

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

August 2024/2023 Report - TOURING

1.0 Introduction August 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering August 2024 and benchmarking against August 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).

2.0 Executive Summary August 2024

The SOAS Report: August 2024/2023 Touring report shows a decrease 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 **4.94** percentage point decrease in August 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 August 2024 is 2.2%, unchanged from July. The inflation 12-month rate (%) for August 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.0%. Inflation rates for restaurants and cafes were 4.3% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in August, however, compared to the 5.6% increase in August 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of August 2023, when they had increased by 8.6%.

Domestic consumer sentiment provided by the GB National Tourist Boards for August 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the July 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the July 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 August to September sector of 2024 and 79% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (74%). However, the three key barriers to taking an overnight UK trip in the next six months are the rising cost of living, UK weather, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Survey s(VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

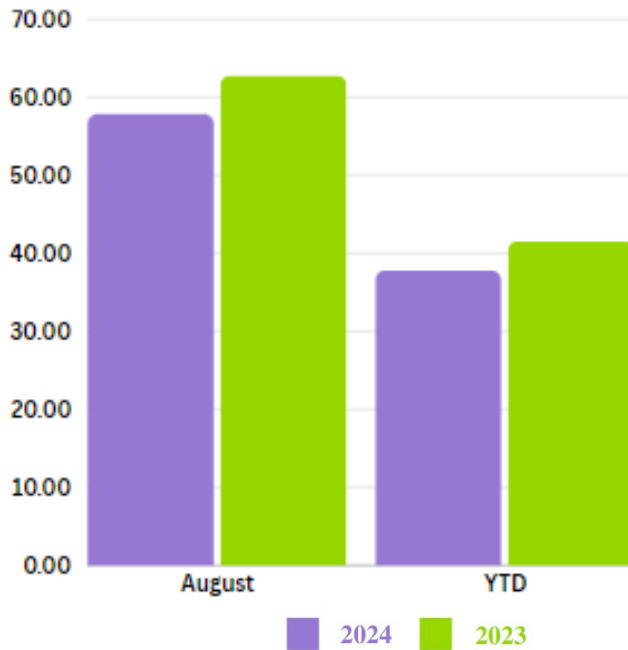
The recovery in international inbound visitation grew in August 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 1% increase when compared to the same period in 2023, however, UK air connectivity saw a 5% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

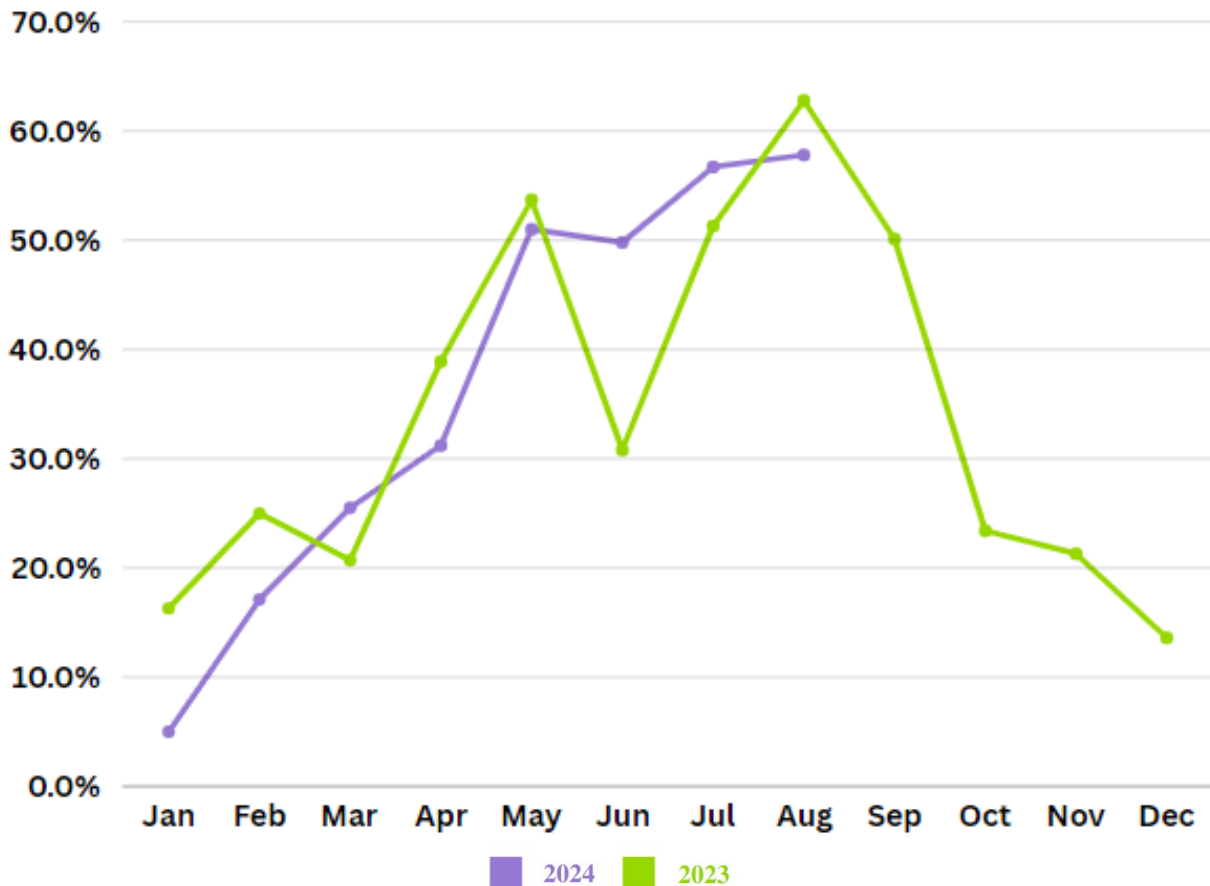
3.1 Performance by Touring Category

Touring Pitch Occupancy – August 2024/2023

Touring Net Pitch Occupancy was **57.84%** in August 2024 when compared to data from the previous year of a **62.78%** occupancy rate; this shows an overall percentage point decrease of **4.94**.

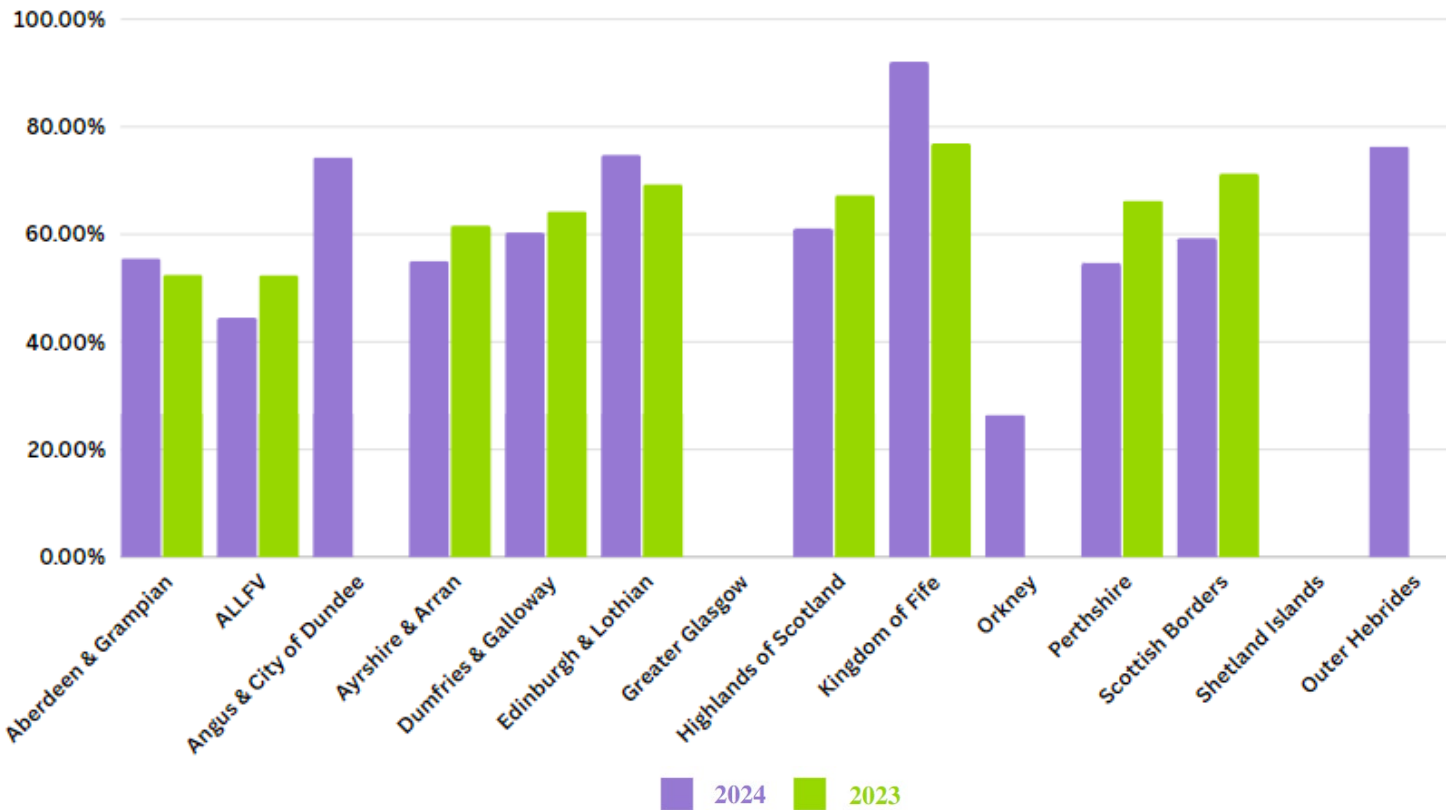


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

Touring Pitch Occupancy by Former VisitScotland Area – August 2024/2023



Pitch by Occupancy Type – August 2024/2023

Occupancy Type	August 24	August 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	57.84%	62.78%	-4.94	95	37.79%	41.54%	-3.75	96
Whole Park Occupancy	54.51%	60.34%	-5.83	94	36.84%	40.96%	-4.12	96
Caravan Pitch Occupancy	79.66%	75.64%	4.02	104	46.76%	50.89%	-4.13	96
Tent Pitch Occupancy	60.51%	62.46%	-1.95	98	28.18%	26.70%	1.48	101

Touring Pitch Occupancy by Size – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	59.90%	52.66%	7.24	107	32.92%	36.70%	-3.78	96
50-99 pitches	55.69%	60.92%	-5.23	95	36.95%	45.27%	-8.32	92
100-199 pitches	55.14%	65.38%	-10.24	90	40.12%	40.33%	-0.21	100
200 or more	-	*	*	*	*	*	*	*

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

¹ 24/23 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 – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	57.79%	28.73%	29.06	129	34.03%	30.37%	3.66	104
50-99 pitches	51.88%	56.51%	-4.63	95	36.71%	46.39%	-9.68	90
100-199 pitches	54.79%	65.45%	-10.66	89	38.35%	39.40%	-1.05	99
200 or more	-	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	76.35%	67.85%	8.50	109	30.17%	40.15%	-9.98	90
50-99 pitches	84.92%	89.99%	-5.07	95	45.37%	44.60%	0.77	101
100-199 pitches	58.80%	64.63%	-5.83	94	57.28%	61.81%	-4.53	95
200 or more	-	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – August 2024/2023

Size	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	64.48%	75.48%	-11.00	89	29.24%	36.70%	-7.46	93
50-99 pitches	71.52%	74.38%	-2.86	97	23.02%	45.27%	-22.25	78
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 – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	46.45%	-	46.45	146
£10 - £14.99	74.19%	*	-17.34	83	48.84%	76.69%	-27.85	72
£15 - £17.99	39.20%	*	-48.52	51	17.80%	26.28%	-8.48	92
£18 - £19.99	*	*	*	*	24.59%	23.30%	1.29	101
£20 +	58.36%	63.92%	-5.56	94	38.74%	41.99%	-3.25	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	46.45%	-	46.45	146
£10 - £14.99	76.35%	*	76.35	176	53.86%	0.00%	53.86	154
£15 - £17.99	23.21%	*	23.21	123	12.94%	0.00%	12.94	113
£18 - £19.99	*	*	*	*	23.44%	23.00%	0.44	100
£20 +	54.90%	61.88%	-6.98	93	37.26%	41.17%	-3.91	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	0.00%	-	0.00	100
£10 - £14.99	0.00%	*	0.00	100	20.03%	0.00%	20.03	120
£15 - £17.99	64.48%	*	64.48	164	15.48%	21.91%	-6.43	94
£18 -£19.99	*	*	*	*	49.19%	0.00%	49.19	149
£20 +	59.29%	75.64%	-16.35	84	52.56%	53.76%	-1.20	99
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – August 2024/2023

Tariff	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	0.00%	-	0.00	100
£10 - £14.99	55.27%	*	-36.26	64	30.56%	76.69%	-46.13	54
£15 - £17.99	81.93%	*	-5.79	94	57.52%	53.35%	4.17	104
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	59.29%	61.01%	-1.72	98	26.03%	25.59%	0.44	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – August 2024/2023

Location Type	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	40.40%	26.57%	13.83	114
Countryside - Village	56.07%	61.93%	-5.86	94	39.22%	42.22%	-3.00	97
Seaside - Coastal	52.69%	59.73%	-7.04	93	33.24%	49.97%	-16.73	83
Small Town	72.64%	*	-27.36	73	50.18%	59.31%	-9.13	91
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – August 2024/2023

Location Type	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	35.95%	18.88%	17.07	117
Countryside - Village	52.47%	57.97%	-5.50	95	38.87%	40.11%	-1.24	99
Seaside - Coastal	51.19%	58.81%	-7.62	92	32.55%	50.20%	-17.65	82
Small Town	72.64%	*	-27.36	73	50.18%	59.31%	-9.13	91
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – August 2024/2023

Location Type	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	56.04%	55.76%	0.28	100
Countryside - Village	68.99%	72.85%	-3.86	96	42.42%	48.92%	-6.50	94
Seaside - Coastal	76.93%	73.26%	3.67	104	43.73%	48.88%	-5.15	95
Small Town	0.00%	*	0.00	100	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 – August 2024/2023

Location Type	August 24	August 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	20.85%	13.48%	7.37	107
Countryside - Village	69.14%	76.10%	-6.96	93	33.50%	44.62%	-11.12	89
Seaside - Coastal	64.47%	68.24%	-3.77	96	37.28%	42.97%	-5.69	94
Small Town	0.00%	*	0.00	100	0.00%	0.00%	0.00	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					