27.08%	29.45%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – September 2023/2022

Location Type	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	30.57%	39.75%	-9.18	91
Countryside - Village	47.93%	47.70%	0.23	100	40.30%	43.45%	-3.15	97
Seaside - Coastal	48.77%	54.18%	-5.41	95	49.31%	45.96%	3.35	103
Small Town	*	*	*	*	57.87%	47.54%	10.33	110
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – September 2023/2022

Location Type	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	27.90%	43.78%	-15.88	84
Countryside - Village	48.07%	47.57%	0.50	101	40.41%	41.55%	-1.14	99
Seaside - Coastal	48.03%	54.91%	-6.88	93	49.98%	45.57%	4.41	104
Small Town	*	*	*	*	57.87%	47.54%	10.33	110
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – September 2023/2022

Location Type	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	67.86%	47.72%	20.14	120
Countryside - Village	30.33%	61.62%	-31.29	69	41.84%	60.03%	-18.19	82
Seaside - Coastal	60.27%	54.88%	5.39	105	47.00%	49.13%	-2.13	98
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 – September 2023/2022

Location Type	September 23	September 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
City - Large Town	*	*	*	*	24.93%	20.67%	4.26	104
Countryside - Village	76.64%	25.62%	51.02	151	31.83%	37.98%	-6.15	94
Seaside - Coastal	39.86%	23.10%	16.76	117	37.79%	42.55%	-4.76	95
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
- Sample Size = Nil								*Sample Size (between 1 and 4) too small to be included