

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

October 2024/2023 Report - TOURING

1.0 Introduction October 2024/2023

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

The SOAS Report: October 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 **2.72** percentage point increase in October 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 October 2024 is 2.3%, up from 1.7% in September. The CPI 12-month rate (%) for October 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.0% down from 3.8% in September. Inflation rates for restaurants and cafes were 4.3% up from 4.1% in September.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by 0.7% in October, however, compared to the 2.9% increase in October 2023 this was disappointing growth in total sales.

Domestic consumer sentiment provided by the GB National Tourist Boards for October 2024 found that 18% of respondents said they had "...been hit hard - no option but to cut back on spending" (a 1% decrease on the September 2024 survey). The survey recorded 45% of respondents (a 2% decrease on the September 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 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 (78%). 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.

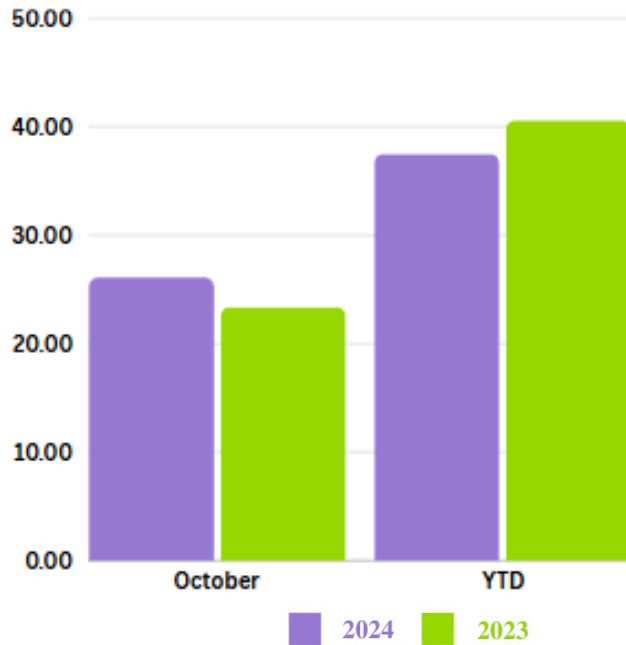
Eurocontrol (European Air Traffic Agency) indicated in October 2024 that UK air connectivity saw a 3% increase when compared to the same period in 2023, also, UK air connectivity saw a 3% decrease in year-to-date flights compared to 2019. Globally, the International Air Transport Association (IATA) reported that for October 2024 global air passenger demand, measured by revenue per kilometer, was up 7.1% compared to October 2023. International demand rose 9.5% over the same period with domestic demand increasing 3.5%. Asia-Pacific region was the biggest global air passenger growth driver in October 2024 at 12.7% when compared to Europe.

3.0 Touring Accommodation

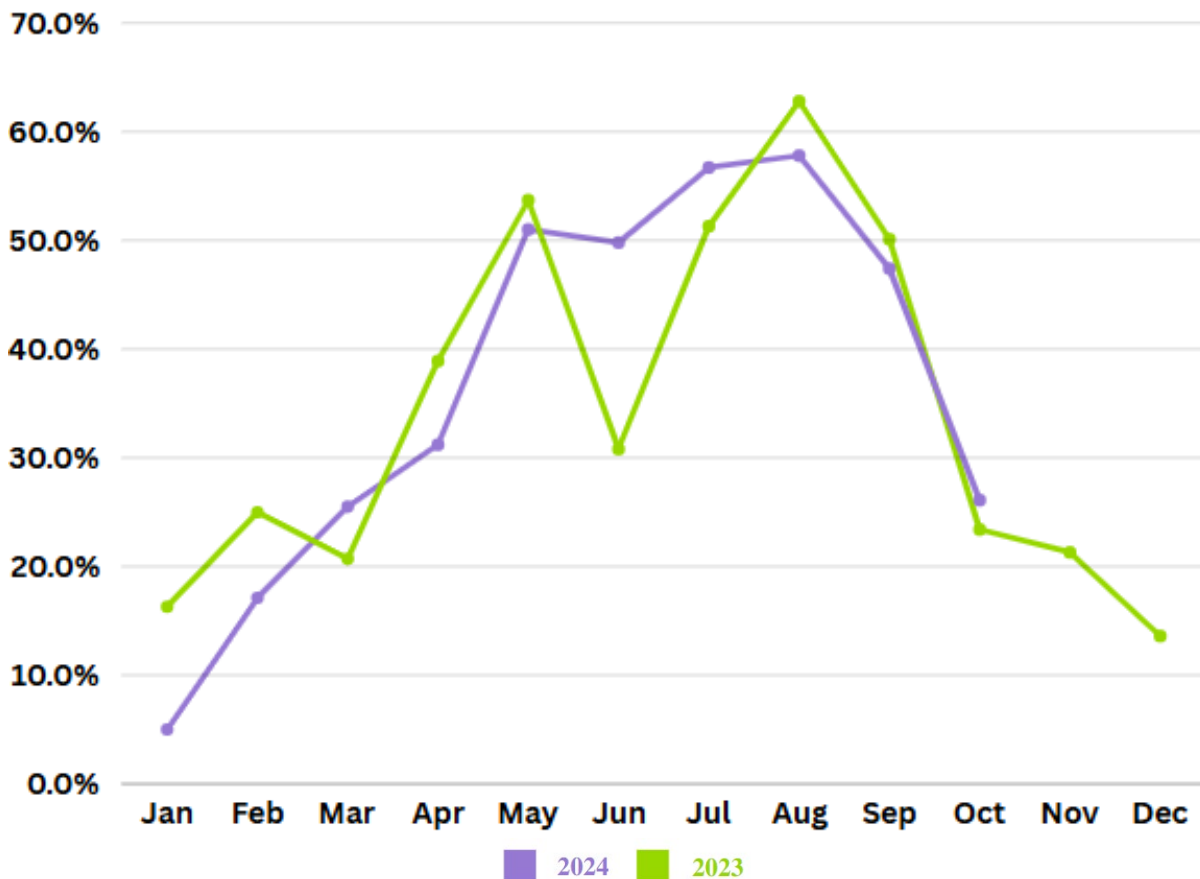
3.1 Performance by Touring Category

Touring Pitch Occupancy – October 2024/2023

Touring Net Pitch Occupancy was **26.11%** in October 2024 when compared to data from the previous year of a **23.39%** occupancy rate; this shows an overall percentage point increase of **2.72**.

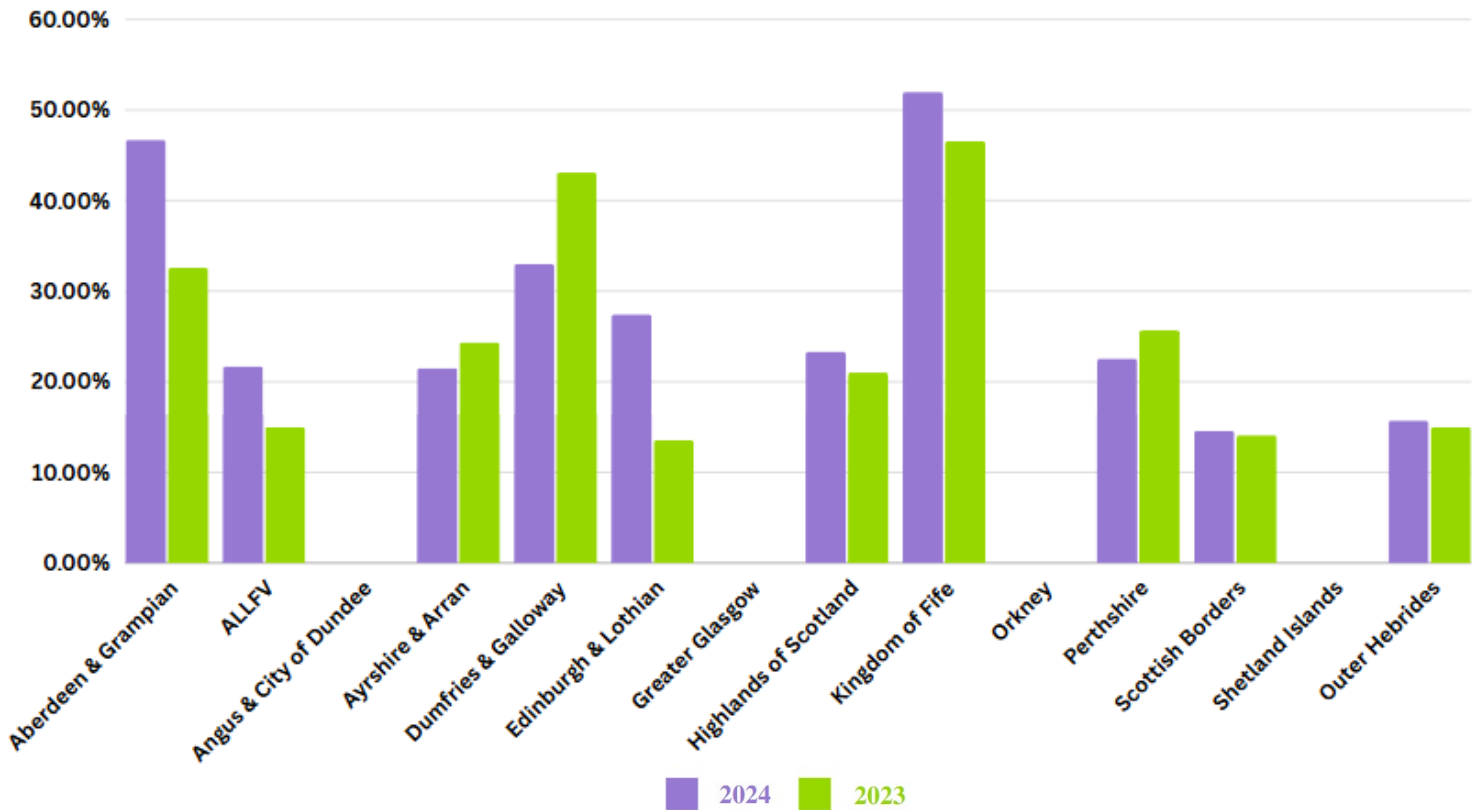


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – October 2024/2023

Occupancy Type	Oct 24	Oct 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	26.11%	23.39%	2.72	103	37.51%	40.60%	-3.09	97
Whole Park Occupancy	25.59%	22.16%	3.43	103	36.70%	39.94%	-3.24	97
Caravan Pitch Occupancy	39.13%	37.43%	1.70	102	47.07%	50.46%	-3.39	97
Tent Pitch Occupancy	4.89%	4.42%	0.47	100	25.45%	25.32%	0.13	100

Touring Pitch Occupancy by Size – October 2024/2023

Size	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	22.12%	24.07%	-1.95	98	32.95%	35.90%	-2.95	97
50-99 pitches	25.40%	20.11%	5.29	105	36.19%	42.60%	-6.41	94
100-199 pitches	28.79%	25.21%	3.58	104	40.20%	40.27%	-0.07	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 – October 2024/2023

Size	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	19.37%	9.88%	9.49	109	33.46%	25.29%	8.17	108
50-99 pitches	28.36%	19.04%	9.32	109	36.45%	43.04%	-6.59	93
100-199 pitches	26.21%	24.88%	1.33	101	38.47%	39.57%	-1.10	99
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – October 2024/2023

Size	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	37.50%	51.10%	-13.60	86	32.88%	42.33%	-9.45	91
50-99 pitches	0.00%	61.00%	-61.00	39	46.00%	46.74%	-0.74	99
100-199 pitches	39.93%	26.87%	13.06	113	54.11%	56.02%	-1.91	98
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – October 2024/2023

Size	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	11.57%	8.92%	2.65	103	29.02%	35.24%	-6.22	94
50-99 pitches	2.80%	3.16%	-0.36	100	19.57%	32.16%	-12.59	87
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 – October 2024/2023

Tariff	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	*	*	*	43.58%	*	23.72	124
£10 - £14.99	61.37%	*	34.30	134	49.01%	31.37%	17.64	118
£15 - £17.99	10.22%	*	5.10	105	17.70%	26.49%	-8.79	91
£18 - £19.99	70.02%	*	54.31	154	27.07%	22.23%	4.84	105
£20 +	23.35%	23.46%	-0.11	100	38.15%	41.11%	-2.96	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – October 2024/2023

Tariff	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	*	*	*	43.58%	*	23.72	124
£10 - £14.99	61.37%	*	34.30	134	55.83%	27.07%	28.76	129
£15 - £17.99	8.58%	*	8.58	109	13.15%	0.00%	13.15	113
£18 - £19.99	70.02%	*	64.98	165	26.19%	22.17%	4.02	104
£20 +	21.98%	22.10%	-0.12	100	36.74%	40.29%	-3.55	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – October 2024/2023

Tariff	Oct 24	Oct 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	14.80%	0.00%	14.80	115
£15 - £17.99	20.18%	*	20.18	120	15.70%	21.91%	-6.21	94
£18 - £19.99	0.00%	*	-37.09	63	49.19%	37.09%	12.10	112
£20 +	39.27%	37.43%	1.84	102	52.26%	52.71%	-0.45	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Tariff – October 2024/2023

Tariff	Oct 24	Oct 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	23.13%	76.69%	-53.56	46
£15 - £17.99	13.50%	*	8.38	108	46.12%	47.33%	-1.21	99
£18 - £19.99	0.00%	*	-11.26	89	0.00%	11.26%	-11.26	89
£20 +	3.12%	3.99%	-0.87	99	23.94%	24.39%	-0.45	100
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Touring Pitch Occupancy by Location Type – October 2024/2023

Location Type	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	39.99%	27.08%	12.91	113
Countryside - Village	28.31%	30.14%	-1.83	98	38.78%	42.17%	-3.39	97
Seaside - Coastal	21.87%	19.26%	2.61	103	33.36%	45.61%	-12.25	88
Small Town	30.13%	*	7.75	108	47.56%	53.36%	-5.80	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Location Type – October 2024/2023

Location Type	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	36.33%	21.04%	15.29	115
Countryside - Village	29.31%	27.30%	2.01	102	38.55%	40.03%	-1.48	99
Seaside - Coastal	20.42%	17.75%	2.67	103	32.65%	45.42%	-12.77	87
Small Town	30.13%	*	7.75	108	47.56%	53.36%	-5.80	94
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Location Type – October 2024/2023

Location Type	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	55.70%	51.21%	4.49	104
Countryside - Village	33.48%	49.39%	-15.91	84	43.12%	50.17%	-7.05	93
Seaside - Coastal	37.89%	45.35%	-7.46	93	44.50%	50.07%	-5.57	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						

Tent Pitch Occupancy by Location Type – October 2024/2023

Location Type	Oct 24	Oct 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	19.18%	12.68%	6.50	107
Countryside - Village	5.62%	6.32%	-0.70	99	29.31%	41.18%	-11.87	88
Seaside - Coastal	9.44%	7.57%	1.87	102	32.25%	35.80%	-3.55	96
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					