Pitching the Value

2024 Economic Benefit Report: Holiday Parks and Campsites NORTHERN IRELAND

Report for the

UK Caravan & Camping Alliance

February 2024

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Executive Summary

The Northern Irish holiday park and campsite sector makes a substantial contribution to the Northern Irish tourism economy, generating £390.7m in visitor expenditure, which is equivalent to £205.7m GVA and supports 7,236 FTE jobs.

Visitors to Northern Ireland's holiday parks and campsites stayed 133% longer and spent 24% more than the Northern Irish tourism averages.

Background

Travel and tourism contribute significantly to the UK economy. According to the World Travel and Tourism Council (WTTC), in 2022, **UK tourism's GDP contribution was £214bn (8.9% of total GDP),** a 62.7% increase on the previous year[1].

A 2023 Mintel report looking at **the UK camping and caravanning sector**[2]**,** found that total volumes returned to pre-pandemic levels in 2022, with the overall number of camping and/or caravanning trips reaching an estimated 16.7m[3]. Furthermore, the value of the domestic market has risen by 25% over the past five years with touring holidays (e.g. in a caravan or motorhome) and rental holiday caravans estimated to be the key areas of growth over the next five-years.

Report Purpose

In November 2022, **the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent reassessment of the economic impact and benefit of the holiday park and campsite sector in the UK.** This includes an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland.

Economic Impact

In 2022/23 it is estimated that the Northern Irish holiday park and campsite sector generated **a gross direct visitor expenditure impact of £390.7m in the economy**. This visitor expenditure **supports 7,236 FTE jobs and contributes £205.7m** (including multipliers) **of GVA to the economy.** In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £154.1m of expenditure to the Northern Irish economy**.

Holiday Park and Campsite Operators

According to evidence provided by the UKCCA and the Frontline survey, **in 2023 there were 92 holiday parks and campsites operating in Northern Ireland, accounting for 14,746 pitches**[4]**.** This was drawn from a database provided by the UKCCA as well as wider non-member holiday parks and campsites.

Consultations were undertaken with 26 of these parks. Research found that **Northern Irish holiday parks and campsites offer a wide range of accommodation options to visitors**, which allows it to serve a diverse range of customers' tastes and budgets. These include touring pitches for caravans, campervans, motorhomes and tents; owner-occupied holiday caravans and lodges; and rented holiday caravans and lodges, apartments, chalets, wigwams, pods and yurts. **Northern Irish holiday parks/campsites also offer a wide range of facilities and amenities**, including restaurants, swimming pools, Wi-Fi and games rooms.

The majority have run their holiday parks and campsites for over 10 years (83%) and many have done so for over 25 years (63%). Occupancy rates peaked at 81% in high season (August) and 66% in mid-season (September). Holiday park and campsite operators support their local communities through:

- **expenditure** – 73% from the total survey sample cumulatively spent £9.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local business and causes either on the park or via social media
- **environmental activities** – including recycling schemes, supporting biodiversity on-site, and water and energy conservation initiatives
- **health and wellbeing** – including providing cycle paths, and promotion of wider community health and fitness sessions

[1] *https://wttc.org/news-article/new-report-from-wttc-reveals-uk-travel-and-tourism-sector-is-expected-to-create-700000-jobs-over-the-next-decade*
[2] *Camping and caravanning is defined as holidays that use tents, trailer tents, touring caravans, caravan holiday homes, park homes, and motorhomes or campervans as accommodation.*
[3] *Camping and Caravanning UK, Mintel, 2023.*
[4] *This includes Certificated Sites and Certificated Locations.*

Several external factors affecting the sector in recent years were highlighted, including:

- **COVID-19** – leading to an initial spike in bookings post restrictions which is now returning to pre-COVID-19 levels, increased costs as well as a change in consumer behaviour and operational changes
- **consumer demographics** – with the continuing shift towards retirees, but with some young people and families engaging in camping for the first time during the pandemic due to international travel restrictions
- **cost of living** – affecting businesses with operating and utility costs leading to pricing challenges, as well as changing consumer habits
- **Brexit** – leading to increased cost and supply chain disruptions for operators purchasing holiday caravans, and decreased availability of essential parts for park operation

Holiday Park and Campsite Visitors

393 respondents to the survey had made a visit to a holiday park and campsite in Northern Ireland in 2023. The majority of the survey respondents lived in Northern Ireland (95%). The majority of respondents (86%) stayed on a holiday park and campsite in the UK five times or more during the last 12 months**. 76% stayed in an owner-occupied holiday caravan or lodge**. 19% stayed in a touring caravan, motorhome or tent over the course of the year, a further 4% stayed in some form of rented, stationary accommodation, while 1% stayed in other accommodation. **The average adult group size was 2,** and **44% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 2. **43% of groups brought a pet.** Visitors spent 4.9 nights per trip. **This is higher than the average tourism number of nights per trip at 2.1[5].**

Visitors who stayed in rented accommodation spent, on average, £293 per day, including £210 on-site and £83 off-site. **Touring visitors, on average, £129 per day**, including £64 on-site and £66 off-site. **Visitors who owned their holiday caravan spent £99 per day**, including £42 on-site and £57 off-site. **This is higher than the average tourism spend per night by those taking a trip in Northern Ireland at £80[6].**

[5] https://www.tourismni.com/globalassets/covid19/marketing/ni-market/ni-domestic-tourism-strategy.pdf
[6] https://www.tourismni.com/globalassets/covid19/marketing/ni-market/ni-domestic-tourism-strategy.pdf

1 Introduction

In November 2022, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent reassessment of the economic impact and benefit of holidays taken in all forms of accommodation on holiday parks and campsites in the UK. This includes an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland. **This report is for Northern Ireland**[7].

The UKCCA comprises the following sponsor organisations:

1.1 Research objectives

The **objectives of the impact and benefit assessment** were to:

- Provide an independent, evidence based, understanding of the direct and indirect economic impact/contribution of the holiday park and campsite sector to the UK.
- Provide the economic impact/contribution from all forms of accommodation on holiday parks and campsites, including:
  - touring caravan/ motorhome/ campervan – owned
  - touring caravan/ motorhome/ campervan – rented
  - holiday caravans and lodges – owned
  - holiday caravans and lodges – rented
  - camping (including trailer tents)
  - glamping – all unit types
- Understand the type of spend by the sector and each subset, both direct and indirect, and how much income remains in the UK and regional economies.
- Determine the number of full-time equivalent (FTE) jobs supported by the sector and each subset, both those employed directly and indirectly as well as seasonal and part-time jobs.
- Report and provide robust data at UK level as well as for the four countries (England, Scotland, Wales and Northern Ireland).
- Consider expenditure by the holiday park and campsite owners/operators, e.g. ongoing maintenance, capital investment to extend, improve and/or provide new facilities and also infrastructure, to accommodate changes such as EV charging points, energy efficiency, environmental and sustainability aspects.
- Consider spend by visitors to the holiday parks and campsites, both on and off-site, for all types of accommodation.
- Assess the impact caused by Brexit and the pandemic on the sector.
- Consider how the study can link to other aspects, such as:
  - health, social wellbeing, family time
  - closeness to nature and the outdoors
  - cost of living implications, affordable holidays
  - consumer demographics – new entrants, staycations
  - sustainability, environmental and green benefits
  - how the COVID-19 pandemic has changed the sector and shaped it moving forward

The UKCCA intend to conduct this assessment periodically to maintain an up-to-date position.

[7] *This report, the other country and UK reports can be found at www.ukcca.org.uk*

2 Northern Irish Tourism in Context

This section provides a contextual review of national tourism policies and available statistics at a Northern Irish level.

2.1 National tourism strategies

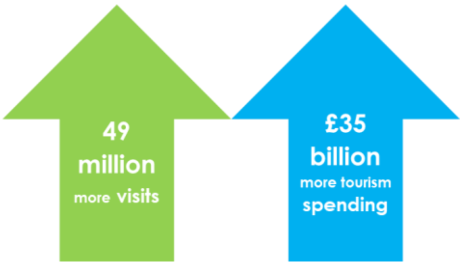
VisitBritain developed the *"Delivering a Golden Legacy"* strategy covering 2012 to 2020, and in 2020 they released a new five-year strategy covering up to 2025[8]. Each country except for England (England use Visit Britain's strategy) also has their own tourism strategy:

- Scotland – Scotland Outlook 2030[9]
- Northern Ireland – Tourism Strategy for Northern Ireland 2020-2030[10], which is currently in consultation for a new ten year plan[11]
- Wales – Welcome to Wales: Priorities for the Visitor Economy 2020-2025[12]

These strategies all promote sectoral growth and strong economic performance at a country and UK level.

VisitBritain's strategy has the ambitions of[13]:

- achieving 49m visits by 2025
- generating £35bn in visitor spend
- growing the value of tourism while also driving the dispersal of tourism across Britain



This strategy comes at an important time with the market evolving, changing visitor demands, a complex political agenda and increased global competition having a significant impact on the sector. The strategy aims to adapt and flex to the fast pace of change, adopting an agile and innovative approach.

Northern Ireland's vision for tourism, which sets out its strategy as well as its yearly operating plans, states that its desire is to become an internationally competitive destination renowned for world class 3-5 day breaks[14].

The vision of the Tourism Strategy is that the tourism sector contributes to the Department for the Economy's vision of placing Northern Ireland *"amongst the most competitive small, advanced economies in the world"*[15].

The operating plan identifies **six mission statements for tourism in Northern Ireland[16]**:

1. Supporting our industry to rebuild its customer base following the pandemic.
2. Promoting Northern Ireland as a must-see destination to markets which offer the greatest potential for growth.
3. Supporting our tourism businesses to grow sustainably.
4. Supporting the development of authentic tourism experiences which bring our unique heritage to life in an invigorating, responsible and sustainable way.
5. Looking after our people.
6. Transforming the way we work.

[8] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/visitbritainvisitengland_2020_strategy.pdf
[9] https://scottishtourismalliance.co.uk/scotland-outlook-2030-overview/
[10] https://www.economy-ni.gov.uk/topics/tourism#:~:text=The%20department%20is%20leading%20on,of%20the%20growth%20of%20the
[11] https://www.economy-ni.gov.uk/consultations/draft-tourism-strategy-northern-ireland-10-year-plan
[12] https://www.gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf
[13] https://www.visitbritain.org/introduction-tourism-britain/tourism-action-plan
[14] https://www.tourismni.com/globalassets/about-tourism-ni/strategic-documents/operating-plans/2022-23/tourism-ni---2022-23-operating-plan_web.pdf
[15] https://www.economy-ni.gov.uk/topics/tourism
[16] https://www.tourismni.com/globalassets/about-tourism-ni/strategic-documents/operating-plans/2022-23/tourism-ni---2022-23-operating-plan_web.pdf

In order to achieve the mission statements the paper details nine priority areas that will enable the vision to be implemented. This includes improving customer and market insights to deliver a robust evidence base, developing and growing sustainable tourism experiences, and supporting the development of sustainable tourism businesses, all *"to support the development of a thriving tourism ecosystem that enriches Northern Ireland"*.

While Northern Ireland relies heavily on its ports and airports to access key markets, it lacks direct services to inbound tourism markets such as Canada, Germany, Scandinavia and the Middle East. More positively, it notes an investment in transport infrastructure to upgrade gateways between Northern Ireland and Republic of Ireland and the creation of innovative ways to encourage visitor exploration between both. Improved and increased accommodation to meet the demands, needs and expectations of visitors is also highlighted as a focus.

2.2 National tourism statistics

Travel and tourism contribute significantly to the UK economy. According to the World Travel and Tourism Council [17]:

- the total contribution of travel and tourism to the UK's **GDP increased by 40%** from 2020 to 2023
- in 2022, **UK tourism's GDP contribution was £214bn (8.9% of total GDP)** this represents a 62.7% increase on the previous year
- tourism's GDP contribution should **grow by 3%** annually between 2022 and 2032

40% increase in GDP from 2020 to 2023

GDP contribution of £214 billion in 2022

3% annual growth 2022 - 2032

All UK countries including Northern Ireland saw a decrease in tourist numbers during the COVID-19 pandemic. Northern Irish tourism levels rebounded healthily in 2022, in particular due to strong performances from closer to home markets, including overnight trips from the Republic of Ireland which exceeded one million for the first time and was up more than 50% since 2019[18].

Tourism Northen Ireland's industry barometer shows that[19]:

- the industry had a positive performance during January-September 2023 with the majority reporting business turnover exceeding or similar to 2022 levels
- room yields have been higher (52%) or similar (30%) to 2022 for the majority of accommodation providers
- a significant proportion of businesses report growth across the closer to home markets (NI, ROI and GB), although a minority of around one fifth experienced a decline in visitor volumes from these key markets compared to 2022

According to the 'Northern Ireland Domestic Tourism Strategy', in 2020 **spend per night by visitors to Northern Ireland was £66 (£79.93 when adjusted for 2022/23 prices) (per adult equivalent) and visitors spent an average of 2.1 nights per trip[20].**

[17] https://wttc.org/news-article/new-report-from-wttc-reveals-uk-travel-and-tourism-sector-is-expected-to-create-700000-jobs-over-the-next-decade
[18] *https://www.tourismni.com/globalassets/industry-insights/tourism-360/tourism-360---2022-performance---at-a-glance/tourism-360---2022-jan-dec-performance.pdf*
[19] *https://www.tourismni.com/research-insights/tourism-industry-barometer/*
[20] *https://www.tourismni.com/globalassets/covid19/marketing/ni-market/ni-domestic-tourism-strategy.pdf*

A 2023 Mintel report looking specifically at the UK camping and caravanning sector,[21] found that total volumes returned to pre-pandemic levels in 2022, with the overall number of camping and/or caravanning trips reaching an estimated 16.7m[22]. Other notable statistics from this report include:

- value of the domestic market rising by 25% over the past five-years
- rental holiday caravan spending reached £1.2bn
- touring holidays (e.g. in a caravan or motorhome) and rental holiday caravans are estimated to be the key areas of growth over the next five years

Since the pandemic, a more affluent demographic has entered the market (across the UK); 37% of new campers have a household income above £50,000, compared with just 21% of those who camped/caravanned pre-pandemic[23].

Demand remains robust at the premium end of the spectrum. Over two third (69%) of recent and potential future campers/caravanners say they would pay more to stay on a holiday park and campsite with private bathroom facilities, 55% would pay more to stay in a luxury caravan, and 54% would pay more to stay in unusual 'glamping' accommodation[24].

[21] *Camping and caravanning is defined as holidays that use tents, trailer tents, touring caravans, caravan holiday homes, park homes, and motorhomes or campervans as accommodation.*
[22] *Camping and Caravanning UK, Mintel, 2023.*
[23] https://www.easier.com/141247-carry-on-camping-4-5-million-brits-took-their-first-camping-holiday-during-the-pandemic.html
[24] *Camping and Caravanning UK, Mintel, 2023.*

3 Holiday Park and Campsite Operator Consultation

This section provides evidence from consultations with holiday park and campsite operators across Northern Ireland. This was drawn from a database provided by the UKCCA[25] as well as wider non-member holiday parks and campsites, including:

- British Holiday and Home Parks Association
- Camping and Caravanning Club
- Caravan and Motorhome Club
- National Caravan Council
- Non-member parks completing the survey[26]

While this represents a comprehensive list of holiday parks and campsites in Northern Ireland it does not include all of them.

For this reason, the impact figures presented in this report are considered to be a conservative estimate of the total value of the sector.

3.1 Composition of Northern Ireland's holiday parks and campsites

According to evidence provided by local councils to the 2021 Review of Caravans Act (Northern Ireland), **there were 92 holiday parks and campsites operating in Northern Ireland, accounting for 14,746 pitches[27].**

In order to determine the make-up of these parks as well as their location we used data provided by the UKCCA members on 63 parks located in Northern Ireland. The allocation of parks and pitch numbers by accommodation type and county was worked out for these 63 parks and those ratios applied to the 92 parks.

The majority of these pitches are either owner-occupied holiday caravans (11,041, 75%) or touring pitches[28] (1,880, 13%). However, the holiday parks and campsites have a wide and growing mix of other accommodation options which cater for a broad range of tastes and budgets, including wigwams, yurts and pods.

County Down contains both the highest number of holiday parks and campsites (39) and the highest number of pitches (7,604). Table 3.1 summarises the composition of Northern Ireland's holiday park and campsite sector.

Table 3.1: Composition of Northern Ireland's holiday park and campsite sector[29]

	Number of holiday parks and campsites	Touring Pitches*	Glamping **	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/ chalet/ cottage	Rented lodge/ chalet/ cottage	Total pitches
Antrim	23	260	4	0	1,583	611	0	38	**2,496**
Armagh	5	29	0	0	0	0	0	0	**29**
Down	39	796	6	0	6,260	519	23	0	**7,604**
Fermanagh	7	465	11	17	946	8	8	0	**1,455**
Derry/Londonderry	12	301	0	0	1,935	580	0	0	**2,816**
Tyrone	6	29	0	0	317	0	0	0	**346**
Northern Ireland	**92**	**1,880**	**21**	**17**	**11,041**	**1,718**	**31**	**38**	**14,746**

Source: UKCCA, the 2021 Review of Caravans Act (Northern Ireland) report and the Frontline Holiday Park and Campsite Operators Survey, 2023
**Includes touring caravans, motorhomes/campervans and tents*
***Yurts/wigwams/other excluding pods*

[25] *This includes Certificated Sites and Certificated Locations.*
[26] *Where holiday parks/campsites that were not members of the UKCCA completed the survey, they were added to the population database.*
[27] *Figures we not broken down by accommodation type.*
[28] *This includes touring caravans, motorhomes/campervans and tents.*
[29] *To understand figures by accommodation type we took the list of UKCCA member parks (63) and applied the average accommodation split from that data to the overall figures.*

3.2 Sampling methodology

Holiday parks and campsite operators across Northern Ireland were invited to participate in the research. This was done by the various sponsor members reaching out to operators and gaining consent. Telephone interviews and e-surveys were conducted with those agreeing to participate.

The UKCCA and Frontline met at various stages throughout the project to review the response rates, identifying which geographic areas or accommodation types were under-represented and those were targeted accordingly.

26 out of 92 holiday parks and campsites across Northern Ireland participated giving us a 95% confidence +/– 16% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population.

3.3 Geography locations

The geographic location of those completing the survey was broadly representative of the holiday park and campsite sector with the exception of Armagh and Fermanagh where there were no respondents.

Table 3.2: Locations of holiday parks and campsites surveyed

Location	Number responding	Estimated population	Percentage consulted
Antrim	5	23	22%
Armagh	0	5	0%
Down	16	39	41%
Fermanagh	0	7	0%
Derry/Londonderry	4	12	33%
Tyrone	1	6	17%
Total	**26**	**92**	**28%**

Source: Frontline Holiday Park and Campsite Operators Survey, 2023

3.4 Holiday parks and campsites size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large holiday parks and campsites, including 6 very large (251 pitches or more); and 2 very small (5 pitches or fewer), these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 3.3: Sizes of the holiday parks and campsites surveyed

Number	Number responding	Estimated population[30]	Percentage consulted
Very small (1-5 pitches)	2	27	7%
Small parks (6-50 pitches)	1	6	17%
Medium sized (51-100 pitches)	5	18	28%
Large (101-250 pitches)	10	26	38%
Very large (251 pitches or more)	6	15	40%
Unknown	2		
Total	**26**	**92**	**28%**

Source: UKCCA, 2023

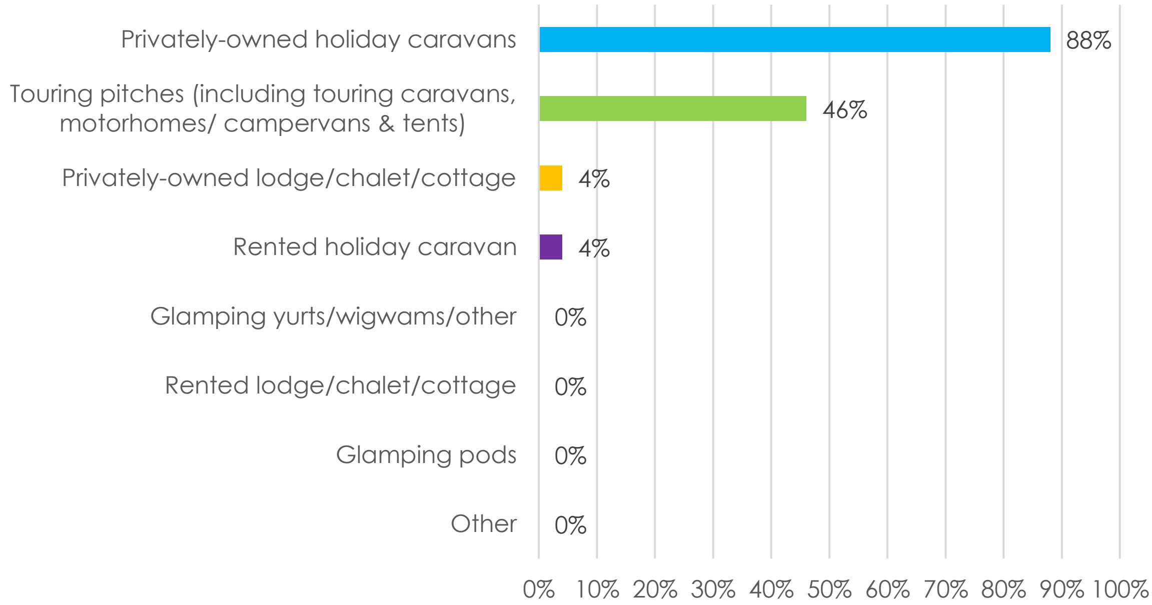
[30] *Percentage of parks that have either privately owned caravans, lodges/chalets, or both.*

3.5 Accommodation provided

Almost half (46%) of respondents had touring pitches which includes touring caravans, motorhomes/campervans and tents.

88%[31] had owner-occupied accommodation (caravans or lodges). The large proportion of privately-owned holiday caravan parks and campsites is likely due to the methods used to promote the survey in Northern Ireland.

Figure 3.1: Types of accommodation on the holiday parks and campsites surveyed



Source: Frontline Holiday Park and Campsite Operators Survey, 2023 N=24 (survey respondents)
(figures sum to over 100% as most holiday parks and campsites offer more than one type of accommodation)

3.6 Facilities and activities provided

In addition to accommodation, many offer a range of **facilities**. The figures in Table 3.4 capture only those who listed each type of facility in their response; it is possible that some of the holiday parks and campsites may have some of these facilities but did not answer this question in full. The figures may therefore under-estimate the true mix of facilities on Northern Ireland's holiday parks and campsites.

Small, medium and large holiday parks and campsites (6-50, 51-100 and 101-250 pitches respectively) had a wider range of facilities with shower facilities and toilet blocks, outdoor play areas, Wi-Fi and laundry being most common.

Those larger holiday parks and campsites, with more than 250 pitches, all had retail shops, restaurants/bar/takeaway and outdoor plays areas, while the majority, laundry, Wi-Fi, heat pumps and games/information rooms.

Other facilities included a wildlife pond, family room and tennis courts.

[31] *Percentage of parks that have either privately owned caravans, lodges/chalets, or both.*

Table 3.4: Facilities listed by holiday park and campsites surveyed

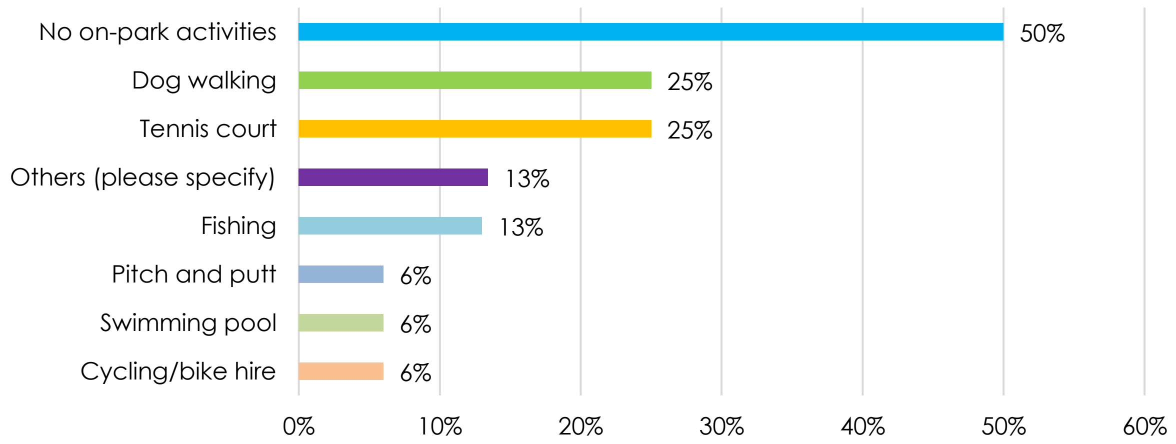
Facility	Very small holiday parks and campsites	Small, medium and large holiday parks and campsites	Very large holiday parks and campsites
Toilet block	1	8	4
Showers	1	8	4
Laundry	1	10	5
Retail/shop	-	2	6
Restaurant/bar/takeaway	-	1	6
Entertainment	-	1	1
Outdoor play area	-	12	6
Games/information room	-	7	4
Wi-Fi	1	10	5
Electric vehicle charging points	-	2	2
Dog washing facilities	-	1	-
Bike cleaning stations	-	-	-
Locker and or back packing facilities	-	1	-
Defibrillators	-	6	3
Solar panels	-	4	1
Heat pumps	-	-	4
Other	-	1	4
Total responding	**1**	**15**	**6**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 **N= 22**

The most common **activities** provided on-site included dog-walking (25%) and tennis courts (25%).

'Other' activities included children's disco, alpaca walks and a history museum. 50% said that they did not provide any on-site activities.

Figure 3.2: Activities listed by holiday park and campsites surveyed

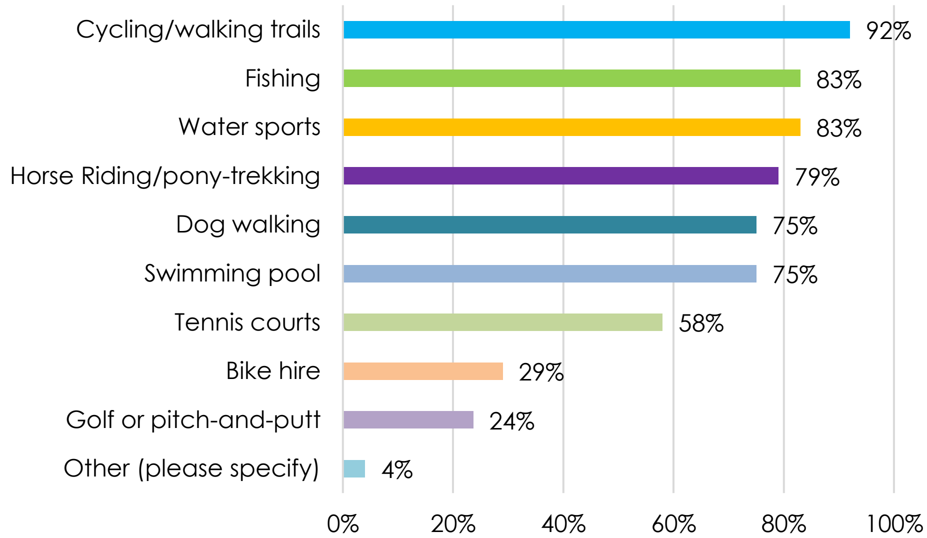


Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=16
(figures sum to over 100% as most parks offer more than one type of facility)

Holiday parks and campsites have access to a range of **activities in the local area**. 92% had cycling/walking trails in the areas as well as fishing (83%) and watersports (83%). 79% had horse riding or pony trekking.

'Other' activities included local gardens, forest parks, and mountain climbing.

Figure 3.3: Range of activities in the local area



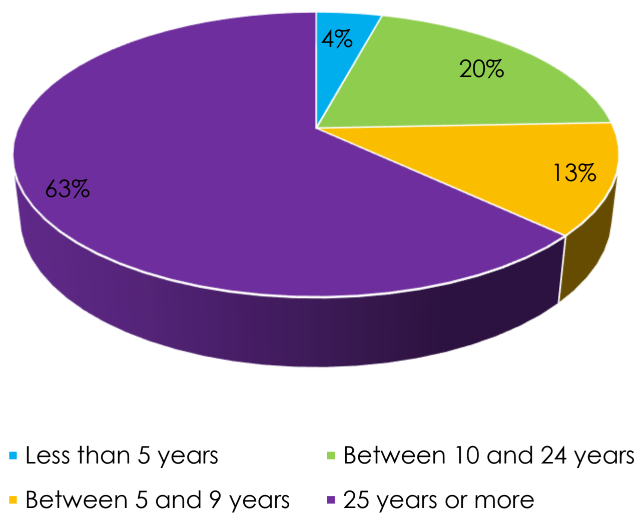
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=24
(figures sum to over 100% as most parks had more than one type of activity in the local area).

3.7 Holiday park and campsite ownership

In the majority of responses operators saw their holiday parks and campsites as long-term investments, with 63% owned and operated for over 25 years and a further 20% between 10 and 24 years.

Figure 3.4 summarises the feedback.

Figure 3.4: Length of time survey operators have owned/operated their holiday parks and campsites



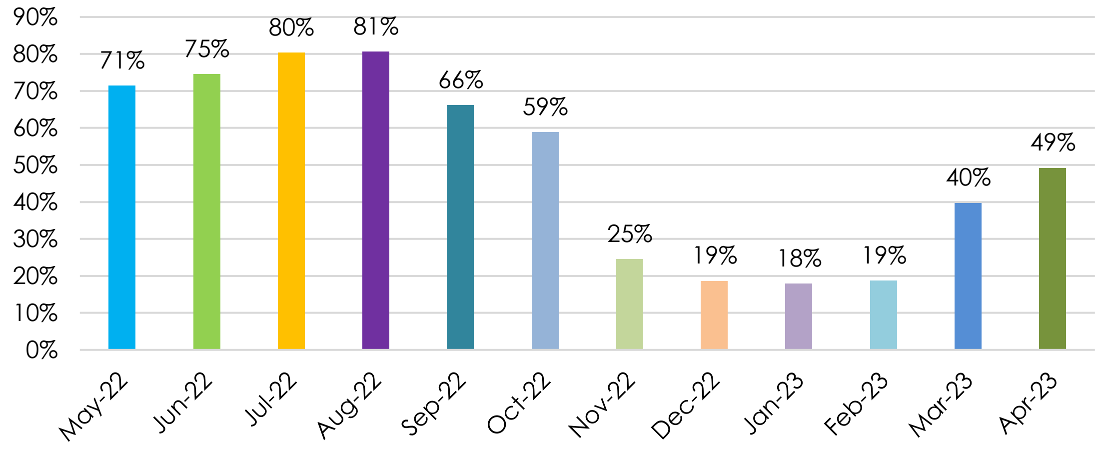
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=24

3.8 Length of season and occupancy rates

The majority (79%) operated seasonally with the remainder (21%) open all year. Where holiday parks and campsites were seasonal, most were open from March – October/November.

Average occupancy rates peaked at 81% in high season (August 2022), falling to 66% in mid-season (September 2022). Low season average occupancy ranged from a low of 18% in January (2023) to a high of 40% in March (2023) as presented in Figure 3.5.

Figure 3.5: Average occupancy rates on holiday parks and campsites surveyed[32]



Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=19

3.9 Visitor origin

When asked where their visitors came from, respondents said that, 89% came from Northern Ireland, 4% from England, 1% from Scotland, and <1% from Wales. 5% were from outside the UK. The most cited market for visitors from outside the UK was the Republic of Ireland.

When segmented by region (Table 3.5) there was no real variance – except for Tyrone, however this region only had one respondent.

Table 3.5: Visitor origin of holiday parks and campsites surveyed

Area	Northern Ireland	England	Scotland	Wales	Outside UK
Antrim	91%	3%	1%	<1%	5%
Armagh	-	-	-	-	-
Fermanagh	-	-	-	-	-
Derry/Londonderry	98%	1%	1%	1%	-
Tyrone	50%	30%	5%	1%	11%
Down	89%	4%	1%	<1%	1%
Total**	**89%**	**4%**	**1%**	**<1%**	**5%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 *N=24 total*
***Total percentages may add up to under/over 100% due to rounding and recipient input*

[32] *Due to the higher margin of error in sample (16%) and the fact that those responding to the survey are heavily focused on one accommodation type (privately-owned holiday caravans) we have opted to use the UK average occupancy figures in the economic modelling.*

3.10 Staff employed

Results show that on average, there were 4.9 full-time and 0.4 part-time staff all year round and 0.3 full-time and 0.3 part-time seasonal staff. Numbers varied and as not all parks and campsites responded on this question it is therefore likely to be an underrepresentation of employment in the sector.

None of the holiday parks and campsites employed migrant workers.

Table 3.6: Average staff employed per holiday parks and campsite surveyed

Holiday Park and Campsite Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small (1-5 pitches)*	-	-	-	-
Small (6-50 pitches)	-	-	-	3.0
Medium sized (51-100 pitches)	-	0.5	3.0	-
Large (101-250 pitches)	0.2	0.5	3.9	0.3
Very large (251 pitches or more)	0.7	-	8.5	0.5
Average across all holiday parks and campsites**	**0.3**	**0.3**	**4.9**	**0.4**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=21

**There was only one response from parks which had 1-5 pitches, typically because these are CL/CS sites that have a small number of pitches and do not require employees directly related to this element of the business*

***Ranges from 1-17 full time and 1-3 part time all year staff, and 1-4 full time and 1-2 part time seasonal staff*

3.11 Expenditure by holiday park and campsite[33]

Operators were asked to provide details of their capital expenditure, operating expenditure, wages and salaries for the last financial year (2022/23, or the most recent one available).

The total expenditure is presented in Table 3.7. Again, this is likely to be an underrepresentation as not all parks responded.

Table 3.7: Total expenditure by holiday parks and campsites surveyed

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£4,015,040	£223,058
Operating expenditure	£3,150,909	£165,837
Wages and salaries	£2,341,433	£130,080
Total expenditure	**£9,507,382**	**£518,975**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=15-19

**Ranges from £9,210-£1.5m (capital), £30,000-£629,622 (operating) and £20,000-£393,711 (wages and salaries)*

55% of operators stated that their capital expenditure had stayed the same over the last three-years, with 40% saying it had increased and 5% saying it had decreased. Some of the reasons given for the increase in expenditure were:

- **rising utility costs and inflation**
- **upgrading** of facilities and other **park developments**

The top five areas of capital expenditure over the last five years included:

- **accommodation** – including purchasing of caravans, trailers and other stock, and expanding and developing the parks
- **equipment** – including tractors, digging equipment and other commercial vehicles, playground equipment and other machinery
- **utility development** – including upgrading gas mains supply
- **facilities** – including general facilities and service upgrades
- **park infrastructure** – road improvements, and replacement decking

The total and average planned expenditure is presented in Table 3.8.

[33] *For various reasons some holiday parks and campsites were unable to provide this information.*

Table 3.8: Planned expenditure

	Expenditure			
	Average maintenance	Total maintenance	Average improvements	Total improvements
Next financial year	£53,167	£637,999	£70,889	£567,115
Next three financial years	£152,583	£1,831,000	£230,250	£2,763,000

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=8-12
**Ranges from: maintenance £9,104-£150,000 (next financial year) and, £30,088-£460,344 (next three financial years); improvements £10,000-£200,000 (next financial year) and £17,000-£1.5m (next three financial years)*

When asked how their income had changed over the last two-years, just over half (55%) of the 77% who responded said it had increased, with 25% saying it stayed the same while 20% said it had decreased.

The main reason cited for an increase in income was due to an increase in domestic tourism due to COVID-19 restrictions, increased sales, and increased margins due to rising prices.

3.12 Community engagement

Half of respondents provided information on how they **engage with the local community**, responses included:

- **local events** – 100% promoted and sponsored local events, with one holiday park sponsoring local football strips
- **promoting local** – 100% also actively promote local producers, suppliers, restaurants and shops
- **social media advertising** – 77% advertise and signpost local businesses and causes on social media
- **fundraising** – 69% work with community groups and community councils

Some **holiday park and campsite operator** feedback included:

"Charity fundraisers. Promote local businesses who benefit from my customers."

County Down

"Open day walks, visitors invest in local economy."

County Tyrone

3.13 Environmental improvement

Just over a third of holiday park and campsite operators (35%) provided information on how they **supported environmental improvements**. 16% of respondents had a carbon reduction plan. The most frequently occurring environmental initiatives included:

- **recycling** – which was highlighted by 100%
- 78% showed **support for local wildlife** – including having native trees and wildflowers on-site
- **using sustainable accommodation** – 67% of parks had sustainable accommodation
- 67% had **restricted vehicle movement** – **such as** car-free zones and promoted lower energy modes of travel
- **energy and water conservation** – 33% of parks did this through solar panels and LED lighting on timers light sensors
- 22% participated in **award schemes,** such as the Green Tourism Award

Some **holiday park and campsite operator** feedback included:

> *"[We have] wildflowers, solar powered lights, native trees, recycling, encourages low energy modes of travel - bicycles and foot."*
>
> ***County Tyrone***
>
> *"Waste recycling, solar panels, LED lighting also on time clocks."*
>
> ***County Down***

3.14 Health and wellbeing

Over half (54%) provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- 86% **encourage dog owners**
- access to **walking and cycling routes, waterways and beaches** was provided by 79%
- 21% **provided local health and wellbeing facilities** – which they promoted and granted access to the broader community (e.g. school groups) to these amenities
- **healthy food options** – 7% had on-site restaurants/cafes

'Other' responses (21%) included access to green spaces.

More detail on the health and wellbeing benefits for visitors is presented in Section 4.5.

Some **holiday park and campsite operator** feedback included:

> *"Caravan owners enjoy the social interaction with their neighbouring caravan owners on the park."*
> ***County Derry/Londonderry***

3.15 COVID-19 pandemic

Operators were asked how the COVID-19 pandemic had changed the sector; over half (54%) provided some insight. These included:

- **initial surge in bookings** – due to travel restrictions meaning an increase in domestic tourism, which was followed by a big reduction in bookings as overseas travel became possible again
- **economic impacts** – for example supply costs and labour costs, as well as supply chain disruption with orders not being filled, and general inflation
- **changing customer behaviour** – for example the type of accommodation booked i.e. opting for more self-contained options, as well as an increase in last-minute bookings
- **operational changes** – such as contactless payments, other contactless processes e.g. check in, flexible booking policies to react to shifting government policy, and other health and safety protocols implemented

Operators were also asked what effect COVID-19 had on their operational expenditure over the last two-years; of the 58% who responded, all said it had risen.

Some **holiday park and campsite operator** feedback included:

"During COVID-19 the caravan park experienced a mini boom in business after the initial lockdowns were lifted. This has since dropped off to pre COVID-19 levels and sales are much reduced mainly due to uncertainty in the economy and huge price inflation now attached to purchasing a caravan."

County Derry/Londonderry

"Amplified interest in caravan holidays as travellers seek more isolated, self-contained, and flexible vacation options… need for minimising physical contact accelerated the adoption of technology, from online bookings to virtual tours and digital check-ins, the sector has had to adapt swiftly."

County Antrim

3.16 Consumer demographics

Operators were asked if the consumer demographics have changed over the years; over half (54%) provided some insight. Examples included:

- **increase in younger guests and families** – some of whom camped for the first time during the pandemic; this allowed them to enjoy the flexibility and freedom that camping/caravanning gives
- **reset towards older guests and retirees** – reverting back to this after the COVID-19 boom in younger guests, retirees with more leisure time and access to more cash savings continue to represent the largest customer segment

Some **holiday park and campsite operator** feedback included:

" An emerging trend is the increase in early retirees or those approaching retirement. With more leisure time and a desire for flexible travel options, many are investing in caravans or motorhomes. They value the community aspect of caravan parks and the opportunity to explore different regions at their own pace."

County Antrim

" During COVID-19 period, younger generation uptake, but normal demographic has resumed."

County Down

" Early retirees, more staycations, increase in young families."

County Tyrone

" Consumer demographics have changed slightly with the primary market moving towards the older generation who have greater access to cash/savings."

County Down

3.17 Cost of living implications

Operators were asked about the implications of the cost-of-living crisis; 58% responded. The most frequently occurring examples included:

- **financial challenges** – operating costs including wages, and utility and maintenance costs, both of which lead to pricing challenges to try and offset increased overheads
- **changing customer behaviour** – with customers being priced out of foreign holidays leading to increased staycation trends, but also affecting their financial priorities in regard to holidays/holiday homes and therefore travelling less
- **decrease in ownership spend** – reduced spending for caravan upgrades, and an increase in abandoned caravans and unpaid utility bills altogether

Some **holiday park and campsite operator** feedback included:

"As the frequency of caravan owners changing/upgrading their caravans has reduced dramatically (due in part to the Caravans (NI) Act 2011), the annual cost of utilities often outweighs the value of the caravan. We are seeing an increase in the number of abandoned caravans and unpaid bills."

County Down

"The most direct effect is the increased operational cost. Utilities form a significant portion of our monthly outgoings, and any substantial increase would directly influence our profitability. To offset the higher utilities costs, there might be a need to adjust our pricing. However, such decisions must be taken with caution to ensure that we remain competitive and don't alienate customer base."

County Antrim

"Reduced sales and increased customers giving up their holiday home due to these costs of living."

County Down

3.18 Brexit

Half of respondents provided feedback on the implications of Brexit on supplies. The most frequently occurring examples included:

- **supply chain delays or disruptions** – for example getting repairs completed or parts for new units
- **difficulty importing goods** – with increased administration required, decreased availability, and at times just not possible without workarounds

Operators were also asked if Brexit had produced more red tape for their business; if the 54% who responded, the vast majority (93%) said it had.

It should be noted that Northern Ireland, unlike the rest of the UK, remains in the EU single market for goods. This puts in place a de facto Irish Sea trade border for goods moving to Northern Ireland from Great Britain creating unique challenges for trade which impacts on local economies and services.

Some **holiday park and campsite operator** feedback included:

" As we are based in Northern Ireland the extra paperwork after Brexit has added to the cost of caravan delivery due to the extra administration."

County Derry/Londonderry

" The supply of all goods to Northern Ireland from Great Britain [is] impossible without making customs entry declarations. The procedure of making declarations is also complicated, resource hungry and expensive which puts us at a commercial disadvantage."

County Derry/Londonderry

"Slowed down the manufacturing and transport of new homes. Made getting spare parts also harder and more [time consuming]."

County Down

3.19 Holiday park and campsite operator summary

This research found that Northern Ireland's holiday parks and campsites offer a wide range of accommodation options to visitors, which allow them to serve a diverse range of customers' tastes and budgets. These include both touring pitches for caravans, campervans, motorhomes and tents; owner-occupied holiday caravans; and rented holiday caravans, lodges, apartments, chalets, wigwams, pods and yurts.

In addition to the diverse accommodation offered, holiday parks and campsites also offer a wide range of leisure facilities and amenities, including restaurants, swimming pools, Wi-Fi and games rooms.

The majority have run their holiday parks and campsites for over 10 years (73%) and the majority have done so for over 25 years (63%).

Occupancy rates peaked at 81% in high season (August 2022) and 66% in mid-season (September 2022). The proportion of visitors who live outside Northern Ireland varied somewhat depending on geographic location, however the majority were from Northern Ireland.

As well as supporting local economies by providing a source for visitor off-site expenditure, holiday park and campsite operators also support their local communities through:

- **expenditure** – 73% from the total survey sample cumulatively spent £9.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local businesses and causes either on the park or via social media
- **environmental activities** – including recycling schemes, supporting biodiversity on-site, and water and energy conservation initiatives
- **health and wellbeing** – including providing cycle paths, and promotion of wider community health and fitness sessions

Several external factors affecting the sector in recent years were highlighted which will also shape the industry in the future. These included:

- **COVID-19** – leading to an initial spike in bookings post restrictions which is now returning to pre-COVID-19 levels; increased costs as well as a change in consumer behaviour and operational changes
- **consumer demographics** – with the continuing shift towards retirees with some new guests engaging in camping leading to new consumer behaviours
- **cost of living** – affecting businesses with operating and utility costs leading to pricing challenges, as well as changing consumer habits
- **Brexit** – leading to increased cost and supply chain disruptions for operators purchasing holiday caravans, and decreased availability of essential parts for park operation as well as an increase to red tape

4 Visitor Survey

An online visitor survey was open from May to November 2023. The survey was disseminated electronically by the Caravan and Motorhome Club and the Camping and Caravanning Club to a sample of their members.

The survey was also promoted by some of the holiday parks and campsites, in sector magazines, through various social media channels, visitor flyers and in the show guide at sector events as well as through Caravan Sitefinder.

393 respondents had made a visit to a holiday park and campsite in Northern Ireland in 2023. Table 4.1 shows the spread of visitors across the Northern Ireland regions.

Table 4.1: Location of holiday parks and campsites visited

Location	Percentage
Antrim	27%
Armagh	3%
Down	46%
Fermanagh	2%
Derry/Londonderry	21%
Tyrone	1%
Total respondents	**393**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

4.1 Visitor origin and number of trips

The vast majority of the survey respondents lived in Northern Ireland (95%). 2% came from outside the UK. This aligns to Northern Ireland holiday park and campsite operators who reported that the majority of their visitors come from Northern Ireland (Section 3).

Table 4.2: Visitor home country

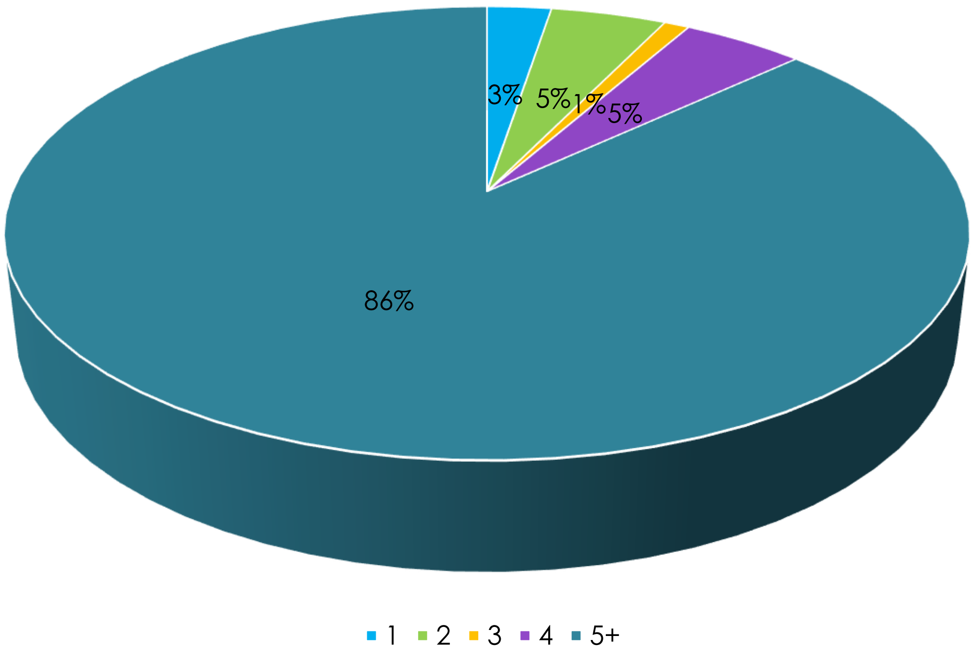
Location	Visitors
Northern Ireland	95%
England	2%
Scotland	<1%
Wales	<1%
Outside the UK[34]	2%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=393

[34] *This is an underrepresentation of actual overseas numbers and is a result of difficulty engaging this group to participate in the study.*

The majority of respondents (86%) stayed on a holiday park and campsite five times or more during the last 12 months; a further 5% stayed four times. 8% of these were a rally campsite or temporary campsite. Where respondents stayed more than five nights, the average was twenty nights.

Figure 4.1: Average number of visits made in the past 12 months



N=391

4.2 Visitor characteristics

19% of respondents had stayed in a touring caravan, motorhome or tent over the course of the year. 76% stayed in an owner-occupied holiday caravan or lodge; while 3% stayed in some form of rented accommodation.

The high proportion of of privately-owned holiday caravans is again likely due to the promotional routes used to target Northern Ireland.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	7%
Touring caravan	11%
Tent	1%
Static accommodation types	
Holiday caravan privately owned	73%
Holiday caravan rented	2%
Privately-owned lodge/chalet/cottage	3%
Glamping e.g. pods/yurts/wigwams/other	1%
Rented lodge/chalet/cottage	1%
Mixed types e.g. holiday caravan and glamping pods	
Multiple or mixed types of accommodation	1%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

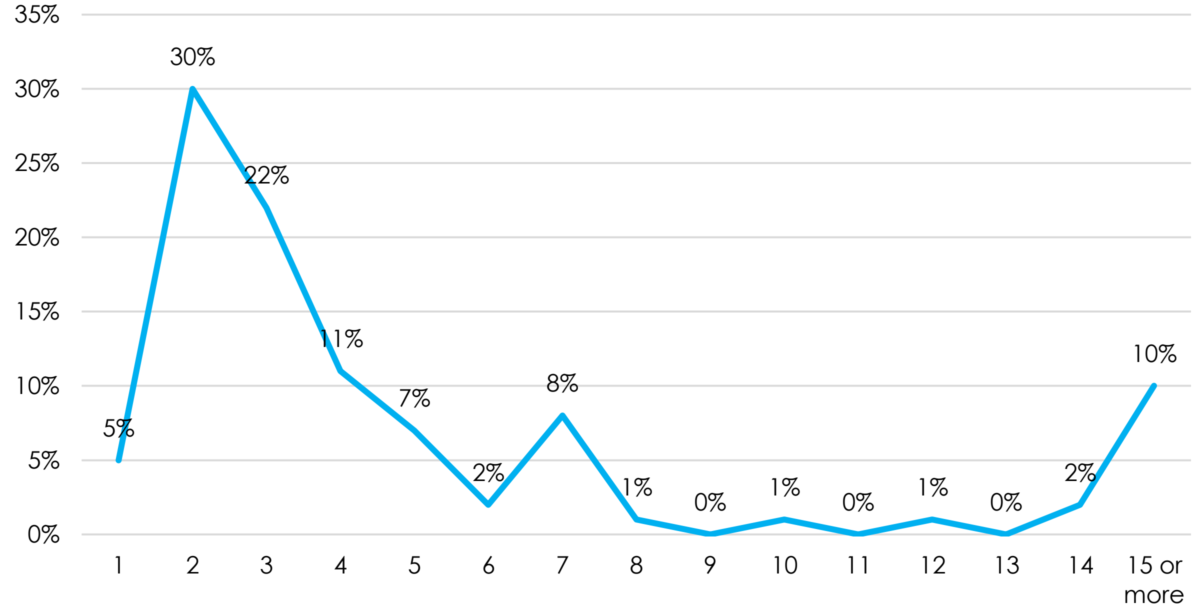
While 12% of respondents were a member of either CCC or CAMC[35], the majority were not affiliated with either (87%).

When broken down further:

- 5% were members of CCC
- 3% were members of CAMC
- 4% were members of both

On average visitors spent **4.9 nights per trip**. The distribution of responses is shown in Figure 4.2.

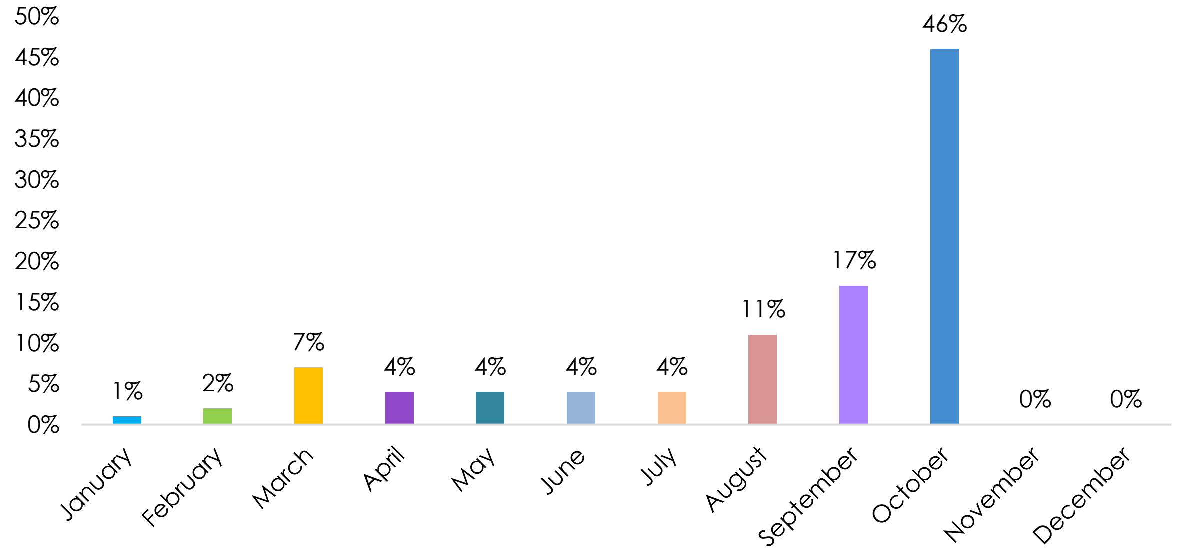
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=359

Figure 4.3 shows the month in which respondents began their trip. October (46%) was the most popular followed by September (17%). This is likely due to specific promotion of the survey in the month of October.

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=158

[35] *This representation has no bearing on the reliability of the survey findings as the methodology involves calculating the impacts for the owner-occupier/renter and the touring markets separately, then aggregating these together.*

Table 4.4 shows the number of adults, children and pets in each party. The average adult group size was 2.2, and 44% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2.0. 43% brought a pet.

The average total group size was 3.1. When broken down by accommodation, renters and owners have larger group sizes (3.6 and 3.2 respectively) compared with tourers at 3.0.

Table 4.4: Number of adults, children, and pets in each group

Number	…of adults	… of children*	…..of pets**
1	5%	31%	68%
2	79%	40%	25%
3	9%	24%	6%
4	7%	4%	2%
5+	1%	0%	-
Average	**2.2**	**2.0**	**1.4**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
** of groups with children*
*** of groups with pets*

4.3 Visitor expenditure

Visitors and their party who stayed in rented accommodation spent, on average, £1,174 per visit, including £842 on-site and £332 off-site.

Touring visitors and their party spent, on average, £465 per visit, including £230 on-site and £236 off-site.

Visitors who owned their holiday caravan spent, on average, £518 per visit, including £221 on-site and £298 off-site.

Accommodation including touring and pitch fees, transport and food and drink were the biggest expenditure items. Table 4.5 summarises the areas of expenditure.

Table 4.5: Visitor spend per visit

Area of expenditure	Renters[36]	Tourers	Owners
Transport to and from destination	£84	£51	£49
Transport spent during trip	£88	£29	£23
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)[37]	£703	£188	£169
Holiday park and campsite facilities (e.g. Wi-Fi, laundrette etc)	£0	£7	£15
Eating/drinking on the holiday park and campsite	£102	£22	£25
Eating/drinking in the surrounding area	£56	£67	£92
Recreation/entertainment on the holiday park and campsite	£14	£7	£3
Recreation/entertainment in the surrounding area	£36	£16	£25
Shopping on the holiday park and campsite	£22	£6	£9
Shopping off the holiday park and campsite	£12	£50	£95
Visitor attractions off the holiday park and campsite	£6	£20	£12
Other	£50	£3	£2
Total – on-site	**£842**	**£230**	**£221**
Total – off-site	**£332**	**£236**	**£298**
Total – both on and off-site	**£1,174**	**£465**	**£518**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
Due to rounding there may be slight discrepancies when totalling

[36] *Note – this was based on a small sample size – 13 respondents.*
[37] *As the accommodation spend has been provided for typically for the medium to high season – predominantly April-October a deduction of 25% has been applied to the low season months in the economic impact model.*

Visitors who stayed in rented accommodation spent, on average, £293 per day, including £210 on-site and £83 off-site.

Touring visitors spent, on average, £129 per day, including £64 on-site and £66 off-site.

Visitors who owned their holiday caravan spent, on average, £99 per day, including £42 on-site and £57 off-site.

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters[38]	Tourers[39]	Owners
Transport to and from destination	£21	£14	£9
Transport spent during trip	£22	£8	£4
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)	£176[40]	£52[41]	£32[42]
Holiday park and campsite facilities (e.g. Wi-Fi, laundrette etc)	£0	£2	£3
Eating/drinking on the holiday park and campsite	£26	£6	£5
Eating/drinking in the surrounding area	£14	£19	£18
Recreation/entertainment on the holiday park and campsite	£4	£2	£1
Recreation/entertainment in the surrounding area	£9	£4	£5
Shopping on the holiday park and campsite	£5	£2	£2
Shopping off the holiday park and campsite	£3	£14	£18
Visitor attractions off the holiday park and campsite	£2	£6	£2
Other	£12	£1	<£1
Total – on-site	**£210**	**£64**	**£42**
Total – off-site	**£83**	**£66**	**£57**
Total – both on and off-site	**£293**	**£129**	**£99**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
Due to rounding there may be slight discrepancies when totalling

4.4 Influences on visitor decisions on which holiday park and campsite to visit

Visitors were asked *"what influenced you in making these visits?"*

The most popular responses were *"It's an area I know well/been before"* (41%); and *"The holiday park and campsite was recommended to me by family/friends"* (14%).

Table 4.7: Influences on visitor decisions on which holiday parks and campsites to visit

Factor	Number responding
It's an area I know well/been before	41%
The holiday park and campsite was recommended to me by family/friends	14%
Family/friend connections in the area	11%
Specific activities available in the area, such as golf, walking, cycling	10%
I wanted to visit the area/country	9%
I had been to this country before and wanted to visit another area	6%
We/I saw advertising for the holiday park and campsite i.e. magazine/website	5%
CAMC/CCC club member communication	3%
I was attending an event/festival	2%
Other	35%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=281
**Figures sum to more than 100% as multiple answers were allowed to this question*

[38] *Due to the low level of renter responses, the UK average has been used in the economic modelling.*
[39] *Due to the low level of tourer responses, the UK average has been used in the economic modelling.*
[40] *Rental accommodation spend ranged from £15 per night to £100 per night.*
[41] *This does not include the cost of buying the accommodation.*
[42] *This does not include the cost of buying the accommodation. Where total accommodations fees per trip were more than £2,000, an assumption was made that this was the annual site fees, and this was divided by 365 to give a per day figure.*

'Other' responses included:

- ownership of a caravan or other accommodation on-site (78%)[43]
- for a specific hobby/event/place (8%)
- seasonal or regular trip (5%)
- general getaway (4%)

4.5 Health and wellbeing

All respondents stated time spent relaxing was what they did most whilst visiting a holiday park and campsite. This was followed by short walks (98%) and spending time with friends and family (96%).

Table 4.8 summarises the results.

Table 4.8: Activities undertaken whilst visiting a holiday park and campsite

	Level of activity done				
	More	**Less**	**Same**	**I did not undertake this activity**	**Total**
Spent time relaxing	78%	2%	20%	0%	255
Short walks (under 2 miles)	66%	5%	27%	2%	249
Spent time with family and friends	68%	2%	26%	4%	254
Long walks (over 2 miles)	55%	12%	20%	13%	249
Wildlife/nature activities	34%	6%	26%	35%	249
Other outdoor physical activities	27%	4%	7%	62%	249
Cycling	19%	2%	16%	64%	247

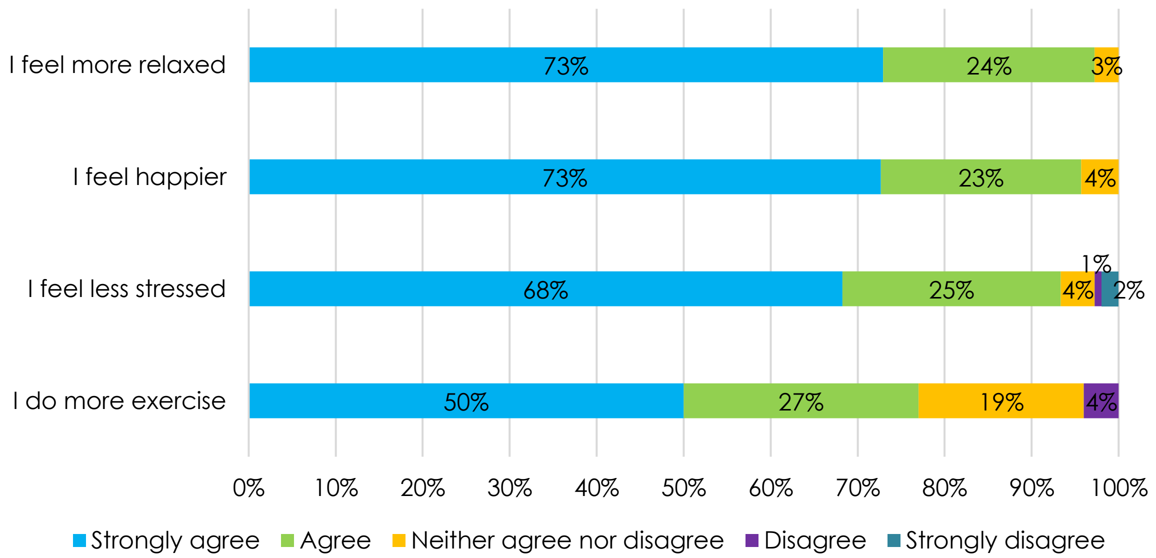
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

Visitors were asked to what extent they agree with a range of health and wellbeing statements; the results were as follows:

- 97% strongly agree or agree that they **feel more relaxed when visiting a holiday park and campsite**
- 96% strongly agree or agree that they **feel happier when visiting a holiday park and campsite**
- 93% strongly agree or agreed that they **feel less stressed when visiting a holiday park and campsite**
- 77% strongly agree or agree that they **do more exercise when visiting a holiday park and campsite**

Figure 4.4 presents the detailed feedback.

Figure 4.4: When visiting a holiday park and campsite …



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

[43] *This is likely due to the high response from privately-owned holiday caravan owners to the survey.*

Comments are shown in the word cloud below:

Some **visitor** comments included:

"I can escape from the routine of home, enjoy the beauty the countryside has to offer whilst in a safe and warm familiar environment when using my touring caravan."
Touring Caravan Owner, *County Armagh*

"That I can totally switch off from the stresses of life. People on the sites are very helpful and friendly, some have even joined us and we've spent the day getting to know each other."
Touring Caravan Owner, *County Antrim*

"I am more active, do more as a family and enjoy additional time with grandkids as I can accommodate them in caravan. Making wonderful family memories."
Static Caravan Owner, County Antrim

"Content, happy that the kids have freedom to make friends and in a safe environment."
Tent Owner, County Down

"Happier and healthy, walked six miles one day! Got away from stress and back to nature."
Motorhome/Campervan Owner, County Antrim

4.5.1 Benefits and impacts of improved physical and mental health

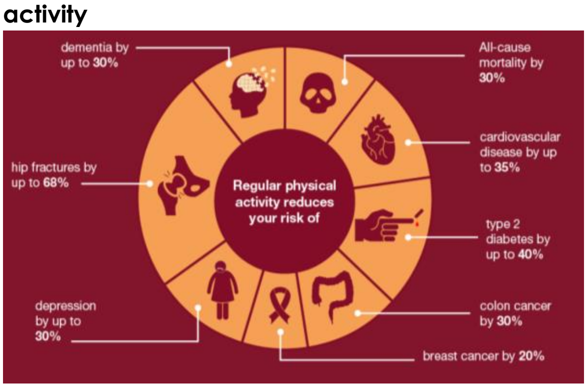
There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling. Holiday parks and campsites occupy green spaces and often have sport and recreational facilities or access to nature and are therefore widely recognised as a key contributor to improving physical and mental health.

The Chief Medical Officer stated that [44]:

> *"There is strong, consistent and convincing evidence that regular physical activity is beneficial for a wide range of health outcomes and risk factors."*

The health benefits include hard health outcomes such as all-cause mortality, cardiovascular disease, heart disease, and stroke. Regular physical activity reduces the risk for developing many cancers and improves metabolic health reducing the risk of developing Type 2 diabetes. There are also neurological benefits including reduced risk of dementia and mental health outcomes such as depression and anxiety. Moderate-to-vigorous physical activity has been shown to improve the quality of sleep[45].

Figure 4.5: The health benefits of physical activity



Source: Guidance Physical activity: applying All Our Health, 2022

As well as health impacts, **there are significant socioeconomic implications**. Physical inactivity is estimated to cost the UK £7.4bn annually (including £0.9bn to the NHS alone)[46].

Research also shows that **feeling more relaxed can reduce stress in a person's everyday life** which is vital for maintaining overall health, as it can improve mood, boost immune function, promote longevity and allow greater productivity[47].

New data and economic modelling from AXA UK and Centre for Business and Economic Research (CBER), indicated that burnout and stress cost the UK economy £28bn in sick days and lack of productivity (in 2022)[48]. Furthermore, in 2019, in-patient hospital admissions caused by stress-related illnesses in the UK cost over £8bn[49].

In 2019, the Office for Health Improvement and Disparities' introduced the *'All Our Health Framework'*. It is a call to action to all health and care professionals to embed prevention within their day-to-day work. As part of this, physical activity and mental wellbeing information has been created to help all health professionals:

- understand specific activities and interventions that can prevent physical inactivity
- access key evidence, data and signposting to trusted resources to help prevent illness, protect health and promote wellbeing

The evidence gathered from visitors during this study demonstrates that the Northern Ireland holiday park and campsite sector is making a positive contribution to visitor health and wellbeing.

Visitors were:

- increasing their physical activity
- improving their mental health through being more relaxed and less stressed
- accessing the natural environment

Therefore, Northern Ireland's holiday park and campsite sector is supporting the Northern Ireland and wider UK policy agenda for health and wellbeing.

[44] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[45] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[46] https://www.gov.uk/government/publications/physical-activity-applying-all-our-health/physical-activity-applying-all-our-health#:~:text=Physical%20inactivity%20is%20associated%20with,35%25%20less%20active%20by%202030.
[47] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[48] https://www.hrgrapevine.com/content/article/2023-03-29-burnout-is-costing-the-uk-economy-28bn-a-year
[49] https://www.statista.com/statistics/1135048/costs-of-stress-related-illnesses-in-the-uk/

4.6 The COVID-19 pandemic, cost of living crisis and Brexit

Visitors were asked to complete the following phrase: *"In relation to my holidays, as a result of the COVID-19 pandemic I….?"*

The most popular responses were:

- *"I holidayed more on holiday parks and campsites in the UK i.e. a staycation"* (41%)
- *"I already had a caravan/motorhome/ tent/lodge/chalet and now do more touring/camping"* (36%)
- *"I am more likely to continue to holiday on holiday parks and campsites in the UK"* (35%)

Table 4.9 presents the detailed feedback.

Table 4.9: As a result of the COVID-19 pandemic I…

Response	Number responding*
holidayed more on holiday parks and campsites in the UK i.e. a staycation	41%
already had a caravan/motorhome/tent/lodge/chalet/cottage and **now do more touring/camping**	36%
am **more likely to continue to holiday** on holiday parks and campsites in the UK	35%
am looking to **combine overseas holidays with staycations**	32%
bought a caravan/motorhome/tent/lodge/chalet/cottage and have **continued to use it**	23%
resumed overseas holidays	17%
discovered (rediscovered) holiday parks and campsites as a holiday destination	8%
done less holidaying in holiday parks and campsites	4%
bought a caravan/motorhome/tent/lodge/chalet/cottage but **have not used it in the last 12 months**	0%
bought a caravan/motorhome/tent/lodge/chalet/cottage but **have since sold it**	0%
other	2%
none of the above	6%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=252
**Figures sum to more than 100% as multiple answers were allowed to this question*

Visitors were asked to complete the following phrase: *"In relation to my holidays, as a result of the cost-of-living crisis I……?"*. The most popular responses were:

- *"I view holiday parks and campsites as a good value for money holiday option" (43%)*
- *"I will holiday more in my caravan/motorhome/tent/lodge/chalet" (43%)*

When comparing holiday parks or campsites as either a good or poor value holiday choice, 76% of respondents see them as good value[50].

Table 4.10 presents the detailed feedback.

[50] The 'good value' and 'poor value' options were part of a larger group of responses as per Table 4.10. The figures above have been calculated by isolating and comparing the two specific responses, the figures in the table are the overall proportion of survey respondents who chose each response.

Table 4.10: As a result of the cost-of-living crisis I…

Response	Number responding*
view holiday parks and campsites as a **good value for money** holiday option	43%
will **holiday more** in my caravan/motorhome/tent/lodge/chalet/cottage on holiday parks and campsites	43%
view holidays **overseas to be a much more considered purchase**	20%
view holiday parks and campsites as a **poor value for money** holiday option compared to other holiday choices	14%
view holiday on **holiday parks and campsites to be a much more considered purchase**	13%
discovered (rediscovered) holiday parks and campsites as a **cost-effective** holiday destination	10%
will **travel shorter distances** to visit holiday parks and campsites	10%
invested in a tent/caravan/motorhome during the pandemic and plan to **still go abroad** as I did before 2020 but also take holidays on campsites/parks due to that investment	7%
have **reduced my use** of activities/facilities in the holiday parks and campsites area	6%
invested in a tent/caravan/motorhome during the pandemic and plan to **continue using it** rather than go abroad	6%
will stay fewer nights at holiday parks and campsites	5%
will take **fewer trips** to holiday parks and campsites	4%
invested in a tent/caravan/motorhome during the pandemic but **now plan to go abroad as I did before**	2%
will **tour less** but stay the same amount of time	1%
other	3%
none of the above	7%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=*250*
**Figures sum to more than 100% as multiple answers were allowed to this question*

Visitors were asked if they had been put off holidaying abroad as a result of Brexit and if so, is this likely to be short or long term decision/choice. 79% of respondents claimed they had not been put of holidaying abroad as a result of Brexit. Whether they had or had not been put off holidaying abroad, respondents felt this was a long-term decision, with **no difference** in effect in those who **had not** been put off holidaying abroad (69%) than those who **had** been put off (66%).

Some **visitor** comments included:

"Happy and healthy in the motorhome. Meet new people and exercises more and actually chill! Visiting places, old and new, is my 'happy place'."
Motorhome/Campervan Owner, County Antrim

"Have owned a number of static caravans on the same site for 35 years. Great fun and many memories shared with families and friends."
Static Caravan Owner, County Down

"Holidaying at home is more expensive than going abroad now because of high site fees and cost of living. I prefer, however, to support my local economy."
Static Caravan Owner, County Down

"Wouldn't be without our caravan!"
Touring Caravan User, County Antrim

4.7 Visitor summary

The majority of the respondents lived in Northern Ireland (95%), of which the majority (86%) stayed on a holiday park and campsite in Northern Ireland five times or more during the last 12 months.

84% stayed in a touring caravan, motorhome or tent over the course of the year. 10% stayed in an owner-occupied holiday caravan or lodge, a further 5% stayed in some form of rented, stationary accommodation, while 1% stayed in other accommodation.

The average adult group size was 2, and 44% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. 43% of groups brought a pet.

Visitors spent 4.9 nights per trip. **This is higher than the average tourism number of nights per trip at 2.1[51].**

Visitors who stayed in rented accommodation spent, on average, £293 per day, including £210 on-site and £83 off-site. Touring visitors spent, on average, £129 per day, including £64 on-site and £66 off-site[52]. Visitors who owned their holiday caravan spent, on average, £99 per day, including £42 on-site and £57 off-site. **This is higher than the wider average tourism spend per night by those taking a trip in Northern Ireland at £66 in 2020 (£80 when accounting for inflation)[53].**

[51] https://www.tourismni.com/globalassets/covid19/marketing/ni-market/ni-domestic-tourism-strategy.pdf
[52] Does not total to £130 due to rounding.
[53] https://www.tourismni.com/globalassets/covid19/marketing/ni-market/ni-domestic-tourism-strategy.pdf

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

The main objective of this research was to assess the total value of visitor spend attributable to the Northern Ireland holiday park and campsite sector from May 2022-April 2023.

As part of Northern Ireland's impact model, an economic impact figure was calculated for every possible combination of:

- days of the year (365)
- accommodation type (7)
- Northern Ireland counties (6)

In other words, the model includes 15,330 separate economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures.

5.2 Measuring on-site and off-site expenditure

Table 5.1 provides an illustrative example of how the gross on-site expenditure figures were estimated for touring caravans in Fermanagh on Saturday 5th August 2023.

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Fermanagh	465
Multiplied by:	
Average occupancy rate on 5th August	68%[54]
Number of pitches occupied on 5th August	316
Multiplied by:	
Average on-site expenditure per day for touring holiday-makers	£42.00[55]
= On-site expenditure of touring caravan visitors to Fermanagh on 5th August	**£13,272**

Due to the low number of renters and tourers responding to the survey in Northern Ireland, the UK average spends for these groups was used instead. For accommodation spend (part of on-site spend), a 25% reduction has been applied to the low season months (October to April) to account for the fact that average daily spend by visitors was given primarily for the medium to high season months (April to October).

The gross off-site expenditure was measured in exactly the same way without the low season discount applied as the same off-site spending is assumed regardless of what time in the season they visit. Following the same worked example as above, it was calculated that in Fermanagh, on Saturday 5th August 2023, total off-site expenditure by touring caravan visitors is presented in Table 5.2.

Table 5.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Fermanagh	465
Multiplied by:	
Average occupancy rate on 5th August	68%[56]
Number of pitches occupied on 5th August	316
Multiplied by:	
Average off-site expenditure per day for renting holiday-makers	£59.32[57]
= Off-site expenditure of touring caravan visitors to Fermanagh on 5th August	**£18,745**

[54] Due to the higher number of parks responding with predominantly privately-owned holiday caravan' pitches the average UK occupancy figures have been used in the economic modelling.
[55] Due to the low level of tourer responses, UK average have been used.
[56] Due to the higher number of parks responding with predominantly privately-owned holiday caravan' pitches the average UK occupancy figures have been used in the economic modelling.
[57] Due to the low level of tourer responses, UK average have been used.

5.3 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted above, the Fermanagh economy would also have benefited from additional knock-on impacts on this day as a result of:

Indirect expenditure: the knock-on benefits that take place further down the supply chain.

Induced expenditure: the knock-on benefits that take place as a result of employees' expenditure of income.

The most up to date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (2019). This publication recommended that the 0.64 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation.

Table 5.3 presents a worked example for Northern Ireland.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£13,272
Plus	
Total off-site expenditure	£18,745
Total combined on and off-site expenditure	**£32,017**
Multiplied by:	0.64
= Indirect and induced effects	**£20,491**

5.4 Measuring visitor impact

The gross expenditure impact is equal to the sum of the on-site expenditure, off-site expenditure and multiplier impacts.

Table 5.4 presents a worked example.

Table 5.4: Visitor impact

Total on-site expenditure	£13,272
Plus	
Total off-site expenditure	£18,745
Indirect and induced effects	£20,491
Visitor impact	**£52,508**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[58], every £54,000 spent by tourists in a local economy sustains one full-time equivalent (FTE) job. This proxy was applied in the assessment of the FTE employment impacts associated with the holiday park and campsite visitor expenditure.

Figures from the most recent ONS publication[59], indicate that every £100 of turnover generated by Northern Ireland's overnight accommodation sector translates to a GVA impact of £52.63[60].

This proxy was applied to the above turnover figures to produce an estimate of the holiday park and campsite sector's contribution to Northern Ireland's GVA.

[58] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[59] *2021 Annual Business Survey, ONS.*
[60] *Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks).*

5.6 Capturing owner annual pitch fees

In our spend figures in Section 4.3, anything over £2,000 in the privately-owned holiday caravan and privately-owned lodge/chalet spend figures was assumed to be annual site fees, and this was divided by 365 to give a per day figure.

As the yearly average occupancy was only 38%, the remaining 62% of fees are not captured.

To account for this, we undertook research to understand the average annual pitch fees and divided this by 365 to get a per day spend. This was then multiplied by the 62% as shown in Table 5.5.

£3.74 per day was added to the privately-owned holiday caravan and privately-owned lodge/chalet on-site spend figures in our model.

Table 5.5: Owner annual pitch fees

Average annual pitch fees	£2,200[61]
Divided by 365 days	
Remaining average daily pitch fees spend	£3.74

[61] *We understand from industry intelligence gained from Northern Irish operators that the average annual pitch fees in Northern Ireland are in the region of £2200 (2021/2022).*

6 Economic Impact of Holiday Parks and Campsites in Northern Ireland

This section presents a summary of the visitor expenditure, Gross Value Added (GVA) and Full Time Equivalent (FTE) employment impacts of the holiday park and campsite sector in Northern Ireland, broken down by region and by accommodation type.

6.1 Impact by Northern Irish region

It is estimated that in 2022/23 visitors to Northern Ireland holiday parks and campsites spent **a total of £390.7m in the Northern Irish economy**, made up as follows:

- £114.1m on-site spend
- £124.2m off-site spend
- £152.5m of multiplier impacts

This visitor expenditure supports **7,236 FTE jobs** and contributes **£205.7m of GVA to the Northern Irish economy.**

Table 6.1: Economic impacts by Northern Irish region

County	Visitor expenditure (£m)	Employment (FTE jobs)
Antrim	74.4	1,378
Armagh	2.5	46
Down	190.9	3,535
Fermanagh	34.7	642
Derry/Londonderry	80.2	1,485
Tyrone	8.1	150
Northern Ireland	**390.7**	**7,236**

Source: Frontline, 2023
Due to rounding there may be slight discrepancies when totalling at the NI level

6.2 Impact by accommodation type

Table 6.2 summarises the impacts aligned to accommodation type.

Table 6.2: Economic impacts by accommodation type

Northern Ireland	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Touring Pitches*	42.9	794	22.6
Glamping yurts/wigwams/others	1.0	19	0.5
Pods	0.8	15	0.4
Privately-owned holiday caravans	259.2	4800	136.4
Rented holiday caravans	82.5	1528	43.4
Privately-owned lodge/chalet/cottage	0.6	11	0.3
Rented lodge/chalet/cottage	3.7	68	1.9
All accommodation	**390.7**	**7,236**	**205.7**

Source: Frontline, 2023
*Includes touring caravans, motorhomes/campervans and tents
**Due to rounding there may be slight discrepancies when totalling at the 'all accommodation' level

6.3 Assessing the economic impacts of maintenance expenditure

The impacts presented to date are based on visitor expenditure to holiday parks and campsites in Northern Ireland, including their pitch fees. However, the figures do not capture the ongoing costs of maintaining their accommodation.

Based on the survey, Table 6.3 estimates the average maintenance expenditure across Northern Ireland.

Table 6.3: Average Northern Ireland annual expenditure on privately-owned holiday caravan and touring caravan/motorhome maintenance

Area of expenditure	Touring Caravan/Motorhome Owner*[62],[63]	Privately-owned holiday caravans/lodge owner[64],
Servicing	£218	£373
Insurance	£293	£242
Road Tax	£144	N/A
General upkeep	£164	£360
Total	**£819**	**£975**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023
**includes touring caravans, motorhomes/campervans and tents*

The predicted expenditure figure for touring caravan owners is equal to the estimated number of touring caravans/owned motorhomes in Northern Ireland (52,850 [65]) multiplied by average maintenance expenditure per touring caravan/motorhome (£819). This equals £43.3m.

Aligned to the approach presented above, the estimated gross expenditure figure for privately-owned holiday caravan/lodge owners is 11,072[66], multiplied by average maintenance expenditure per holiday caravan (£975). This equals £10.8m.

The total impact associated with expenditure on maintenance by tourers and privately owned holiday caravans **is estimated to be in the region of £154.1m.**

More detailed impact finding are shown in Appendix 1.

6.4 Economic impact summary

In 2022/23 it is estimated that Northern Ireland's holiday park and campsite sector generated **a gross direct visitor expenditure impact of £390.7m. This expenditure supports 7,236 FTE** jobs and contributes **£205.7m** (including multipliers) **GVA impact** to Northern Ireland's economy.

The **geographic areas** which recorded the highest visitor impacts were:

- **County Down**: with visitor expenditure of £190.9m, equivalent to a GVA impact of £100.5m, and 3,535 supported FTE jobs
- **Derry/Londonderry**: with visitor expenditure of £80.2m, equivalent to a GVA impact of £42.2m, and 1,485 supported FTE jobs

The **accommodation types** which recorded the highest net visitor impacts were:

- **privately-owned holiday caravans**: with visitor expenditure of £259.2m, equivalent to a GVA impact of £136.4m, and 4,800 supported FTE jobs
- **rented holiday caravans**: with visitor expenditure of £82.5m, equivalent to a GVA impact of £43.4m, and 1,528 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £154.1m of expenditure to the Northern Irish economy**.

[62] *These figures were taken from visitors who lived in Northern Ireland as it was assumed that's where they would spend their money.*
[63] *Note this is based on 64 respondents.*
[64] *These figures were taken from visitors visiting Northern Ireland as it was assumed that's where they would spend their money.*
[65] *https://www.caravantimes.co.uk/features/the-strange-and-wonderful-sights-of-caravanning/ and apportioned according the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[66] *UKCCA, 2023.*

7 Conclusions

The Northern Irish holiday park and campsite sector makes a substantial contribution to the Northern Irish tourism economy, generating £390.7m in visitor expenditure, equivalent to £205.7m GVA and supporting 7,236 FTE jobs.

Visitors to Northern Irish holiday parks and campsites spend more money than the national tourism average: During each of these stays, visitors spend a considerable amount of money per day in the local economy, including £293 on-site and off-site by renters, £99 on-site and off-site by owners and £129 on-site and off-site by tourers. This is an increase on the average Northern Irish tourism visitor spend (per day) £80[67].

Flexible accommodation and facilities provision, supporting local communities, protecting the environment and encouraging a healthier lifestyle: Northern Ireland's 92 holiday parks and campsites account for 14,746 pitches[68]. These holiday parks and campsites offer a flexible choice of accommodation and wide-ranging facilities, and regularly undertake activities which support local communities, help to protect the local environment and promote health and wellbeing.

Local suppliers also benefit: In addition to the figures above, money spent on maintenance by tourers and caravan holiday homeowners adds a further £154.1m of expenditure to the economy.

Visitors' health and wellbeing is also improved: Visitors reported doing more exercise and feeling more relaxed when visiting a holiday park and campsite. This is supported by holiday park and campsite operators who provide a range of health and wellbeing activities for their visitors.

Several external factors have an may potentially continue to affect the sector including:

- **COVID-19** – leading to an initial spike in bookings post restrictions which is now returning to pre-COVID-19 levels, increased costs as well as a change in consumer behaviour and operational changes
- **consumer demographics** – with the continuing shift towards retirees, however with some new guests engaging in camping leading to new consumer behaviours
- **cost of living** – affecting businesses with operating and utility costs leading to pricing challenges, as well as changing consumer habits
- **Brexit** – leading to increased cost and supply chain disruptions for operators purchasing holiday caravans, increased administration, and decreased availability of essential parts for park operation

[67] https://www.tourismni.com/globalassets/covid19/marketing/ni-market/ni-domestic-tourism-strategy.pdf
[68] *This includes Certificated Sites and Certificated Locations.*

Appendix 1 – Regional Breakdown

Antrim – includes the majority of Belfast as well as Ballymena

Armagh – includes Armagh, Portadown and Craigavon

Derry/Londonderry – includes Derry/Londonderry, Coleraine and Limavady

Down – includes parts of Belfast as well as Bangor and Downpatrick

Fermanagh – includes Enniskillen and Lisnaskea

Tyrone – includes Omagh and Dungannon

Appendix 2 – Detailed Impact Findings

Visitor Expenditure

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	1.4	0.1	0.0	10.1	10.9	0.0	0.7	**23.2**
Armagh	0.2	0.0	0.0	0.0	0.0	0.0	0.7	**0.8**
Down	4.5	0.1	0.0	40.1	9.2	0.1	0.0	**54.1**
Fermanagh	2.6	0.2	0.3	6.1	0.1	0.0	0.0	**9.4**
Derry/Londonderry	1.7	0.0	0.0	12.4	10.3	0.0	0.0	**24.4**
Tyrone	0.2	0.0	0.0	2.0	0.0	0.0	0.0	**2.2**
Total	**10.6**	**0.4**	**0.3**	**70.6**	**30.6**	**0.2**	**1.4**	**114.1**

Due to rounding there may be slight discrepancies when totalling

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	2.2	0.0	0.0	12.5	7.0	0.0	0.4	**22.2**
Armagh	0.2	0.0	0.0	0.0	0.0	0.0	0.4	**0.7**
Down	6.6	0.1	0.0	49.6	6.0	0.2	0.0	**62.3**
Fermanagh	3.8	0.1	0.2	7.5	0.1	0.0	0.0	**11.7**
Derry/Londonderry	2.5	0.0	0.0	15.3	6.7	0.0	0.0	**24.5**
Tyrone	0.2	0.0	0.0	2.5	0.0	0.0	0.0	**2.8**
Total	**15.5**	**0.2**	**0.2**	**87.4**	**19.7**	**0.2**	**0.9**	**124.2**

Due to rounding there may be slight discrepancies when totalling

Indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
furthAntrim	2.3	0.1	0.0	14.5	11.5	0.0	0.7	**29.0**
Armagh	0.3	0.0	0.0	0.0	0.0	0.0	0.7	**1.0**
Down	7.1	0.1	0.0	57.3	9.7	0.2	0.0	**74.5**
Fermanagh	4.1	0.2	0.3	8.7	0.1	0.0	0.0	**13.5**
Derry/Londonderry	2.7	0.0	0.0	17.7	10.9	0.0	0.0	**31.3**
Tyrone	0.3	0.0	0.0	2.9	0.0	0.0	0.0	**3.2**
Total	**16.7**	**0.4**	**0.3**	**101.2**	**32.2**	**0.2**	**1.4**	**152.5**

Due to rounding there may be slight discrepancies when totalling

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	5.9	0.2	0.0	37.2	29.3	0.0	1.8	**74.4**
Armagh	0.7	0.0	0.0	0.0	0.0	0.0	1.8	**2.5**
Down	18.2	0.3	0.0	146.9	24.9	0.5	0.0	**190.9**
Fermanagh	10.6	0.6	0.8	22.2	0.4	0.1	0.0	**34.7**
Derry/Londonderry	6.9	0.0	0.0	45.4	27.9	0.0	0.0	**80.2**
Tyrone	0.7	0.0	0.0	7.5	0.0	0.0	0.0	**8.1**
Total	**42.9**	**1.0**	**0.8**	**259.2**	**82.5**	**0.6**	**3.7**	**390.7**

Due to rounding there may be slight discrepancies when totalling

FTE Employment

Employment associated with on-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	27	1	0	188	201	0	13	**430**
Armagh	3	0	0	0	0	0	13	**16**
Down	84	2	0	742	171	3	0	**1,001**
Fermanagh	49	4	6	112	3	1	0	**174**
Derry/Londonderry	32	0	0	229	191	0	0	**452**
Tyrone	3	0	0	38	0	0	0	**41**
Total	**197**	**7**	**6**	**1,308**	**567**	**4**	**25**	**2,113**

Due to rounding there may be slight discrepancies when totalling

Employment associated with off-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	40	1	0	232	130	0	8	**411**
Armagh	4	0	0	0	0	0	8	**13**
Down	122	1	0	918	110	3	0	**1,154**
Fermanagh	71	2	4	139	2	0	0	**218**
Derry/Londonderry	46	0	0	284	123	0	0	**453**
Tyrone	4	0	0	47	0	0	0	**51**
Total	**288**	**4**	**4**	**1,619**	**365**	**3**	**16**	**2,299**

Due to rounding there may be slight discrepancies when totalling

Employment associated with indirect and induced multiplier impacts (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	43	1	0	269	212	0	13	**538**
Armagh	5	0	0	0	0	0	13	**18**
Down	131	2	0	1,062	180	4	0	**1,379**
Fermanagh	77	4	6	160	3	1	0	**250**
Derry/Londonderry	50	0	0	328	201	0	0	**579**
Tyrone	5	0	0	54	0	0	0	**59**
Total	**310**	**7**	**6**	**1,873**	**596**	**4**	**27**	**2,824**

Due to rounding there may be slight discrepancies when totalling

Employment associated with visitor expenditure impact (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	109	3	0	688	543	0	34	**1,378**
Armagh	12	0	0	0	0	0	34	**46**
Down	337	5	0	2,721	462	10	0	**3,535**
Fermanagh	197	10	15	411	7	1	0	**642**
Derry/Londonderry	127	0	0	841	516	0	0	**1,485**
Tyrone	12	0	0	138	0	0	0	**150**
Total	**794**	**19**	**15**	**4,800**	**1,528**	**11**	**68**	**7,236**

Due to rounding there may be slight discrepancies when totalling

Gross Value Added

GVA associated with on-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	0.8	0.0	0.0	5.3	5.7	0.0	0.4	**12.2**
Armagh	0.1	0.0	0.0	0.0	0.0	0.0	0.4	**0.4**
Down	2.4	0.1	0.0	21.1	4.9	0.1	0.0	**28.4**
Fermanagh	1.4	0.1	0.2	3.2	0.1	0.0	0.0	**4.9**
Derry/Londonderry	0.9	0.0	0.0	6.5	5.4	0.0	0.0	**12.9**
Tyrone	0.1	0.0	0.0	1.1	0.0	0.0	0.0	**1.2**
Total	**5.6**	**0.2**	**0.2**	**37.2**	**16.1**	**0.1**	**0.7**	**60.0**

Due to rounding there may be slight discrepancies when totalling

GVA associated with off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	1.1	0.0	0.0	6.6	3.7	0.0	0.2	**11.7**
Armagh	0.1	0.0	0.0	0.0	0.0	0.0	0.2	**0.4**
Down	3.5	0.0	0.0	26.1	3.1	0.1	0.0	**32.8**
Fermanagh	2.0	0.1	0.1	3.9	0.0	0.0	0.0	**6.2**
Derry/Londonderry	1.3	0.0	0.0	8.1	3.5	0.0	0.0	**12.9**
Tyrone	0.1	0.0	0.0	1.3	0.0	0.0	0.0	**1.4**
Total	**8.2**	**0.1**	**0.1**	**46.0**	**10.4**	**0.1**	**0.5**	**65.3**

Due to rounding there may be slight discrepancies when totalling

GVA associated with indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	1.2	0.0	0.0	7.6	6.0	0.0	0.4	**15.3**
Armagh	0.1	0.0	0.0	0.0	0.0	0.0	0.4	**0.5**
Down	3.7	0.1	0.0	30.2	5.1	0.1	0.0	**39.2**
Fermanagh	2.2	0.1	0.2	4.6	0.1	0.0	0.0	**7.1**
Derry/Londonderry	1.4	0.0	0.0	9.3	5.7	0.0	0.0	**16.5**
Tyrone	0.1	0.0	0.0	1.5	0.0	0.0	0.0	**1.7**
Total	**8.8**	**0.2**	**0.2**	**53.2**	**17.0**	**0.1**	**0.8**	**80.3**

Due to rounding there may be slight discrepancies when totalling

GVA associated with visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
Antrim	3.1	0.1	0.0	19.6	15.4	0.0	1.0	**39.2**
Armagh	0.3	0.0	0.0	0.0	0.0	0.0	1.0	**1.3**
Down	9.6	0.1	0.0	77.3	13.1	0.3	0.0	**100.5**
Fermanagh	5.6	0.3	0.4	11.7	0.2	0.0	0.0	**18.2**
Derry/Londonderry	3.6	0.0	0.0	23.9	14.7	0.0	0.0	**42.2**
Tyrone	0.3	0.0	0.0	3.9	0.0	0.0	0.0	**4.3**
Total	**22.6**	**0.5**	**0.4**	**136.4**	**43.4**	**0.3**	**1.9**	**205.7**

Due to rounding there may be slight discrepancies when totalling