Pitching the Value

2019 Economic Benefit Report: Holiday Parks and Campsites ENGLAND

Report for the

UK Caravan & Camping Alliance

February 2019

Frontline
11 Academy Street, Coatbridge, Lanarkshire, Scotland, ML5 3AW
T: 01236 433019 E: consult@frontlinemc.com
www.frontline-consultants.com
Also at: Central Court, 25 Southampton Buildings, London, WC2A 1AL

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Executive Summary

England's holiday park and campsite sector makes a substantial contribution to England's tourism economy, generating £6.81bn in visitor expenditure, equivalent to £3.88bn GVA and supporting 126,098 jobs.

The English holiday park and campsite sector accounted for 5% of the tourism sector's GVA.

Visitors to English holiday parks and campsites stayed up to 73% longer and spent up to 59% more than the national tourism average.

Background

Tourism is one of England's key industries. In 2016 **tourism in England contributed £106bn to the British economy** (GDP) and **supported 2.6 million jobs**. Looking at **direct impacts only**, **tourism contributed £48bn and supported 1.4 million jobs**[1].

With **a planned 5% growth** the sector will be even more important by 2020[2]. If achieved, **the cumulative increase in the size of the English market will be 64% by 2020**. This would result in **an additional £50bn in expenditure and the creation of 225,000 jobs**. This would significantly outstrip the performance of other major sectors of the national economy such as manufacturing.

Report Purpose

In November 2017, **the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd to undertake an independent economic impact and benefit assessment of the holiday park and campsite sector across the UK**. This included 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 2018 it is estimated that England's holiday park and campsite sector generated **a total visitor expenditure impact of £6.81bn. This expenditure equates to a GVA impact of £3.88bn (including multipliers) and supports 126,098 FTE jobs in the English economy.**

According to a report commissioned by VisitBritain[3] **the tourism sector in England had a direct GVA of £54.3bn[4] (excluding multipliers). Therefore the holiday park and campsite sector in England at £2.64bn (excluding multiplier)[5] makes a considerable contribution (5%) to the sector's GVA.**

In addition, tourers and caravan holiday home owners spend money on **maintenance which adds a further £589.5m of expenditure to the economy**.

[1] *VisitEngland, Tourism Factsheet, 2017.*
[2] *https://www.visitengland.com/sites/ default/files/downloads/strategic_framework_for_tourism_document_1.pdf*
[3]*https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf*
[4] *Converted to 2018 prices.*
[5] *See Appendix 3 for GVA excluding multipliers summary table.*

Holiday Park/Campsite Operators

According to evidence provided by the UKCCA, **in the summer of 2018 there were 4,845 member holiday parks/campsites operating in England accounting for 320,005 pitches**[6]. This was drawn from a database of holiday parks/campsites provided by the UKCCA. Consultations were undertaken with 529 of these parks. Research found that **England's holiday parks/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 homes; and rented holiday homes, lodges, apartments, chalets, wigwams, pods and yurts.

In addition to this diverse accommodation, **England's holiday parks/campsites also offer a wide range of facilities and amenities**, including restaurants, swimming pools, cafés and games rooms.

The majority of holiday park/campsite operators have owned their parks for over 10 years and many have done so for over 25 years. Park occupancy rates vary from an average of 70% in high season (August) to 55% in mid season (September). The proportion of visitors who live outside England was 17%. From this, 6% came from Scotland, 5% from Wales, 4% from outside of the UK and 2% from Northern Ireland.

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

- **expenditure** – 42% of parks from the total survey sample cumulatively spent £69.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events and fund raising particularly around sports and community groups
- **environmental activities** – including support for recycling and biodiversity, and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycle paths, promotion of wider community health and fitness sessions and healthy food options provided in parks' restaurants.

Park Visitors

6,275 respondents to the survey had made 10,675 visits to a holiday park in England in 2018 across two trips. The remainder of this section is based on those visiting England in **Trip 1 only (5,752)** which had the most comprehensive data set as all respondents participated in at least one trip.

The majority of the survey participants lived in England (92%) and just under half of respondents (44%) had stayed on a holiday park/campsite in England 5 times or more during the last 12 months.

78% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 8% stayed in an owner-occupied caravan holiday home or lodge; while 9% stayed in some form of rented accommodation.

The average adult group size was 2.2, and **25% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 2. **34% of groups brought a pet**.

Visitors and their party who stayed in rented or touring accommodation spent, on average, £451 per visit (£100 per day), spending, on average, 4.5 days on a holiday park/campsite on each **holiday. Visitors staying in owned accommodation spent, on average,** £482 per visit (£92 per day) and stayed, on average 5.2 days. This is higher than the average daily spend by visitors to England at £63[7] and 3.0 days per holiday[8].

Health and wellbeing was also improved with visitors reporting doing more exercise and feeling more relaxed when staying on a holiday park/campsite. This is supported by holiday park/campsite operators who provide easy access to a variety of sporting activities or support a range of health and wellbeing activities for their visitors.

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[6] *This includes Certificated Sites and Certificated Locations.*
[7] *https://www.visitbritain.org/value-tourism-england*
[8] *https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf*

1 Introduction

In November 2017, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent economic impact and benefit assessment of the holiday park/campsite sector across 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 England[9]**.

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/campsite sector in the UK
- provide the economic impact/ contribution from all forms of holiday parks/campsites accommodation including:
  - touring caravan/motorhome/ campervan (owned and hired)
  - caravan holiday homes/lodges (park or privately owned/rented)
  - camping
  - glamping
  - self-catering (apartments, chalets, permanent lodges/cabins)
- understand the type of spend by the sector and each subset and estimate how much tourism spend, both direct and indirect, is made, and how much income remains in the UK/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 the UK level as well as the four countries (England, Scotland, Wales and Northern Ireland); include regional level within each of the four countries
- consider expenditure by the holiday park/campsite owners/operators, e.g. ongoing maintenance, capital investment to extend, improve and/or provide new facilities
- consider spend by visitors to the holiday parks/campsites, both on and off-site, for all types of accommodation; identify spend by overseas visitors
- consider how the study can link to aspects of health and social wellbeing

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

The assessment method is presented in Appendix 1.

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

2 English Tourism in Context

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

2.1 National tourism strategies

VisitBritain has developed the *"Delivering a Golden Legacy"*[10] strategy covering 2012 to 2020. Each country also has their own tourism strategies:

- Scotland – Tourism 2020 initiative
- Northern Ireland – draft strategy "Economy 2030"
- Wales – Partnerships for Growth initiative
- England – Strategic Framework for Tourism (2012 – 2020)

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

VisitBritain's strategy has the ambitions of:

- achieving 40 million visits by 2020 – 9 million additional visits a year compared to 2012
- £8.7bn visitor spend annually
- support for 200,000 additional jobs across the UK per annum

This strategy aims on building from the past while taking advantage of the opportunities for Britain including:

- prominence following the London 2012 Olympics
- large global aviation route network
- strong associations with culture and heritage
- strong tourism infrastructure
- English language
- London being a global city

In England, VisitEngland's Strategic Framework[11] has four clear objectives:

- increase England's share of global visitor markets
- offer visitors compelling destinations of distinction
- champion a successful, thriving tourism industry
- facilitate greater engagement between the visitor and the experience

VisitEngland is also targeting a 5% annual growth rate. If achieved, the cumulative increase in the size of the England market will be 64% by 2020. This would result in an additional £50bn in expenditure and the creation of 225,000 jobs. This would significantly outstrip the performance of other major sectors of the national economy such as manufacturing.

To achieve these objectives, a series of action plans were developed by cross industry groups. The action plans in the first phase of implementation were:

- national marketing strategy
- accessibility
- rural tourism
- wise growth
- seaside resorts
- destination management
- modernising visitor information
- welcome
- business tourism
- research and intelligence

These action plans are monitored and reviewed regularly to highlight progress, showcase delivery by partners and demonstrate impact. The plans are dynamic documents that are expected to change during the life of the Strategic Framework.

The board of VisitEngland is responsible for setting and overseeing the success of the principal target areas of the Framework with key partners taking responsibility for delivery and reporting progress.

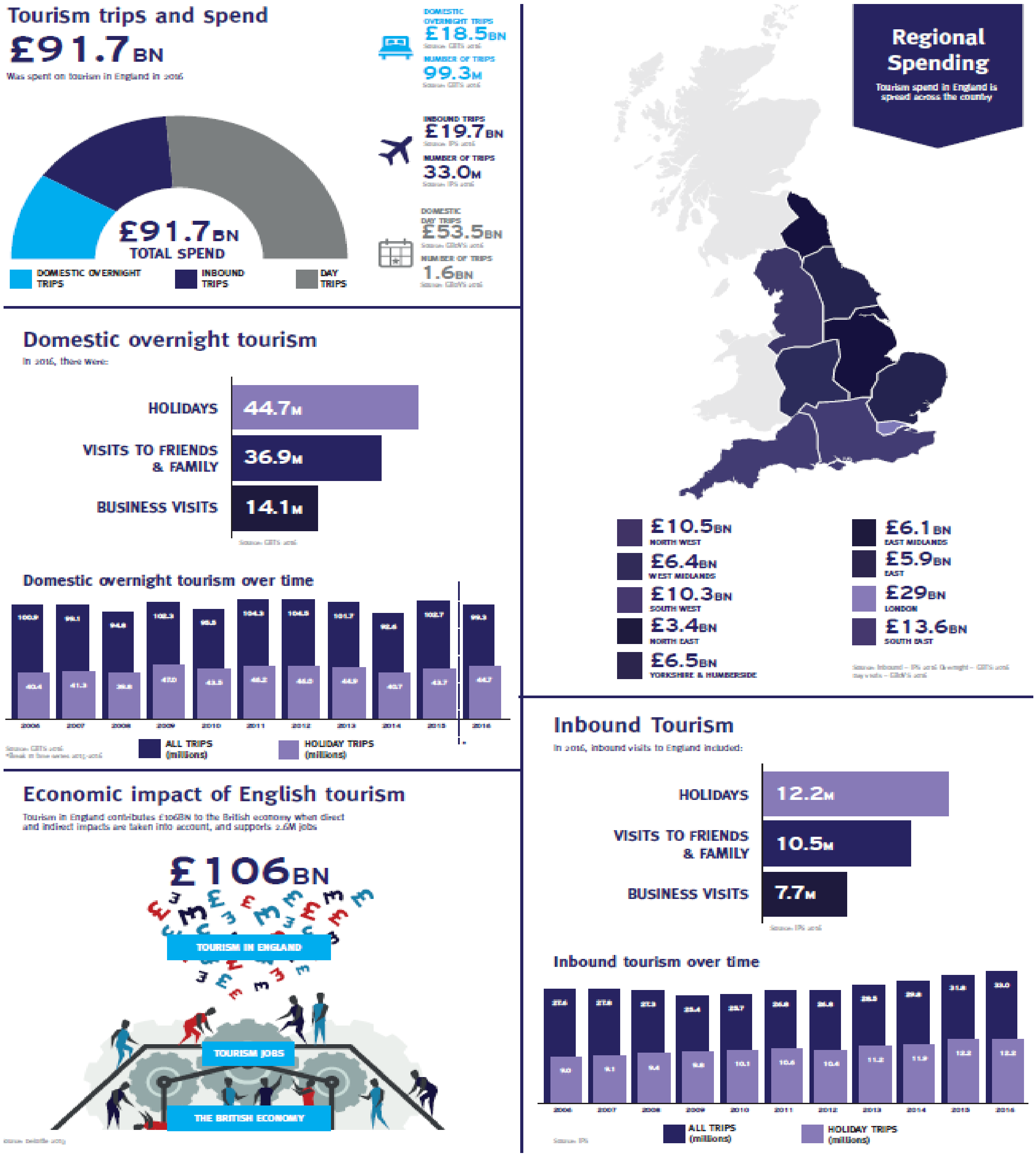
[10] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Britain_Growth_%20Strategy%20_inbound_Golden_Legacy_2012_to_2020.pdf

[11] https://www.visitengland.com/sites/default/files/downloads/strategic_framework_for_tourism_document_1.pdf

2.2 National tourism statistics

Taking into account direct and indirect impacts (e.g. supply chain), in 2016 tourism in England contributed £106bn to the British economy (GDP) and supported 2.6 million jobs. Looking at direct impacts only, tourism contributed £48bn and supported 1.4 million jobs[12]. Figure 2.1 outlines some of the key impacts of the tourism sector in 2016[13].

Figure 2.1: Impacts of the tourism sector



Source: VisitEngland: Tourism Key Facts and Trends, 2016

In 2016, £19.0bn was spent by British residents on 100.6 million overnight trips in England, equating to 299.4 million nights away from home. £50.9bn was spent on 1.5 billion domestic tourism day trips. The scale of the tourism sector in England is significant and the sector works hand in hand with a wide range of sectors including farming, transport, retail, sport, museums and the arts. With a planned 5% growth the sector will be even more important by 2020.

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[12] *VisitEngland, Tourism Factsheet, 2017.*
[13] *https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/ve_tourism_keyfactsv4.pdf*

3 Holiday Park/Campsite Operator Consultation

This section provides evidence from consultations with holiday parks/campsites across England. This was drawn from a database of holiday parks/campsites provided by the UKCCA[14]. This database includes data from the:

- British Holiday and Home Parks Association
- Camping and Caravanning Club
- Caravan and Motorhome Club
- National Caravan Council

While this represents a comprehensive list of the UKCCA member holiday parks/campsites in England it does not include them all. For this reason, the impact figures presented in this report can be considered to be a prudent estimate of the total value of the sector.

3.1 Database of English holiday parks/campsites

According to evidence provided by the UKCCA, **in the summer of 2018 there were 4,845 member holiday parks/campsites operating in England, accounting for 320,005 pitches[15].**

The majority of these pitches are either owner-occupied caravan holiday homes or lodges (150,731 pitches, 47%) or touring pitches[16] (120,363 pitches, 38%). However, the holiday parks/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.

The South East of England contains both the highest number of holiday parks/campsites (993) and the highest number of pitches (37,820); South West England and the East Midlands also contain a high number of both parks and pitches. Table 3.1 summarises the composition of England's holiday park/campsite sector.

Table 3.1: Composition of England's holiday park/campsite sector

	Number of parks	Touring pitches	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Glamping	Lodge/ chalet/ cottage Owned	Lodge/ chalet/ cottage Rented	Total pitches
East Midlands	638	13,191	22,475	1,848	199	1,236	583	39,532
East of England	501	7,358	10,546	2,761	64	619	755	22,103
North East England	230	5,622	11,796	993	75	523	252	19,261
North West England	527	10,014	17,876	2,201	247	1,883	484	32,705
South East England	993	37,820	39,516	21,048	280	2,779	1,998	103,441
South West England	866	24,282	9,922	8,376	207	1,972	2,616	47,375
West Midlands	511	10,126	6,854	1,197	108	699	182	19,166
Yorkshire	579	11,950	19,981	1,916	174	2,054	347	36,422
England	**4,845**	**120,363**	**138,966**	**40,340**	**1,354**	**11,765**	**7,217**	**320,005**

Source: UKCCA, 2018

[14] *This includes Certificated Sites and Certificated Locations.*
[15] *This includes Certificated Sites and Certificated Locations.*
[16] *This includes touring caravans, motorhomes/campervans and tents.*

3.2 Sampling methodology

Holiday parks/campsites across England were invited to participate in the research. This was done by the various sponsor groups reaching out to holiday park/campsite 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.

529 holiday parks/campsites out of a population of 4,845 across England participated giving us a 95% confidence +/- 5% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population and is therefore representative of the holiday park/campsite sector in England.

3.3 Geographic locations

The geographic location of the surveyed holiday park/campsite was broadly representative of the sector as a whole. For example, it included parks from all eight regional areas, receiving a minimum response at least 6%.

Table 3.2: Locations of holiday parks/campsites

Location	Number of parks responding	Estimated number of parks	Percentage consulted
East Midlands	71	638	11%
East of England	41	501	8%
North East England	25	230	11%
North West England	60	527	11%
South East England	155	993	16%
South West England	67	866	8%
West Midlands	63	511	12%
Yorkshire	36	579	6%
Unknown	11	-	-
Total	**529**	**4,845**	**11%**

Source: Frontline Park/Campsite Operators Survey, 2018

3.4 Holiday park/campsite park size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large parks, including 68 very large parks (parks with 251 pitches or more); and 202 very small parks (parks with 5 pitches or fewer), these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 3.3: Sizes of the holiday parks/campsites surveyed

Number	Number of parks responding	Estimated number of parks	Percentage consulted
Very small (1-5 pitches)	202	3,084	6%
Small parks (6-50 pitches)	108	453	24%
Medium sized parks (51-100 pitches)	69	447	15%
Large parks (101-250 pitches)	82	552	15%
Very large parks (251 pitches or more)	68	309	22%
Total	**529**	**4,845**	**11%**

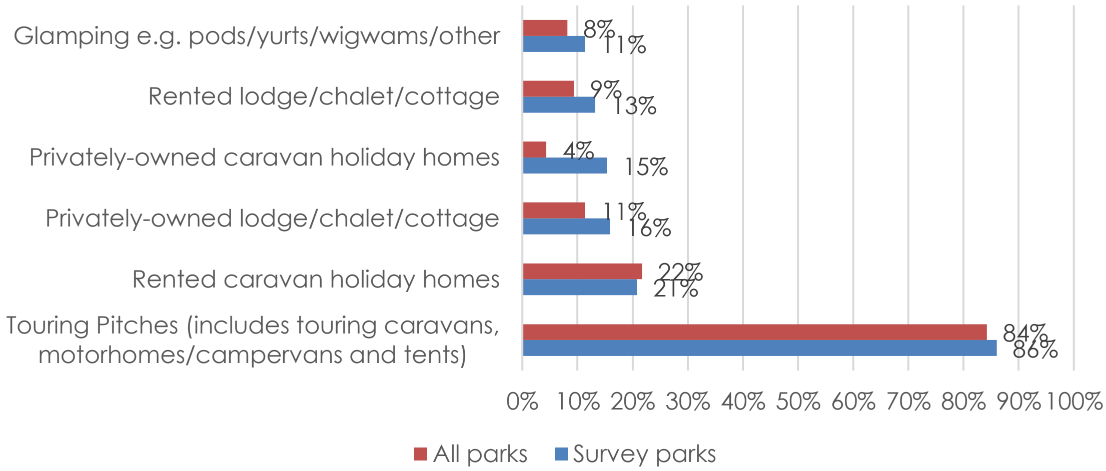
Source: UKCCA, 2018

3.5 Accommodation provided

The accommodation type of the surveyed holiday parks/campsites was also broadly representative of the sector. The majority of holiday parks/campsites (86%) surveyed had touring pitches which includes touring caravans, motorhomes/ campervans and tents.

31% of holiday parks/campsites had owner-occupied accommodation on their holiday parks/campsites, and under half (45%) offered rented accommodation.

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



N=529

Source: Frontline Park/Campsite Operators Survey, 2018 (figures sum to over 100% as most holiday parks/campsites offer more than one type of accommodation)

3.6 Facilities and activities provided

In addition to accommodation, many holiday parks/campsites offer a range of facilities. Holiday parks/campsites were asked to list what other **facilities they had on-site**. In the very small sites (1-5 pitches) just under half (49%) had toilet blocks and over a third (37%) had Wi-Fi and shower blocks. In the small to large parks (6-250+ pitches), facilities were more frequent with toilet blocks, Wi-Fi and laundry being most common.

When assessed by type of holiday parks/campsites almost all of those offering touring pitches provided toilet and shower blocks, compared to those that only had static accommodation.

'Other' facilities included:

- hardstandings
- electric hook ups
- motorhome service point
- dishwashing facilities

Table 3.4: Facilities listed by holiday park/campsite operators

Facility	Very small parks		Small to very large parks	
	Number of parks	% of parks	Number of parks	% of parks
Toilet blocks	84	49%	215	72%
Wi-Fi	64	37%	229	77%
Shower blocks	63	37%	206	69%
Laundry	17	10%	226	76%
Outdoor play area	-		175	59%
Restaurant/bar/takeaway	-		99	33%
Retail/shop	-		100	34%
Games room	1	1%	76	26%
Entertainment	-		71	24%
No on-park facilities	-		4	1%
Others (please specify)	167	97%	81	27%
Total parks consulted	**172**	-	**298**	-

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most parks offer more than one type of facility)

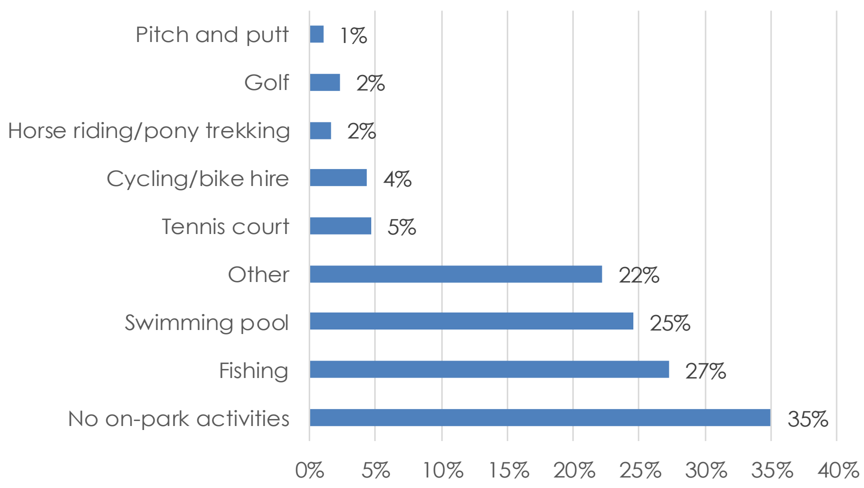
The figures in Table 3.4 capture only those holiday parks/campsites who listed each type of facility in their response; it is possible that some of the holiday parks/campsites may have some of these activities but did answer this question in full. The figures may, therefore, under-estimate the true mix of facilities on England's holiday parks/campsites.

Holiday parks/campsites were also asked about the activities provided on-site.

Over a third provided no on-park activities while a quarter provided swimming, 27% fishing, 5% tennis courts, 4% cycling and bike hire, 2% horse riding/pony trekking and golf respectively and 1% pitch and putt. Other included; clay pigeon shooting, canoe hire, petting zoo, spa and walking trails.

Only 53% of very small parks (1-5 pitches) had onsite activities.

Figure 3.2: Activities listed by holiday park/campsite operators



N=297

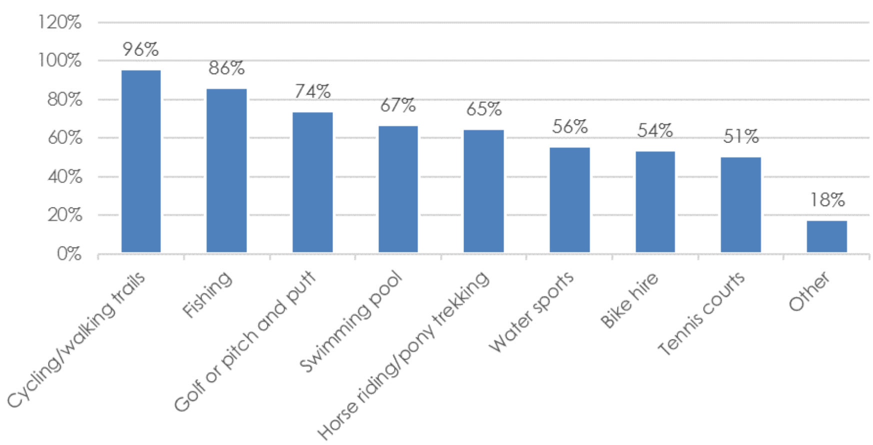
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most parks offer more than one type of facility)

Surveyed holiday parks/campsites were also asked about **range of activities provided in the local area**. The majority of holiday parks/campsites had cycling/walking trails (96%) in the areas as well as fishing (86%). A further 74% had golf or pitch and putt, while 67% had a swimming pool. Over half had horse riding/pony trekking, water sports, bike hire and tennis courts.

'Other' included:

- ten pin bowling
- beach
- go karting
- zoo
- cinema
- museum
- shooting range

Figure 3.3: Range of activities in the local area



N=406

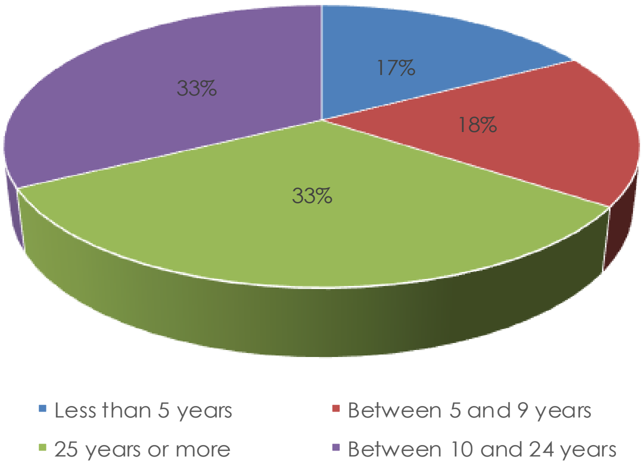
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most parks had more than one type of activity in the local area).

3.7 Holiday park/campsite ownership

In the majority of cases, holiday park/campsite operators saw their holiday parks/campsites as long-term investments, with the parks owned and operated for at least ten years and often much longer (66%).

Figure 3.4 summarises the feedback.

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



Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=528

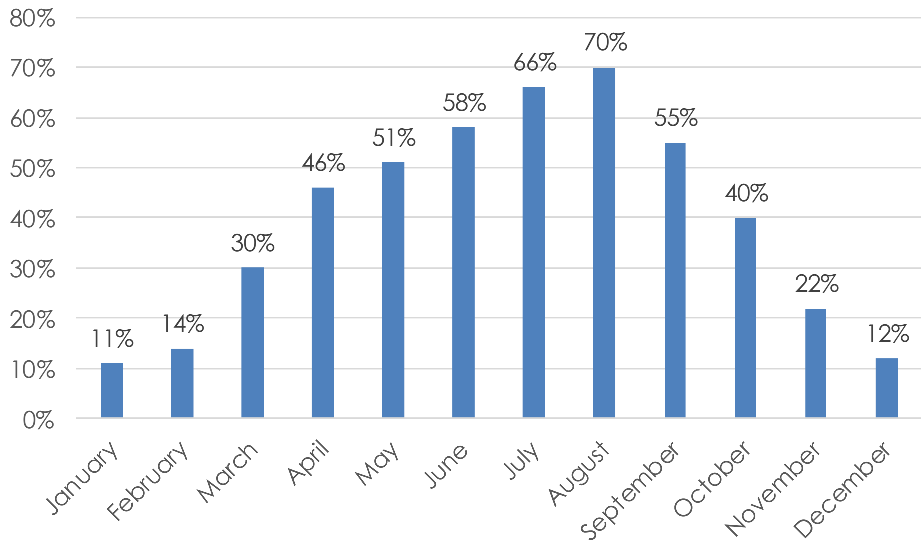
3.8 Length of season and occupancy rates

Just over half of the holiday parks/campsites (52%) operated seasonally with 48% open all year round. Where holiday parks/campsites were seasonal, the vast majority (78%) are open from late March to the end of October.

Holiday park/campsite operators were asked to report their typical occupancy rates for each month they were opened.

Occupancy rates in England's holiday parks/campsites peaked at 70% in high season (August) to 55% in mid season (September). Low season average occupancy ranged from a low of 11% in January to a high of 30% in March as presented in Figure 3.5.

Figure 3.5: Average occupancy rates on participants' holiday parks/campsites



N=396

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

3.9 Visitor origin

All survey participants were asked where their visitors came from. Overall, 83% came from England, 6% from Scotland; 4% were from outside the UK.

When segmented by region (Table 3.5) there was no significant variance in responses by holiday parks/campsites.

Table 3.5: Visitor origin

Area	England	Scotland	Wales	NI	Outside UK
East Midlands	83%	5%	6%	2%	4%
East of England	88%	4%	4%	1%	3%
North East England	77%	12%	4%	2%	5%
North West England	80%	11%	4%	2%	3%
South East England	85%	3%	5%	1%	6%
South West England	88%	3%	5%	1%	3%
West Midlands	78%	5%	12%	1%	4%
Yorkshire	84%	6%	3%	2%	5%
Total	**83%**	**6%**	**5%**	**2%**	**4%**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 *N=513*

3.10 Staff employed

Surveyed holiday parks/campsites were asked to provide staff numbers both part-time and full-time as well as seasonal and all year round.

Results show that on average, across all parks, there were 9.3 full-time and 3 part-time staff all year round and 18.4 full-time and 19.8 part-time seasonal staff.

Numbers varied depending on the size of the holiday parks/campsites. **5% of holiday parks/campsites employed migrant workers; this represented, on average, 14% of their total workforce.**

Table 3.6: Average staff employed per holiday parks/campsites

Park Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small parks (1-5 pitches)*	-	-	-	-
Small parks (6-50 pitches)	0.7	1.8	2.9	4.2
Medium sized parks (51-100 pitches)	1.9	6.5	3.9	2.7
Large parks (101-250 pitches)	7.8	10.3	5.7	1.8
Very large parks (251 pitches or more)	32.6	36.1	21.4	4
Average across all parks	**18.4**	**19.8**	**9.3**	**3**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=227

**No employee numbers were gathered on the very small parks, 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.*

3.11 Expenditure by holiday parks/campsites[17]

Holiday park/campsite operators were asked to provide details of their capital expenditure, operating expenditure, wages and salaries for the last financial year (2017/18).

The total expenditure for respondent holiday parks/campsites is presented in Table 3.7.

Table 3.7: Total expenditure by holiday parks/campsites

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£69,534,554	£317,509
Operating expenditure	£79,680,010	£517,403
Wages and salaries	£87,001,615	£368,651
Total expenditure	**£236,216,179**	**£1,203,563**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=156-238

Holiday park/campsite operators were asked to comment on the top three areas of capital expenditure over the last five years; the following were most frequently cited:

- **accommodation** – new and existing renovation across caravans, chalets and lodges; including development of staff accommodation
- **utility development** – electric hook up and connections; power upgrades and water supplies
- **pitch development** – adding new and improving existing
- **facilities** – new and refurbishment of washrooms, shower blocks, play areas, leisure facilities and restaurants
- **park infrastructure** – roads and wider landscaping
- **fleet development** – cars and wider transportation, covering new and refurbishment
- **materials and plant/equipment** purchases including mowers and wider site equipment
- **broadband** and Wi-Fi infrastructure

Looking to the future, holiday parks/campsites were then asked to provide their planned expenditure for maintenance and/or expansion/improvement of their holiday parks/campsites and on-site facilities. The total expenditure is presented in Table 3.8.

Table 3.8: Planned expenditure

	Expenditure	
	Maintenance	**Improvements**
Next financial year	£30,272,637	£26,414,823
Next three financial years	£92,992,859	£74,466,531
Total	**£123,265,496**	**£100,881,354**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=125-465

[17] *For various reasons some holiday parks/campsites were unable to provide this information; this will be highlighted and reason provided where available.*

3.12 Community engagement

Almost half (47%) of holiday park/campsite operators provided information on how they **engage with the local community**, the most frequently occurring included:

- **local events** – promotion, sponsorship and involvement
- **selling and promoting local produce**
- **working with and membership of community and working groups** – and volunteering
- **fundraising** – particularly around sports and community groups and parish and community councils
- **leaflets and local information**

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

"Sit on local committees and councils. The sites in general engage openly with the local community as a matter of course. Any event organiser will generally pop into the site with flyers to hand out to customers and posters to advertise the event."

North West England

"We sell the local village magazine and local walks maps. Display all posters relating to functions and events being held in the village and surrounding areas. Have full menus and opening times for the 3 public houses in the village and surrounding areas."

South East England

"We advertise all local events on our Facebook page."

West Midlands

"The people who visit support the local businesses (pub, cafe, fish, chip shop, amusements and village hall) and help them keep trading as otherwise they would have to shut without the tourists as only 500 people live in the village."

East of England

3.13 Environmental improvement

Over half of holiday park/campsite operators (53%) provided information on how they **supported environmental improvement** at their holiday park/campsite, the most frequently occurring included:

- **recycling** – which was highlighted by the majority (73%) and included educating and encouraging visitors to support this
- **David Bellamy Award participation** – some have achieved gold
- **phasing out plastics**
- **support for local wildlife** – including a range of conservation projects, some were engaged in sites of special scientific interest (SSSI)
- **use of low energy and water** – saving solutions including solar panels, water conservation
- **encouraging limited car usage** – and promotion of public transport, walking and cycling

The word cloud below shows the **importance of recycling and the David Bellamy Award Programme.**

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

"We have a central recycling depot and we only have refillable cups and paper straws and recyclable packaging for our take away food. The shop only stocks green carrier bags that disintegrate in water made from plant/vegetation and do not break down to micro plastics."

South East England

"English Nature sponsored an owl box and we have provided sparrow boxes around the site."

Yorkshire

"The farm is run as a conservation farm and is a county wildlife site. A book about the farm tells the caravanners what we are doing to preserve this beautiful river valley for the future."

East of England

"We support the environment where we can, some ways include solar panels for heating the swimming pool, water recycling, conservation and wildlife boxes around the park and this can be seen by us winning Green Awards at our local borough council's competitions. As well as holding the Staffordshire Environmental Quality Mark Award for the past 4 years."

West Midlands

"Recycling, promoting public transport – 95% visitors use public transport once pitched – biodiversity area including bug hotel."

South East England

"Engaged in Bellamy Scheme, encourage recycling, educate guests and in particular children regarding environment, always looking for ways to reduce energy and water consumption and investing in energy efficient technology where cost effective and to help achieve this. i.e. solar panels."

North East England

3.14 Health and wellbeing

Almost half (40%) of holiday park/campsite operators provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **provision of local health and wellbeing facilities** – and promotion within the wider community – includes on-site pools and fitness activities
- **walking and cycling routes, beaches** – provision and information about these
- **positive effect of being outdoors** – and close to nature
- **healthy food options** – on-park/site restaurants/cafes
- **activities across all ages and abilities**

5% of respondents did not provide any facilities on their holiday parks/campsites – we expect the majority of these were CL/CS sites.

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

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

"Provide a top quality tranquil location and environment to escape the pressures of everyday life. Lots of forest/heathland walks from the park. Range of local products in the shop."

South East England

"Currently we have commissioned dedicated walks from our Club sites that covers half the network, each site has multiple walks with varying degrees of difficulty. These walks can be accessed through the club's website."

South East England

"We get quite a few owners who are the 'active unwell', people who are recovering from a major illness e.g. cancer or heart problems – we have produced our own leaflets on the birds that can be seen from the park and the wild flowers. Promote local walks/cycleways. Promote local events such as beach cleaning and walking clubs. Promote local businesses such as cycle hire shop."

North East England

"Swimming pools, gym, ten pin bowling, countryside walks, day time activities."

South East England

"Walking and cycling maps for routes directly from site. Cycle hire on-site. Games field."

East Midlands

3.15 External factors impacting the business

A small sample of holiday park/campsite operators in England provided some insight to the external factors affecting their business. Not surprisingly the weather came out first with around two thirds (68%) highlighting this. This was followed by uncertainty aligned to Brexit (44%); although some saw positive aspects due to current exchange rates resulting in more European visitors and increased staycations.

Others mentioned:

- lower caravan holiday home sales
- lack of trained staff
- local council policies hampering site expansion
- increased business rates

Less than 1% of respondents specified no external factors.

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

"Business Rates have gone up ridiculously and seem to be based on turnover not profitability. Brexit uncertainty has pushed costs up, we find it difficult to recruit good staff in Cornwall."

South West England

"Uncertainty of Brexit, lack of government and local authority understanding of our financial input to the community."

South East England

"Have no way of judging what Brexit will bring but the lower pound has encouraged more European visitors."

South West England

3.16 In summary

This research found that England's holiday parks/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 homes; and rented holiday homes, lodges, apartments, chalets, wigwams, pods and yurts.

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

The majority of holiday park/campsite operators have run their holiday parks/campsites for over 10 years and many have done so for over 25 years. Occupancy rates in UK holiday parks/campsites peaked at 70% in high season (August) and 51% in mid season (May). The proportion of visitors to England's holiday parks/campsites who live outside England varied significantly from park to park, depending on geographic location.

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

- **expenditure** – 42% of holiday parks/ campsites from the total survey sample cumulatively spent £69.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events and fundraising particularly around sports and community groups
- **environmental activities** – including support for recycling and biodiversity, and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycle paths, promotion of wider community health and fitness sessions and healthy food option provided on-parks

4 Visitors Survey

An online visitor survey was open from May to November 2018. 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/campsites, in sector magazines and though social media.

6,275 respondents to the survey had made 10,675 visits to a holiday park/campsite in England in 2018 across two trips. Table 4.1 shows the spread of visitors across the English regions.

Table 4.1: Location of holiday parks/campsites visited

Location	Visitors	
	Trip 1	Trip 2
East Midlands	10%	10%
East of England	10%	10%
North East England	6%	6%
North West England	12%	11%
South East England	29%	29%
South West England	17%	16%
West Midlands	3%	4%
Yorkshire	9%	9%
Unknown	4%	6%
Total consulted	**5,752**	**4,923**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The remainder of this section is based on those **visiting England in Trip 1 only (5,752)** which had the most comprehensive data set as all respondents participated in at least one trip.

4.1 Visitor origin and number of trips

The vast majority of the survey participants lived in England (92%). This aligns to English holiday park/campsite operators who reported that the majority of their visitors come from England (Section 3).

1% came from outside the UK.

Table 4.2: Visitor home country

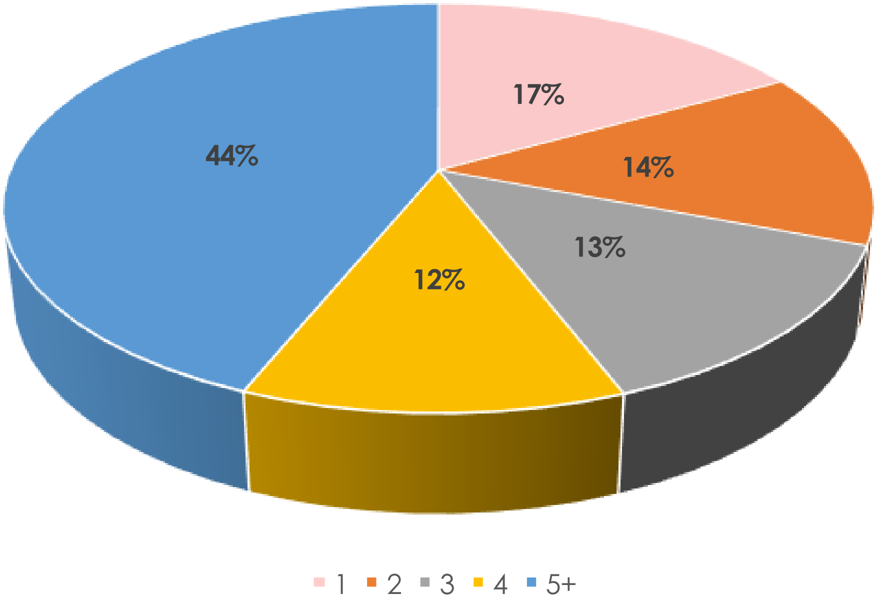
Location	Visitors
England	92%
Wales	4%
Scotland	3%
Northern Ireland	1%
Outside the UK[18]	1%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=5,752

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

Slightly under half of respondents (44%) stayed on a holiday park/campsite in England five times or more during the last 12 months; a further 12% stayed four times.

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



N=5,733

4.2 Visitor characteristics

78% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 8% stayed in an owner-occupied caravan holiday home or lodge; while 9% stayed in some form of rented accommodation.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Touring caravan	32%
Motorhome/campervan	35%
Tent	11%
Static accommodation types	
Caravan holiday home owned	8%
Caravan holiday home rented	7%
Glamping e.g. pods/yurts/wigwams/other	2%
Privately-owned lodge/chalet/cottage	1%

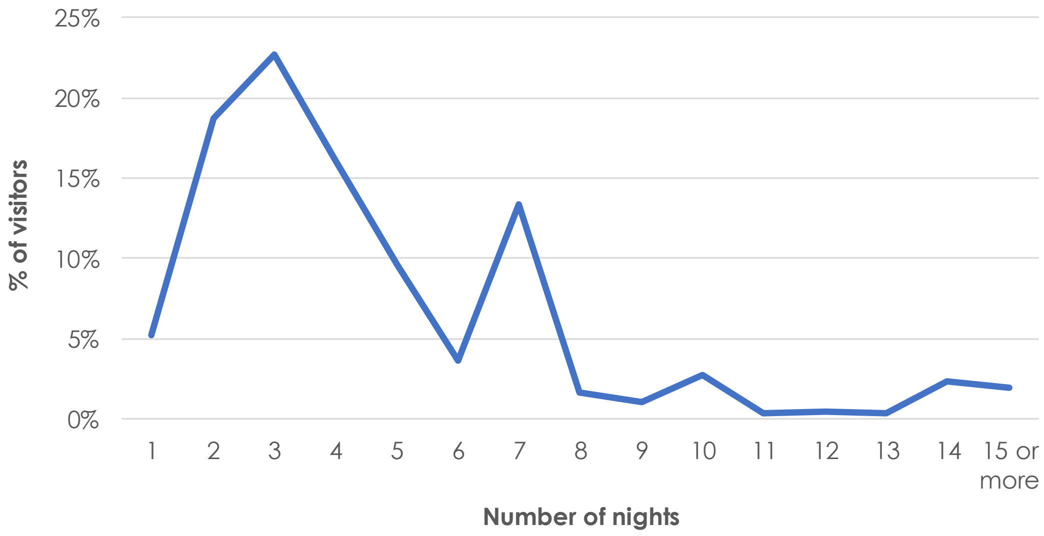
Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The high level of tourers is not surprising as over two thirds (67%) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club[19]. When broken down further:

- 55% (2,142) were members of the Camping and Caravanning Club
- 78% (3,040) were members of the Caravan and Motorhome Club
- 34% (1,319) were members of both

On average visitors spent 4.6 nights per trip. The distribution of responses is shown in Figure 4.4.

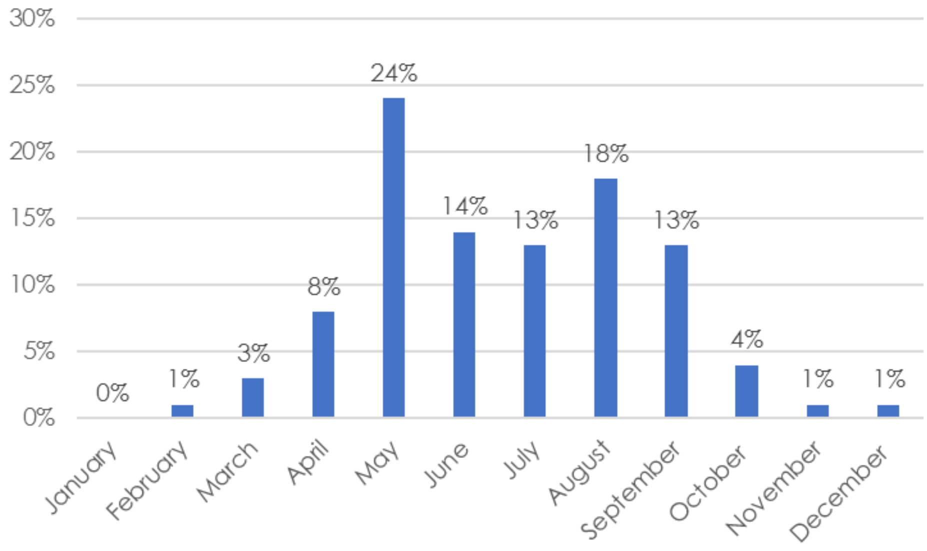
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=5,726

Figure 4.3 shows the month in which respondent visitors began their trip. May (24%) was the most popular followed by August (18%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=4,700

[19] *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 25% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. 34% of groups brought a pet.

The average total group size was 2.4. There was no difference when broken down by tourers and owners.

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

	Number of adults	Number of children	Number of pets
1	6%	73%	62%
2	82%	9%	25%
3	5%	12%	10%
4	5%	4%	1%
5+	3%	1%	0%
Average	2.2	2	1.4

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

4.3 Visitor expenditure

Visitors and their party who stayed in rented or touring accommodation spent, on average, £451 per visit, including £247 on-site and £204 off-site. Visitors who owned their holiday home spent, on average, £482 per visit, including £282 on-site and £200 off-site.

Accommodation hire cost, 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 and tourers	Owners
Transport to and from destination	£71	£71
Transport spent during trip	£28	£32
Total cost of holiday accommodation	£114	£137
Touring-pitch/ fees paid to park	£101	£111
Park facilities (e.g. Wi-Fi, laundry etc)	£3	£3
Eating/drinking on the park	£24	£25
Eating/drinking/takeaways in the surrounding area	£69	£61
Recreation/entertainment on the park	£5	£6
Recreation/entertainment in the surrounding area	£18	£15
Visitor attractions	£17	£17
Other	£1	£4
Total – on-site	**£247**	**£282**
Total – off-site	**£204**	**£200**
Total – both on and off-site	**£451**	**£482**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors who stayed in rented and touring accommodation spent, on average, £100 per day, including £55 on-site and £45 off-site. Visitors who owned their holiday home spent, on average, £92 per day, including £54 on-site and £38 off-site.

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£16	£14
Transport spent during trip	£6	£6
Total cost of holiday accommodation	£25	£26
Touring-pitch/ fees paid to park	£22	£21
Park facilities (e.g. Wi-Fi, laundry etc)	£1	£1
Eating/drinking on the park	£5	£5
Eating/drinking/takeaways in the surrounding area	£15	£12
Recreation/entertainment on the park	£1	£1
Recreation/entertainment in the surrounding area	£4	£3
Visitor attractions	£4	£3
Other	£0	£1
Total – on-site	**£55**	**£54**
Total – off-site	**£45**	**£38**
Total – both on and off-site	**£100**	**£92**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

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

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

The most popular responses were *"I wanted to visit the area"* (35%); and *"I wanted to revisit the area"* (32%).

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

Factor	Number responding*
Wanted to visit the area	35%
Wanted to revisit the area	32%
Had been to this region/country before and wanted to visit another area	15%
Club member communication	15%
Park/site recommended by family/friends	13%
Saw advertisement for the park(s) in a magazine, newspaper or website	13%
Family/friends in the area	12%
Specific activities available in the area	8%
Attending an event/festival	7%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=*4,737*

**Figures sum to more than 100% as multiple answers were allowed to this question. The majority of people who responded to this question were tourers.*

4.5 Health and wellbeing

Time spent relaxing (63%) was the most commonly undertaken activity by visitors followed by short (55%) and long walks (50%) and spending time with friends and family (49%).

Table 4.8 summarises the results.

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

	More	Less	Same	I did not undertake this activity	Total
Spent time relaxing	63%	6%	29%	1%	**4,548**
Short walks (under 2 miles)	55%	4%	38%	3%	**4,366**
Long walks (over 2 miles)	50%	7%	29%	14%	**4,428**
Spent time with family and friends	49%	6%	29%	16%	**4,284**
Wildlife/nature activities	34%	4%	32%	30%	**4,132**
Other outdoor physical activities	27%	5%	25%	43%	**3,978**
Cycling	19%	4%	13%	64%	**4,101**

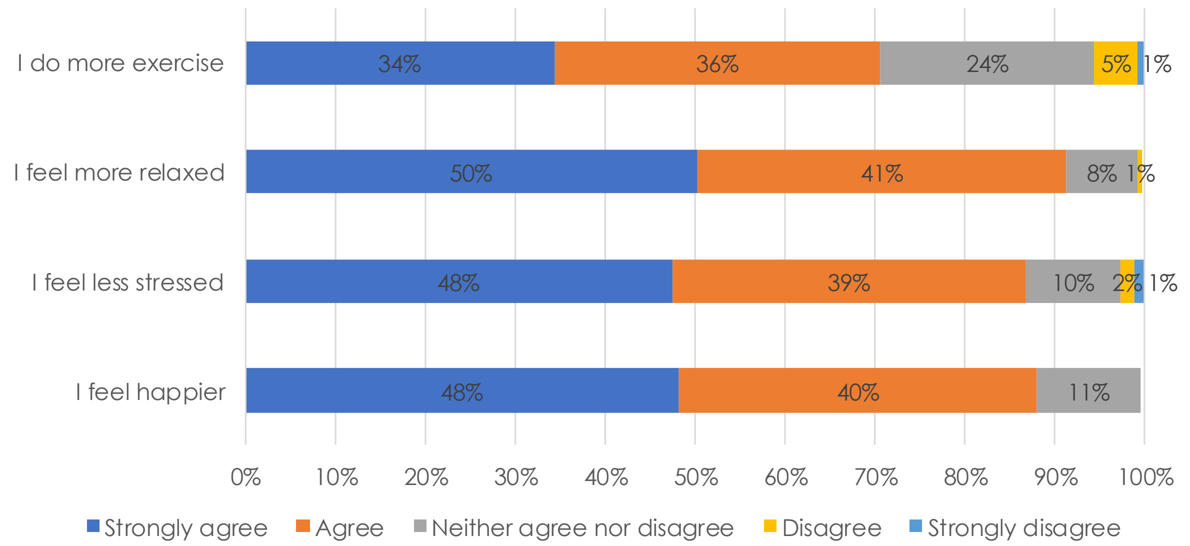
Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

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

- 91% strongly agree or agree that they **feel more relaxed when visiting a holiday park/campsite**
- 87% strongly agree or agree that they **feel less stressed when visiting a holiday park/campsite**
- 88% strongly agree or agreed that they **feel happier when visiting a holiday park/campsite**
- 70% strongly agree or agree that they **do more exercise when visiting a holiday park/campsite**

Figure 4.4 presents the detailed feedback.

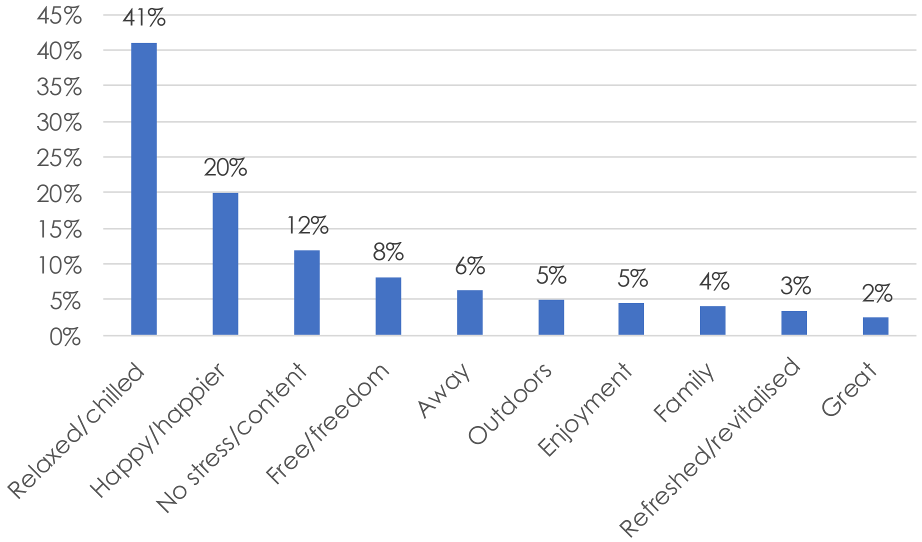
Figure 4.4: When visiting a holiday park/campsite …



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors felt more relaxed (41%), happier (20%) and more content (12%) as a result of visiting a holiday park/campsite. This is summarised in Figure 4.5 and the word cloud below.

Figure 4.5: During my time visiting a holiday park/campsite I feel……



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=4,167

Some **visitor** comments included:

"Delighted to be seeing new places, enjoying the summer weather, dining out - all from the comfort of our own holiday vehicle."

Motorhome/Campervan Owner, West Midlands

"Able to enjoy the area and maximise my relaxation time doing things not normally available where I live."

Motorhome/Campervan Owner, North West England

"Relaxed and love the close family time building wonderful memories. Freedom of our Campervan gives us the opportunity to explore."

Motorhome/Campervan Owner, East Midlands

"Glad I can afford the time and money to explore other regions of UK and France."

Tent Owner, South West England

"Content, able to do exactly what I want to do surrounded by like-minded people, doing the same thing!"

Tent Owner, West Midlands

"Happy that we have family time because we both work to raise our children. We don't seem to have much time for each other but on our camping holidays we do."

Tent Owner, South West England

"Happy in our little camping bubble!"

Motorhome/Campervan Owner, East Midlands

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.

According to the Chief Medical Officer[20]:

> *"If a medication existed which had a similar effect to physical activity [like walking], it would be regarded as a wonder drug or a miracle cure"* (2010).

Data shows that walking regularly at any speed will[21]:

- help manage weight
- reduce the risk of Type 2 diabetes
- reduce the risk of certain cancers such as colon, breast and lung cancer
- improve flexibility and strength of joints, muscles and bones, and reduce the risk of osteoporosis
- increase 'good' cholesterol
- boost the immune system
- improve mood, reduce anxiety, aid sleep and improve self-image

As well as health impacts, **there are significant socioeconomic implications**. Physical inactivity currently costs the NHS between £1billion and £1.8 billion a year. Costs to the wider economy are conservatively estimated at £5.5 billion in sickness absence and £1billion in premature deaths – a total of £8.3 billion[22].

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[23]. A study by the New Economics[24] Foundation found there were 17,500 episodes where stress or anxiety was the primary cause for hospital admissions in 2016/17, which led to 165,800 days when beds were occupied. According to the think tank, the average cost of a bed day to the NHS is around £429, which means the total cost to the taxpayer of these episodes is £71.1m[25].

In 2014, Public Health England (PHE) has published a framework to address the national physical inactivity epidemic in England[26].

To facilitate cross-sector collaboration, PHE co-produced the framework with over 1,000 national and local leaders in physical activity and is calling for action from providers and commissioners in: health, social care, transportation, planning, education, sport and leisure, culture, the voluntary and community sector, as well as public and private employers. The framework aimed to:

- change the social 'norm' to make physical activity the expectation
- develop expertise and leadership within professionals and volunteers
- create environments to support active lives
- identify and up-scale successful programmes nationwide

PHE is also working to ensure that physical activity and broader health and wellbeing strategies are factored into planning for housing, towns and communities. PHE has partnered with the built environment and transport sectors through its Healthy Places programme. Work includes a Memorandum of Understanding with some of the country's leading housing developers committing to embedding health and wellbeing initiatives in new housing developments and working with NHS England on its 'Healthy New Towns' programme.

The evidence gathered from visitors during this study demonstrates that England's holiday park/campsite sector is making a positive contribution to visitors' 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 England's holiday park/campsite sector is supporting the English policy agenda for health and wellbeing.

[20] https://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[21] http://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[22] https://www.thebmc.co.uk/briefingpaper
[23] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[24] https://neweconomics.org/2018/05/stressed-economy-stressed-society-stressed-nhs
[25] https://www.shponline.co.uk/stress/stress-and-anxiety-costing-the-nhs-71m-a-year/
[26] https://www.networks.nhs.uk/news/public-health-england-targets-ps7.4bn-cost-of-physical-inactivity

Some **visitor** comments included:

"Camping with our seven daughters is so much fun and the camaraderie between the girls is amazing. Buying the camping gear was the best thing I did."

Tent Owner, South West England

"New to motorhoming this year and thoroughly enjoy it, made many like-minded people/friends who have recommended sites. So much to see, we can't wait until the spring!"

Motorhome/Campervan Owner, Yorkshire

"We, as a family love having holidays in the Lake District. It has stunning scenery, is very dog friendly and the people there are very friendly. It is the perfect staycation destination. Love camping to get real quality time with my wife and grandchildren away from the stresses of daily life."

Rented Caravan User, North West England

"So important to have breaks away and spend quality time with the family. We definitely are closer as a result of being away on a UK break."

Glamping User, East of England

"We have always been campers in tents but now feel the campervan, well a Vauxhall Vivaro conversion is slightly more comfy now we're older :-)."

Motorhome/Campervan Owner, North West England

"Caravanning has given me a better life, being disabled, caravanning has opened my life up to doing more things I cannot do while at home."

Touring Caravan Owner, East Midlands

4.6 In summary

The majority of the survey participants lived in England (92%) and just under half of respondents (44%) stayed on a holiday park/campsite in England five times or more during the last 12 months.

78% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 9% stayed in an owner-occupied caravan holiday home or lodge; while a further 14% stayed in some form of rented, stationary accommodation.

The average adult group size was 2, and 25% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. 34% of groups brought a pet.

Visitors who stayed in rented and touring accommodation spent, on average, £100 per day, including £55 on-site and £45 off-site. Visitors who owned their holiday home spent, on average, £92 per day, including £54 on-site and £38 off-site. **This is higher than the average daily spend by visitors to England at £63[27].**

[27] https://www.visitbritain.org/value-tourism-england

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

The main objectives of this research were to assess the total value of visitor spend attributable to the English holiday park/campsite sector in the 12 months to December 2018.

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

- days of the year (365)
- accommodation type (6)
- English regions (8)

In other words, the model includes 19,710 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 the North West on Saturday 4th August:

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in the North West	17,876
Multiplied by:	
Average occupancy rate on 4th August	70%
Number of pitches occupied on 4th August	12,513
Multiplied by:	
Ave. on-site expenditure per day for renting holiday-makers	£54.26
= On-site expenditure of touring caravan visitors to the North West on 4th August	**£678,955**

The gross off-site expenditure was measured in exactly the same way. Following the same worked example as above, it was calculated that in the North West, on Saturday 4th August, 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 the North West	17,876
Multiplied by:	
Average occupancy rate on 4th August	70%
Number of pitches occupied on 4th August	12,513
Multiplied by:	
Ave. off-site expenditure per day for renting holiday-makers	£38.28
= Off-site expenditure of touring caravan visitors to the North West on 4th August	**£478,998**

5.3 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted above, the North West 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 (March 2018). This publication recommended that the 0.47 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 England.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£678,955
Plus	
Total off-site expenditure	£478,998
Total combined on and off-site expenditure	**£1,157,952**
Multiplied by:	0.47
= Indirect and induced effects:	**£904,084**

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	£678,955
Plus	
Total off-site expenditure	£478,998
Indirect and induced effects	£904,084
Visitor impact	**£2,062,037**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[28], 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 gross and net FTE employment impacts associated with the holiday park/campsite visitor expenditure.

According to figures from the most recent ONS's publication[29], every £100 of turnover generated by England's overnight accommodation sector translates to a GVA impact of £56.92[30]. This proxy was applied to the above turnover figures to produce an estimate of the holiday park/campsite sector's contribution to English GVA.

[28] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[29] *2018 Annual Business Survey, ONS, 2018.*
[30] *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).*

6 Economic Impact of Holiday Parks/Campsites in England

This section presents a summary of the gross visitor expenditure, gross value added (GVA) and full-time equivalent (FTE) employment impacts of the holiday park/campsites sector in England, broken down by region and by accommodation type.

6.1 Impact by English region

It is estimated that in 2018 visitors to English holiday parks/campsites spent **a total of £6,81bn in the English economy**, made up as follows:

This visitor expenditure supports **126,098 FTE jobs** and contributes **£3.88bn of GVA to the English economy.**

- £2.62bn on-site spend
- £2bn off-site spend
- £2.18bn of multiplier impacts

Table 6.1: Economic impacts by English county

Region	Visitor expenditure (£m)	Employment (FTE jobs)
South East England	2,212.1	40,962
South West England	1,025.7	18,995
East Midlands	832.6	15,417
Yorkshire	766.7	14,199
North West England	688.5	12,752
East of England	469.0	8,686
West Midlands	410.3	7,597
North East England	404.4	7,490
England	**6,809.3**	**126,098**

Source: Frontline, 2019

6.2 Impact by accommodation type

Table 6.2 summarises the impacts aligned to accommodation type.

Table 6.2: Economic impacts by accommodation type

England	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Caravan Holiday Home (owned)	2,832.9	52,462	1,612.3
Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	2,657.0	49,202	1,512.6
Caravan Holiday Home (rented)	890.4	16,490	506.8
Lodge/chalet/cottage (owned)	240.0	4,439	136.3
Lodge/chalet/cottage (rented)	159.3	2,951	90.7
Glamping e.g. pods/yurts/wigwams/other	29.7	554	17.1
All accommodation	**6,809.3**	**126,098**	**3,875.8**

Source: Frontline, 2019

6.3 Assessing the economic impacts of maintenance expenditure

The impacts presented to date are based on visitor expenditure to holiday parks/campsites in England, 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 England.

Table 6.3: Average English annual expenditure on caravan holiday home and touring caravan / motorhome maintenance

Area of expenditure	Touring Caravan / Motorhome Owner*[31]	Caravan/Holiday Home Owner[32]
Servicing	£270	£227
Insurance	£250	£228
Road Tax	£166	N/A
General Upkeep	£247	£412
Total	**£933**	**£867**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018
**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 England (631,800[33]) multiplied by average maintenance expenditure per touring caravan/motorhome (£933). This equals £589.5m.

Aligned to the approach presented above, the estimated gross expenditure figure for caravan holiday home/lodge owners is equal to the number of owner caravan holiday homes (138,966[34]), multiplied by average maintenance expenditure per holiday home (£867). This equals £120.5m.

The total impact associated with expenditure on caravan and holiday home maintenance is estimated to be in the region of £589.5m.

6.4 In summary

In 2018 it is estimated that England's holiday park/campsite sector generated **a gross direct, visitor expenditure impact of £6.81bn**. **This expenditure impact equates to a GVA impact of £3.88bn** (including multipliers) and supported **126,098 FTE** jobs in the English economy.

According to a report commissioned by VisitBritain[35] the tourism sector in England had a direct GVA of £54.3bn[36], therefore the holiday park/campsite sector with a direct GVA of £2.64bn (excluding multiplier)[37] makes a considerable contribution (5%) to the sector's GVA.

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

- **South East England**: with visitor expenditure of £2.21bn, equivalent to a GVA impact of £1.26bn, and to 40,962 supported FTE jobs
- **South West:** with visitor expenditure of £1.03bn, equivalent to a GVA impact of £584m, and to 18,994 supported FTE jobs
- **East Midlands**: with visitor expenditure of £832m, equivalent to a GVA impact of £474m and to 15,418 supported FTE jobs

[31] *These figures were taken from visitors who lived in England as it was assumed that's where they would spend their money.*
[32] *These figures were taken from visitors visiting England as it was assumed that's where they would spend their money.*
[33] *NCC https://www.thencc.org.uk/Our_Industry/statistics.aspx and apportioned according to the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[34] *UKCCA, 2018.*
[35] https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf
[36] *Converted to 2018 prices.*
[37] *See appendix 3 for GVA excluding multipliers summary table.*

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

- **owner-occupied caravan holiday homes**: with visitor expenditure of £2.83bn, equivalent to a GVA impact of £1.62bn, and to 52,460 supported FTE jobs
- **touring pitches**: with visitor expenditure of £2.66bn, equivalent to a GVA impact of £1.51bn, and to 49,202 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and caravan holiday home owners adds a **further £589.5m of expenditure to the English economy**.

7 Conclusions

England's holiday park and campsite sector makes a considerable contribution to England's tourism economy, generating £6.81bn in visitor expenditure, equivalent to £3.88bn GVA and supporting 126,098 jobs.

Visitors stay longer on England's holiday parks/campsites than the national average: Visitors take a holiday or short break on a holiday park/campsites on several occasions over the course of a year, with 44% of respondents taking five or more trips a year. They also tend to take lengthy stays, with renters and tourers spending, on average, 4.5 days on a holiday park/campsite on each holiday, and owners staying 5.2 days. This is longer than the average stay figures of 3.0 days reported by VisitEngland[38].

Visitors to English holiday parks/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 £100 on-site and off-site by renters and tourers, and £92 on-site and off-site by owners. This is higher than the average daily spend by visitors to England at £64[39].

Flexible accommodation and facilities provision, which support local communities, protect the environment and encourage a healthier lifestyle: England's 4,845 member holiday parks/campsites account for 320,005 pitches[40]. These holiday park/campsite 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 home owners adds a further £589.5m of expenditure to the economy.

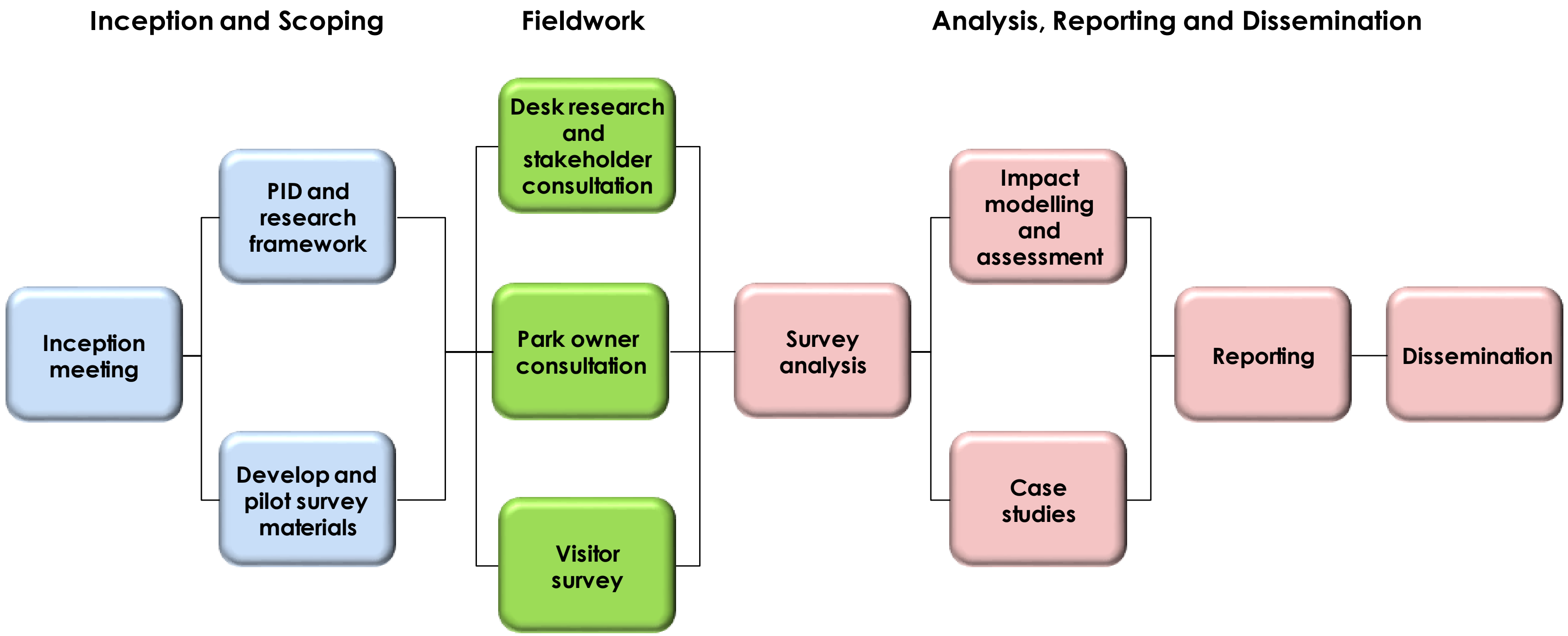
Visitors' health and wellbeing is also improved: Visitors reported doing more exercise and feeling more relaxed when visiting a holiday park/campsites. This is supported by holiday park/campsite operators who provide or support a range of health and wellbeing activities for their visitors.

Usage of migrant workforce may negatively impact a small proportion of parks following Brexit: While only 5% of respondent holiday park/campsites reported using migrant workers, this equated to an average of 14% of their workforce. Brexit could therefore result in staff shortages for a small proportion of holiday parks/campsites.

[38] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf
[39] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf
[40] *This includes Certificated Sites and Certificated Locations.*

Appendix 1 – Method

The research was undertaken during March through to December 2018 and is based on a combination of desk-based analysis, consultations with key stakeholders and surveys of holiday park/campsite operators and visitors. The method is summarised below.



Appendix 2 – Regional Breakdown

East Midlands – includes Derbyshire, Leicestershire, Lincolnshire (except North and North East Lincolnshire), Northamptonshire, Nottinghamshire and Rutland

East of England – includes Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk

North East England – includes County Durham, Darlington, Hartlepool, Middlesbrough, Northumberland, Redcar and Cleveland, Stockton-on-Tees and Tyne and Wear

North West England – includes Cheshire, Cumbria, Greater Manchester, Lancashire and Merseyside

South East England – includes Berkshire, Buckinghamshire, East Sussex, Hampshire, the Isle of Wight, Kent, Oxfordshire, Surrey and West Sussex

South West England – includes Gloucestershire, Bristol, Wiltshire, Somerset, Dorset, Devon and Cornwall, as well as the Isles of Scilly

West Midlands – includes Birmingham and the larger West Midlands conurbation, which includes the city of Wolverhampton and large towns of Dudley, Solihull, Walsall and West Bromwich

Yorkshire – includes South Yorkshire, West Yorkshire, East Riding of Yorkshire, Hull, North Yorkshire and the City of York, as well as North Lincolnshire and North East Lincolnshire

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	108.7	182.8	15.2	1.6	10.1	4.8	323.2
East of England	60.6	85.8	22.8	0.5	5.0	6.2	180.9
North East England	46.3	95.9	8.2	0.6	4.3	2.1	157.4
North West England	82.5	145.4	18.1	2.0	15.3	4.0	267.3
South East England	311.7	321.3	173.5	2.3	22.6	16.5	847.9
South West England	200.1	80.7	69.0	1.7	16.0	21.6	389.1
West Midlands	83.4	55.7	9.9	0.9	5.7	1.5	157.1
Yorkshire	98.5	162.4	15.8	1.4	16.7	2.9	297.7
Total	**991.8**	**1,130.0**	**332.5**	**11.0**	**95.7**	**59.6**	**2,620.6**

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet / cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	89.4	128.9	12.5	1.3	7.1	4.0	243.2
East of England	49.9	60.5	18.7	0.4	3.6	5.1	138.2
North East England	38.1	67.7	6.7	0.5	3.0	1.7	117.7
North West England	67.9	102.5	14.9	1.7	10.8	3.3	201.1
South East England	256.3	226.7	142.6	1.9	15.9	3.3	646.7
South West England	164.5	56.9	56.8	1.4	11.3	17.6	308.5
West Midlands	68.6	39.3	8.1	0.7	4.0	1.2	121.9
Yorkshire	81.0	114.6	13.0	1.2	11.8	2.4	224.0
Total	**815.7**	**797.1**	**273.3**	**9.1**	**67.5**	**38.6**	**2,001.3**

Indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	93.1	146.5	13.0	1.4	8.1	4.1	266.2
East of England	51.9	68.7	19.5	0.5	4.0	5.3	149.9
North East England	39.7	76.9	7.0	0.5	3.4	1.8	129.3
North West England	70.7	116.5	15.5	1.7	12.3	3.4	220.1
South East England	266.9	257.6	148.6	2.0	18.1	24.3	717.5
South West England	171.4	64.7	59.1	1.5	12.9	18.5	328.1
West Midlands	71.5	44.7	8.4	0.8	4.6	1.3	131.3
Yorkshire	84.3	130.2	13.5	1.2	13.4	2.4	245.0
Total	**849.5**	**905.8**	**284.6**	**9.6**	**76.8**	**61.1**	**2,187.4**

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	291.2	458.2	40.7	4.3	25.3	12.9	832.6
East of England	162.4	215.0	61.0	1.4	12.6	16.6	469.0
North East England	124.1	240.5	21.9	1.6	10.7	5.6	404.4
North West England	221.1	364.4	48.5	5.4	38.4	10.7	688.5
South East England	834.9	805.6	464.7	6.2	56.6	44.1	2,212.1
South West England	536.0	202.3	184.9	4.6	40.2	57.7	1,025.7
West Midlands	223.5	139.7	26.4	2.4	14.3	4.0	410.3
Yorkshire	263.8	407.2	42.3	3.8	41.9	7.7	766.7
Total	**2,657.0**	**2,832.9**	**890.4**	**29.7**	**240.0**	**159.3**	**6,809.3**

FTE Employment

Employment associated with on-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	2,013	3,384	282	30	186	89	5,984
East of England	1,123	1,588	421	10	93	115	3,350
North East England	858	1,777	152	11	79	38	2,915
North West England	1,528	2,692	336	38	284	74	4,952
South East England	5,772	5,950	3,212	43	418	305	15,700
South West England	3,706	1,494	1,278	32	297	399	7,206
West Midlands	1,545	1,032	183	16	105	28	2,909
Yorkshire	1,824	3,009	292	27	309	53	5,514
Total	**18,369**	**20,926**	**6,156**	**207**	**1,771**	**1,101**	**48,530**

Employment associated with off-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	1,655	2,387	232	25	131	73	4,503
East of England	923	1,120	346	8	66	95	2,558
North East England	705	1,253	125	9	56	32	2,180
North West England	1,256	1,899	276	31	200	61	3,723
South East England	4,745	4,198	2,641	35	295	61	11,975
South West England	3,047	1,054	1,051	26	209	328	5,715
West Midlands	1,271	728	150	14	74	23	2,260
Yorkshire	1,499	2,122	240	22	218	44	4,145
Total	**15,101**	**14,761**	**5,061**	**170**	**1,249**	**717**	**37,059**

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

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	1,724	2,713	242	26	149	76	4,930
East of England	962	1,273	361	8	75	99	2,778
North East England	735	1,424	130	10	63	33	2,395
North West England	1,309	2,158	288	32	227	63	4,077
South East England	4,943	4,770	2,751	37	335	451	13,287
South West England	3,174	1,198	1,095	27	238	342	6,074
West Midlands	1,323	827	156	14	84	24	2,428
Yorkshire	1,562	2,412	250	23	248	45	4,540
Total	**15,732**	**16,775**	**5,273**	**177**	**1,419**	**1,133**	**40,509**

Employment associated with visitor expenditure impact (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	5,392	8,484	756	81	466	238	15,417
East of England	3,008	3,981	1,128	26	234	309	8,686
North East England	2,298	4,454	407	30	198	103	7,490
North West England	4,093	6,749	900	101	711	198	12,752
South East England	15,460	14,918	8,604	115	1,048	817	40,962
South West England	9,927	3,746	3,424	85	744	1,069	18,995
West Midlands	4,139	2,587	489	44	263	75	7,597
Yorkshire	4,885	7,543	782	72	775	142	14,199
Total	**49,202**	**52,462**	**16,490**	**554**	**4,439**	**2,951**	**126,098**

Gross Value Added

GVA associated with on-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	61.9	104	8.7	0.9	5.7	2.7	183.9
East of England	34.5	48.8	13	0.3	2.9	3.5	103.0
North East England	26.4	54.6	4.7	0.4	2.4	1.2	89.7
North West England	47	82.7	10.3	1.2	8.7	2.3	152.2
South East England	177.4	182.9	98.7	1.3	12.9	9.4	482.6
South West England	113.9	45.9	39.3	1	9.1	12.3	221.5
West Midlands	47.5	31.7	5.6	0.5	3.2	0.9	89.4
Yorkshire	56.1	92.5	9	0.8	9.5	1.6	169.5
Total	**564.7**	**643.1**	**189.3**	**6.4**	**54.4**	**33.9**	**1,491.8**

GVA associated with off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	50.9	73.4	7.1	0.8	4	2.7	138.9
East of England	28.4	34.4	10.6	0.2	2	2.9	78.5
North East England	21.7	38.5	3.8	0.3	1.7	1	67.0
North West England	38.6	58.4	8.5	1	6.1	1.9	114.5
South East England	145.9	129	81.2	1.1	9.1	1.9	368.2
South West England	93.6	32.4	32.3	0.8	6.4	10.1	175.6
West Midlands	39.1	22.4	4.6	0.4	2.3	0.7	69.5
Yorkshire	46.1	65.2	7.4	0.7	6.7	1.3	127.4
Total	**464.3**	**453.7**	**155.5**	**5.3**	**38.3**	**22.5**	**1,139.6**

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

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	53	83.4	7.4	0.8	4.6	1.9	151.1
East of England	29.7	39.1	11.1	0.3	2.3	3	85.5
North East England	22.6	43.8	4	0.3	1.9	1	73.6
North West England	40.2	66.3	8.8	1	7	1.9	125.2
South East England	151.9	146.6	84.6	1.1	10.3	13.9	408.4
South West England	97.5	36.8	33.6	0.8	7.3	10.5	186.5
West Midlands	40.7	25.4	4.8	0.4	2.6	0.7	74.6
Yorkshire	48	74.1	7.7	0.7	7.6	1.4	139.5
Total	**483.6**	**515.5**	**162.0**	**5.4**	**43.6**	**34.3**	**1,244.4**

GVA associated with visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
East Midlands	165.8	260.8	23.2	2.5	14.3	7.3	473.9
East of England	92.6	122.3	34.7	0.8	7.2	9.4	267.0
North East England	70.7	136.9	12.5	1.0	6.0	3.2	230.3
North West England	125.8	207.4	27.6	3.2	21.8	6.1	391.9
South East England	475.2	458.5	264.5	3.5	32.3	25.2	1,259.2
South West England	305.0	115.1	105.2	2.6	22.8	32.9	583.6
West Midlands	127.3	79.5	15.0	1.3	8.1	2.3	233.5
Yorkshire	150.2	231.8	24.1	2.2	23.8	4.3	436.4
Total	**1,512.6**	**1,612.3**	**506.8**	**17.1**	**136.3**	**90.7**	**3,875.8**