

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

February 2024/2023 Report - TOURING

1.0 Introduction February 2024/2023

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

The SOAS Report: February 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 an **8.38** percentage point decrease in February 2024 compared to last year.

Data from the Scottish Retail Consortium showed that total sales remained weak in February with growth of just 1.4%, however when adjusted for inflation, the year-on-year decline was 1.1%. Total food sales continued to drive sales, with a 3% increase compared to the monthly performance of February 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for February 2024 found that 21% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 2% increase on the January 2024 survey). The survey recorded 49% of respondents (a 1% increase on the January 2024 Survey) saying they were "...cautious - things are ok but I feel I have to be very careful".

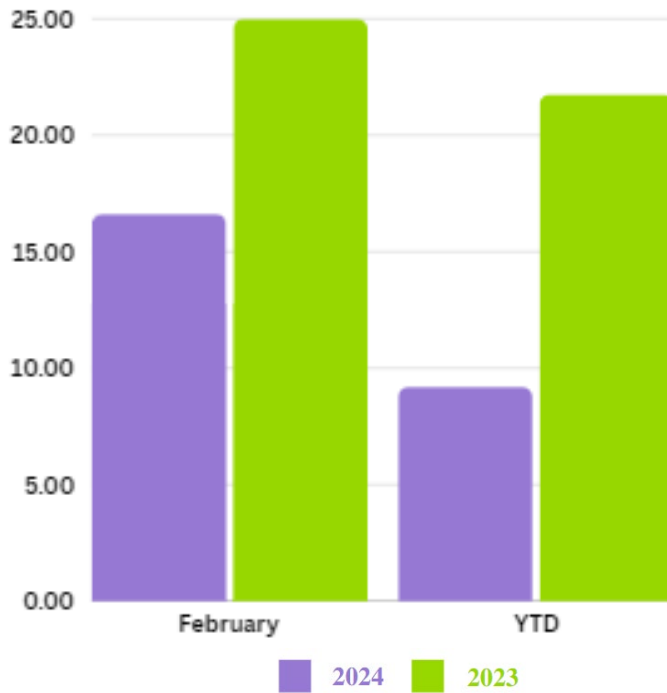
Despite consumer concern about the state of the economy, 18% of UK adults intended to take a domestic overnight trip in the first quarter of 2024 and 81% in the following 12 months. These figures show a significant increase in those planning an overnight trip compared with February 2023 (11% and 72% respectively). 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 figures above have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

The recovery in international inbound visitation continued to grow in February 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 6% increase when compared to the same period in 2023, however, UK air connectivity saw a 10% decrease in year-to-date flights compared to 2019.

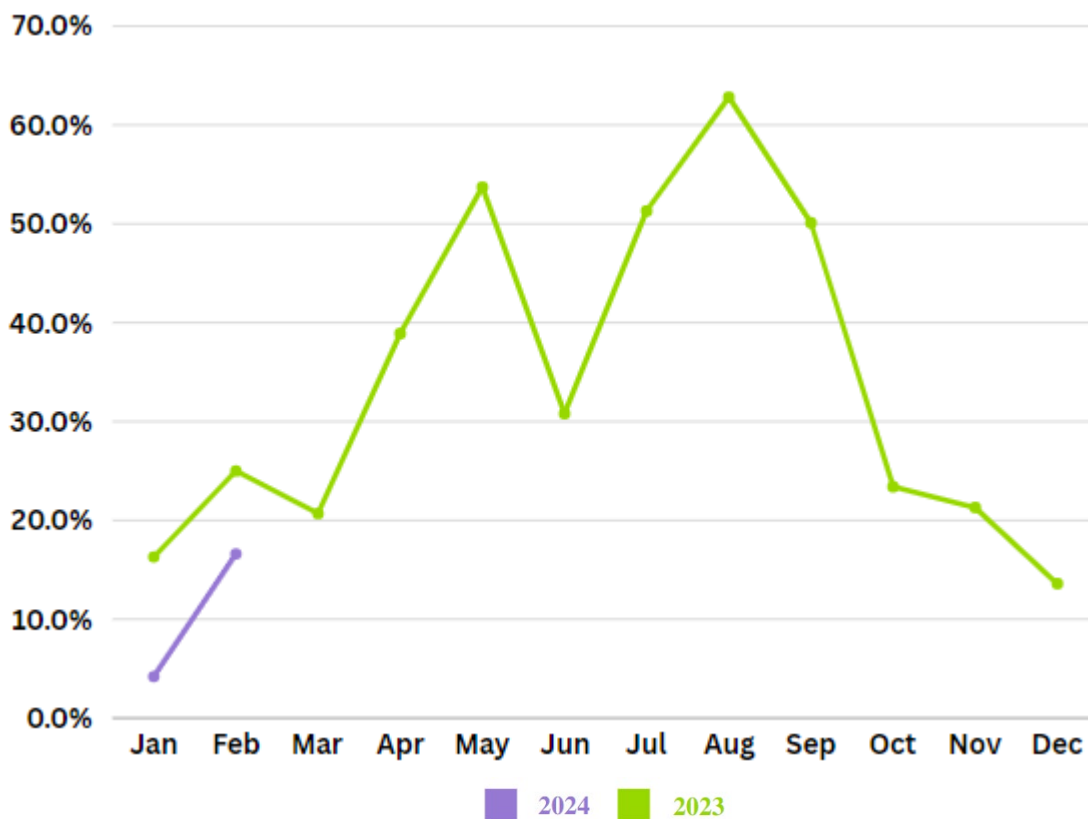
3.0 Touring Accommodation
3.1 Performance by Touring Category

Touring Pitch Occupancy – February 2024/2023

Touring Net Pitch Occupancy was **16.62%** in February 2024 when compared to data from the previous year of a **25.00%** occupancy rate; this shows an overall percentage point decrease of **8.38**.



Touring Pitch Occupancy – Year-to-Date



Whole Park Occupancy by Size – February 2024/2023

Size	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	3.30%	0.00%	3.30	103	8.72%	0.00%	8.72	109
50-99 pitches	*	*	*	*	7.47%	0.00%	7.47	107
100-199 pitches	*	*	*	*	0.75%	29.79%	-29.04	71
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – February 2024/2023

Size	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	14.10%	24.43%	-10.33	90	13.90%	22.67%	-8.77	91
50-99 pitches	*	*	*	*	34.92%	25.62%	9.30	109
100-199 pitches	*	*	*	*	0.00%	0.00%	0.00	100
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – February 2024/2023

Size	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	1.39%	3.34%	-1.95%	98	2.17%	3.41%	-1.24%	99
50-99 pitches	*	*	*	*	0.31%	0.00%	0.31%	100
100-199 pitches	*	*	*	*	0.00%	0.27%	-0.27%	100
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – February 2024/2023

Tariff	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	5.02%	*	5.02	105
£15 - £17.99	-	*	*	*	*	*	*	*
£18 - £19.99	*	-	*	*	*	*	*	*
£20 +	16.80%	25.96%	-9.16	91	9.24%	21.84%	-12.60	87
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – February 2024/2023

Tariff	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	5.02%	*	5.02	105
£15 - £17.99	-	*	*	*	*	*	*	*
£18 - £19.99	*	-	*	*	*	*	*	*
£20 +	8.21%	36.75%	-28.54	71	4.23%	29.79%	-25.56	74
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – February 2024/2023

Tariff	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	0.00%	*	0.00	100
£15 - £17.99	-	*	*	*	*	*	*	*
£18 -£19.99	*	-	*	*	*	*	*	*
£20 +	44.78%	29.49%	15.29	115	30.92%	25.40%	5.52	106
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – February 2024/2023

Tariff	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	0.00%	*	0.00	100
£15 - £17.99	-	*	*	*	*	*	*	*
£18 -£19.99	*	-	*	*	*	*	*	*
£20 +	0.73%	0.93%	0.20	100	1.03%	0.85%	0.18	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – February 2024/2023

Location Type	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	16.24%	13.77%	2.47	102
Countryside - Village	32.94%	29.28%	3.66	104	14.46%	26.01%	-11.55	88
Seaside - Coastal	3.80%	14.38%	-10.58	89	2.28%	13.14%	-10.86	89
Small Town	*	-	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – February 2024/2023

Location Type	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	6.84%	16.10%	-9.26	91
Countryside - Village	20.42%	36.75%	-16.33	84	8.92%	30.60%	-21.68	78
Seaside - Coastal	2.19%	0.00%	2.19	102	1.05%	0.00%	1.05	101
Small Town	*	-	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – February 2024/2023

Location Type	February 24	February 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	35.19%	30.66%	4.53	105
Countryside - Village	68.54%	25.25%	43.29	143	26.99%	23.52%	3.47	103
Seaside - Coastal	14.10%	15.40%	-1.30	99	15.04%	13.74%	1.30	101
Small Town	*	-	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

