Pitching the Value

2024 Economic Benefit Report: Holiday Parks and Campsites UK

Report for the

UK Caravan & Camping Alliance

February 2024

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Executive Summary

The UK holiday park and campsite sector makes a substantial contribution to the UK tourism economy, generating £12.2bn in visitor expenditure, which is equivalent to £7.2bn GVA and 226,745 FTE jobs.

The UK holiday park and campsite sector accounted for over 5% of the tourism sector's GDP.

Visitors to UK holiday parks and campsites stayed 82% longer and spent 12% more than the UK 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. This is the second published Economic Impact Report from UKCCA, the first being published in 2019.

Stakeholder Feedback

As part of the research, Frontline conducted interviews with senior stakeholders across the industry and facilitated a workshop with members of the UKCCA. **The purpose of the workshop and interviews was to gather views on the drivers for change and develop an assessment of the strengths, weaknesses, opportunities and threats (SWOT) faced by the UK's holiday park and campsite sector.** Findings are summarised below.

STRENGTHS	WEAKNESSES
• good variety of offering and value for money • access to space and open air • welcoming and trusted • multi-generational family oriented, accessible and pet friendly • UK-wide locations keeping money local • digital detox, off-grid mental health/wellbeing • eco-friendly breaks • operators with long tradition of good standards • long-term business resilience • supporting staycation market	• staff recruitment and retention • lack of confidence in investing • cost of delivery – more than EU market • uncertainty over new tech e.g. EVs hybrids • reduction in visitors' time and days away • rural issues with e.g. broadband connectivity, transport • low margins • crowded tourist hotspots and congestion • local housing issues • seasonality of offering
OPPORTUNITES	**THREATS**
• large and varied consumer base • investment potential • marketing the lifestyle message i.e. work/life balance, off-the-beaten-track, experience holidays • innovation – across parks and vehicles • green and environmental tourism • increasing links with local communities/businesses • extending the season – weather proofing and product innovation	• cost of living, inflation and rising operating costs • lack of infrastructure to support EVs • regulation/legislation/tourism levy • planning constraints • cost of redevelopment/innovation • lack of electric vehicle supply • consumer behaviour and high expectations • competition from other holiday destinations • climate change – flooding, wind, heatwaves

[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.*

Economic Impact

In 2022/23 it is estimated that the UK holiday park and campsite sector generated **a gross direct, visitor expenditure impact of £12.2bn to the economy**. This visitor expenditure **supports 226,745 FTE jobs and contributes £7.2bn** (including multipliers) **of GVA to the economy.** According to the WTTA, in 2022, **UK tourism's GDP contribution was £214bn to the UK economy in 2022**[4]**, therefore the holiday park and campsite sector with a contribution of £12.2bn makes a considerable contribution (over 5%) to the sector's economic value.** In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £1,045.5m of expenditure to the UK economy**.

Holiday Park and Campsite Operators

According to evidence provided by the UKCCA and the Frontline survey, **in 2023 there were 6,169 holiday parks and campsites operating in the UK, accounting for 439,828 pitches**[5]**.** This was drawn from a database provided by the UKCCA as well as wider non-member holiday parks and campsites.

Consultations were undertaken with 868 of these parks. Research found that **UK 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. **UK holiday parks and campsites also offer a wide range of facilities**, including swimming pools, Wi-Fi and games rooms.

The majority have run their holiday parks and campsites for over 10 years (76%) and many have done so for over 25 years (48%). Occupancy rates peaked at 68% in high season (August) and 54% in mid-season (May). Holiday park and campsite operators support their local communities through:

- **expenditure** – 41% cumulatively spent £263.5m per year in capital and operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local business and causes, and fundraising particularly around sports and community groups
- **environmental activities** – including support for recycling and biodiversity, water and energy conservation initiatives, and participation in the David Bellamy Conservation or Green Tourism award schemes
- **health and wellbeing** – including providing cycle paths, promotion of wider community health and fitness sessions and healthy food options provided on-site

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

- **COVID-19 pandemic** – leading to an initial spike in bookings which have now largely returned 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 costs and pricing challenges, as well as consumers becoming more frugal and changing how they book e.g. with last minute bookings, leading to uncertainty for operators
- **Brexit** – leading to increased cost and supply chain disruptions, as well as a decrease in the quality of service

Holiday Park and Campsite Visitors

5,224 visitor respondents to the survey had made a visit to a holiday park and campsite in the UK in 2023. The majority of the survey respondent (77%) lived in England. Just over half of the respondents (54%) stayed on a holiday park and campsite in the UK 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 4% stayed in some form of rented, stationary accommodation, while 1% stayed in other accommodation. **The average adult group size was 2,** and **15% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 2. **32% of groups brought a pet. Visitors spent, on average, 5.1 nights per trip**. **This is higher than the average overall tourism number of nights per trip at 2.8**[6]**.**

Visitors who stayed in rented accommodation spent, on average, £217 per day, including £134 on-site and £82 off-site. **Touring visitors spent, on average, £101 per day**, including £42 on-site and £59 off-site. **Visitors who owned their holiday caravan spent £102 per day**, including £44 on-site and £58 off-site. This is higher than the average tourism spend per night by UK visitors at £96[7].

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[4] 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

[5] *This includes Certificated Sites and Certificated Locations.*

[6] *https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms*

[7] *https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms*

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 also detailed individual country reports for England, Scotland, Wales and Northern Ireland. **This report is for the UK[8].** This is the second published Economic Impact Report from UKCCA, the first being published in 2019.

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.

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

2 UK Tourism in Context

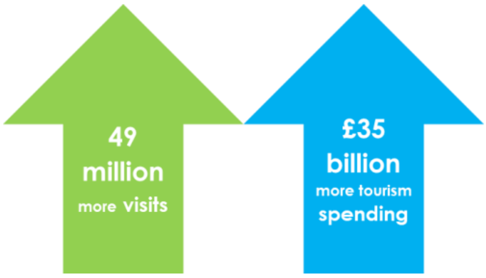
This section provides a contextual review of national tourism policies and available statistics at a UK level.

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[9]. Each country except for England (England use Visit Britain's strategy) also has their own tourism strategy:

- Scotland – Scotland Outlook 2030[10]
- Northern Ireland – Tourism Strategy for Northern Ireland 2020-2030[11], which is currently in consultation for a new ten year plan[12]
- Wales – Welcome to Wales: Priorities for the Visitor Economy 2020-2025[13]

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



VisitBritain's strategy has the ambitions of[14]:

- 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.

The strategy identifies the following opportunities:

- large global aviation route network
- strong associations with culture and heritage
- strong tourism infrastructure
- English being a widely-spoken international language
- London being a global city

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

2.2 National tourism statistics

Travel and tourism contribute significantly to the UK economy. According to the World Travel and Tourism Council [15]:

- 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

A 2023 Mintel report looking at the UK camping and caravanning sector,[16] 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[17]. Other notable statistics include:

- the value of the domestic market has risen by 25% over the past five years
- anecdotal feedback suggests 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
- rental holiday caravan spending reached £1.2bn

Since the pandemic, a more affluent demographic has entered the market; 37% of new campers have a household income above £50,000, compared with just 21% of those who camped/caravanned pre-pandemic[18].

Demand remains robust at the premium end of the spectrum. Over two thirds (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[19].

[15] 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
[16] *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.*
[17] *Camping and Caravanning UK, Mintel, 2023.*
[18] https://www.easier.com/141247-carry-on-camping-4-5-million-brits-took-their-first-camping-holiday-during-the-pandemic.html
[19] *Camping and Caravanning UK, Mintel, 2023.*

3 Stakeholder Feedback

As part of the research, Frontline conducted interviews with senior stakeholders across the industry and facilitated a workshop with members of the UKCCA. A list of contributors is presented in Appendix 1.

The purpose of the workshop and interviews was to gather views on the drivers for change and develop an assessment of the strengths, weaknesses, opportunities and threats (SWOT) faced by the UK's holiday park and campsite sector.

3.1 Drivers for change

There was consistency across stakeholders regarding the main drivers for change for the holiday park and campsite sector. In summary these were:

- **cost of living** – supports an increase in continued staycations, while looking for increased value for money and spending less
- **eco-friendly and supporting a positive environmental culture** – driving innovation to offset energy usage, EVs, solar and wind farms – infrastructure needs to catch up
- **Brexit and its continued economic impact** – disrupting the migrant labour pool leading to staff shortages
- **health and wellbeing** – the ability for holiday parks and campsites to support health, fitness and the overall wellness agenda
- **increased appetite for shorter breaks** – requires holiday park and campsite operators to be more flexible around provision to compete with other forms of accommodation
- **price** – holiday parks and campsites to continue to be viewed as a value for money family offering
- **innovation and new product development steadily increasing** – improved EVs, including reducing range anxiety, smaller/lighter caravans, roof tents
- **blended travel continues to rise** – bringing together work and travel allowing continuation of post pandemic hybrid working, as well as multi-generational holidays
- **premiumisation** – quality at the right price – everyone is competing, resulting in add-ons becoming the norm
- **increasing diversity of offering** – across types of accommodation, quality, price and size
- **legislative changes** – increased regulation, legislation and tourism levies all on the radar

3.2 SWOT analysis

The **strengths** of the sector were:

- **quality and variety of offering** – across accommodation types and standards
- **good value for money** – wide range of affordable options for all types of family groups
- **access to natural environment** – open air and proximity to outdoors; eco-friendly
- **welcoming and trusted** – loyal customer base, extensive repeat business
- **family-oriented** – multi-generational, accessible and pet friendly
- **UK wide locations** – contributing to rural and local economies
- **positive impact on mental health and wellbeing** – digital detox, off-grid
- **committed owners** – with long tradition of good standards
- **resilient and adaptable to change** – the ability to react to COVID-19 with operational changes e.g. contact free check ins
- **supporting staycations** – continuing to ensure the UK remains a destination of choice for visitors from the UK

Some comments around **drivers for change** included:

> *"Wealth of choice – self curation and freedom to roam – blended travel – work and play – opportunity to do this because most employers accept hybrid work and better infrastructure."*
>
> *"Global economic challenges, the cost of living crisis, rampant inflation, seen consumers tightening discretionary spending. Air travel on the increase but still quite costly, the popularity for staycation is still there."*
>
> *"Holiday caravans getting bigger, higher specification that consumers are looking for – home from home – the migrations of 2-3 touring pitches for 1 holiday home."*
>
> *"Value on experience – need to offer more than we did – 10 years ago pool bar etc – not more diversification and more activities, more entertainment."*

The **weaknesses** of the sector were:

- **staff recruitment and retention** – working for the sector not seen as a career choice
- **lack of confidence in investment** – particularly within small businesses
- **cost of delivery** – more than EU market
- **uncertainty over new tech** – e.g. EVs, hybrids
- **visitors having less time for holidays**
- **rurality of location** – e.g. broadband connectivity, EV transport, infrastructure
- **low margins** – impacting on investment and attractiveness to new entrants
- **crowded tourist hotspots and congestion**
- **seasonality** – limiting the availability of holiday park and campsite facilities and impacting labour

The **opportunities** for the sector were:

- **large and varied consumer base** – increasing multi-generational offering
- **investment potential** – including growth of 'glamping', agricultural diversification for new income streams; digital detox
- **innovation** – across parks and vehicles
- **marketing the lifestyle message** – i.e. work/life balance, off-the-beaten-track, experience holidays, working on the move, wellbeing holidays
- **innovation** – across holiday parks, accommodation and vehicles
- **green and environmental tourism**
- **increasing links with local communities/businesses** – economic ripple effect
- **extending the season** – weather proofing and product innovation

The **threats** for the sector were:

- **regulation/legislation/policy changes** – uncertainty; potential impact of tourism levies
- **planning** – reducing ability to expand
- **cost of living, inflation and rising operating costs** – less money to go around
- **lack of infrastructure** – to allow for easy access and to support EVs as well as a lack of road repairs and public transport provision
- **cost of redevelopment/innovation** – driven by risk of investment
- **lack of electric vehicle supply**
- **consumer behaviour and high expectations** – with the pandemic and growth in staycations a key driver
- **competition** – from other holiday destinations
- **weather and climate change** – flooding, wind, heatwaves

Some comments included:

"There are lots of fabulous things on a holiday park – modern experience, good value for money, and a wealth of choice."

"The whole staycation thing is still there – this has really been beneficial for the sector."

"It is difficult getting people with the right skills into the industry, in everything, hospitality businesses, attractions etc. This is compounded by a very competitive job market."

"Generational tourism – family market is a real strength/USP; from grandparents to young ones – more affordability on holiday park; ability to get up and go."

"Investors saw value and opportunity in UK parks – this enhanced as a result of the pandemic – genuine attractive sector for private equity."

"Site choices based on the cost of site nights – so many staying fewer nights; fuel costs limiting travel; affordability of taking any holidays; weather patterns and the change due to global warming leading to uncertainty."

"Increasing costs for running businesses pose a threat to the industry – energy costs, food etc all much higher than before. Businesses have had to pass some of that on – not seen an impact on demand yet."

3.3 Summary SWOT

The holiday park and campsite sector's SWOT is presented in Table 3.1.

Table 3.1: SWOT analysis of the holiday park and campsite sector

STRENGTHS	**WEAKNESSES**
• good variety of offering and value for money • access to space and open air • welcoming and trusted • multi-generational family oriented, accessible and pet friendly • UK-wide locations keeping money local • digital detox, off-grid mental health/wellbeing • eco-friendly breaks • operators with long tradition of good standards • long-term business resilience • supporting staycation market	• staff recruitment and retention • lack of confidence in investing • cost of delivery – more than EU market • uncertainty over new tech e.g. EVs hybrids • reduction in visitors' time and days away • rural issues with e.g. broadband connectivity, transport • low margins • crowded tourist hotspots and congestion • seasonality of offering
OPPORTUNITES	**THREATS**
• large and varied consumer base • investment potential • marketing the lifestyle message i.e. work/life balance, off-the-beaten-track, experience holidays • innovation – across parks and vehicles • green and environmental tourism • increasing links with local communities/businesses • extending the season – weather proofing and product innovation	• cost of living, inflation and rising operating costs • lack of infrastructure to support EVs • regulation/legislation/tourism levy • planning constraints • cost of redevelopment/innovation • lack of electric vehicle supply • consumer behaviour and high expectations • competition from other holiday destinations • climate change – flooding, wind, heatwaves

4 Holiday Park and Campsite Operator Consultation

This section provides evidence from consultations with holiday park and campsite operators across the UK. This was drawn from a database provided by the UKCCA[20] 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[21]

While this represents a comprehensive list of holiday parks and campsites across the UK, 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.

4.1 Composition of the UK holiday parks and campsites

According to evidence provided by the UKCCA and our survey, **in 2023 there were 6,169 holiday parks and campsites operating in the UK, accounting for 439,828 pitches[22].**

The majority of these pitches are either owner-occupied holiday caravans (220,719, 50%) or touring pitches[23] (138,855s, 32%). 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.

Table 4.1: Composition of the UK's holiday park and campsite sector

	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
England	4,754	108,200	2,765	1,112	151,162	31,974	16,778	8,910	**320,901**
Scotland	401	11,883	287	153	17,341	3,647	891	892	**35,093**
Wales	922	16,892	237	98	41,175	5,535	3,987	1,164	**69,088**
Northern Ireland	92	1,880	21	17	11,041	1,718	31	38	**14,746**
UK	**6,169**	**138,855**	**3,310**	**1,380**	**220,719**	**42,874**	**21,687**	**11,004**	**439,828**

: UKCCA and Frontline Holiday Park and Campsite Operators Survey, 2023
**Includes touring caravans, motorhomes/campervans and tents*
***Yurts/wigwams/other excluding pods which are listed separately*
****Due to rounding there may be slight discrepancies when totalling*

[20] *This includes Certificated Sites and Certificated Locations.*
[21] *Where holiday parks/campsites that were not members of the UKCCA completed the survey, they were added to the population database.*
[22] *This includes Certificated Sites and Certificated Locations.*
[23] *This includes touring caravans, motorhomes/campervans and tents.*

4.2 Sampling methodology

Holiday parks and campsites across the UK were invited to participate in the research. This was done by the various sponsor members reaching out to holiday park and 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.

868 out of 6,169 holiday parks and campsites across the UK participated giving us a 95% confidence +/– 3.1% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population.

4.3 Geographic locations

The geographic location of those completing the survey was broadly representative of the sector. For example, it included holiday parks and campsites from all four constituent nations of the UK, receiving a minimum response rate of at least 11%.

Table 4.2: Locations of holiday parks and campsites surveyed

Location	Number responding	Estimated population	Percentage consulted
England	666	4,754	14%
Wales	97	922	11%
Scotland	79	401	20%
Northern Ireland	26	92	28%
Total	**868**	**6,169**	**14%**

Source: Frontline Holiday Park and Campsite Operators Survey, 2023

4.4 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 42 very large (251 pitches or more); and 370 very small (5 pitches or fewer), these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 4.3: Sizes of the holiday parks and campsites surveyed

Number	Number responding
Very small (1-5 pitches)	370
Small (6-50 pitches)	71
Medium sized (51-100 pitches)	165
Large (101-250 pitches)	166
Very large (251 pitches or more)	42
Total	**814**

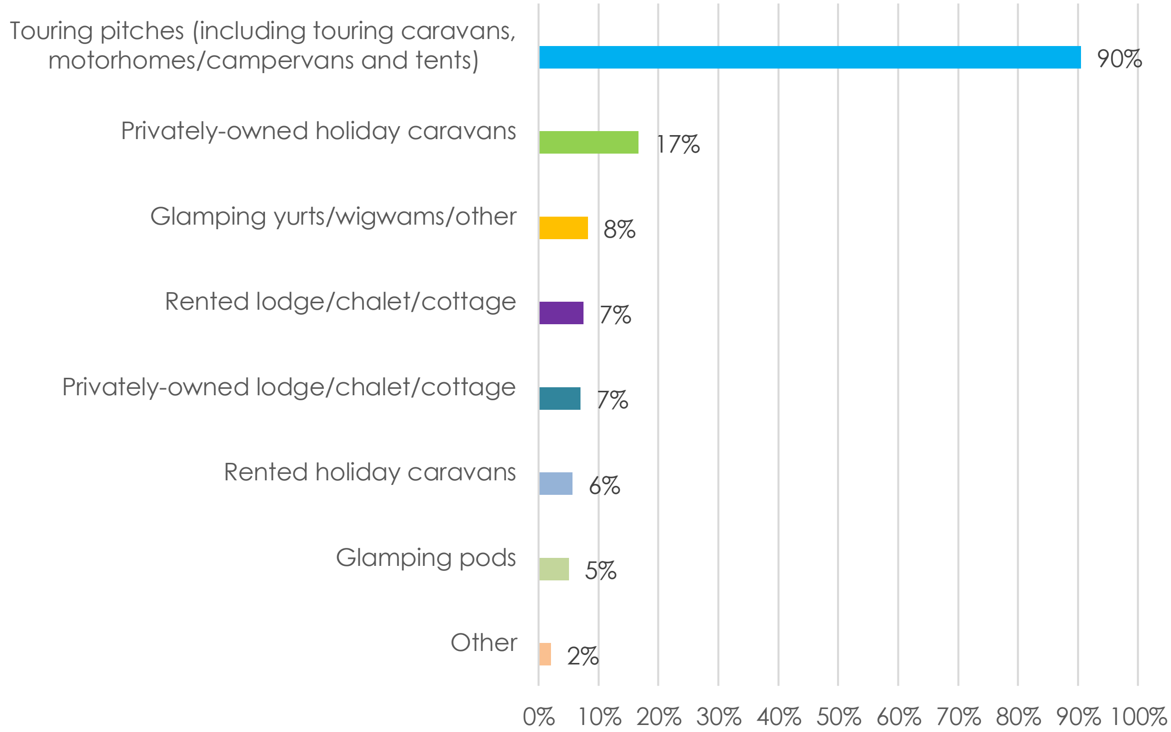
Source: UKCCA, 2023

4.5 Accommodation provided

90% of respondents had touring pitches which includes touring caravans, motorhomes/ campervans and tents.

19% had owner-occupied accommodation (caravans or lodges), and 10% offered rented accommodation (19% including glamping pods and yurts/wigwams).

Figure 4.1: Types of accommodation on the holiday parks and campsites surveyed



Source: Frontline Holiday Park and Campsite Operators Survey, 2023 N=816 (survey respondents)
(figures sum to over 100% as most holiday parks and campsites offer more than one type of accommodation)

4.6 Facilities and activities provided

In addition to accommodation, many offer a range of **facilities**.

The figures in Table 4.4 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 holiday parks and campsites in the UK.

In the very small holiday parks and campsites, the majority (74%) had toilet block and shower facilities (67%) and a third (33%) had Wi-Fi. Small, medium and large holiday parks and campsites (6-50, 51-100 and 101-250 pitches respectively), had a wider range of facilities.

In addition to shower facilities, toilet blocks and Wi-Fi, the majority also had a laundry (67%), defibrillators (57%) and an outdoor play area (52%).

Larger holiday parks and campsites, with more than 250 pitches, had a laundry (94%), outdoor plays area (92%), Wi-Fi (92%), defibrillators (72%), retail shops (67%), restaurants/bar/takeaway (64%) and games/information rooms (58%). Many have also increased their environmental facilities having installed electric vehicle charging, solar panels and heat pumps.

Other facilities included:

- recreational facilities e.g. tennis courts, nature trails
- campsite facilities e.g. biomass boilers, compost toilets
- amenities such as leisure and spa facilities, reception area, farm shops, accessories shops
- other outdoor areas such as seated BBQ area, fire pits, lakes and wildlife ponds

Table 4.4: Facilities listed by holiday park and campsite surveyed

Facility	Very small holiday parks and campsites	Small, medium and large holiday parks and campsites	Very large holiday parks and campsites
Toilet block	74%	84%	81%
Showers	62%	83%	81%
Laundry	10%	67%	94%
Retail/shop	0.5%	11%	67%
Restaurant/bar/takeaway		10%	64%
Entertainment		4%	42%
Outdoor play area	0.5%	52%	92%
Games/information room		29%	58%
Wi-Fi	33%	72%	92%
Electric vehicle charging points		11%	53%
Dog washing facilities		7%	17%
Bike cleaning stations		3%	3%
Locker and or back packing facilities		1%	3%
Defibrillators		57%	72%
Solar panels	0.5%	11%	39%
Heat pumps		3%	14%
Other	34%	7%	3%
Total respondents	**223**	**392**	**36**

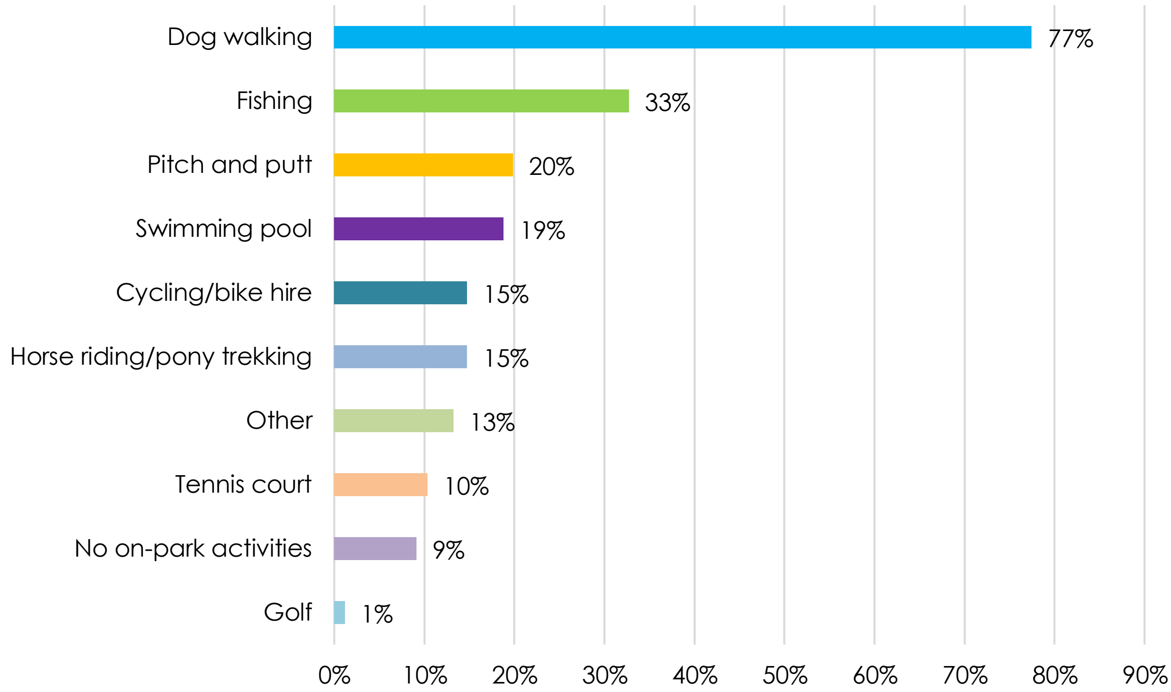
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N= 651

Across all holiday parks and campsites the most common **activities** provided on-site included dog-walking (77%), fishing (33%), pitch and putt (20%), swimming pools (19%), and cycling or bike hire (15%).

'Other' activities included:

- recreational activities e.g. table tennis, archery, a children's disco, llama/alpaca walks and mini golf
- natural attractions e.g. beaches and wildlife parks

Figure 4.2: Activities listed by holiday park and campsites surveyed



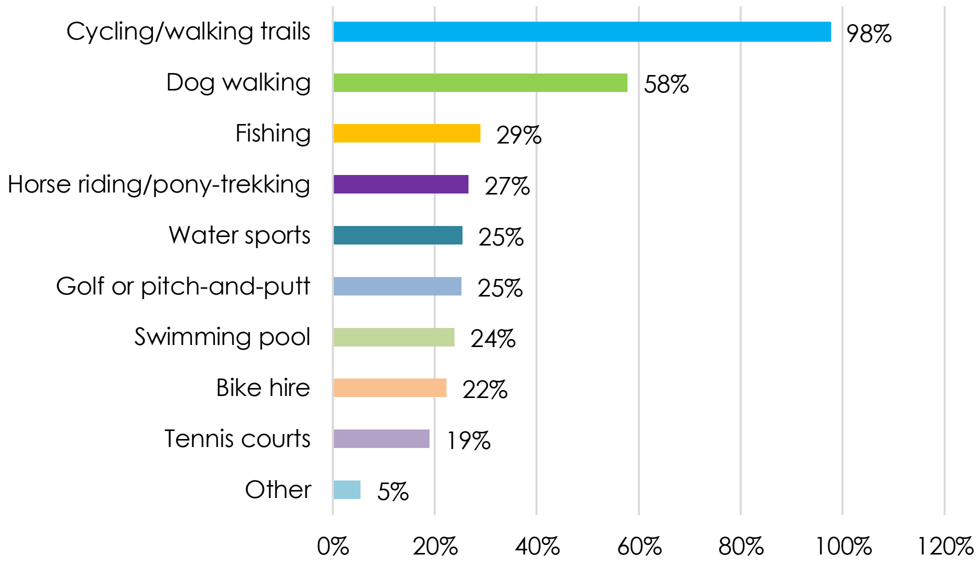
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=590
(figures sum to over 100% as most parks offer more than one type of facility)

Holiday parks and campsites have access to a **range of activities in the local area**. 98% have cycling/walking trails in the area as well as dog walking (58%). A further 29% had fishing, 27% had horse riding and 25% had water sports.

'Other' included:

- entertainment such as cinemas, retail villages, activity centres and arcades
- local attractions such as historic villages and National Trust sites
- recreational activities such as Go Ape, assault courses, mountain biking/climbing, fell walking

Figure 4.3: Range of activities in the local area



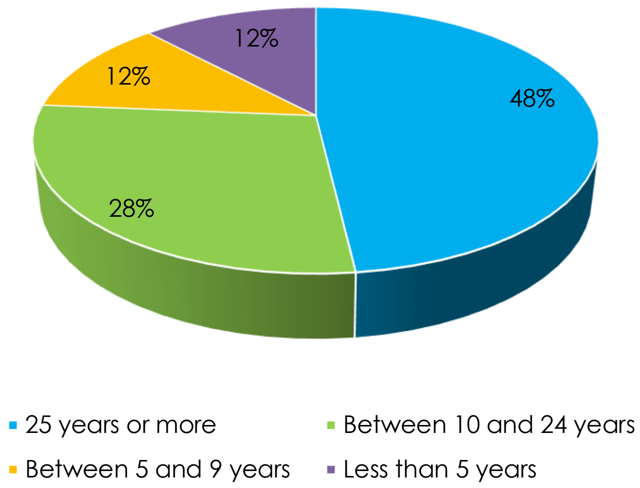
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=571
(figures sum to over 100% as most parks had more than one type of activity in the local area)

4.7 Holiday park and campsite ownership

In the majority of cases respondents saw their holiday parks and campsites as long-term investments, with over three quarters (76%) owned and operated for at least 10 years, and nearly half for over 25 years (48%).

Figure 4.4 summarises the feedback.

Figure 4.4: Length of time survey operators have owned/operated their holiday parks and campsites



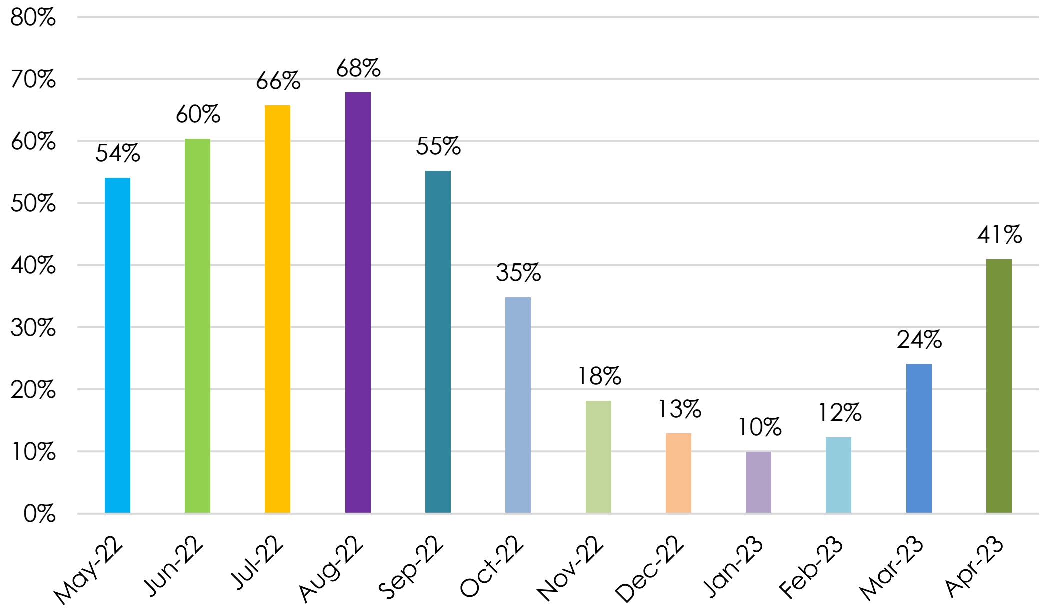
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=777

4.8 Length of season and occupancy rates

The majority of respondents (61%) operated seasonally with the remainder (39%) open all year. Where holiday park and campsites were seasonal, most were open from March – October/November.

Average occupancy rates peaked at 68% in high season (August 2022), falling to 54% in mid-season (May 2022). Low season average occupancy ranged from a low of 10% in January (2023) to a high of 24% in March (2023) as presented in Figure 4.5.

Figure 4.5: Average occupancy rates on holiday parks and campsites surveyed



Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=560

4.9 Visitor origin

When asked where their visitors came from, 76% came from England, 7% from Wales, 6% from Scotland, and 5% from Northern Ireland; 5% were from outside the UK. The most cited market for visitors from outside the UK were countries from Western Europe such as Germany, the Netherlands, Belgium, France, the Republic of Ireland, and Switzerland.

When segmented by country (Table 4.5) there was variance depending on location, with people from England representing the largest group of visitors for all countries except for Northern Ireland. Scotland had the highest percentage of visitors from outside the UK.

Table 4.5: Visitor origin of holiday parks and campsites surveyed

Area*	England	Wales	Scotland	NI	Outside UK
England	87%	5%	4%	1%	4%
Scotland	42%	2%	40%	2%	15%
Wales	68%	25%	2%	<1%	3%
Northern Ireland	4%	<1%	1%	89%	5%
Total**	**76%**	**7%**	**6%**	**5%**	**5%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=454 total
**Rows represent the data broken down by country, columns the survey responses*
***Total percentages may add up to under/over 100% due to rounding and recipient input*

4.10 Staff employed

Results show that on average, there were 5.6 full-time and 1.6 part-time staff all year round and 3.9 full-time and 1.6 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'.

2% employed migrant workers.

Table 4.6: 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)*	-	0.7	2.0	1.3
Small (6-50 pitches)	1.9	0.6	2.4	1.0
Medium sized (51-100 pitches)	1.8	0.5	2.9	0.5
Large (101-250 pitches)	3.3	1.0	4.5	1.0
Very large (251 pitches or more)	19.7	10.7	28.1	10.5
Average across all holiday parks and campsites**	**3.9**	**1.6**	**5.6**	**1.6**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=422
**There was only one response from holiday parks and campsites 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 0-150 full time and 0-100 part time all year staff, and 0-440 full time and 0-51 part time seasonal staff*

4.11 Expenditure by holiday park and campsite[24]

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 4.7. Again, this is likely to be an underrepresentation as not all parks responded.

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

Table 4.7: Total expenditure by holiday parks and campsites surveyed

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£59,845,750	£225,833
Operating expenditure	£119,210,545	£336,753
Wages and salaries	£84,461,411	£239,267
Total expenditure	**£263,517,705**	**£801,853**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=266-354

**Ranges from £0-£10m (capital), £1,000-£9m (operating) and £0-£6m (wages and salaries)*

85% of respondents stated that their capital expenditure had increased over the last three years, with 12% saying it had stayed the same and just 3% saying it had decreased. Some of the reasons given for the increase in expenditure were:

- **rising costs** – of raw materials, utilities, and labour
- **new developments or upgrades** – such as installing or upgrading pitches, expansion, new or improved facilities, and developing utilities e.g. electric or gas
- **investments** – into sustainability projects and business growth

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

- **accommodation** – including purchasing new land or lodges, glamping pods and pitches, and a range of refurbishments
- **utility development** – including installing solar panels, upgrading gas/water/ electricity supply, improving electric hook up and connections, renewable energy projects and water treatment
- **facilities** – including new and refurbishment of washrooms, shower blocks, play areas, and hard standings
- **investments** – into new stock and accommodation, and facilities e.g. cafes, restaurants and shops
- **equipment** – including tractors, digging equipment and other commercial vehicles, playground equipment and other machinery
- **infrastructure** – road resurfacing and improvements, wider landscaping, and drainage systems
- **digital improvements** – such as broadband and Wi-Fi infrastructure, TVs, and IT booking software

The total and average planned expenditure is presented in Table 4.8.

Table 4.8: Planned expenditure

	Expenditure			
	Average maintenance	Total maintenance	Average improvements	Total improvements
Next financial year	£381,610	£111,430,044	£505,995	£143,196,597
Next three financial years	£803,123	£228,086,835	£868,915	£287,610,709

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=245-293

**Ranges from: maintenance £0-£2.6m (next financial year) and, £300-£5.3m (next three financial years); improvements £0-£7.1m (next financial year) and £0-£6m (next three financial years)*

When asked how their income had changed over the last two years, around half (49%) of the 43% who responded said it had stayed the same, with 42% saying it has increased while 9% said it had decreased.

Some of the reasons cited for an increase in income included a rise in sales, increased margins due to raising their prices, an increase in domestic tourism due to COVID-19/staycation trend, expansion of their parks, and the growing popularity of some routes e.g. the NC500.

4.12 Community engagement

Almost a third (30%) of respondents provided information on how they **engage with the local community**, responses included:

- **local events** – 91% promoted and sponsored local events including school events and McMillan coffee mornings
- **promoting local** – 90% actively promote local producers, suppliers, restaurants and shops
- **social media advertising** – 89% advertise and signpost local businesses and causes on social media
- **fundraising** – 80% fundraise for the community, particularly around sports and community groups and parish and community councils
- a further **16%** work with **community groups and community councils**

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

"Annual fundraiser…coffee mornings for Macmillan…invites for field trips for local school."

England

"We provide business for local pubs, restaurants, local petrol station, local farm shop (all within one mile of site). Some campers come to visit families in the area. We also host youth activities such as local scout group."

England

"Support school events, gala days and youth organisations. Free stays for all local youth organisations like schools, guides, scouts for education support and/or Duke of Edinburgh. Charity support including regular and guest donations on booking."

Scotland

"Charity/fundraising teas; installing a community defibrillator."

Wales

"Charity fundraisers; promoting local businesses who benefit from my customers."

Northern Ireland

4.13 Environmental improvement

Almost a third (31%) of respondents provided information on how they **supported environmental improvements**. Almost two thirds (65%) had a carbon reduction plan. The most frequently occurring environmental initiatives included:

- **recycling** – which was highlighted by 98% and included educating and encouraging visitors to follow on-site procedures
- **energy and water conservation** – 84% did this through water harvesting, solar panels, light sensors and low wattage solutions, compost toilets
- 83% showed **support for local wildlife** – including a range of conservation projects such as planting trees, maintaining wildflower meadows, and some were engaged in sites of special scientific interest (SSSI)
- **award participation** – 76% took part in award schemes including the David Bellamy Conservation Award or Green Tourism awards
- **using sustainable accommodation** – 68% of parks had sustainable accommodation including the use of upcycled materials
- 14% had **restricted vehicle movement** – such as car-free zones

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

"Recycling points on-site. Solar field supplying 1/3 of our electricity. Water Harvesting for flower watering. Green Tourism Gold, Living Wage accredited employer. Support wildlife in all of business. EV for site use and cargo bike for cleaning team."

Scotland

"100% green electricity provided by Ecotricity. We are maintaining a wildflower meadow [and] hundreds of meters of traditional Devon hedgerow. Encouraging the bat population with bat box provision and bat-friendly lighting. Providing for recycling of waste. Encouraging biodiversity through the management of land."

England

"Recycling on-site, solar hot water, planned EV charger, wild hedgerows."

Wales

"[We have] wildflowers, solar powered lights, native trees, recycling, encourages low energy modes of travel – bicycles and foot."

Northern Ireland

4.14 Health and wellbeing

Almost half (44%) of respondents provided information on how they **encourage health and wellbeing**. The most frequently occurring examples included:

- **walking and cycling routes, waterways and beaches** – 68% provided access and information about these
- 67% **encourage dog owners**
- **healthy food options** – 51% had onsite restaurants/cafes
- 49% **provided local health and wellbeing facilities** – and granted access to these amenities to the broader community (e.g. school groups)

'Other' responses (31%) included:

- outdoor activities such as walking, cycling and swimming
- community events and local promotion of cultural or nature trails
- providing a relaxing environment and access to green spaces

More detail on the health and wellbeing benefits for visitors is presented in Section 5.5.

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

"Encouraging healthy leisure activities such as walking, cycling, swimming…water sports at local reservoir (kayaking, sailing, paddle boards)."

England

"We have created a very natural environment for our campsite with long grass between pitches, no light pollution and as little noise as possible."

Wales

"New toilet block with family space and non-binary space. Camper's kitchen with free games, DVDs, books etc for all to use. Shop stocks variety of things for all tastes, including those on vegan/vegetarian diets…local woodlands which people are free to explore and build dens in."

Scotland

4.15 COVID-19 pandemic

Operators were asked how the COVID-19 pandemic had changed the sector; over a third (35%) provided some insight. These included:

- **initial surge in bookings** – due to travel restrictions, as well as new people taking up camping or glamping. Also an increase in motorhome/caravan ownership, but generally there has been a dramatic reduction in bookings since overseas travel became possible again
- **economic impacts** – e.g. supply costs and labour costs
- **changing customer behaviour** – for example the type of accommodation booked and their expectations, with an increase in purchase or renting of self-contained accommodation e.g. motorhomes, caravans and lodges

Operators were also finding newcomers to camping and caravanning were expecting a higher quality of product for the price:

- **an increase in competition** – from more farm sites and temporary pop-up sites or 'Aire' style designated parking areas.
- **staffing issues** – in particular the recruitment, retention and availability of staff
- **operational changes** – such as contactless payments and arrivals and reducing the number of facilities offered

Operators were also asked what effect COVID-19 had on their operational expenditure over the last two years. Of the 42% who responded, 86% said it had risen while 12% said it has stayed the same; only 2% said it reduced.

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

"Boom for three years now bookings reduced to less than a pre-pandemic year."

England

" Yes at the start people were holidaying in UK now we have started to see a drop off as people can go abroad again."

Scotland

" It created busier times for a short period, although pop up campsites charging massive rates have damaged the sector. Numbers are again in decline as people return to their normal holiday choices."

Wales

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

Northern Ireland

4.16 Consumer demographics

Operators were asked if the consumer demographics have changed over the years; over half (53%) provided some insight. Examples included:

- **demographic shift** – both in terms of new younger guests or young families who camped for the first time during the pandemic, and a general ongoing shift towards older retired people, with some mentioning there were fewer families who had possibly reverted back to their previous holiday habits
- **spending behaviour** – including reduced customer spending
- **changing customer behaviour** – with a growth in motorhome/caravan ownership, as well as a rise in last-minute bookings
- **increase in local tourism** – an increase in the 'staycation' trend

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

"Our customer is still, on the whole, retired, and in their 70s/80s. We are finding attracting customers harder than ever now."

England

"Increasing number of motorhomes and last-minute short stays."

Wales

"During COVID-19 there was increased younger generation uptake, but normal demographic has resumed."

Northern Ireland

"More budget conscious customers. Staying one night to utilise the facilities then spending three or four days parking up off grid."

Scotland

4.17 Cost of living implications

Operators were asked about the implications of the cost-of-living crisis; 54% responded. The most frequently occurring examples included:

- **economic pressures** – both in terms of guests not spending as much, or increasing site costs for the operator
- **changing customer behaviour** – in particular shorter visitor stays or booking last minute
- **pricing challenges** – decreased margins due to trying to limit price increases
- **decrease in spend** – including on new caravan stock
- **increasing general uncertainty** – including customer numbers, operating costs and interest rates
- **decrease in ownership spend** – reduced spending for holiday caravan upgrades, and an increase in abandoned holiday caravans and unpaid utility bills altogether
- **impact on business** – from utility costs and pricing challenges, as well as the need to invest and improve to continue to attract customers who may be travelling/ holidaying less

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

"Reduced or pressurised disposable income means guests are more frugal with expenditure."
England

"Cost of fuel to travel, rising energy prices, less disposable income, holidays become a considered purchase."
Scotland

"Worrying…could be a decider of whether we keep going."
Wales

" 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 our loyal customer base."
Northern Ireland

4.18 Brexit

Over a quarter of respondents (28%) provided feedback on the implications of Brexit on supplies; the majority (86%) had issues. The most frequently occurring issues included:

- **supply chain delays or disruptions** – for example getting repairs completed or parts for new units
- **increased costs** – for materials, products and services
- **service issues** – including delays in repairs and poor standards of aftercare
- **difficulty importing goods** – with increased regulations and 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; of the 47% who responded, almost half (47%) said it had.

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

"Brexit has resulted in a hugely increased cost of materials for the caravan manufacturers."
England

"Long delays resulting in cancellations, poor after-service, drop in the quality of the product delivered to the park."
England

"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."
Northern Ireland

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

4.19 Overseas travel and overseas visitors

Operators were asked if they had seen a decrease in overseas visitors; 40% responded. The majority (82%) said they had **seen a decrease during travel restrictions. Some estimated the reduction was up to 50%.**

4.20 Holiday park and campsite operator summary

This research found that the UK's holiday parks and campsites offer a wide range of accommodation options to visitors, which allow them to serve a diverse range of customer 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, they 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 (76%) and many have done so for over 25 years (48%). Occupancy rates peaked at 68% in high season (August) and 54% in mid-season (May). The proportion outside of each constituent nation varied from country to country; however English visitors formed the biggest group in each nation apart from Northern Ireland which has a very strong domestic market.

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** – 41% from the total survey sample cumulatively spent £263.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local businesses and causes, and fundraising particularly around sports and community groups
- **environmental activities** – including support for recycling and biodiversity, water and energy conservation initiatives, and participation in the David Bellamy Conservation or Green Tourism award schemes
- **health and wellbeing** – including providing cycle paths, promotion of wider community health and fitness sessions and healthy food options provided on-site

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

- **COVID-19 pandemic** – leading to an initial spike in bookings which have now largely returned 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 people engaging in camping leading to new consumer behaviours
- **cost of living** – affecting businesses with operating costs and pricing challenges, as well as consumers becoming more frugal and changing how they book e.g. with last minute bookings, leading to uncertainty for operators
- **Brexit** – leading to increased cost and supply chain disruptions for operators, as well as a decrease in the quality of service

5 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.

5,224 respondents to the survey had made a visit to a holiday park and campsite in the UK in 2023. Table 5.1 shows the spread of visitors across the UK.

Table 5.1: Location of holiday parks and campsites visited

Location	Percentage
England	70%
Scotland	12%
Wales	8%
Northern Ireland	8%
Unknown	2%
Total consulted	**5,224**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

5.1 Visitor origin and number of trips

The majority of the respondents lived in England (77%). 1% came from outside the UK. This aligns to the English, Welsh and Scottish holiday park and campsite operators who reported that the majority of their visitors come from England (Section 3).

Table 5.2: Visitor home country

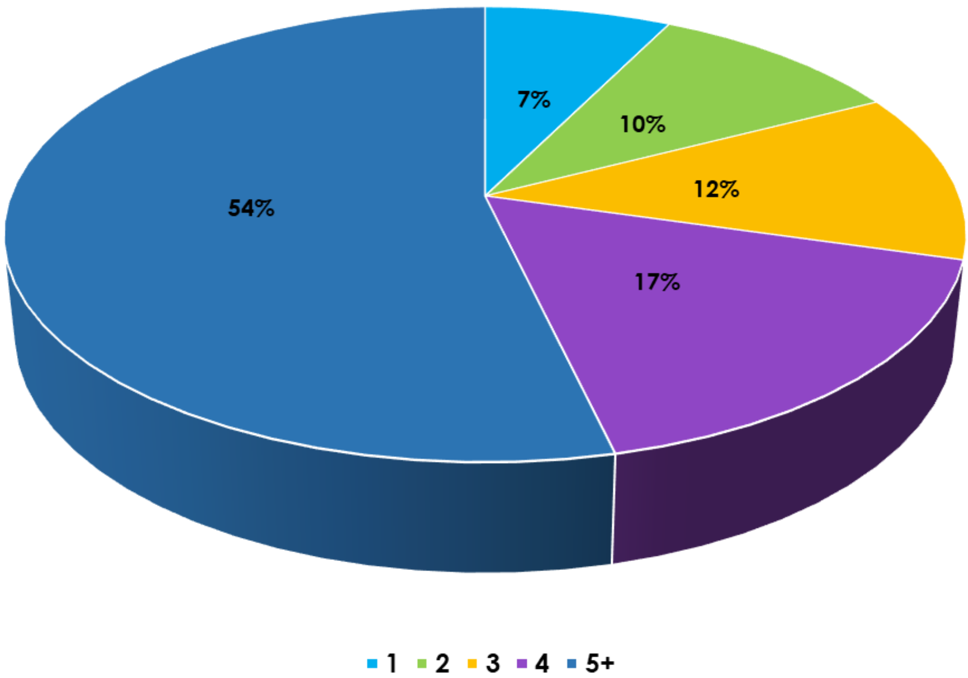
Location	Visitors
England	77%
Scotland	9%
Northern Ireland	8%
Wales	5%
Outside the UK[25]	1%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=5,217

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

Over half of respondents (54%) stayed on a holiday park and campsite five times or more during the last 12 months; a further 17% stayed four times. 14% of these were a rally park campsite or temporary campsite. Where respondents stayed more than five nights, the average was 12 nights.

Figure 5.1: Average number of visits made in the past 12 months



N=4,994

5.2 Visitor characteristics

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

Table 5.3 provides a full breakdown.

Table 5.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	41%
Touring caravan	36%
Tent	6%
Static accommodation types	
Holiday caravan privately owned	9%
Holiday caravan rented	3%
Privately-owned lodge/chalet/cottage	1%
Rented lodge/chalet/cottage	1%
Glamping e.g. pods/yurts/wigwams/other	<1%
Mixed types e.g. e.g. rented holiday caravan and motorhome	
Multiple or mixed types of accommodation	1%

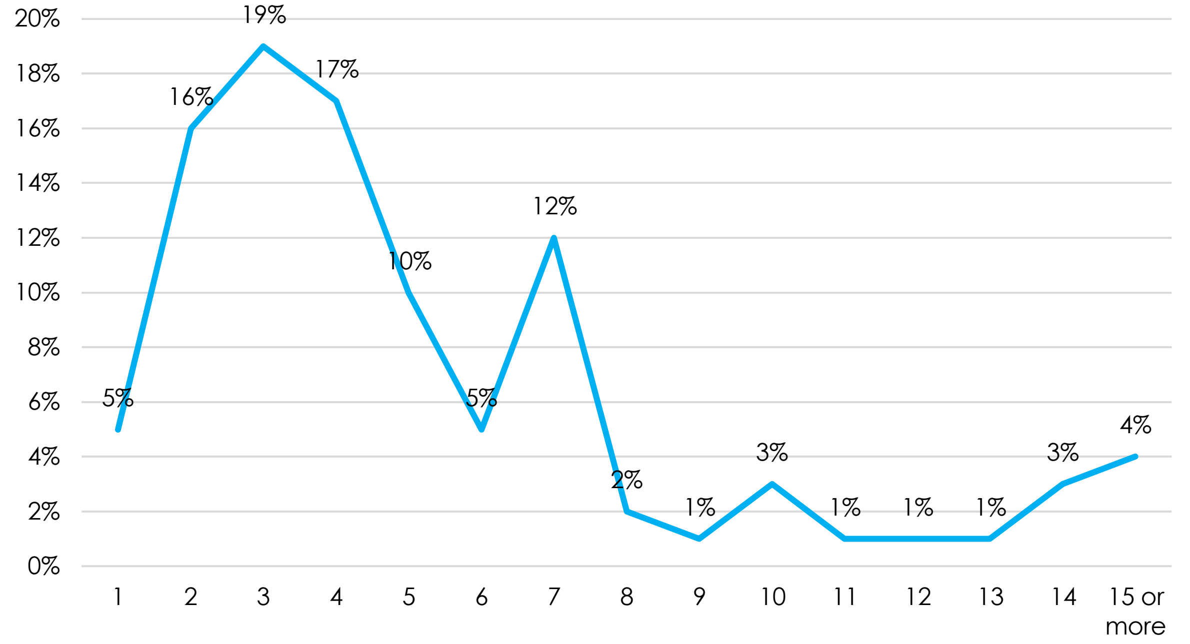
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

The high level of tourers is not surprising as the vast majority (83%) of visitors responding were a member of either the Camping and Caravanning Club (CCC) or Caravan and Motorhome Club (CAMC)[26]. When broken down further:

- 24% were members of CCC
- 24% were members of CAMC
- 35% were members of both

On average visitors **spent 5.1 nights per trip**. The distribution of responses is shown in Figure 5.2.

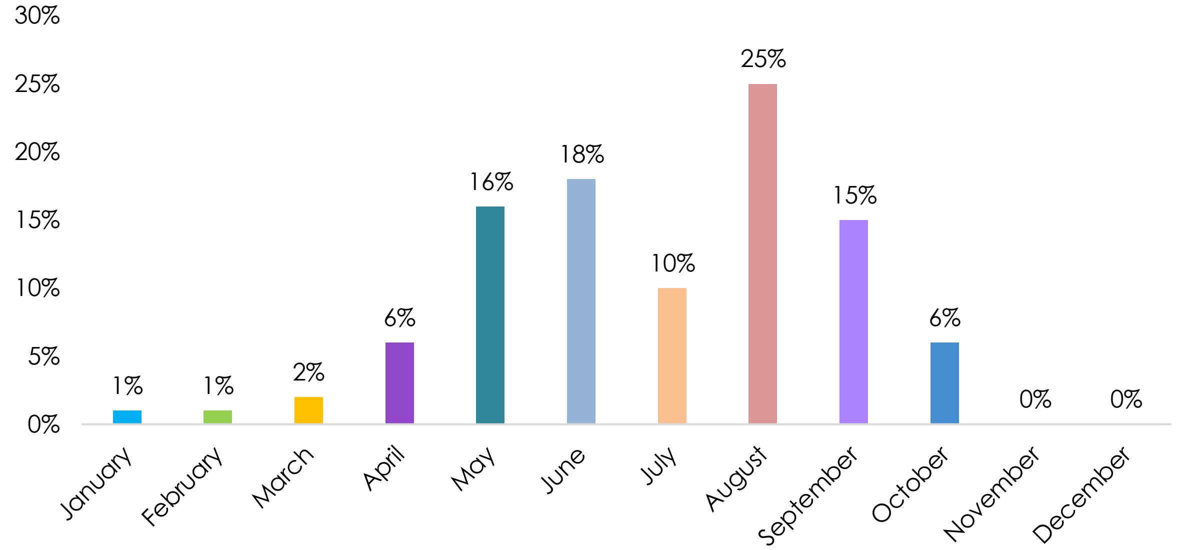
Figure 5.2: Number of nights stayed per visit



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=4,743

Figure 5.3 shows the month in which respondent visitors began their trip. August (25%) was the most popular followed by June (18%).

Figure 5.3: Month during which visitors began their trip



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=2,995

[26] *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 5.4 shows the number of adults, children and pets in each party. The average adult group size was 2.1, and 15% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.9. 32% of groups brought a pet.

The average total group size was 2.4. This is likely due to the high proportion of tourers completing the survey. When broken down by accommodation, renters and owners have larger group sizes (3.5 and 2.9 respectively) compared with tourers at 2.3.

Table 5.4: Number of adults, children, and pets in each group

Number	…of adults	… of children*	…..of pets**
1	9%	37%	72%
2	81%	45%	23%
3	5%	12%	4%
4	3%	4%	0%
5+	2%	2%	1%
Average	2.1	1.9	1.4

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

5.3 Visitor expenditure

Visitors and their party who stayed in rented accommodation spent, on average, £1,137 per visit, including £705 on-site and £433 off-site.

Touring visitors and their party spent, on average, £514 per visit, including £213 on-site and £301 off-site.

Visitors who owned their holiday caravan spent, on average, £587 per visit, including £254 on-site and £333 off-site.

Accommodation including touring and pitch fees, transport and food and drink were the biggest expenditure items. Table 5.5 summarises the areas of expenditure.

Table 5.5: Visitor spend per visit

Area of expenditure	Renters	Tourers	Owners
Transport to and from destination	£96	£83	£59
Transport spent during trip	£30	£28	£27
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)[27]	£554	£184	£175
Holiday park and campsite facilities (e.g. Wi-Fi, laundry room etc)	£6	£6	£15
Eating/drinking on the holiday park and campsite	£93	£17	£38
Eating/drinking in the surrounding area	£130	£83	£98
Recreation/entertainment on the holiday park and campsite	£30	£2	£8
Recreation/entertainment in the surrounding area	£46	£23	£28
Shopping on the holiday park and campsite	£22	£5	£18
Shopping off the holiday park and campsite	£80	£59	£97
Visitor attractions off the holiday park and campsite	£34	£19	£17
Other	£17	£6	£7
Total – on-site	**£705**	**£213**	**£254**
Total – off-site	**£433**	**£302**	**£333**
Total – both on and off-site	**£1,137**	**£515**	**£587**

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

[27] *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, £217 per day, including £134 on-site and £82 off-site.

Touring visitors spent, on average, £101 per day, including £42 on-site and £59 off-site.

Visitors who owned their holiday caravan spent, on average, £102 per day, including £44 on-site and £58 off-site.

Table 5.6 summarises the daily expenditure.

Table 5.6: Visitor spend per day

Area of expenditure	Renters	Tourers	Owners
Transport to and from destination	£18	£16	£10
Transport spent during trip	£6	£5	£5
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)	£106[28]	£36[29]	£30[30]
Holiday park and campsite facilities (e.g. Wi-Fi, laundrette etc)	£1	£1	£3
Eating/drinking on the holiday park and campsite	£18	£3	£7
Eating/drinking in the surrounding area	£25	£16	£17
Recreation/entertainment on the holiday park and campsite	£6	£1	£1
Recreation/entertainment in the surrounding area	£9	£5	£5
Shopping on the holiday park and campsite	£4	£1	£3
Shopping off the holiday park and campsite	£15	£12	£17
Visitor attractions off the holiday park and campsite	£6	£4	£3
Other	£3	£1	£1
Total – on-site	**£134**	**£42**	**£44**
Total – off-site	**£82**	**£59**	**£58**
Total – both on and off-site	**£217**	**£101**	**£102**

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

5.4 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"* (37%); and *"I wanted to visit the area/country"* (31%).

Table 5.7: Influences on visitor decisions on which holiday parks and campsites to visit

Factor	Number responding*
It's an area I know well/been before	37%
I wanted to visit the area/country	31%
CAMC/CCC club member communication	16%
Family/friend connections in the area	12%
Specific activities available in the area, such as golf, walking, cycling	12%
The holiday park and campsite was recommended to me by family/friends	9%
I was attending an event/festival	8%
We/I saw advertising for the holiday park and campsite i.e. magazine/website/etc	7%
I had been to this country before and wanted to visit another area	6%
Other	19%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=4,076
**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*

[28] *Rental accommodation spend ranged from £3 per night to £428 per night.*
[29] *This does not include the cost of buying the accommodation.*
[30] *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 (21%) most notably from Northern Ireland
- convenient location or general convenience (21%)
- for a specific hobby/event/place (19%)
- general getaway (14%)
- seasonal or regular trip (12%)
- trips with family or friends (11%)

Also included were club events or membership (5%), good value holiday (4%), following a recommendation (4%), special occasion (3%), and for work (1%).

5.5 Health and wellbeing

Almost all respondents (99%) stated that time spent time relaxing was what they did most whilst visiting a holiday park and campsite.

This was followed by short (95%) and long walks (85%) and spending time with friends and family (75%). Table 5.8 summarises the results.

Table 5.8: 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	57%	6%	36%	1%	3,787
Short walks (under 2 miles)	44%	7%	45%	5%	3,681
Long walks (over 2 miles)	43%	11%	31%	15%	3,729
Spent time with family and friends	40%	4%	31%	25%	3,720
Wildlife/nature activities	26%	5%	35%	35%	3,674
Other outdoor physical activities	13%	6%	14%	67%	3,648
Cycling	11%	4%	8%	78%	3,668

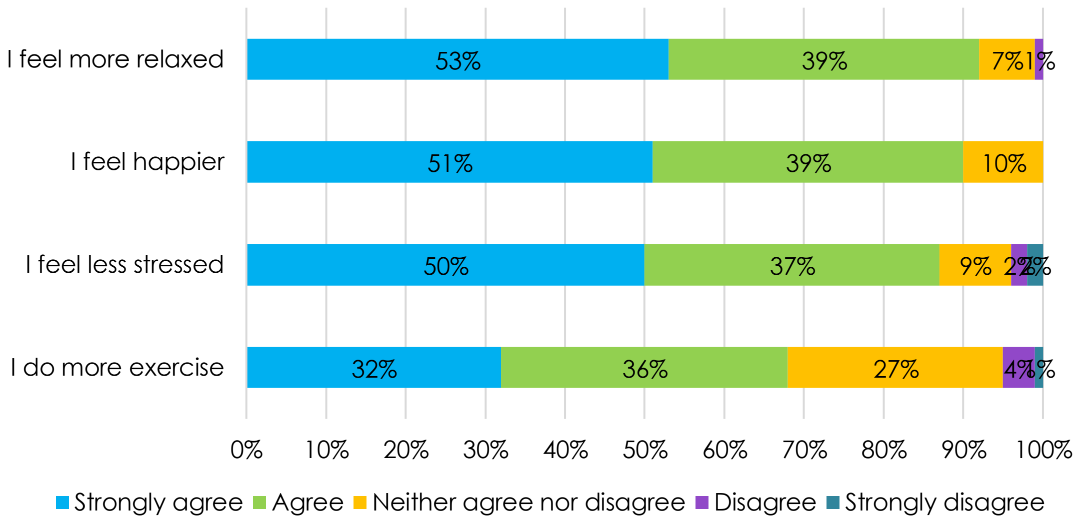
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

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

- 91% strongly agree or agree that they **feel more relaxed when visiting a holiday park and campsite**
- 89% strongly agree or agree that they **feel happier when visiting a holiday park and campsite**
- 87% strongly agree or agree that they **feel less stressed when visiting a holiday park and campsite**
- 68% strongly agree or agree that they **do more exercise when visiting a holiday park and campsite**

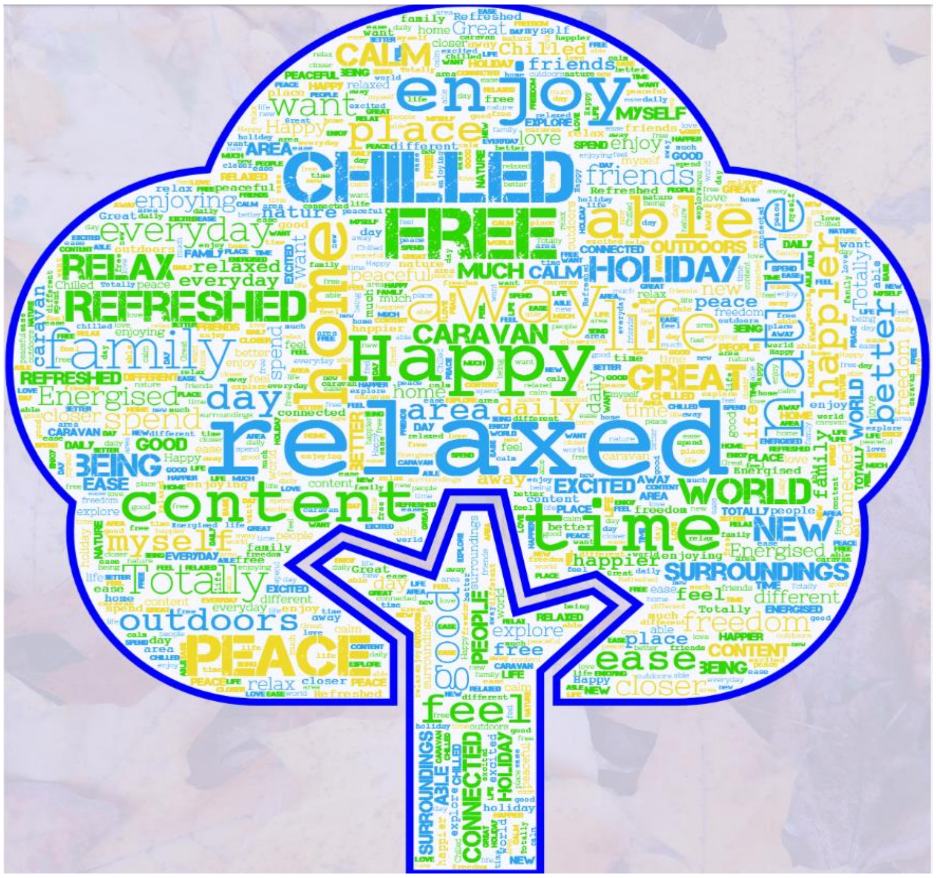
Figure 5.4 presents the detailed feedback.

Figure 5.4: When visiting a holiday park and campsite …



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

Comments are shown in the word cloud below:



Some **visitor** comments included:

"Like I've escaped from the world and I'm free to breathe, smell, listen and really see clearly and I love it."

Rented Static Caravan User, England

"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, Northern Ireland

"Relaxed and content being able to spend quality time with the family which I don't get the opportunity to do at home due to work/busy lifestyle."

Holiday/Campervan Owner, Scotland

"Incredibly relaxed; it's a joy to see how much our children enjoy themselves and, whilst we still love to travel internationally as a family and explore new cultures, there is no doubt that the honest simplicity of camping feeds the soul in a very special way. We are thrilled to have rediscovered the joys of camping!"

Tent Owner, Wales

"Away from the maddening crowds and hustle and bustle of modern cities. We can do things at our own pace."

Motorhome/Campervan Owner, England

"Like I'm recharging my batteries away from everyday life."

Motorhome/Campervan Owner, Scotland

5.5.1 Benefits and impacts of improved physical and mental health

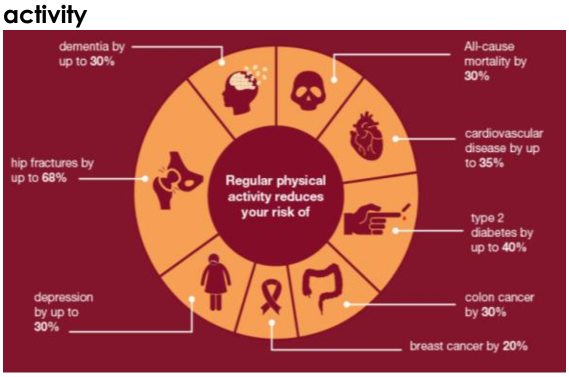
There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling, as well as being in the great outdoors. Holiday parks and campsites occupy green spaces and often have sport and recreational facilities or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

The Chief Medical Officer stated that [31]:

> *"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[32].

Figure 5.5: 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)[33].

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[34].

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)[35]. Furthermore, in 2019, in-patient hospital admissions caused by stress-related illnesses in the UK cost over £8bn[36].

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 UK 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, the UK holiday park and campsite sector is supporting the UK policy agenda for health and wellbeing.

[31] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[32] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[33] 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.
[34] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[35] https://www.hrgrapevine.com/content/article/2023-03-29-burnout-is-costing-the-uk-economy-28bn-a-year
[36] https://www.statista.com/statistics/1135048/costs-of-stress-related-illnesses-in-the-uk/

5.6 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 am more likely to continue to holiday on holiday parks and campsites in the UK"* (44%)
- *"I already had a caravan/motorhome/ tent/lodge/chalet and now do more touring/camping"* (39%)
- *"I holidayed more on holiday parks and campsites in the UK i.e. a staycation"* (38%)

Table 5.9 presents the detailed feedback.

Table 5.9: As a result of the COVID-19 pandemic I…

Response	Number responding*
am **more likely to continue to holiday** on holiday parks and campsites in the UK	44%
already had a caravan/motorhome/tent/lodge/chalet/cottage and **now do more touring/camping**	39%
holidayed more on holiday parks and campsites in the UK i.e. a staycation	38%
am looking to **combine overseas holidays with staycations**	32%
bought a caravan/motorhome/tent/lodge/chalet/cottage and have **continued to use it**	20%
resumed overseas holidays	18%
discovered (rediscovered) holiday parks and campsites as a holiday destination	12%
Have 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**	1%
bought a caravan/motorhome/tent/lodge/chalet/cottage but **have since sold it**	1%
other	2%
none of the above	11%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=3,796
**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" (53%)*
- *"I will holiday more in my caravan/motorhome/tent/lodge/chalet" (37%)*

When comparing holiday parks or campsites as either a good or poor value holiday choice, 86% of respondents see them as good value[37].

Table 5.10 presents the detailed feedback.

[37] The 'good value' and 'poor value' options were part of a larger group of responses as per Table 5.10. The figures above have been calculated by isolating and comparing the two specific responses. The figures in the table is the overall proportion of survey respondents who chose each response.

Table 5.10: 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	53%
will **holiday more** in my caravan/motorhome/tent/lodge/chalet/cottage on holiday parks and campsites	37%
will **travel shorter distances** to visit holiday parks and campsites	23%
view holidays **overseas to be a much more considered purchase**	20%
view holidays on **holiday parks and campsites to be a much more considered purchase**	14%
discovered (rediscovered) holiday parks and campsites as a **cost-effective** holiday destination	12%
view holiday parks and campsites as a **poor value for money** holiday option compared to other holiday choices	9%
will stay **fewer nights** at holiday parks and campsites	7%
will take **fewer trips** to holiday parks and campsites	7%
invested in a tent/caravan/motorhome during the pandemic and plan to **continue using it** rather than go abroad	7%
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%
will tour less but stay the same length of time	5%
have **reduced my use** of activities/facilities in the holiday parks and campsites area	5%
invested in a tent/caravan/motorhome during the pandemic but **now plan to go abroad as I did before**	2%
other	4%
none of the above	11%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=3,793
**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 a short or long term decision/choice. 78% 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, though this effect was **greater** in those who **had not** been put off holidaying abroad (84%) than those who **had** been put off (64%). Some **visitor** comments included:

"Going on a caravan holiday gives me the opportunity to relax reflect and appreciate what is important in life."

Touring Caravan Owner, England

"Caravanning and now motorhome holidays are my favourite pastimes. It is totally restorative to every aspect of our health and wellbeing. The CAMC provides beautiful and safe spaces for people to enjoy our wonderful countryside. Long may it continue."

Motorhome/Campervan Owner, England

"Camping in our tent provides us with the freedom to choose where we pitch and enjoy travelling our beautiful country without forking out a fortune."

Tent User, Scotland

"Love our motorhome. Affordable and allows us to experience more of UK and Europe than we ever considered. Love the long trips we are able to do wherever we fancy going."

Motorhome/Campervan Owner, Wales

"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, Northern Ireland

5.7 Visitor summary

The majority of the respondents lived in England (77%); of which over half (54%) stayed on a holiday park and campsite in the UK 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 4% stayed in some form of rented, stationary accommodation, while 1% stayed in other accommodation.

The average adult group size was 2, and 15% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. Almost one third (32%) brought a pet.

Visitors spent 5.1 nights per trip. **This is higher than the UK average tourism number of nights per trip at 2.8[38].**

Visitors who stayed in rented accommodation spent, on average, £217 per day, including £134 on-site and £82 off-site[39]. Touring visitors, on average, £101 per day, including £42 on-site and £59 off-site. Visitors who owned their holiday caravan spent £102 per day, including £44 on-site and £58 off-site. **This is higher than the wider average tourism spend per night by UK visitors at £96[40].**

[38] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms

[39] Does not total to £217 due to rounding.

[40] https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms

6 Economic Impact Assessment – Methodological Approach

6.1 General approach

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

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

- days of the year
- accommodation type
- regions in each country

In other words, the model includes a range of economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures. In total there were 68,985 separate calculations, including the following country level:

- Scotland: 22,995
- England: 20,440
- Northern Ireland: 15,330
- Wales: 10,220

6.2 Measuring on-site and off-site expenditure

Table 6.1 provides an illustrative example of how the gross on-site expenditure figures were estimated for touring caravans in a particular UK region on Saturday 5th August.

Table 6.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in a region	6,194
Multiplied by:	
Average occupancy rate on 5th August	68%
Number of pitches occupied on 5th August	4,212
Multiplied by:	
Average on-site expenditure per day for renting holiday-makers	£41.67
= On-site expenditure of touring caravan visitors to a region on 5th August	**£175,514**

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 that in a particular UK region, on Saturday 5th August 2023, total off-site expenditure by touring caravan visitors is presented in Table 6.2.

Table 6.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in a region	6,194
Multiplied by:	
Average occupancy rate on 5th August	68%
Number of pitches occupied on 5th August	4,212
Multiplied by:	
Average off-site expenditure per day for renting holiday-makers	£57.73
= Off-site expenditure of touring caravan visitors to a region on 5th August	**£243,159**

6.3 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted above, the UK 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 6.3 presents a worked example for a region in the UK.

Table 6.3: Indirect and induced effects

Total on-site expenditure	£175,514
Plus	
Total off-site expenditure	£243,159
Total combined on and off-site expenditure	**£418,673**
Multiplied by:	0.64
= Indirect and induced effects	**£267,951**

6.4 Measuring visitor impact

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

Table 6.4 presents a worked example.

Table 6.4: Visitor impact

Total on-site expenditure	£175,514
Plus	
Total off-site expenditure	£243,159
Indirect and induced effects	£267,951
Visitor impact	**£686,624**

6.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[41], 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.

According to figures from the most recent ONS publication[42], turnover generated by the tourism industry translates to a Gross Value Added (GVA) impact. Figures are presented in each country report as to the turnover: GVA ratio[43].

6.6 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.

The average occupancy was then used to calculate the remaining fees are not captured.

To account for this, we undertook desk 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 difference in average and full occupancy.

Figures are presented in each country report as to the additional value added to the privately-owned holiday caravan and privately-owned lodge/chalet on-site spend figures in the model.

[41] *Tourism: Jobs and Growth – The economic contribution of the tourism economy, 2013.*
[42] *2021 Annual Business Survey, ONS.*
[43] *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).*

7 Economic Impact of Holiday Parks and Campsites in the UK

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 the UK broken down by country and by accommodation type.

7.1 Impact by UK country

It is estimated that in 2022/23 visitors to UK holiday parks and campsites spent **a total of £12.2bn in the economy**.

This visitor expenditure **supports 226,745 FTE jobs and contributes £7.2bn of GVA to the economy.**

Table 7.1: Economic impacts by UK country

Country	Visitor Expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
England	9,203	170,429	5,455
Scotland	991.1	18,354	565
Wales	1,659	30,726	945.9
Northern Ireland	390.7	7,236.1	205.7
UK	**12,244**	**226,745**	**7,171**

Source: Frontline, 2023

**Due to rounding there may be slight discrepancies when adding to the total*

7.2 Impact by accommodation type

Table 7.2 summarises the impacts aligned to accommodation type.

Table 7.2: Economic impacts by accommodation type

UK	Visitor Expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Touring Pitches*	3,123	57,840	1,834
Glamping yurts/wigwams/others	151	2,801	89
Pods	63	1,169	37
Privately-owned holiday caravans	5,871	108,748	3,432
Rented holiday caravans	1,957	36,247	1,145
Privately-owned lodge/chalet/cottage	589	10,898	346
Rented lodge/chalet/cottage	489	9,040	288
All accommodation	**12,244**	**226,745**	**7,171**

Source: Frontline, 2023

*Includes touring caravans, motorhomes/campervans and tents

***Due to rounding there may be slight discrepancies when totalling*

7.3 Assessing the economic impacts of maintenance expenditure

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

Based on the survey, Table 7.3 estimates the average maintenance expenditure.

Table 7.3: Average annual expenditure on privately-owned holiday caravan and touring caravan/motorhome maintenance

Area of expenditure	Touring Caravan/Motorhome Owner*[44]	Privately-owned Holiday Caravans/Lodge Owner[45]
Servicing	£257	£630
Insurance	£313	£245
Road Tax	£173	N/A
General upkeep	£188	£538
Total	**£931**	**£1,413**

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 the UK (755,000 [46]) multiplied by average maintenance expenditure per touring caravan/motorhome (£931). This equals £703m.

Aligned to the approach presented above, the estimated gross expenditure figure for privately-owned holiday caravan/lodge owners is 242,406[47], multiplied by average maintenance expenditure per holiday caravan (£1,413). This equals £342.5m.

The total impact associated with expenditure on maintenance by tourers and privately owned holiday caravans **is estimated to be in the region of £1,045.5m.**

More detailed impact findings are shown in Appendix 3**.**

7.4 Economic Impact summary

In 2022/23 it is estimated that the UK holiday park and campsite sector generated **a gross direct, visitor expenditure impact of £12.2bn in the economy**. This visitor expenditure **supports 226,745 FTE jobs and contributes £7.2bn** (including multipliers) **of GVA to the economy.**

According to the WTTC, in 2022, **UK tourism's GDP contribution was £214bn**[48]**, therefore the holiday park and campsite sector with a contribution of £12.2bn makes a considerable contribution (over 5%) to the sector's economic value.**

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

- **privately-owned holiday caravans**: with visitor expenditure of £5.87bn, equivalent to a GVA impact of £3.43bn, and 108,748 supported FTE jobs
- **touring pitches**: with visitor expenditure of £3.12bn, equivalent to a GVA impact of £1.83bn, and 57,840 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £1,045.5m of expenditure to the UK economy**.

[44] *These figures were taken from visitors who lived in England as it was assumed that's where they would spend their money.*
[45] *These figures were taken from visitors visiting England as it was assumed that's where they would spend their money.*
[46] https://www.caravantimes.co.uk/features/the-strange-and-wonderful-sights-of-caravanning/
[47] *UKCCA, 2023.*
[48] 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

8 Conclusions

The UK holiday park and campsite sector makes a substantial contribution to the UK tourism economy, generating £12.2bn in visitor expenditure, equivalent to £7.2bn GVA and supporting 226,745 FTE jobs.

Visitors to UK holiday parks and campsites spend more money than the national tourism average: During each of their stays, visitors spend a considerable amount of money per day in the local economy, including £217 on-site and off-site by renters, £102 on-site and off-site by owners and £101 on-site and off-site by tourers. This is higher than the average UK tourism visitor spend (per day) of £96[49].

Flexible accommodation and facilities provision, supporting local communities, protecting the environment and encouraging a healthier lifestyle: The UK's 6,169 holiday parks and campsites account for 439,828 pitches[50]. 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 £1,045.5m 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 and campsites. 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 and may potentially continue to affect the sector including:

- **COVID-19 pandemic** – leading to an initial spike in bookings which have now largely returned 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 people engaging in camping leading to new consumer behaviours
- **cost of living** – affecting businesses with operating costs and pricing challenges, as well as consumers becoming more frugal and changing how they book e.g. with last minute bookings, leading to uncertainty for operators
- **Brexit** – leading to increased cost and supply chain disruptions for operators, as well as a decrease in the quality of service

[49] *https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results#:~:text=There%20were%20in%20total%2069.8,5%25%20in%20real%20terms)*

[50] *This includes Certificated Sites and Certificated Locations.*

Appendix 1 – Contributors

UKCCA Group

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Katherine Squires, Deputy Director General, British Holiday & Home Parks Association
Helen Charlesworth, Head of Policy and Communications, British Holiday & Home Parks Association
Sarah Allanson, Policy and Membership Director for Scotland and Northern Ireland, British Holiday & Home Parks Association

Industry stakeholders

Sabina Voysey, Director General, The Camping and Caravanning Club
Geoff Coupe, Director of Commercial Insights, The Camping and Caravanning Club
Nick Lomas, Director General, Caravan and Motorhome Club
Viv Harrison, Insights Manager, Caravan and Motorhome Club
Thomas Marshall, Chairman, British Holiday & Home Parks Association Ltd
John Lally, Director General, National Caravan Council
Richard Toomer, Director, The Tourism Alliance
Marc Crothall MBE, CEO, Scottish Tourism Alliance
Dr Joanne Stuart, CEO, Northern Ireland Tourism Alliance
Suzy Davies, Chairman, Wales Tourism Alliance
Paul Evans, Vice President – Portfolio, Awaze UK
Dylan Roberts, Joint Managing Director, Salop Leisure
Michael Paul, Owner, Caravan Site Finder
Alice Andreason, Director of PR and Communications, Parkdean Resorts
Barrie Robinson, Operations Director, Parkdean Resorts

Appendix 2 – Regional Breakdown

Scotland

Aberdeen and Aberdeenshire – includes all the Grampian postcodes
Ayrshire and Arran – includes North Ayrshire, South Ayrshire and East Ayrshire and Arran
Dumfries and Galloway – includes all Dumfries and Galloway postcodes
Edinburgh, the Lothians and Borders – East Lothian, City of Edinburgh, Midlothian, West Lothian areas along with the Scottish Borders
Fife – includes Dunfermline, Kirkcaldy and Fife
Greater Glasgow and The Clyde Valley – includes East Renfrewshire, Glasgow City Council, Inverclyde, North Lanarkshire, Renfrewshire and South Lanarkshire
Loch Lomond, The Trossachs, Stirling and Forth Valley – includes West Dunbartonshire, Falkirk, Stirling
Tayside – includes Dundee & Angus and Perthshire
The Highlands and Islands – includes Orkney, Outer Hebrides, Shetland and Argyll and Bute

England

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

Wales

Mid Wales – includes Aberystwyth, Cardigan, Newtown
North Wales – includes Llandudno, Rhyl, Colwyn Bay and Prestatyn
South East Wales – includes Vale of Glamorgan, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Cardiff, Newport, Blaenau Gwent, Torfaen, Monmouthshire and Bridgend
South West Wales – includes Swansea, Neath Port Talbot, Pembrokeshire and Carmarthenshire

Northern Ireland

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 3 – 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
England	603.8	47.7	19.2	1,258.30	551.9	140.5	149.5	**2,770.9**
Scotland	72.9	5.1	2.7	123.0	64.5	7.1	12.8	**288.1**
Wales	84.1	3.8	1.6	270.4	89.3	26.2	18.5	**493.8**
Northern Ireland	10.6	0.4	0.3	70.6	30.6	0.2	1.4	**114.1**
Total	**771.4**	**57.0**	**23.8**	**1,722.4**	**736.2**	**173.9**	**182.1**	**3,666.9**

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
England	884.8	29.3	11.8	1,333.70	338.8	146.7	90.7	**2,835.7**
Scotland	117.0	3.2	1.7	137.2	41.2	7.7	7.7	**315.8**
Wales	115.7	2.5	1.0	300.0	57.6	29.0	12.1	**517.9**
Northern Ireland	15.5	0.2	0.2	87.4	19.7	0.2	0.9	**124.2**
Total	**1,133.0**	**35.3**	**14.8**	**1,858.3**	**457.3**	**183.6**	**111.4**	**3,793.6**

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
England	952.7	49.3	19.8	1,658.90	570.1	186	159.8	**3,596.6**
Scotland	121.6	5.3	2.8	166.6	67.6	9.4	13.8	**387.2**
Wales	127.8	4.0	1.7	365.1	94.0	35.3	19.6	**647.5**
Northern Ireland	16.7	0.4	0.3	101.2	32.2	0.2	1.4	**152.5**
Total	**1,218.8**	**59.1**	**24.6**	**2,291.7**	**763.9**	**231.0**	**194.6**	**4,783.8**

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
England	2,441.30	126.3	50.8	4,250.90	1,460.80	473.1	400	**9,203.2**
Scotland	311.6	13.7	7.3	426.8	173.3	24.2	34.3	**991.1**
Wales	327.6	10.3	4.3	935.5	240.8	90.6	50.2	**1,659.2**
Northern Ireland	42.9	1.0	0.8	259.2	82.5	0.6	3.7	**390.7**
Total	**3,123.3**	**151.3**	**63.2**	**5,872.4**	**1,957.4**	**588.5**	**488.2**	**12,244.3**

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
England	11,181	884	355	23,301	10,221	2,601	2,769	**51,312**
Scotland	1,351	94	50	2,278	1,194	131	236	**5,335**
Wales	1,557	71	29	5,007	1,653	485	343	**9,145**
Northern Ireland	197	7	6	1,308	567	4	25	**2,113**
Total	**14,285**	**1,056**	**440**	**31,895**	**13,635**	**3,220**	**3,373**	**67,904**

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
England	16,386	542	218	24,699	6,274	2,716	1,680	**52,514**
Scotland	2,167	60	32	2,541	763	142	143	**5,849**
Wales	2,142	46	19	5,556	1,066	538	224	**9,590**
Northern Ireland	288	4	4	1,619	365	3	16	**2,299**
Total	**20,983**	**652**	**273**	**34,415**	**8,468**	**3,400**	**2,064**	**70,253**

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
England	17,643	913	367	30,720	10,557	3,445	2,959	**66,603**
Scotland	2,252	99	53	3,084	1,252	175	255	**7,170**
Wales	2,367	75	31	6,760	1,740	655	363	**11,991**
Northern Ireland	310	7	6	1,873	596	4	27	**2,824**
Total	**22,572**	**1,094**	**457**	**42,438**	**14,146**	**4,279**	**3,604**	**88,588**

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
England	45,210	2,338	940	78,720	27,051	8,762	7,407	**170,429**
Scotland	5,770	253	135	7,904	3,209	448	635	**18,354**
Wales	6,066	191	79	17,324	4,459	1,677	930	**30,726**
Northern Ireland	794	19	15	4,800	1,528	11	68	**7,236**
Total	**57,840**	**2,801**	**1,170**	**108,748**	**36,248**	**10,899**	**9,039**	**226,745**

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
England	357.9	28.3	11.4	745.8	327.1	83.2	88.6	**1,642.3**
Scotland	41.6	2.9	1.5	70.1	36.8	4.0	7.3	**164.2**
Wales	47.9	2.2	0.9	154.2	50.9	14.9	10.5	**281.5**
Northern Ireland	5.6	0.2	0.2	37.2	16.1	0.1	0.7	**60.0**
Total	**453.0**	**33.6**	**14.0**	**1,007.3**	**430.8**	**102.3**	**107.1**	**2,148.1**

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
England	524.4	17.4	7	790.5	200.8	86.9	53.8	**1,680.7**
Scotland	66.7	1.9	1.0	78.2	23.5	4.4	4.4	**180.1**
Wales	65.9	1.4	0.6	171.0	32.8	16.6	6.9	**295.2**
Northern Ireland	8.2	0.1	0.1	46.0	10.4	0.1	0.5	**65.3**
Total	**665.2**	**20.8**	**8.7**	**1,085.8**	**267.5**	**107.9**	**65.6**	**2,221.4**

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
England	564.7	29.2	11.7	983.2	337.9	110.3	94.7	**2,131.7**
Scotland	69.3	3.0	1.6	95.0	38.6	5.4	7.9	**220.7**
Wales	72.9	2.3	1.0	208.1	53.6	20.2	11.2	**369.1**
Northern Ireland	8.8	0.2	0.2	53.2	17.0	0.1	0.8	**80.3**
Total	**715.7**	**34.7**	**14.4**	**1,339.5**	**447.0**	**136.0**	**114.5**	**2,801.8**

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
England	1,447.00	74.8	30.1	2,519.50	865.8	280.4	237.1	**5,454.6**
Scotland	177.6	7.8	4.2	243.3	98.8	13.8	19.5	**565.0**
Wales	186.7	5.9	2.4	533.3	137.3	51.6	28.6	**945.9**
Northern Ireland	22.6	0.5	0.4	136.4	43.4	0.3	1.9	**205.7**
Total	**1,833.9**	**89.0**	**37.1**	**3,432.6**	**1,145.3**	**346.2**	**287.2**	**7,171.2**

Due to rounding there may be slight discrepancies when totalling