

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

December 2024/2023 Report - TOURING

1.0 Introduction December 2024/2023

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering December 2024 and benchmarking against December 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 December 2024

The SOAS Report: December 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 **4.29** percentage point increase in December 2024 compared to last year.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to December 2024 is 2.5%, up from 2.6% in November. The CPI 12-month rate (%) for December 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.4% down from 3.6% in November. Inflation rates for restaurants and cafes were 3.4% down from 4.0% in November.

Data from the Scottish Retail Consortium showed that total sales in Scotland increased by 0.8% in December compared to the same period in 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering December 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (no change on the November 2024 survey). The survey recorded 46% of respondents (a 1% decrease on the November 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, 26% of UK adults intended to take a domestic overnight trip in the first quarter of 2025 and 80% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (78%). However, the three key barriers to taking an overnight UK trip in the next six months continue to be the UK weather, rising cost of living, and personal finances. The figures as mentioned earlier have been consistent across previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

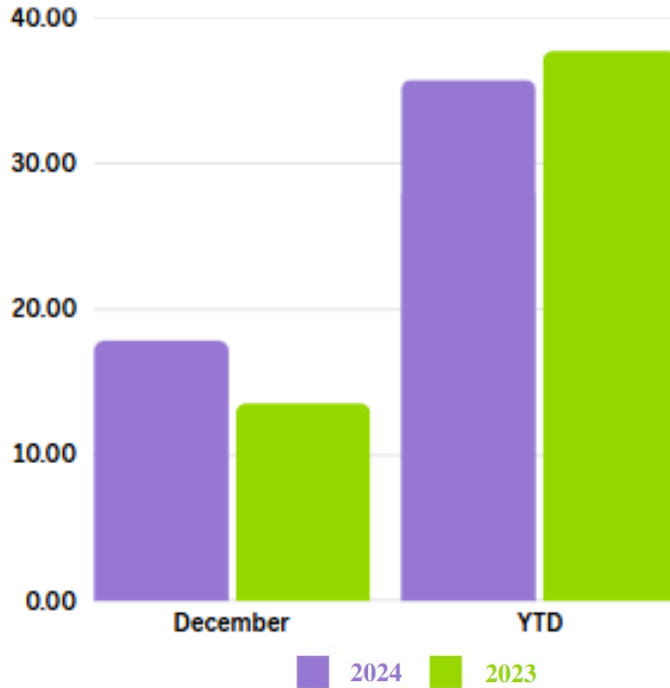
Eurocontrol (European Air Traffic Agency) indicated in December 2024 that UK air connectivity saw a 1% decrease when compared to the same period in 2023, also, UK air connectivity saw a 9% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for December 2024 global air passenger demand, measured by revenue per kilometer, was up 8.6% compared to December 2023. International demand rose 10.6% over the same period with domestic demand increasing 5.5%. Asia-Pacific region was the biggest global air passenger growth driver in December 2024 at 16.9% when compared to Europe at 8.7%.

3.0 Touring Accommodation

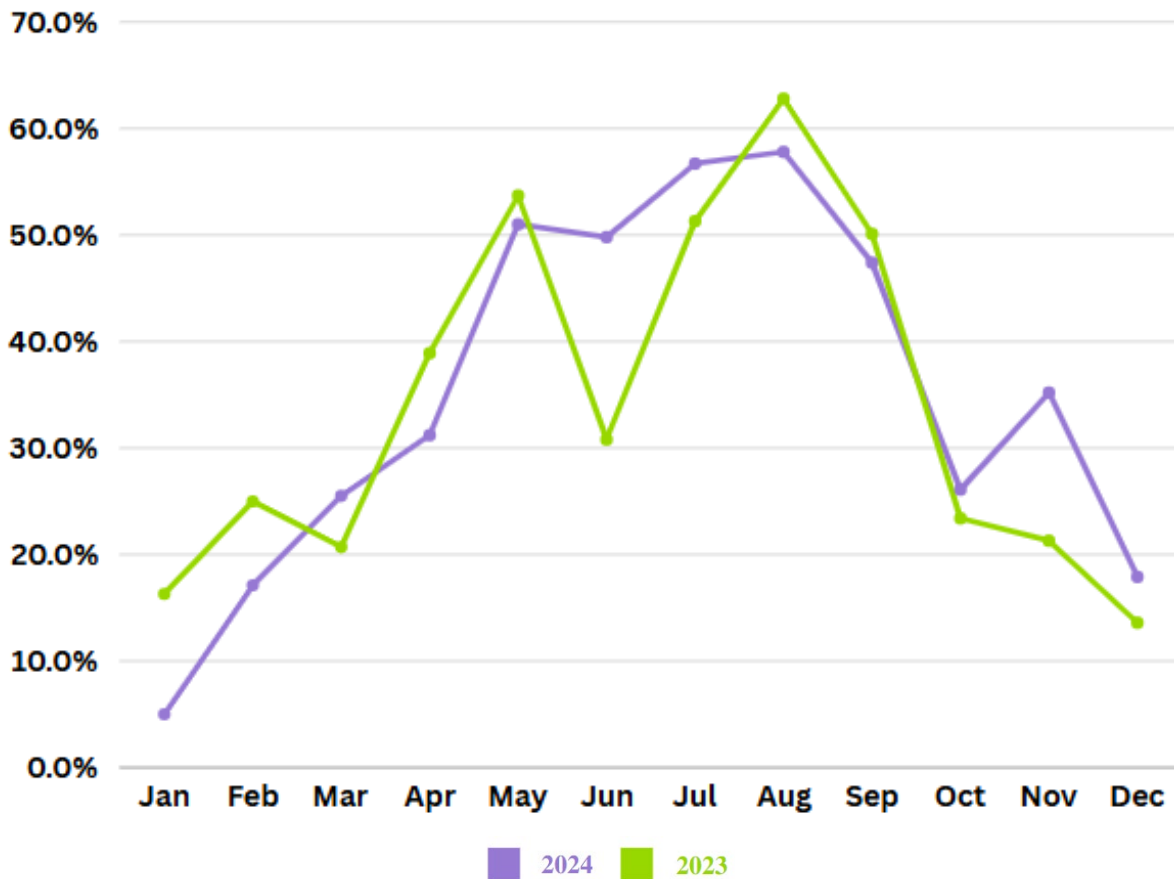
3.1 Performance by Touring Category

Touring Pitch Occupancy – December 2024/2023

Touring Net Pitch Occupancy was **17.85%** in December 2024 when compared to data from the previous year of a **13.56%** occupancy rate; this shows an overall percentage point increase of **4.29**.



Touring Pitch Occupancy – Year-to-Date



Whole Park Occupancy by Size – December 2024/2023

Size	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	15.33%	7.09%	8.24	108	29.74%	25.08%	4.66	105
50-99 pitches	*	*	*	*	38.58%	42.20%	-3.62	96
100-199 pitches	14.50%	*	3.00	103	35.32%	36.21%	-0.89	99
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – December 2024/2023

Size	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	13.35%	12.99%	0.36	100	34.58%	33.83%	0.75	101
50-99 pitches	*	*	*	*	46.91%	47.12%	-0.21	100
100-199 pitches	0.00%	*	0.00	100	50.07%	56.02%	-5.95	94
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – December 2024/2023

Size	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	0.00%	2.25%	-2.25	98	26.86%	26.35%	0.51	101
50-99 pitches	*	*	*	*	16.80%	26.06%	-9.26	91
100-199 pitches	0.00%	*	0.00	100	0.00%	2.51%	-2.51	97
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – December 2024/2023

Tariff	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	*	*	*	29.35%	*	12.15	112
£10 - £14.99	*	*	*	*	46.47%	19.84%	26.63	127
£15 - £17.99	*	-	*	*	17.16%	26.49%	-9.33	91
£18 - £19.99	-	*	*	*	27.07%	22.48%	4.59	105
£20 +	18.37%	13.52%	4.85	105	36.16%	38.14%	-1.98	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – December 2024/2023

Tariff	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	*	*	*	29.35%	*	12.15	112
£10 - £14.99	*	*	*	*	51.26%	16.62%	34.64	135
£15 - £17.99	*	-	*	*	12.91%	0.00%	12.91	113
£18 - £19.99	-	*	*	*	26.19%	22.42%	3.77	104
£20 +	19.10%	11.10%	8.00	108	34.83%	37.58%	-2.75	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – December 2024/2023

Location Type	Dec 24	Dec 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	16.90%	25.45%	-8.55	91
Countryside - Village	0.00%	0.00%	0.00	100	27.12%	40.09%	-12.97	87
Seaside - Coastal	0.00%	3.22%	-3.22	97	26.06%	41.12%	-15.06	85
Small Town	*	*	*	*	0.00%	55.40%	-55.40	45
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					