

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

January 2024/2023 Report - TOURING

1.0 Introduction January 2024/2023

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

The SOAS Report: January 2024/2023 Touring report shows an increase in the Touring sector in Scotland when compared to the same period in 2023. Touring Pitch Occupancy rates within the Touring sector experienced a **12.13** percentage point decrease in January 2024 compared to last year.

Data from the Scottish Retail Consortium showed that total sales remained weak in January with growth of just 1.9%. Total food sales continued to drive sales, with a 5.4% increase when compared with monthly performance in January 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for December 2023 found that 19% of respondents said they were "...been hit hard - no option but to cut back on spending" (a 2% decrease on the December 2023 survey). The survey recorded 48% of respondents (a 1% decrease on the December 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, 21% of UK adults intended to take a domestic overnight trip in the first quarter of 2024 and 79% in the following 12 months. These figures show a significant increase in those planning an overnight trip compared with January 2023 (16% and 70% respectively). However, the key three barriers to taking an overnight UK trip in the next six months continue to be 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.

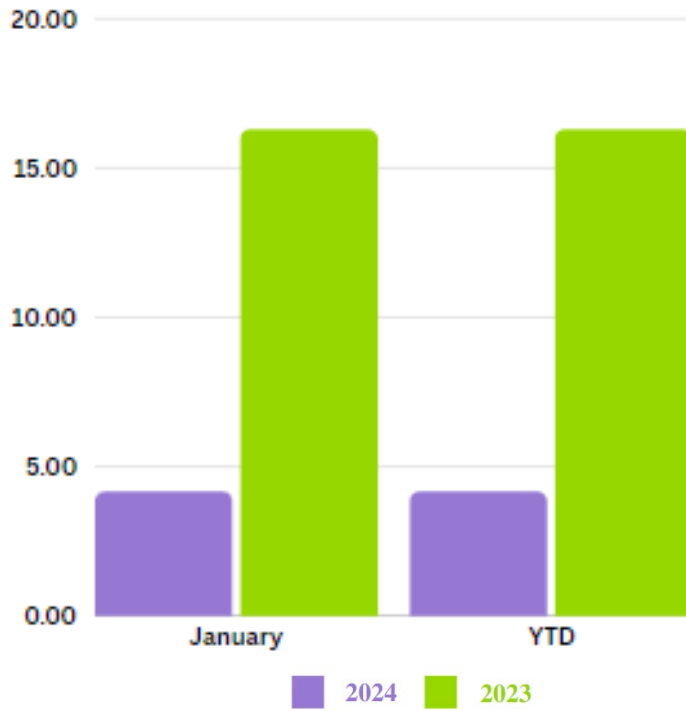
The recovery in international inbound visitation continued to stall in December 2023; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 3% increase when compared to the same period in 2023, however, UK air connectivity had seen a 11% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

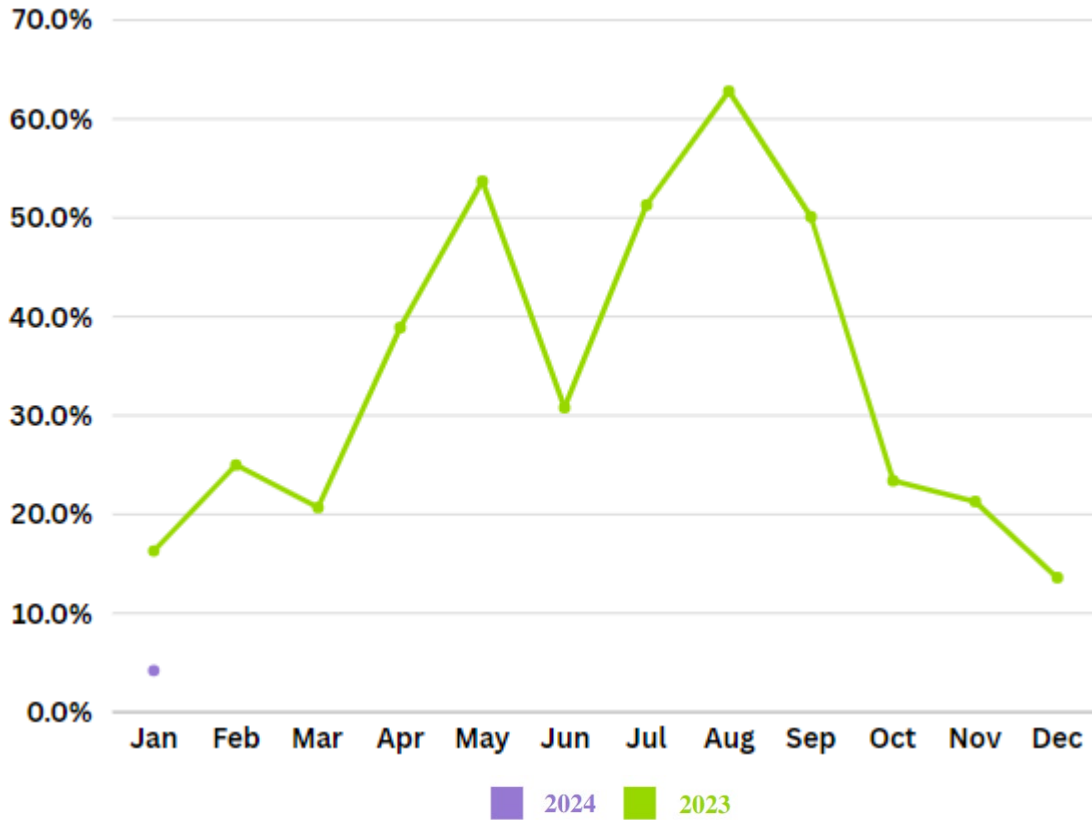
3.1 Performance by Touring Category

Touring Pitch Occupancy – January 2024/2023

Touring Pitch Occupancy was **4.18%** in January 2024 when compared to data from the previous year of a **16.31%** occupancy rate; this shows an overall percentage point decrease of **12.13**.

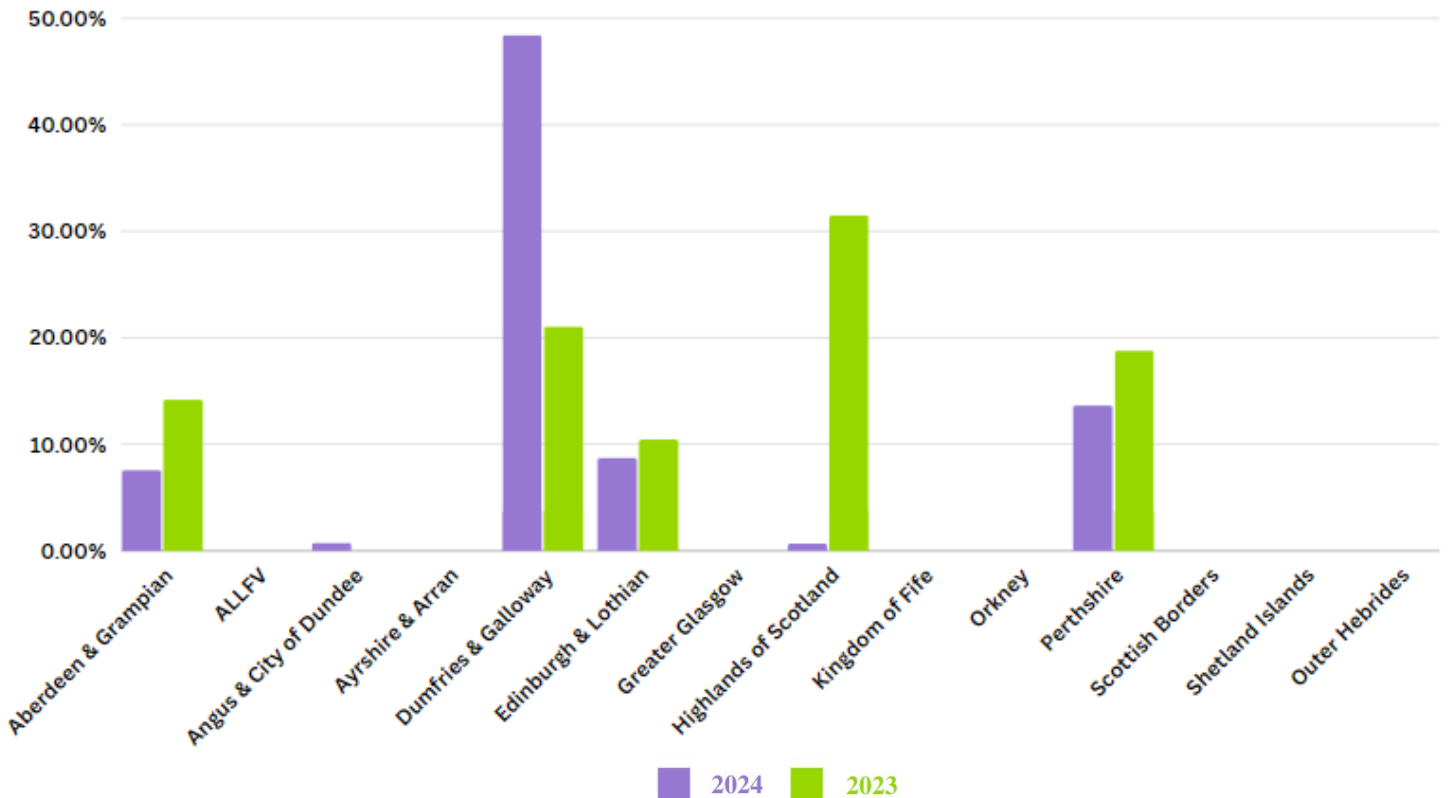


Touring Pitch Occupancy – Year-to-Date



Room Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – January 2024/2023

Occupancy Type	January 24	January 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	4.18%	16.31%	-12.13	88	4.18%	16.31%	-12.13	88
Whole Park Occupancy	1.83%	21.09%	-19.26	81	1.83%	21.09%	-19.26	81
Caravan Pitch Occupancy	13.31%	19.31%	-6.00	94	13.31%	19.31%	-6.00	94
Tent Pitch Occupancy	1.50%	0.75%	0.75	101	1.50%	0.75%	0.75	101

Touring Pitch Occupancy by Size – January 2024/2023

Size	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	13.04%	13.81%	-0.77	99	13.04%	13.81%	-0.77	99
50-99 pitches	3.90%	20.74%	-16.84	83	3.90%	20.74%	-16.84	83
100-199 pitches	0.03%	14.95%	-14.92	85	0.03%	14.95%	-14.92	85
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Size – January 2024/2023

Size	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	13.92%	0.00%	13.92	114	13.92%	0.00%	13.92	114
50-99 pitches	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
100-199 pitches	0.03%	21.09%	-21.06	79	0.03%	21.09%	-21.06	79
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – January 2024/2023

Size	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	13.82%	16.37%	-2.55	97	13.82%	16.37%	-2.55	97
50-99 pitches	12.89%	20.74%	-7.85	92	12.89%	20.74%	-7.85	92
100-199 pitches	0.00%	0.00%	0.00	100	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 – January 2024/2023

Size	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	3.38%	3.53%	-0.15	100	3.38%	3.53%	-0.15	100
50-99 pitches	0.26%	0.00%	0.26	100	0.26%	0.00%	0.26	100
100-199 pitches	0.00%	0.21%	-0.21	100	0.00%	0.21%	-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.

Touring Pitch Occupancy by Tariff – January 2024/2023

Tariff	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	3.61%	16.03%	-12.42	88	3.61%	16.03%	-12.42	88
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – January 2024/2023

Tariff	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	1.86%	21.09%	-19.23	81	1.86%	21.09%	-19.23	81
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – January 2024/2023

Tariff	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	13.52%	18.99%	-5.47	95	13.52%	18.99%	-5.47	95
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – January 2024/2023

Tariff	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	*	*	*	*	*	*	*	*
£15 - £17.99	*	*	*	*	*	*	*	*
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	1.50%	0.75%	0.75	101	1.50%	0.75%	0.00	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – January 2024/2023

Location Type	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	*	*	*	*
Countryside - Village	4.95%	19.72%	-14.77	85	4.95%	19.72%	-14.77	85
Seaside - Coastal	1.33%	10.78%	-9.45	91	1.33%	10.78%	-9.45	91
Small Town	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – January 2024/2023

Location Type	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	*	*	*	*
Countryside - Village	2.69%	21.80%	-19.11	81	2.69%	21.80%	-19.11	81
Seaside - Coastal	0.43%	0.00%	0.43	100	0.43%	0.00%	0.43	100
Small Town	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – January 2024/2023

Location Type	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	*	*	*	*
Countryside - Village	9.22%	18.71%	-9.49	91	9.22%	18.71%	-9.49	91
Seaside - Coastal	16.56%	10.78%	5.78	106	16.56%	10.78%	5.78	106
Small Town	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – January 2024/2023

Location Type	January 24	January 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	*	*	*	*
Countryside - Village	3.38%	3.53%	-0.15	100	3.38%	3.53%	-0.15	100
Seaside - Coastal	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
Small Town	*	*	*	*	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						