

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

May 2024/2023 Report - TOURING

1.0 Introduction May 2024/2023

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

The SOAS Report: May 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 **3.33** percentage point decrease in May 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 May 2024 is 2.0%, down from 2.3% in April. The inflation rate for May 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 4.1%. Inflation rates for restaurants and cafes were 5.8% for the same period.

Data from the Scottish Retail Consortium revealed that total sales in Scotland in May showed a 0.5% year-on-year decrease, it should be noted that May 2023 saw the King's Coronation and two Bank Holidays. With food inflation stabilising (lowest grocery inflation since October 2021), May 2024 saw total food sales increase by just under 1.0% compared to last year's period.

Domestic consumer sentiment provided by the GB National Tourist Boards for May 2024 found that 20% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the April 2024 survey). The survey recorded 46% of respondents (a 2% decrease on the April 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, 25% of UK adults intended to take a domestic overnight trip in the second quarter of 2024, this is an increase compared with May 2023, with 76% of UK adults intending to take a domestic overnight trip in the following 12 months. 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.

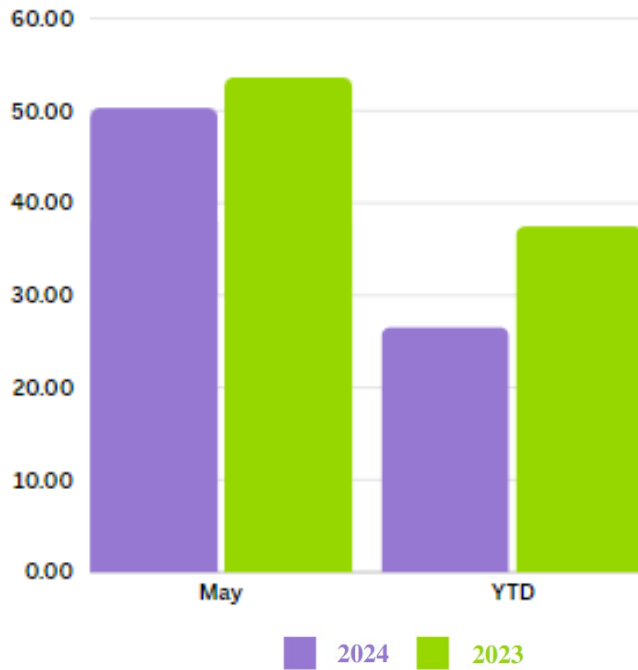
The recovery in international inbound visitation continued to grow in May 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 3% increase when compared to the same period in 2023, however, UK air connectivity saw a 6% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

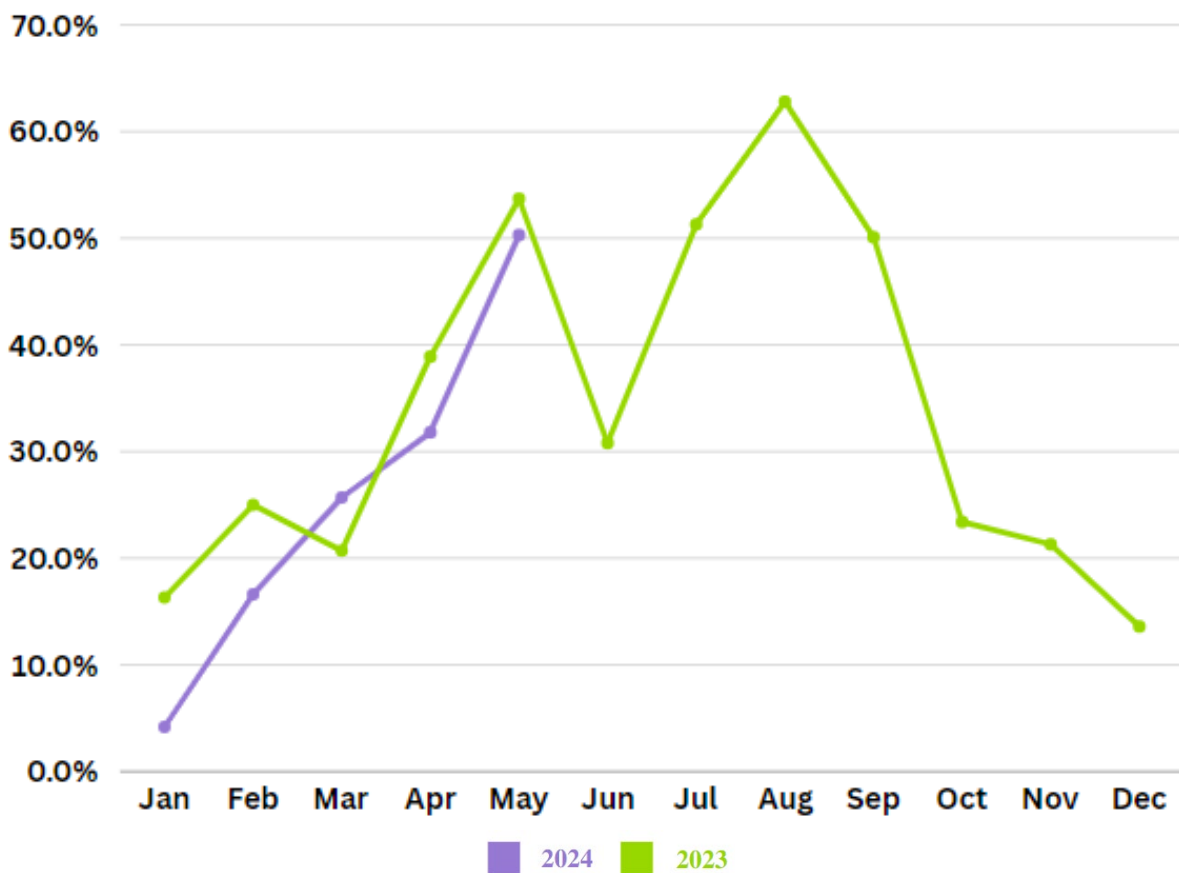
3.1 Performance by Touring Category

Touring Pitch Occupancy – May 2024/2023

Touring Net Pitch Occupancy was **50.32%** in April 2024 when compared to data from the previous year of a **53.65%** occupancy rate; this shows an overall percentage point decrease of **3.33**.

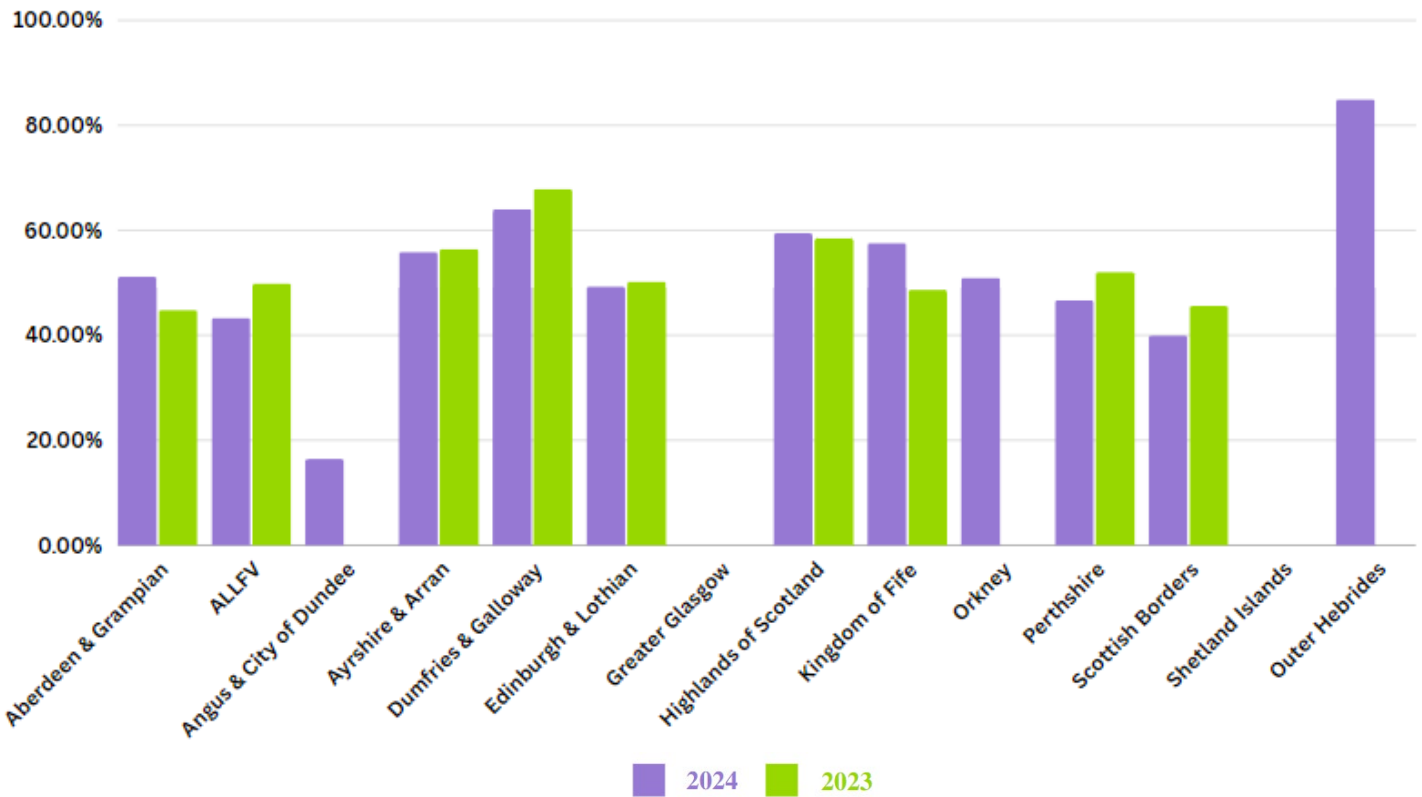


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – May 2024/2023

Occupancy Type	May 24	May 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	50.32%	53.65%	-3.33	97	26.58%	37.49	-10.91%	89
Whole Park Occupancy	50.24%	53.35%	-3.11	97	26.04%	41.47	-15.43%	85
Caravan Pitch Occupancy	56.70%	63.16%	-6.46	94	35.47%	38.57	-3.10%	97
Tent Pitch Occupancy	38.65%	34.76%	3.89	104	11.18%	10.82	0.36%	100

Touring Pitch Occupancy by Size – May 2024/2023

Size	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	45.63%	43.91%	1.72	102	23.73%	26.76%	-3.03	97
50-99 pitches	47.71%	48.56%	-0.85	99	27.85%	34.95%	-7.10	93
100-199 pitches	54.36%	57.69%	-3.33	97	27.58%	41.13%	-13.55	86
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 – May 2024/2023

Size	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	41.92%	20.51%	21.41	121	23.80%	15.67%	8.13	108
50-99 pitches	53.86%	48.53%	5.33	105	27.06%	37.75%	-10.69	89
100-199 pitches	58.94%	56.71%	2.23	102	26.68%	43.40%	-16.72	83
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – May 2024/2023

Size	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	59.24%	45.04%	14.20	114	27.27%	30.64%	-3.37	97
50-99 pitches	53.86%	82.00%	-28.14	72	37.62%	34.29%	3.33	103
100-199 pitches	58.94%	62.59%	-3.65	96	48.20%	55.60%	-7.40	93
200 or more	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – May 2024/2023

Size	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	49.26%	54.32%	-5.06	95	17.16%	17.62%	-0.46	100
50-99 pitches	21.98%	28.36%	-6.38	94	5.27%	20.63%	-15.36	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 – May 2024/2023

Tariff	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	43.39%	-	43.39	143	33.29%	*	33.29	133
£15 - £17.99	30.89%	*	-5.24	95	13.50%	22.06%	-8.56	91
£18 - £19.99	23.97%	*	-0.05	100	18.44%	16.67%	1.77	102
£20 +	53.46%	54.84%	-1.38	99	27.25%	38.65%	-11.40	89
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – May 2024/2023

Tariff	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	*	-	*	*
£10 - £14.99	66.71%	-	66.71	167	38.41%	*	38.41	138
£15 - £17.99	23.95%	*	23.95	124	9.34%	0.00%	9.34	109
£18 - £19.99	23.97%	*	-0.05	100	18.44%	16.67%	1.77	102
£20 +	51.98%	54.80%	-2.82	97	26.46%	42.42%	-15.96	84
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – May 2024/2023

Location Type	May 24	May 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	0.75%	3.28%	-2.53	97
Countryside - Village	39.43%	51.04%	-11.61	88	17.40%	23.03%	-5.63	94
Seaside - Coastal	33.51%	25.47%	8.04	108	12.89%	20.93%	-8.04	92
Small Town	0.00%	*	0.00	100	0.00%	*	0.00	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					