

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

July 2024/2023 Report - TOURING

1.0 Introduction July 2024/2023

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

The SOAS Report: July 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 **5.26** percentage point increase in July 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 July 2024 is 2.2%. The inflation rate for July 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.7%. Inflation rates for restaurants and cafes were 4.9% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -1.2% in July, however, compared to the 4.6% increase in July 2023 this was disappointing growth in total sales. Total food sales decreased by -0.3% compared to the monthly performance of July 2023, when they had increased by 9.1%.

Domestic consumer sentiment provided by the GB National Tourist Boards for July 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 2% decrease on the June 2024 survey). The survey recorded 47% of respondents (a 3% increase on the June 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, 51% of UK adults intended to take a domestic overnight trip in the third quarter of 2024 and 77% in the following 12 months. These figures show an increase in those planning an overnight trip compared with the previous 12 months (75%). 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 the last six 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.

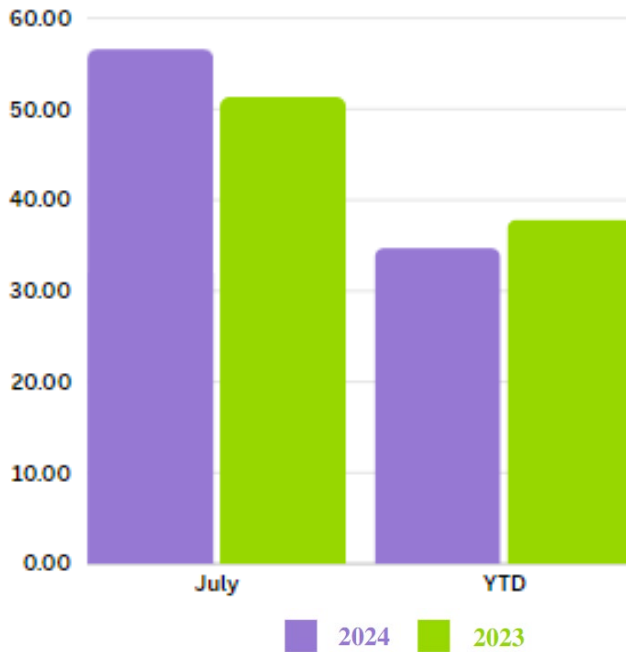
The recovery in international inbound visitation grew in July 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

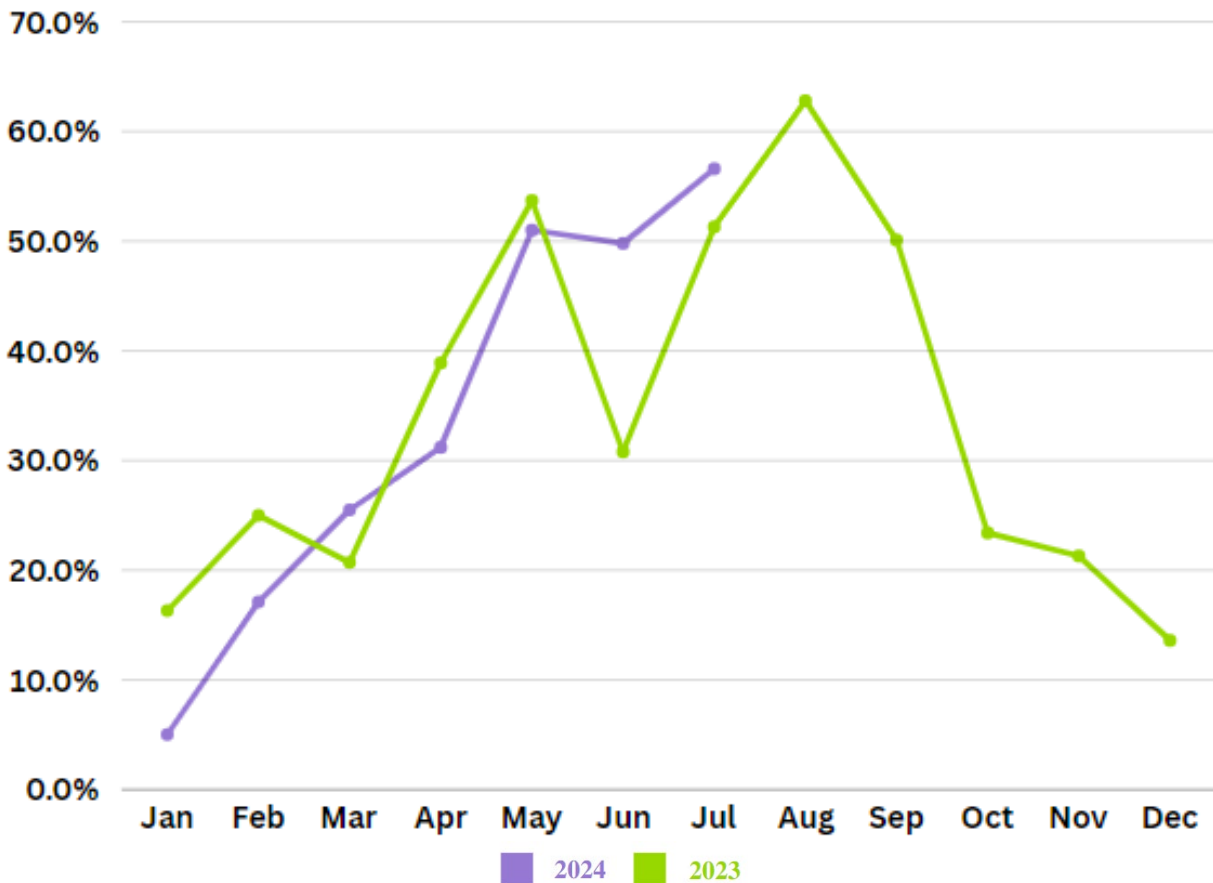
3.1 Performance by Touring Category

Touring Pitch Occupancy – July 2024/2023

Touring Net Pitch Occupancy was **56.60%** in July 2024 when compared to data from the previous year of a **51.34%** occupancy rate; this shows an overall percentage point increase of **5.26**.

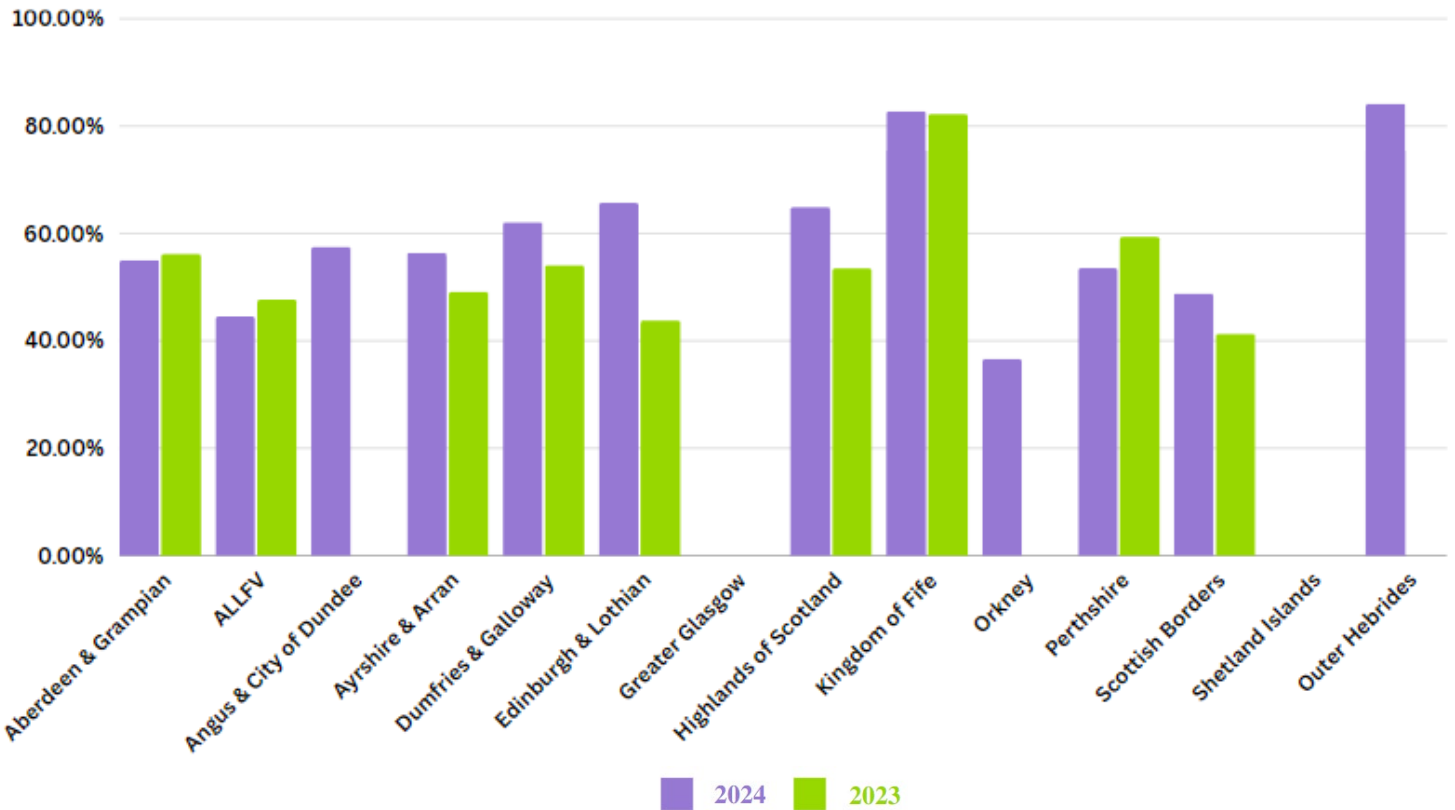


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – July 2024/2023

| Occupancy Type | July 24 | July 23 | 24/23 Diff ¹ | Change ² | YTD 24 | YTD 23 | 24/23 Diff | Change |
|--------------------------------------|---------|---------|-------------------------|---------------------|--------|--------|------------|--------|
| Touring Pitch Occupancy ³ | 56.60% | 51.34% | 5.26 | 105 | 34.72% | 37.86% | -3.14 | 97 |
| Whole Park Occupancy | 53.68% | 49.02% | 4.66 | 105 | 34.06% | 37.47% | -3.41 | 97 |
| Caravan Pitch Occupancy | 73.71% | 71.17% | 2.54 | 103 | 43.05% | 47.37% | -4.32 | 96 |
| Tent Pitch Occupancy | 61.59% | 38.75% | 22.84 | 123 | 21.45% | 20.23% | 1.22 | 101 |

Touring Pitch Occupancy by Size – July 2024/2023

| Size | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------|---------|---------|------------|--------|--------|--------|------------|--------|
| 1-49 pitches | 56.33% | 53.73% | 2.60 | 103 | 29.28% | 34.42% | -5.14 | 95 |
| 50-99 pitches | 54.54% | 51.59% | 2.95 | 103 | 34.55% | 42.22% | -7.67 | 92 |
| 100-199 pitches | 58.43% | 54.89% | 3.54 | 104 | 37.72% | 36.76% | 0.96 | 101 |
| 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 – July 2024/2023

| Size | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| 1-49 pitches | 52.66% | 33.69% | 18.97 | 119 | 30.32% | 30.83% | -0.51 | 99 |
| 50-99 pitches | 51.45% | 46.56% | 4.89 | 105 | 34.39% | 43.93% | -9.54 | 90 |
| 100-199 pitches | 55.85% | 52.78% | 3.07 | 103 | 35.72% | 35.47% | 0.25 | 100 |
| 200 or more | - | * | * | * | * | * | * | * |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Caravan Pitch Occupancy by Size – July 2024/2023

| Size | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| 1-49 pitches | 68.71% | 77.45% | -8.74 | 91 | 27.59% | 37.78% | -10.19 | 90 |
| 50-99 pitches | 83.62% | 81.01% | 2.61 | 103 | 43.18% | 40.96% | 2.22 | 102 |
| 100-199 pitches | 72.27% | 77.45% | -5.18 | 95 | 57.05% | 61.45% | -4.40 | 96 |
| 200 or more | - | * | * | * | * | * | * | * |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Tent Pitch Occupancy by Size – July 2024/2023

| Size | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| 1-49 pitches | 65.28% | 67.03% | -1.75 | 98 | 24.67% | 29.06% | -4.39 | 96 |
| 50-99 pitches | 59.81% | 78.03% | -18.22 | 82 | 19.21% | 33.81% | -14.60 | 85 |
| 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 – July 2024/2023

| Tariff | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Under £10 | * | - | * | * | 42.52% | - | 42.52 | 143 |
| £10 - £14.99 | 68.85% | * | -6.11 | 94 | 44.26% | 68.07% | -23.81 | 76 |
| £15 - £17.99 | 33.06% | * | -53.45 | 47 | 16.35% | 24.52% | -8.17 | 92 |
| £18 - £19.99 | 35.91% | * | 7.74 | 108 | 23.77% | 21.70% | 2.07 | 102 |
| £20 + | 57.95% | 51.10% | 6.85 | 107 | 35.66% | 38.16% | -2.50 | 98 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Whole Park Occupancy by Tariff – July 2024/2023

| Tariff | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Under £10 | * | - | * | * | 42.52% | - | 42.52 | 143 |
| £10 - £14.99 | 70.61% | * | 70.61 | 171 | 49.35% | 0.00% | 49.35 | 149 |
| £15 - £17.99 | 21.50% | * | 21.50 | 122 | 11.79% | 0.00% | 11.79 | 112 |
| £18 - £19.99 | 32.81% | * | 4.64 | 105 | 22.38% | 21.70% | 0.68 | 101 |
| £20 + | 54.86% | 48.72% | 6.14 | 106 | 34.50% | 37.48% | -2.98 | 97 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Caravan Pitch Occupancy by Tariff – July 2024/2023

| Tariff | July 24 | July 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 | 64.43% | * | 64.43 | 164 | 15.22% | 21.91% | -6.69 | 93 |
| £18 -£19.99 | 49.19% | * | 49.19 | 149 | 49.19% | 0.00% | 49.19 | 149 |
| £20 + | 76.08% | 71.17% | 4.91 | 105 | 48.82% | 50.28% | -1.46 | 99 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Tent Pitch Occupancy by Tariff – July 2024/2023

| Tariff | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|---------------------|---------|---|------------|--------|--------|--------|------------|--------|
| Under £10 | * | - | * | * | 0.00% | - | 0.00 | 100 |
| £10 - £14.99 | 49.04% | * | -25.92 | 74 | 25.58% | 68.07% | -42.49 | 58 |
| £15 - £17.99 | 74.91% | * | -11.60 | 88 | 51.82% | 44.71% | 7.11 | 107 |
| £18 -£19.99 | 0.00% | * | 0.00 | 100 | 0.00% | 0.00% | 0.00 | 100 |
| £20 + | 61.21% | 36.75% | 24.46 | 124 | 19.14% | 19.30% | -0.16 | 100 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Touring Pitch Occupancy by Location Type – July 2024/2023

| Location Type | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------|---|------------|--------|--------|--------|------------|--------|
| City - Large Town | * | * | * | * | 35.94% | 22.21% | 13.73 | 114 |
| Countryside - Village | 53.95% | 53.25% | 0.70 | 101 | 36.72% | 39.00% | -2.28 | 98 |
| Seaside - Coastal | 54.82% | 52.07% | 2.75 | 103 | 30.50% | 47.65% | -17.15 | 83 |
| Small Town | 65.76% | * | 16.93 | 117 | 45.36% | 50.18% | -4.82 | 95 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Whole Park Occupancy by Location Type – July 2024/2023

| Location Type | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------|---|------------|--------|--------|--------|------------|--------|
| City - Large Town | * | * | * | * | 33.18% | 15.64% | 17.54 | 118 |
| Countryside - Village | 49.51% | 48.41% | 1.10 | 101 | 36.70% | 37.10% | -0.40 | 100 |
| Seaside - Coastal | 53.71% | 49.41% | 4.30 | 104 | 29.93% | 48.06% | -18.13 | 82 |
| Small Town | 56.76% | * | 7.93 | 108 | 45.36% | 50.18% | -4.82 | 95 |
| - Sample Size = Nil | | *Sample Size (between 1 and 4) too small to be included | | | | | | |

Caravan Pitch Occupancy by Location Type – July 2024/2023

| Location Type | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------|---|------------|--------|--------|--------|------------|--------|
| City - Large Town | * | * | * | * | 50.91% | 51.79% | -0.88 | 99 |
| Countryside - Village | 70.79% | 65.97% | 4.82 | 105 | 39.52% | 45.61% | -6.09 | 94 |
| Seaside - Coastal | 68.83% | 82.82% | -13.99 | 86 | 40.17% | 45.52% | -5.35 | 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 – July 2024/2023

| Location Type | July 24 | July 23 | 24/23 Diff | Change | YTD 24 | YTD 23 | 24/23 Diff | Change |
|-----------------------|---------------------|---------|---|--------|--------|--------|------------|--------|
| City - Large Town | * | * | * | * | 12.60% | 7.01% | 5.59 | 106 |
| Countryside - Village | 75.20% | 75.55% | -0.35 | 100 | 28.18% | 38.64% | -10.46 | 90 |
| Seaside - Coastal | 59.95% | 64.04% | -4.09 | 96 | 28.84% | 36.50% | -7.66 | 92 |
| 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 | | | | | |