

# SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

## *April 2024/2023 Report - TOURING*

### 1.0 Introduction April 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering April 2024 and benchmarking against April 2023. 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 April 2024

The SOAS Report: April 2024/2023 Touring report shows an increase in the Touring sector in Scotland when compared to the same period in 2023. Touring Net Pitch Occupancy rates within the Touring sector experienced a **7.05** percentage point decrease in April 2024 compared to last year.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to April 2024 is 2.3%, down from 3.2% in April. The inflation rate for April 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.6%. Inflation rates for restaurants and cafes were 6.1% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in April showed a 4% year-on-year decrease. It should be noted that with Easter falling in April the year-on-year figures will be distorted, therefore, by adjusting the April and April together this now shows a 0.2% decrease. After a strong start in the first quarter, total food sales dropped by 3.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for April 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the April 2024 survey). The survey recorded 48% of respondents (a 4% increase on the April 2024 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 intended to take a domestic overnight trip in the second quarter of 2024, this is a slight decrease compared with April 2023, with 78% of UK adults intending to take a domestic overnight trip 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.

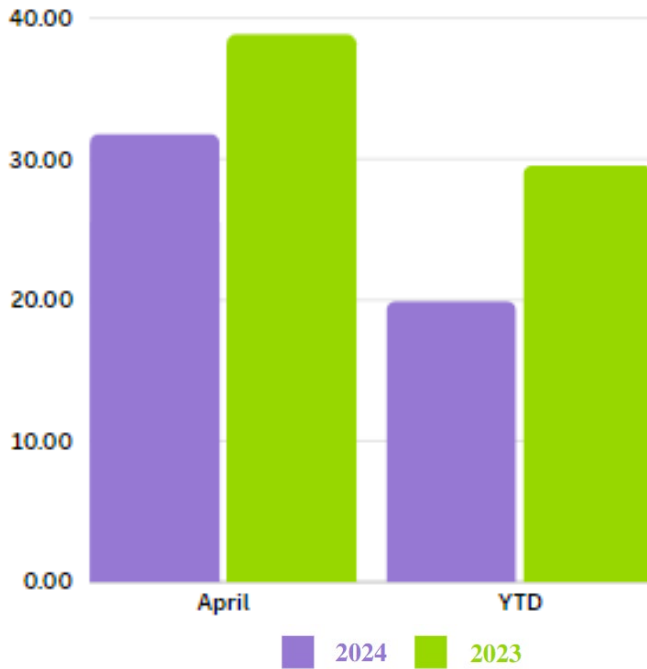
The recovery in international inbound visitation continued to grow in April 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 4% increase when compared to the same period in 2023, however, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019.

### 3.0 Touring Accommodation

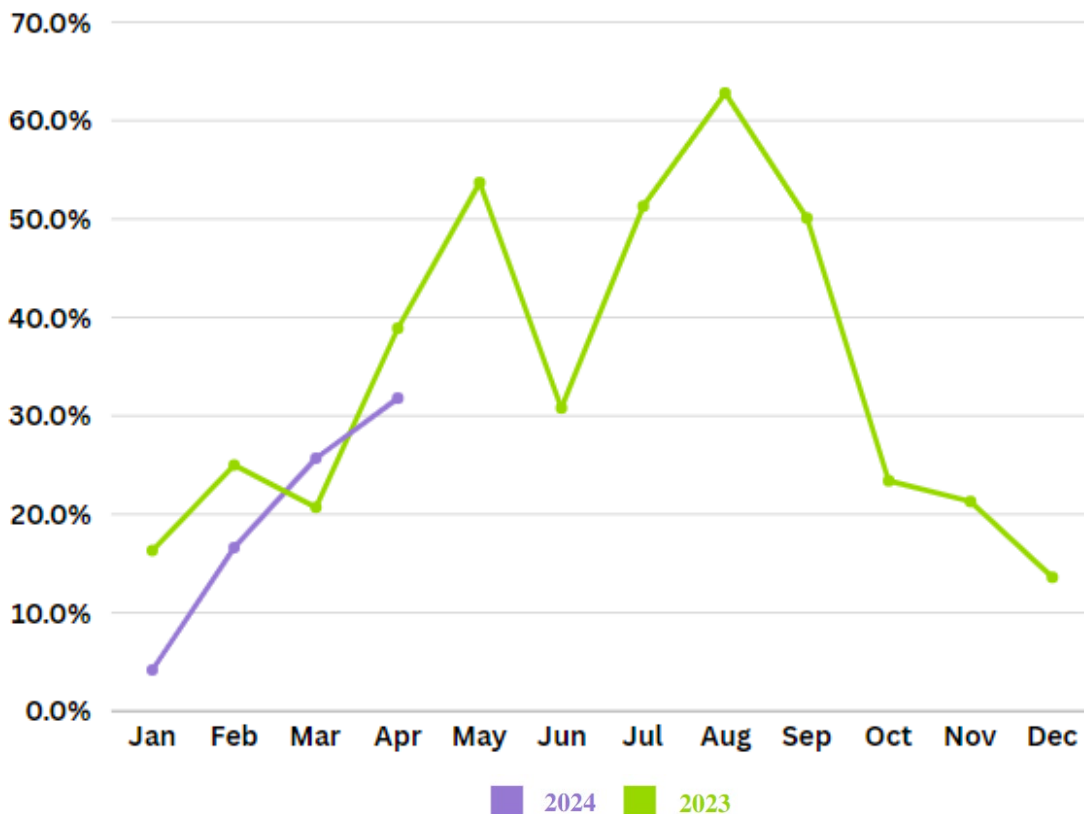
#### 3.1 Performance by Touring Category

##### Touring Pitch Occupancy – April 2024/2023

Touring Net Pitch Occupancy was **31.80%** in April 2024 when compared to data from the previous year of a **38.85%** occupancy rate; this shows an overall percentage point decrease of **7.05**.

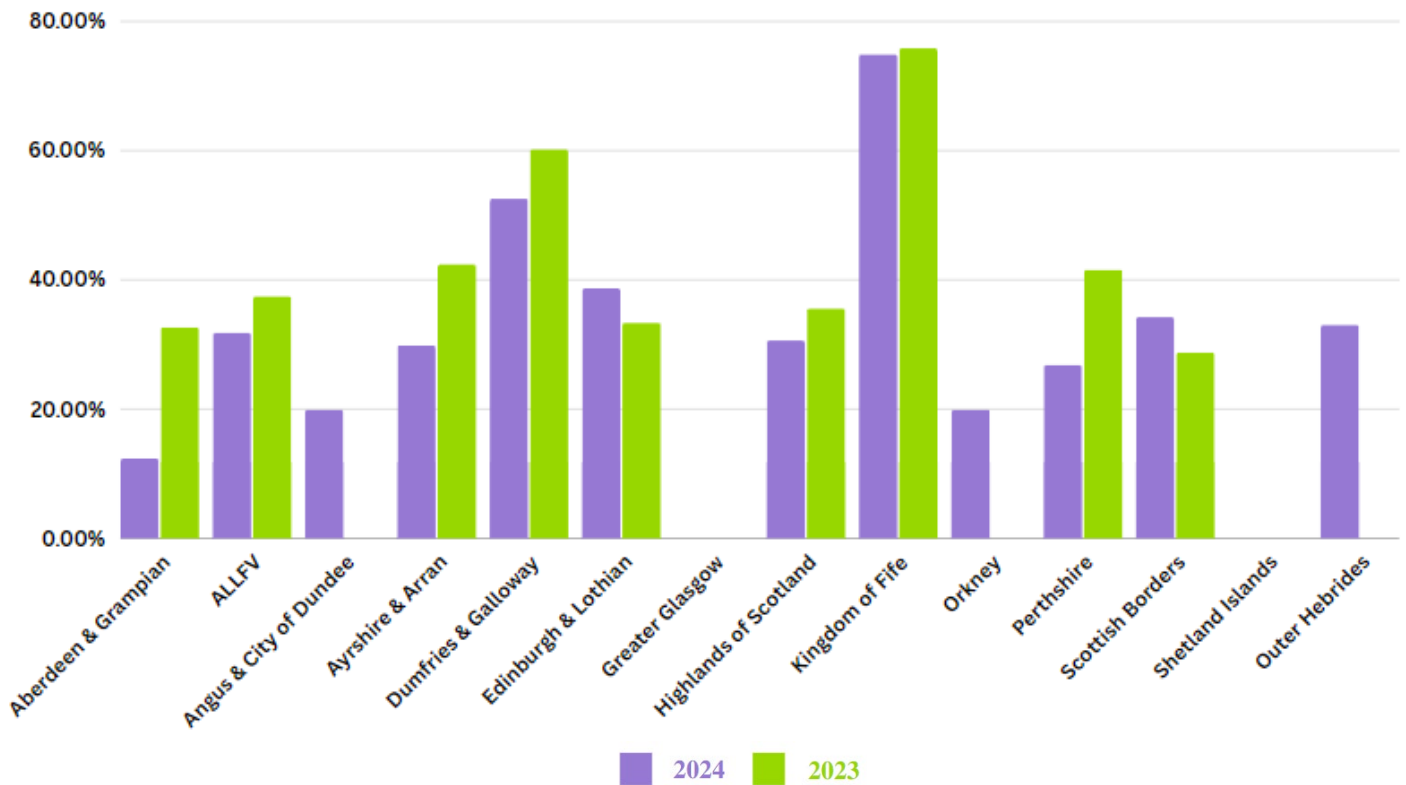


##### Touring Pitch Occupancy – Year-to-Date



## Pitch Occupancy by Former VisitScotland Area

### Touring Pitch Occupancy by Former VisitScotland Area – April 2024/2023



### Pitch by Occupancy Type – April 2024/2023

Occupancy Type	April 24	April 23	24/23 Diff <sup>1</sup>	Change <sup>2</sup>	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy <sup>3</sup>	31.80%	38.85%	-7.05	93	19.93%	29.56%	-9.63	90
Whole Park Occupancy	31.40%	37.77%	-6.37	94	18.76%	33.64%	-14.88	85
Caravan Pitch Occupancy	45.79%	53.56%	-7.77	92	31.52%	32.17%	-0.65	99
Tent Pitch Occupancy	13.33%	15.71%	-2.38	98	4.17%	4.56%	-0.39	100

### Touring Pitch Occupancy by Size – April 2024/2023

Size	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	29.54%	40.32%	-10.78	89	20.32%	23.43%	-3.11	97
50-99 pitches	28.00%	31.22%	-3.22	97	21.76%	27.45%	-5.69	94
100-199 pitches	37.69%	43.52%	-5.83	94	17.80%	32.36%	-14.56	85
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

<sup>1</sup> 24/23 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.

### Whole Park Occupancy by Size – April 2024/2023

Size	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	25.97%	10.65%	15.32	115	21.25%	10.65%	10.60	111
50-99 pitches	28.95%	30.56%	-1.61	98	18.69%	27.87%	-9.18	91
100-199 pitches	37.48%	42.49%	-5.01	95	17.10%	35.91%	-18.81	81
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Caravan Pitch Occupancy by Size – April 2024/2023

Size	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	52.74%	55.60%	-2.86	97	23.03%	28.64%	-5.61	94
50-99 pitches	0.00%	67.99%	-67.99	32	35.32%	29.42%	5.90	106
100-199 pitches	39.42%	48.49%	-9.07	91	39.42%	48.49%	-9.07	91
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Tent Pitch Occupancy by Size – April 2024/2023

Size	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	18.14%	27.30%	-9.16	91	6.45%	7.99%	-1.54	98
50-99 pitches	8.61%	12.76%	-4.15	96	2.15%	12.76%	-10.61	89
100-199 pitches	0.00%	0.00%	0.00	100	0.00%	0.24%	-0.24	100
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Touring Pitch Occupancy by Tariff – April 2024/2023

Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	30.74%	-	30.74	131	23.95%	*	23.95	124
£15 - £17.99	11.33%	*	-11.33	89	10.09%	21.62%	-11.53	88
£18 - £19.99	*	*	*	*	13.29%	*	4.07	104
£20 +	34.58%	40.04%	-5.46	95	20.53%	30.42%	-9.89	90
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

### Whole Park Occupancy by Tariff – April 2024/2023

Tariff	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	32.18%	-	32.18	132	24.83%	*	24.83	125
£15 - £17.99	7.88%	*	7.88	108	5.50%	0.00%	5.50	106
£18 - £19.99	*	*	*	*	13.29%	*	4.07	104
£20 +	34.35%	39.18%	-4.83	95	19.23%	34.41%	-15.18	85
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						



### Tent Pitch Occupancy by Location Type – April 2024/2023

Location Type	April 24	April 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	0.75%	0.87%	-0.12	100
Countryside - Village	13.15%	25.16%	-12.01	88	7.21%	11.77%	-4.56	95
Seaside - Coastal	14.39%	20.93%	-6.54	93	4.56%	14.78%	-10.22	90
Small Town	0.00%	*	0.00	100	0.00%	*	0.00	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					