

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

March 2024/2023 Report - TOURING

1.0 Introduction March 2024/2023

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

The SOAS Report: March 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 **5.05** percentage point increase in March 2024 compared to last year.

Data from the Scottish Retail Consortium showed that an early Easter saw total sales in Scotland increased by 2.8% in March, however, compared to the 8.8% increase in March 2023 this was disappointing growth in total sales. Total food sales and health and beauty continued to drive sales when compared to the monthly performance of March 2023.

Domestic consumer sentiment provided by the GB National Tourist Boards for March 2024 found that 22% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the February 2024 survey). The survey recorded 44% of respondents (a 5% decrease on the February 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, 35% of UK adults intended to take a domestic overnight trip in the second quarter of 2024 and 76% in the following 12 months. These figures show an increase in those planning an overnight trip compared with March 2023 (29% and 73% 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 four 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.

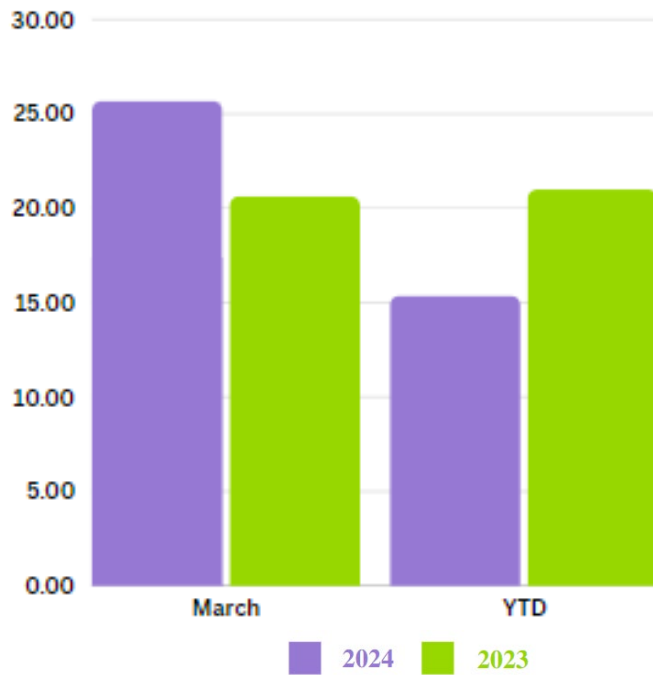
The recovery in international inbound visitation continued to grow in March 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 3% increase when compared to the same period in 2023, however, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

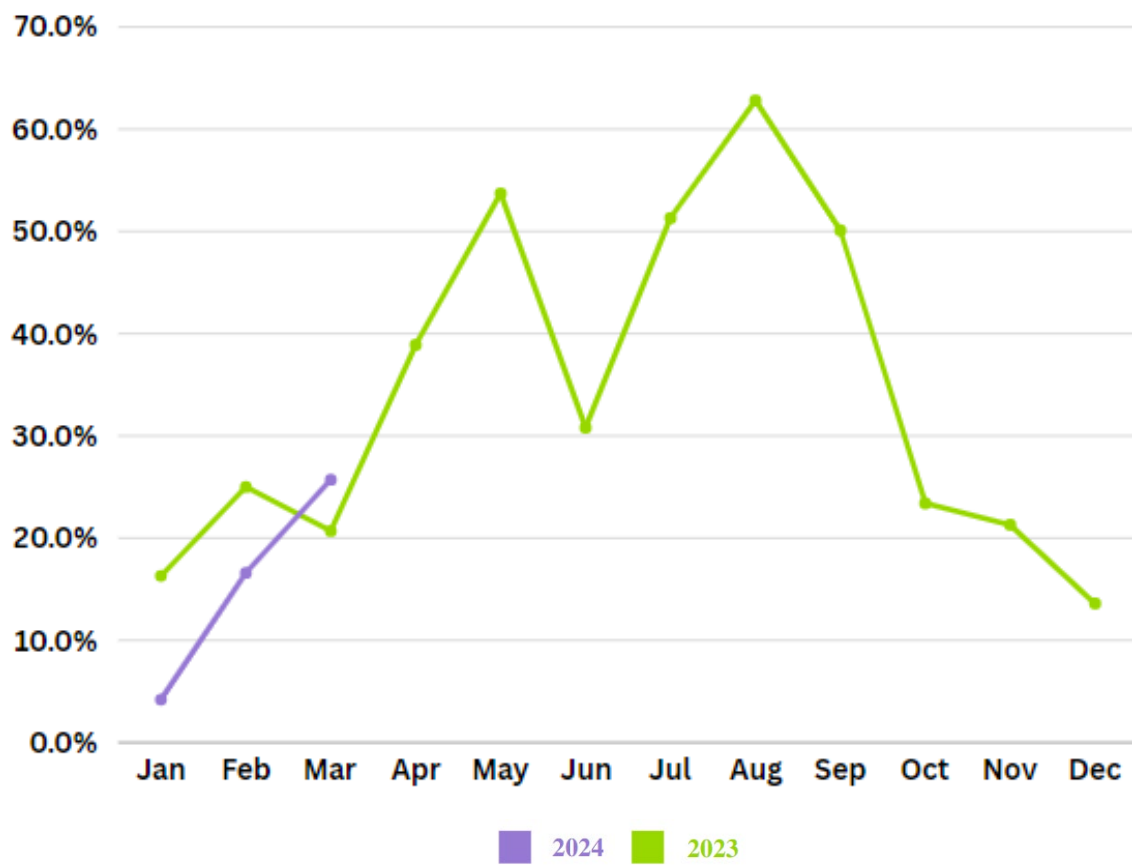
3.1 Performance by Touring Category

Touring Pitch Occupancy – March 2024/2023

Touring Net Pitch Occupancy was **25.70%** in March 2024 when compared to data from the previous year of a **20.65%** occupancy rate; this shows an overall percentage point increase of **5.05**.

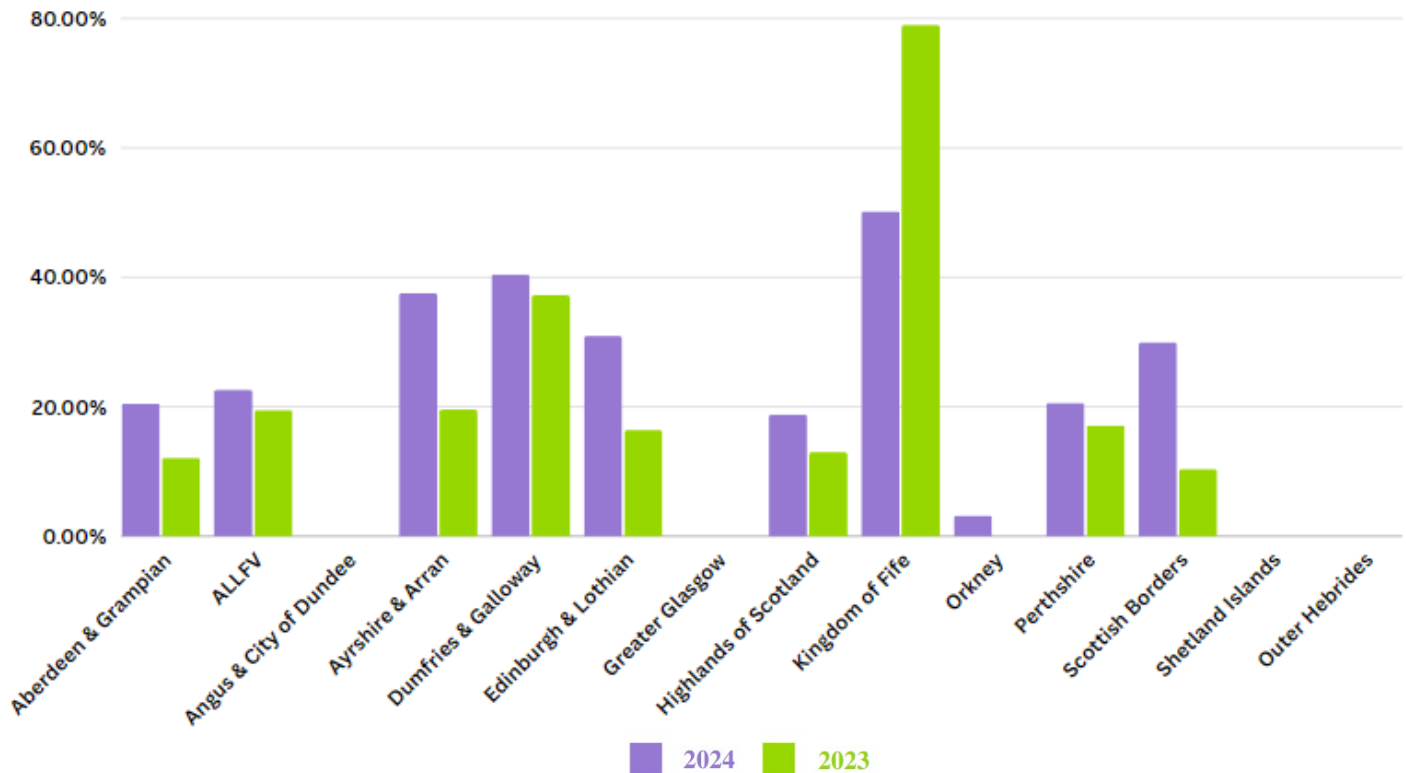


Touring Pitch Occupancy - Year-to-Date



Room Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – March 2024/2023

Occupancy Type	March 24	March 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	25.70%	20.65%	5.05	105	15.38%	21.35%	-5.97	94
Whole Park Occupancy	25.89%	23.09%	2.80	103	13.06%	26.65%	-13.59	86
Caravan Pitch Occupancy	34.81%	26.78%	8.03	108	29.31%	24.95%	4.36	104
Tent Pitch Occupancy	4.00%	1.26%	2.74	103	2.05%	0.99%	1.06	101

Touring Pitch Occupancy by Size – March 2024/2023

Size	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	23.37%	19.30%	4.07	104	18.03%	19.90%	-1.87	98
50-99 pitches	27.42%	19.83%	7.59	108	18.76%	23.12%	-4.36	96
100-199 pitches	*	21.52%	7.93	108	9.43%	20.97%	-11.54	88
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 – March 2024/2023

Size	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	24.42%	0.00%	24.42	124	20.09%	0.00%	20.09	120
50-99 pitches	21.60%	6.92%	14.68	115	9.21%	6.92%	2.29	102
100-199 pitches	*	26.39%	3.06	103	9.43%	28.35%	-18.92	81
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – March 2024/2023

Size	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	28.00%	34.84%	-6.84	93	15.91%	24.57%	-8.66	91
50-99 pitches	36.34%	24.45%	11.89	112	35.32%	25.20%	10.12	110
100-199 pitches	*	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 – March 2024/2023

Size	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	5.22%	2.88%	2.34	102	3.57%	3.13%	0.44	100
50-99 pitches	2.06%	0.00%	2.06	102	0.75%	0.00%	0.75	101
100-199 pitches	*	0.15%	-0.15	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 – March 2024/2023

Tariff	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	24.62%	*	24.62	125	21.19%	*	21.19	121
£15 - £17.99	*	*	*	*	9.31%	21.59%	-12.28	88
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	26.49%	20.58%	5.91	106	15.60%	21.34%	-5.74	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – March 2024/2023

Tariff	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	-	-	-	-	-	-	-	-
£10 - £14.99	25.83%	*	25.83	126	22.03%	*	22.03	122
£15 - £17.99	*	*	*	*	1.91%	0.00%	1.91	102
£18 - £19.99	*	*	*	*	*	*	*	*
£20 +	26.69%	23.18%	3.51	104	13.11%	26.70%	-13.59	86
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – March 2024/2023

Location Type	March 24	March 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	0.75%	0.24%	0.51	101
Countryside - Village	5.22%	2.88%	2.34	102	4.21%	3.24%	0.97	101
Seaside - Coastal	0.00%	0.00%	0.00	100	0.00%	0.00%	0.00	100
Small Town	*	*	*	*	0.00%	*	0.00	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					