

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

November 2024/2023 Report - TOURING

1.0 Introduction November 2024/2023

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

The SOAS Report: November 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 **15.18** percentage point increase in November 2024 compared to last year.

The consumer backdrop shows the latest Inflation Figures from the Office of National Statistics, UK CPI (consumer prices inflation) in the 12 months to November 2024 is 2.6%, up from 2.3% in October. The CPI 12-month rate (%) for November 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.6% up from 3.0% in October. Inflation rates for restaurants and cafes were 4.0% down from 4.3% in October.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 3.3% in November. However, this was disappointing growth compared to the 2.6% increase in November 2023.

Domestic consumer sentiment published by the GB National Tourist Boards covering November 2024 found that 19% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% increase on the October 2024 survey). The survey recorded 47% of respondents (a 2% increase on the October 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, 19% of UK adults intended to take a domestic overnight trip in the two months of 2024 and 78% in the following 12 months. These figures were comparable with those who planned an overnight trip in the previous 12 months (77%). 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 previously published GB National Tourist Surveys (VisitBritain 2024), this continues to show the importance attached to holiday expenditure even in a challenging economic environment.

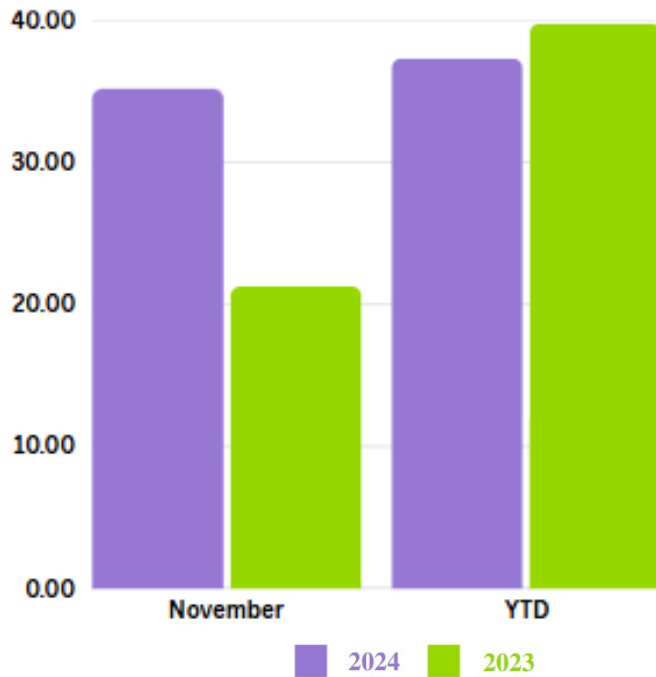
Eurocontrol (European Air Traffic Agency) indicated in November 2024 that UK air connectivity saw a 3% decrease when compared to the same period in 2023, also, UK air connectivity saw a 7% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for November 2024 global air passenger demand, measured by revenue per kilometer, was up 8.1% compared to November 2023. International demand rose 11.6% over the same period with domestic demand increasing 3.1%. Asia-Pacific region was the biggest global air passenger growth driver in November 2024 at 19.9% when compared to Europe at 9.4%.

3.0 Touring Accommodation

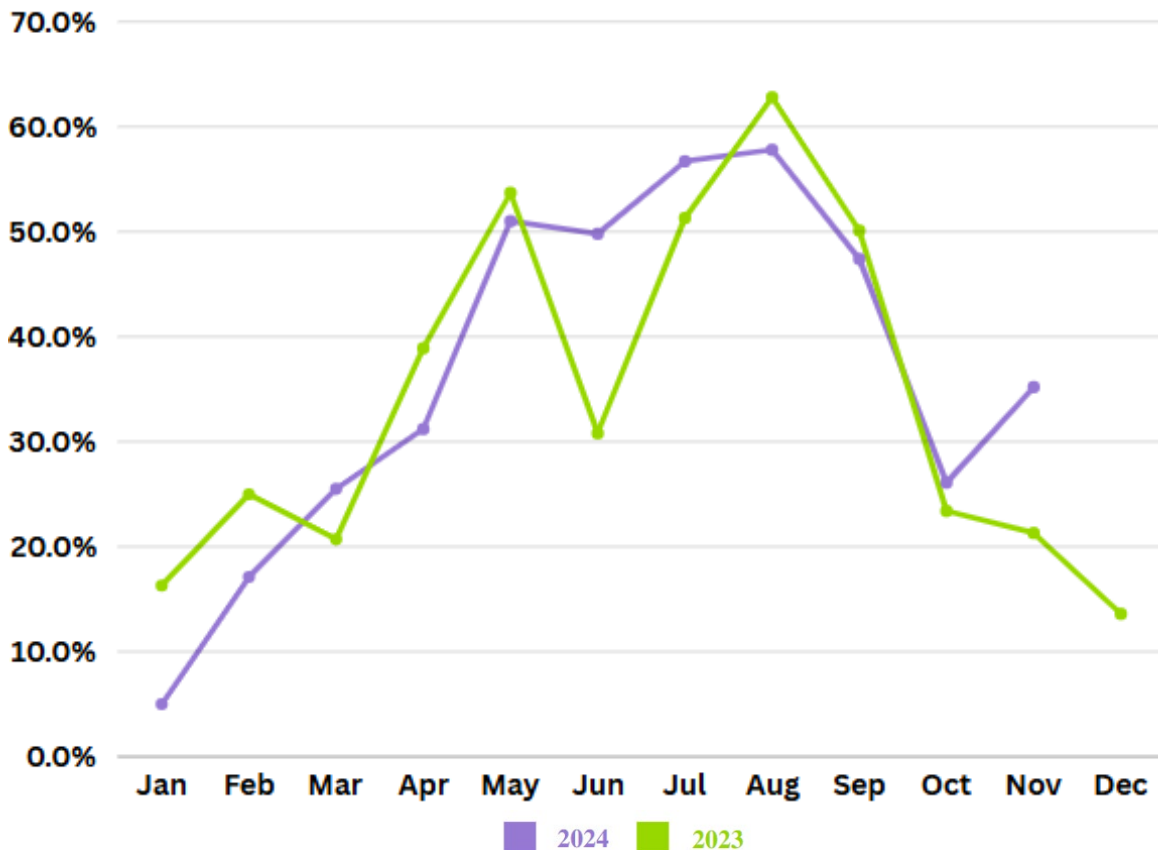
3.1 Performance by Touring Category

Touring Pitch Occupancy – November 2024/2023

Touring Net Pitch Occupancy was **35.25%** in November 2024 when compared to data from the previous year of a **20.07%** occupancy rate; this shows an overall percentage point increase of **15.18**.

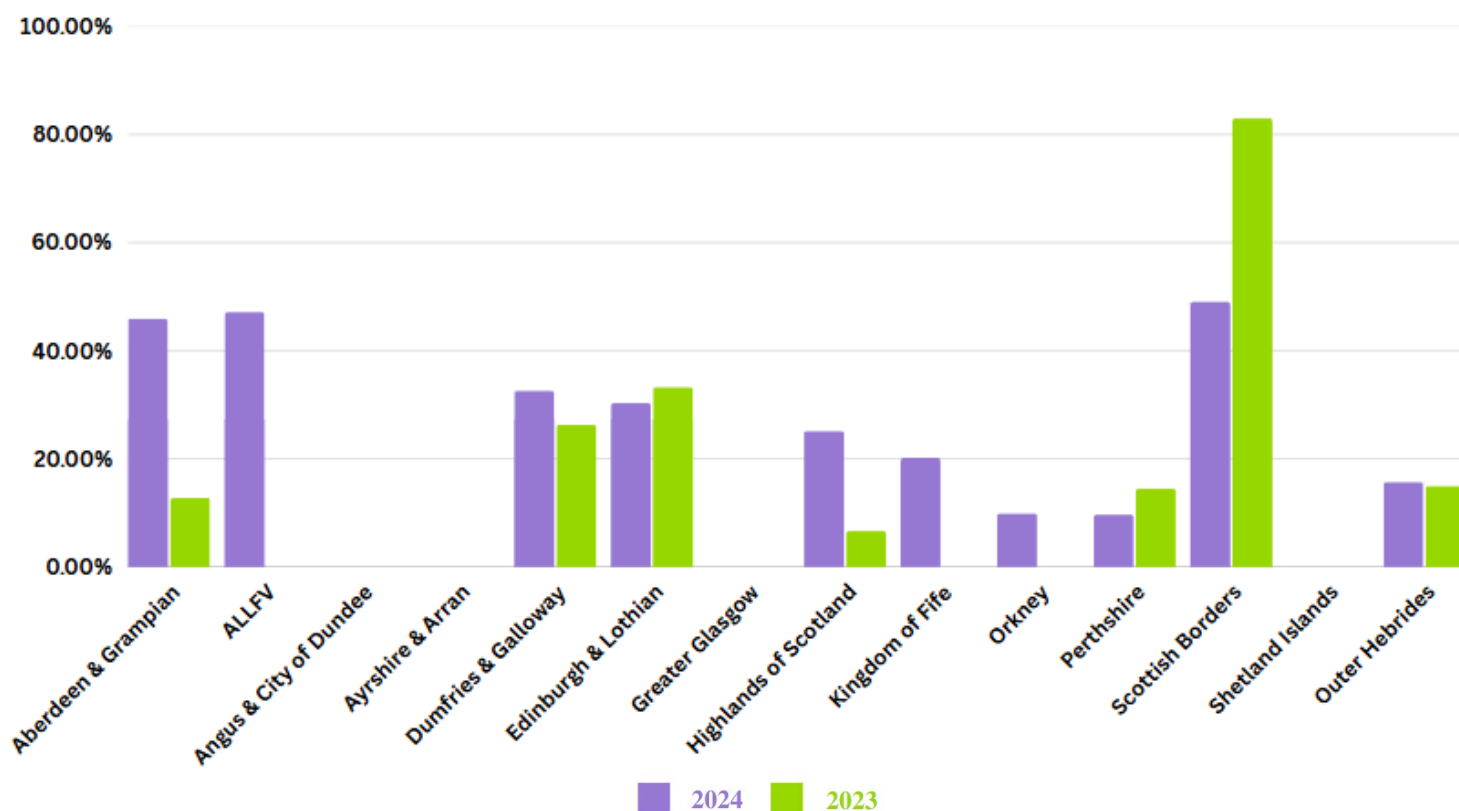


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – November 2024/2023

Occupancy Type	Nov 24	Nov 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	35.16%	21.26%	13.90	114	37.30%	39.75%	-2.45	98
Whole Park Occupancy	34.44%	20.08%	14.36	114	36.53%	39.17%	-2.64	97
Caravan Pitch Occupancy	45.78%	34.73%	11.05	111	46.87%	49.55%	-2.68	97
Tent Pitch Occupancy	2.64%	1.60%	1.04	101	22.93%	23.80%	-0.87	99

Touring Pitch Occupancy by Size – November 2024/2023

Size	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	35.25%	20.07%	15.18	115	33.26%	33.48%	-0.22	100
50-99 pitches	50.27%	46.08%	4.19	104	37.07%	42.66%	-5.59	94
100-199 pitches	25.74%	16.94%	8.80	109	38.98%	39.31%	-0.33	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.

Whole Park Occupancy by Size – November 2024/2023

Size	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	20.47%	37.04%	-16.57	83	32.23%	27.06%	5.17	105
50-99 pitches	70.43%	50.00%	20.43	120	38.09%	43.05%	-4.96	95
100-199 pitches	27.75%	16.94%	10.81	111	37.58%	38.48%	-0.90	99
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – November 2024/2023

Size	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	51.67%	24.70%	26.97	127	38.80%	40.22%	-1.42	99
50-99 pitches	59.39%	45.90%	13.49	113	46.91%	46.67%	0.24	100
100-199 pitches	12.03%	0.00%	12.03	112	50.07%	56.02%	-5.95	94
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – November 2024/2023

Size	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	8.88%	1.60%	7.28	107	27.79%	27.36%	0.43	100
50-99 pitches	1.30%	0.00%	1.30	101	16.80%	42.66%	-25.86	74
100-199 pitches	0.00%	0.00%	0.00	100	0.00%	2.51%	-2.51	97
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Tariff – November 2024/2023

Tariff	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	*	*	*	36.17%	*	16.75	117
£10 - £14.99	*	*	*	*	48.64%	19.84%	28.80	129
£15 - £17.99	*	-	*	*	17.58%	26.49%	-8.91	91
£18 - £19.99	-	*	*	*	27.07%	22.48%	4.59	105
£20 +	34.25%	22.14%	12.11	112	37.80%	40.28%	-2.48	98
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – November 2024/2023

Tariff	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	*	*	*	36.17%	*	16.75	117
£10 - £14.99	*	*	*	*	54.11%	16.62%	37.49	137
£15 - £17.99	*	-	*	*	13.03%	0.00%	13.03	113
£18 - £19.99	-	*	*	*	26.19%	22.42%	3.77	104
£20 +	32.81%	21.35%	11.46	111	36.46%	39.59%	-3.13	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Location Type – November 2024/2023

Location Type	Nov 24	Nov 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	16.90%	12.16%	4.74	105
Countryside - Village	0.37%	0.83%	-0.46	100	27.12%	37.47%	-10.35	90
Seaside - Coastal	8.88%	13.33%	-4.45	96	28.46%	34.29%	-5.83	94
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					