

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

June 2024/2023 Report - TOURING

1.0 Introduction June 2024/2023

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

The SOAS Report: June 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 **18.95** percentage point increase in June 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 June 2024 is 2.0%. The inflation rate for June 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.9%. Inflation rates for restaurants and cafes were 6.2% for the same period.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.6% in June, however, compared to the 8.8% increase in June 2023 this was disappointing growth in total sales. Total food sales decreased by 1.1% compared to the monthly performance of June 2023, when they had increased by 15.8%.

Domestic consumer sentiment provided by the GB National Tourist Boards for June 2024 found that 21% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the May 2024 survey). The survey recorded 44% of respondents (a 2% decrease on the May 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, 55% 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 (74%). 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 five 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.

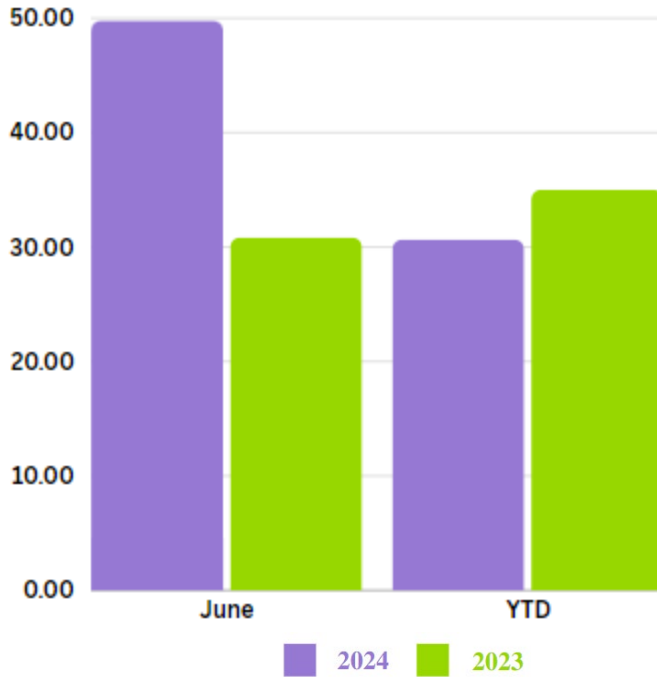
The recovery in international inbound visitation stalled in June 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw no increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

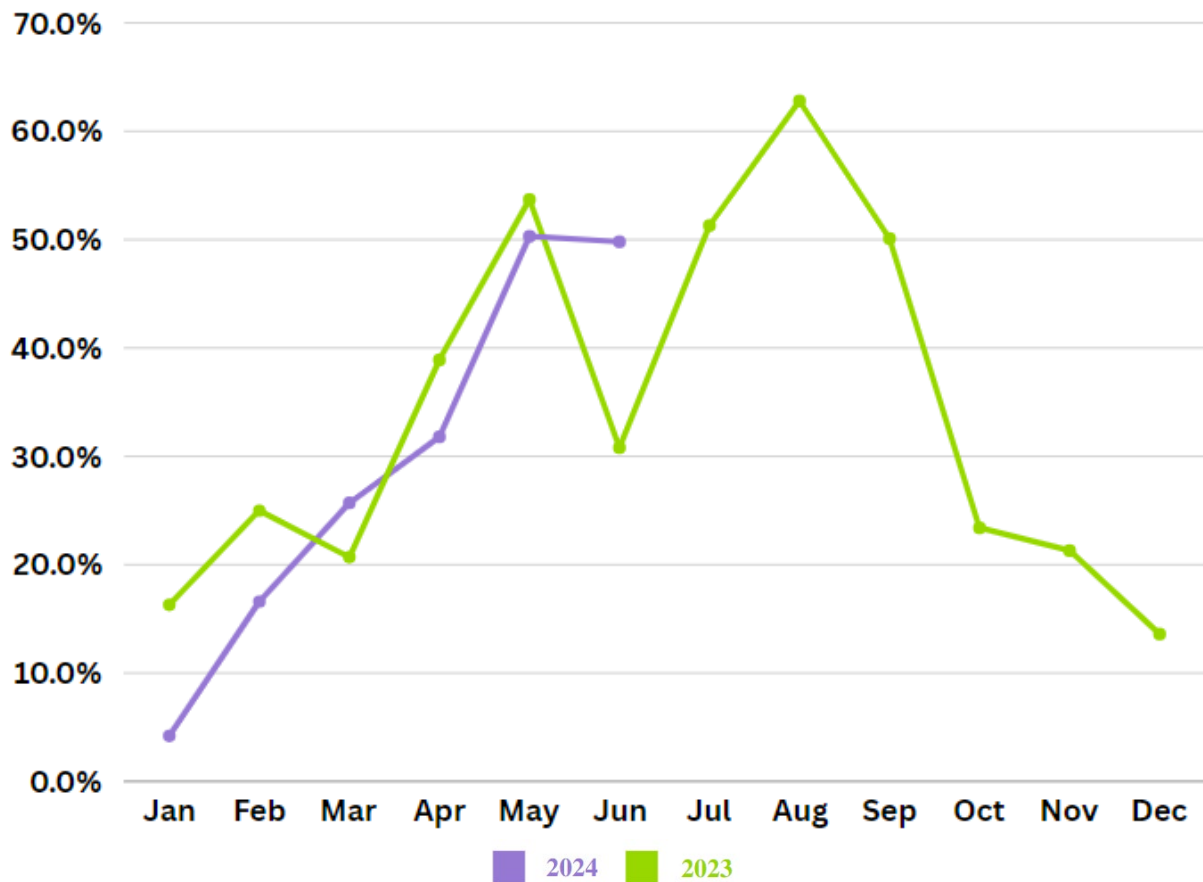
3.1 Performance by Touring Category

Touring Pitch Occupancy – June 2024/2023

Touring Net Pitch Occupancy was **49.79%** in April 2024 when compared to data from the previous year of a **30.84%** occupancy rate; this shows an overall percentage point increase of **18.95**.

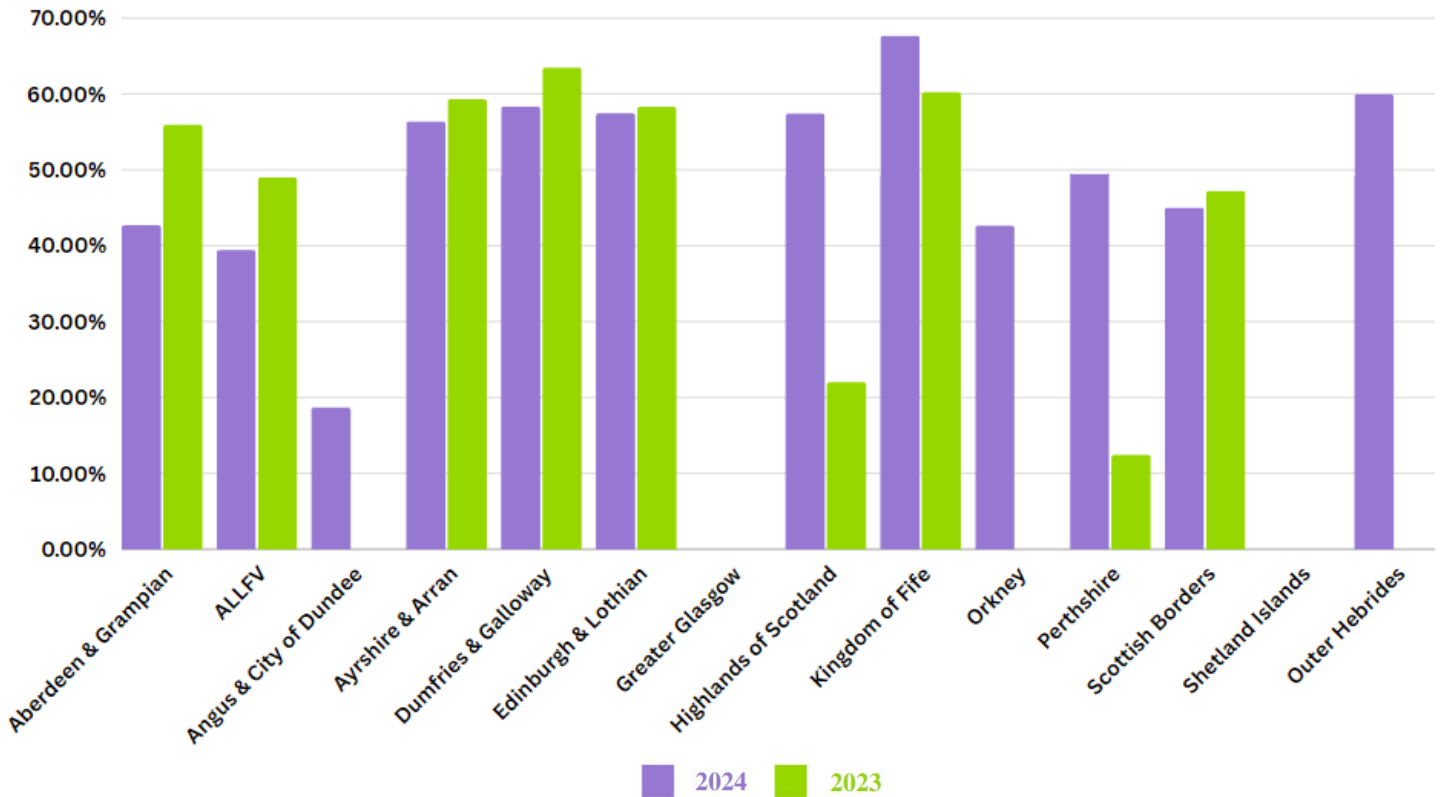


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – June 2024/2023

Occupancy Type	June 24	June 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	49.79%	30.84%	18.95	119	30.66%	35.02%	-4.36	96
Whole Park Occupancy	48.49%	26.83%	21.66	122	30.07%	34.91%	-4.84	95
Caravan Pitch Occupancy	63.32%	69.92%	-6.60	93	39.72%	43.52%	-3.80	96
Tent Pitch Occupancy	39.24%	43.47%	-4.23	96	16.01%	16.14%	-0.13	100

Touring Pitch Occupancy by Size – June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	42.69%	42.71%	-0.02	100	26.07%	30.02%	-3.95	96
50-99 pitches	46.25%	55.28%	-9.03	91	31.12%	40.01%	-8.89	91
100-199 pitches	53.97%	24.09%	29.88	130	32.66%	33.53%	-0.87	99
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 – June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	40.38%	33.44%	6.94	107	25.98%	28.66%	-2.68	97
50-99 pitches	46.46%	54.98%	-8.52	91	31.08%	43.09%	-12.01	88
100-199 pitches	53.39%	20.76%	32.63	133	31.67%	32.46%	-0.79	99
200 or more	*	-	*	*	*	-	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	60.06%	53.27%	6.79	107	30.26%	32.75%	-2.49	98
50-99 pitches	55.71%	87.99%	-32.28	68	38.67%	38.06%	0.61	101
100-199 pitches	61.06%	69.39%	-8.33	92	52.07%	60.10%	-8.03	92
200 or more	*	-	*	*	*	-	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – June 2024/2023

Size	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	41.25%	54.82%	-13.57	86	19.96%	23.41%	-3.45	97
50-99 pitches	38.32%	40.03%	-1.71	98	12.58%	26.95%	-14.37	86
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 – June 2024/2023

Tariff	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	63.48%	*	2.53	103	38.68%	*	-22.27	78
£15 - £17.99	32.97%	*	-35.21	65	15.78%	23.08%	-7.30	93
£18 - £19.99	*	*	*	*	19.15%	19.75%	-0.60	99
£20 +	51.28%	42.12%	9.16	109	31.44%	35.43%	-3.99	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – June 2024/2023

Tariff	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	65.61%	*	65.61	166	44.40%	*	44.40	144
£15 - £17.99	19.82%	*	19.82	120	10.67%	0.00%	10.67	111
£18 - £19.99	*	*	*	*	19.15%	19.75%	-0.60	99
£20 +	50.13%	26.03%	24.10	124	30.61%	35.05%	-4.44	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – June 2024/2023

Location Type	June 24	June 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	6.45%	5.99%	0.46	100
Countryside - Village	46.15%	57.49%	-11.34	89	21.91%	30.43%	-8.52	91
Seaside - Coastal	41.05%	45.04%	-3.99	96	17.98%	28.88%	-10.90	89
Small Town	*	*	*	*	0.00%	0.00%	0.00	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					