

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

September 2024/2023 Report - TOURING

1.0 Introduction September 2024/2023

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

The SOAS Report: September 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 **2.71** percentage point decrease in September 2024 compared to last year.

The Visitor Levy (Scotland) Act 2024 came into force on the 20th of September 2024. The Bill aims to allow Scottish local authorities to charge a visitor levy, which is charged for overnight stays in certain types of accommodation (such as hotels, B&Bs or holiday cottages). Each local authority will be able to decide if they wish to introduce the levy and at what level the levy should be.

Based on the latest Inflation Figures from the Office of National Statistics, UK CPI (inflation) in the 12 months to September 2024 is 1.7%, down from 2.2% in August. The CPI 12-month rate (%) for September 2024 for recreational and cultural services, specifically Museums, libraries and zoological gardens (as a proxy for the attraction sector) is 3.8% down from 4.0% in August. Inflation rates for restaurants and cafes were 4.1% down from 4.3% in August.

Data from the Scottish Retail Consortium showed that total sales in Scotland decreased by -0.5% in September, however, compared to the 6.1% increase in September 2023 this was disappointing growth in total sales. Total food sales decreased by -0.7% compared to the monthly performance of September 2023, when they had increased by 9.2%.

Domestic consumer sentiment provided by the GB National Tourist Boards for September 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 August 2024 survey). The survey recorded 47% of respondents (a 1% increase on the August 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, 37% of UK adults intended to take a domestic overnight trip in the final 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 (76%). 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.

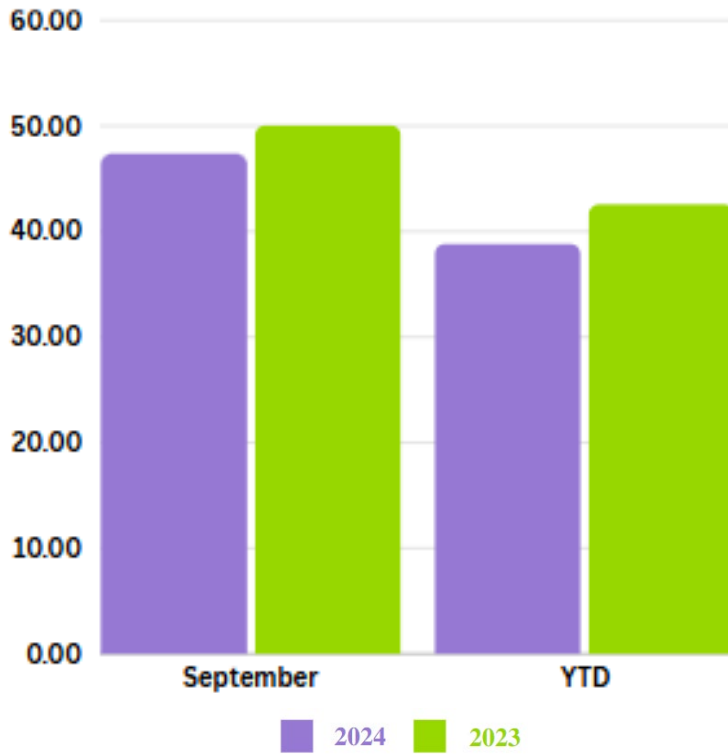
The recovery in international inbound visitation stalled in September 2024; with the Eurocontrol (European Air Traffic Agency) indicating that UK air connectivity saw a 2% decrease when compared to the same period in 2023, also, UK air connectivity saw a 4% decrease in year-to-date flights compared to 2019.

3.0 Touring Accommodation

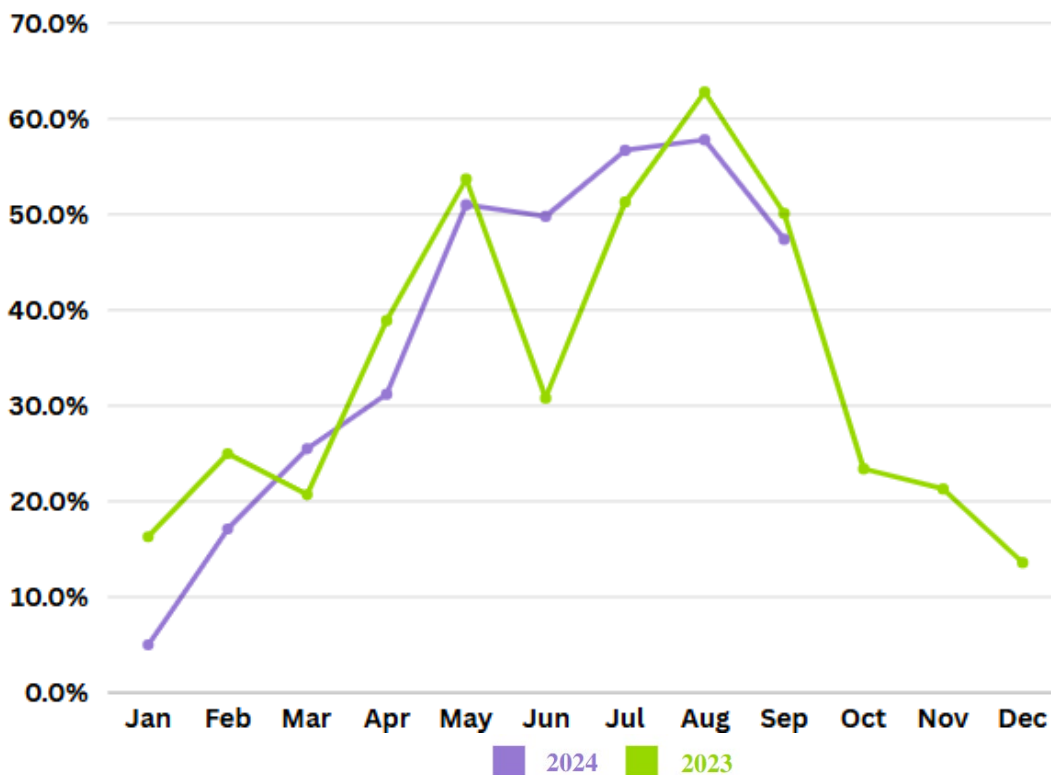
3.1 Performance by Touring Category

Touring Pitch Occupancy – September 2024/2023

Touring Net Pitch Occupancy was **47.38%** in September 2024 when compared to data from the previous year of a **50.09%** occupancy rate; this shows an overall percentage point decrease of **2.71**.

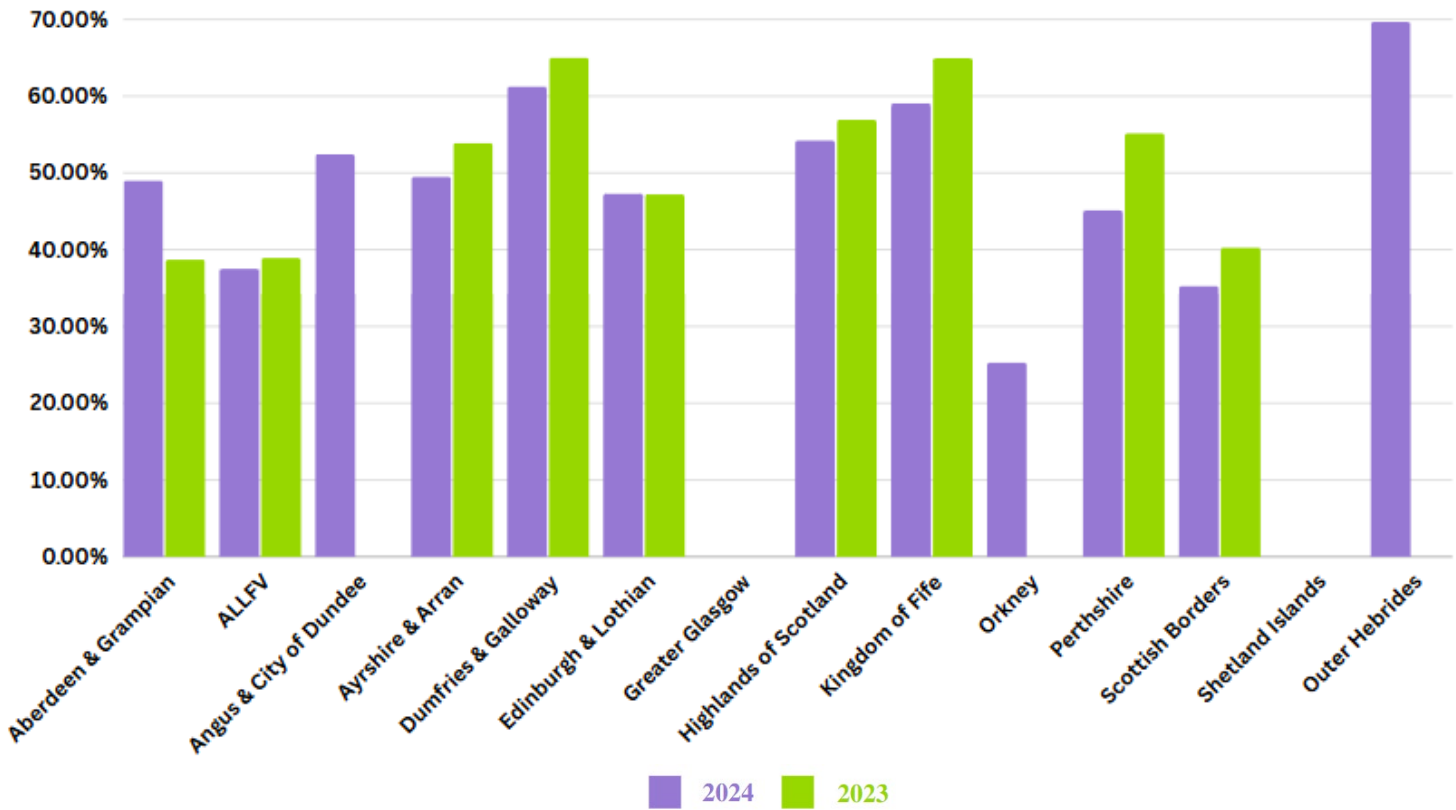


Touring Pitch Occupancy – Year-to-Date



Pitch Occupancy by Former VisitScotland Area

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



Pitch by Occupancy Type – September 2024/2023

Occupancy Type	Sept 24	Sept 23	24/23 Diff ¹	Change ²	YTD 24	YTD 23	24/23 Diff	Change
Touring Pitch Occupancy ³	47.38%	50.09%	-2.71	97	38.87%	42.61%	-3.74	96
Whole Park Occupancy	47.72%	49.56%	-1.84	98	38.08%	42.08%	-4.00	96
Caravan Pitch Occupancy	57.41%	59.74%	-2.33	98	47.84%	51.89%	-4.05	96
Tent Pitch Occupancy	23.30%	33.78%	-10.48	90	27.57%	27.45%	0.12	100

Touring Pitch Occupancy by Size – September 2024/2023

Size	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	49.96%	42.63%	7.33	107	34.16%	37.36%	-3.20	97
50-99 pitches	42.10%	45.62%	-3.52	96	37.50%	45.32%	-7.82	92
100-199 pitches	51.70%	54.01%	-2.31	98	41.64%	42.02%	-0.38	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 – September 2024/2023

Size	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	45.69%	21.23%	24.46	124	35.10%	28.76%	6.34	106
50-99 pitches	44.76%	44.00%	0.76	101	37.64%	46.01%	-8.37	92
100-199 pitches	50.60%	55.35%	-4.75	95	39.87%	41.23%	-1.36	99
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Size – September 2024/2023

Size	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	60.90%	57.16%	3.74	104	32.33%	41.50%	-9.17	91
50-99 pitches	53.93%	64.01%	-10.08	90	46.00%	45.91%	0.09	100
100-199 pitches	58.03%	59.14%	-1.11	99	57.43%	61.32%	-3.89	96
200 or more	-	-	-	-	*	*	*	*
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Tent Pitch Occupancy by Size – September 2024/2023

Size	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
1-49 pitches	38.30%	59.09%	-20.79	79	30.17%	37.85%	-7.68	92
50-99 pitches	16.28%	40.25%	-23.97	76	21.99%	38.78%	-16.79	83
100-199 pitches	0.00%	14.24%	-14.24	86	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 – September 2024/2023

Tariff	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	47.58%	-	47.58	148
£10 - £14.99	38.02%	-	38.02	138	46.81%	76.69%	-29.88	70
£15 - £17.99	28.61%	*	-24.40	76	18.43%	26.98%	-8.55	91
£18 - £19.99	*	*	*	*	25.01%	22.60%	2.41	102
£20 +	49.28%	51.24%	-1.96	98	39.92%	43.16%	-3.24	97
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Whole Park Occupancy by Tariff – September 2024/2023

Tariff	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	47.58%	-	47.58	148
£10 - £14.99	59.35%	-	59.35	159	54.57%	0.00%	54.57	155
£15 - £17.99	22.19%	*	22.19	122	13.81%	0.00%	13.81	114
£18 - £19.99	*	*	*	*	24.01%	22.60%	1.41	101
£20 +	48.41%	51.04%	-2.63	97	38.53%	42.44%	-3.91	96
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Caravan Pitch Occupancy by Tariff – September 2024/2023

Tariff	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	0.00%	-	0.00	100
£10 - £14.99	4.00%	-	4.00	104	14.80%	0.00%	14.80	115
£15 - £17.99	59.17%	*	59.17	159	15.67%	21.91%	-6.24	94
£18 -£19.99	*	*	*	*	49.19%	0.00%	49.19	149
£20 +	63.45%	59.74%	3.71	104	53.74%	54.49%	-0.75	99
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Tent Pitch Occupancy by Tariff – September 2024/2023

Tariff	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
Under £10	*	-	*	*	0.00%	-	0.00	100
£10 - £14.99	9.25%	-	9.25	109	23.13%	76.69%	-53.56	46
£15 - £17.99	44.96%	*	-8.05	92	55.58%	53.29%	2.29	102
£18 -£19.99	*	*	*	*	0.00%	0.00%	0.00	100
£20 +	26.03%	32.73%	-6.70	93	26.03%	26.33%	-0.30	100
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Touring Pitch Occupancy by Location Type – September 2024/2023

Location Type	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	41.15%	28.11%	13.04	113
Countryside - Village	46.08%	52.53%	-6.45	94	39.98%	43.45%	-3.47	97
Seaside - Coastal	46.24%	48.70%	-2.46	98	34.71%	49.77%	-15.06	85
Small Town	53.36%	*	3.62	104	50.57%	57.87%	-7.30	93
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Whole Park Occupancy by Location Type – September 2024/2023

Location Type	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	37.83%	21.01%	16.82	117
Countryside - Village	46.57%	50.49%	-3.92	96	39.72%	41.38%	-1.66	98
Seaside - Coastal	45.77%	48.03%	-2.26	98	34.01%	49.84%	-15.83	84
Small Town	53.36%	*	3.62	104	50.57%	57.87%	-7.30	93
	- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included					

Caravan Pitch Occupancy by Location Type – September 2024/2023

Location Type	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	56.27%	55.66%	0.61	101
Countryside - Village	55.71%	61.58%	-5.87	94	43.80%	50.25%	-6.45	94
Seaside - Coastal	60.96%	63.71%	-2.75	97	45.87%	50.66%	-4.79	95
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 – September 2024/2023

Location Type	Sept 24	Sept 23	24/23 Diff	Change	YTD 24	YTD 23	24/23 Diff	Change
City - Large Town	*	*	*	*	20.63%	13.54%	7.09	107
Countryside - Village	22.68%	51.03%	-28.35	72	31.87%	45.46%	-13.59	86
Seaside - Coastal	31.86%	35.02%	-3.16	97	36.12%	41.50%	-5.38	95
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					