Pitching the Value

2024 Economic Benefit Report: Holiday Parks and Campsites ENGLAND

Report for the

UK Caravan & Camping Alliance

February 2024

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Executive Summary

The English holiday park and campsite sector makes a substantial contribution to the English tourism economy, generating £9.2bn in visitor expenditure, which is equivalent to £5.45bn GVA and supports 170,429 FTE jobs.

Visitors to England's holiday parks and campsites stayed 82% longer and spent 8% more than the English tourism averages.

Background

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

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

Report Purpose

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

Economic Impact

In 2022/23 it is estimated that the English holiday park and campsite sector generated **a gross direct visitor expenditure impact of £9.2bn in the economy**. This visitor expenditure **supports 170,429 FTE jobs and contributes £5.45bn** (including multipliers) **of GVA to the economy.** In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £964.4m 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 4,754 holiday parks and campsites operating in the UK, accounting for 320,901 pitches**[4]**.** This was drawn from a database provided by the UKCCA as well as wider non-member holiday parks and campsites.

Consultations were undertaken with 666 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/campsites also offer a wide range of facilities and amenities**, including restaurants, swimming pools, Wi-Fi and games rooms.

The majority have run their holiday parks and campsites for over 10 years (75%) and many have done so for over 25 years (47%). Occupancy rates peaked at 68% in high season (August) and 53% in mid-season (May). Holiday park and campsite operators support their local communities through:

- **expenditure** – 41% cumulatively spent £218.7m 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-parks

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

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

- **COVID-19** – leading to an initial spike in bookings which have now returned to pre COVD 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 both businesses with operating costs and pricing challenges as well as consumers becoming more frugal and changing how they book, 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

Holiday Park and Campsite Visitors

3,673 respondents to the survey had made a visit to a holiday park and campsite in England in 2023. The majority of the survey respondents lived in England (93%). Half of the respondents (50%) 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 **20% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 2. **31% of groups brought a pet.** Visitors spent, on average, 5.1 nights per trip. **This is higher than the average tourism number of nights per trip at 2.8[5].**

Visitors who stayed in rented accommodation spent, on average, £203 per day, including £128 on-site and £75 off-site. **Touring visitors spent, on average, £99 per day**, including £42 on-site and £58 off-site. **Visitors who owned their holiday caravan spent £114 per day**, including £52 on-site and £62 off-site. **This is higher than the average tourism spend per night by those taking a trip in England of £97[6].**

[5] *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] *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 detailed individual country reports for England, Scotland, Wales and Northern Ireland. **This report is for England**[7].

The UKCCA comprises the following sponsor organisations:

1.1 Research objectives

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

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

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

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

2 English Tourism in Context

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

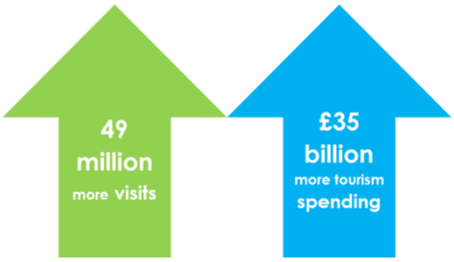
2.1 National tourism strategies

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

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

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

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



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

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

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

In England, VisitEngland use the same strategic framework as VisitBritain, and have five clear objectives:

- grow the value of tourism
- drive the dispersal of tourism value across Britain
- support productivity optimisation
- be the expert body on growing tourism
- deliver a clear strategy for England

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

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

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

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

2.2 National tourism statistics

Travel and tourism contribute significantly to the UK economy. According to the World Travel and Tourism Council[14]:

- 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

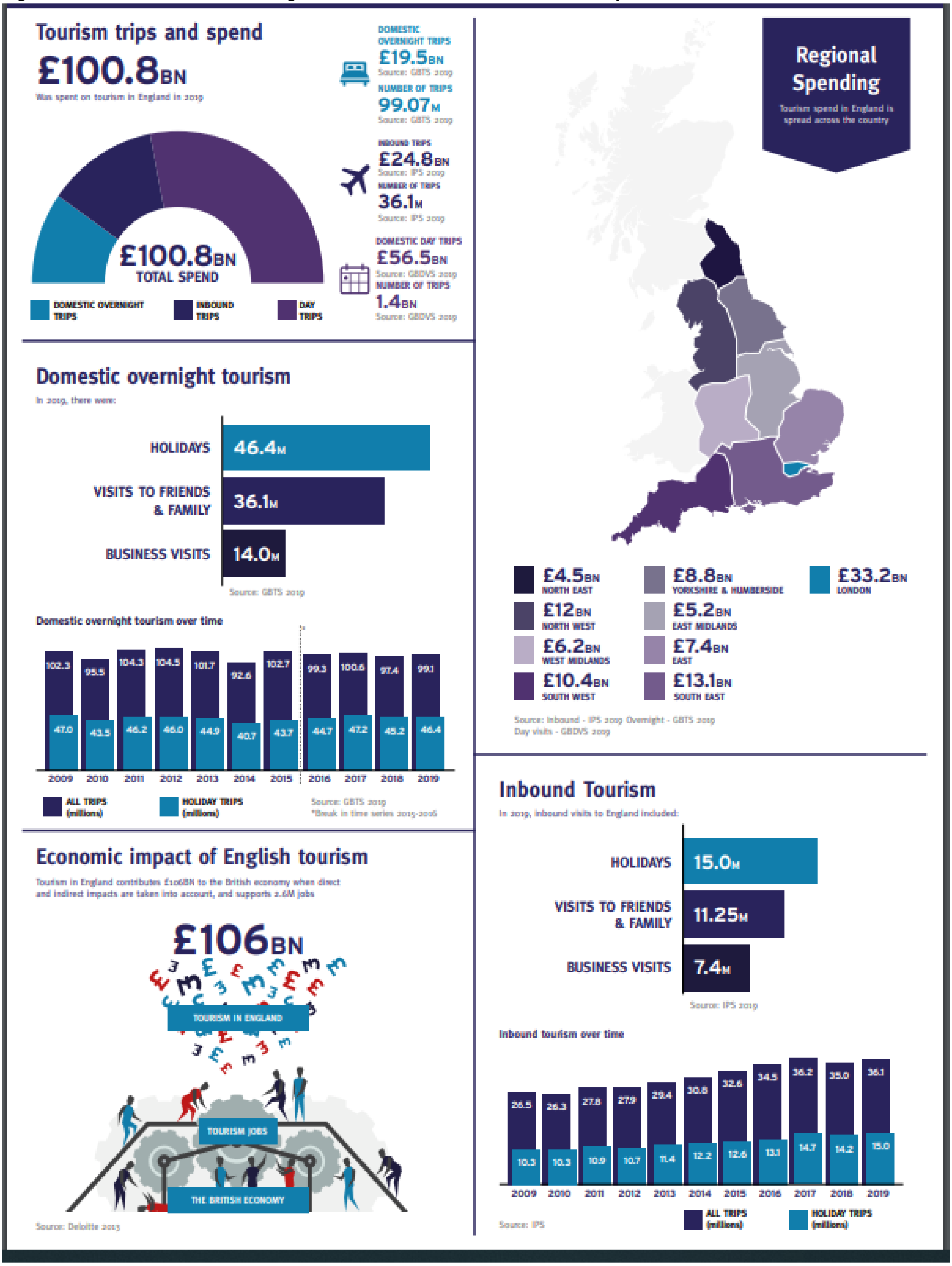
Taking into account direct and indirect impacts (e.g. supply chain), in 2019 tourism in England contributed £106bn to the British economy (GDP) and supported over 2.6m jobs. In 2019, £19.5bn was spent by British residents on 99.1m overnight trips in England, equating to 290.3m nights away from home. £56.5bn was spent on 1.4bn domestic tourism day trips. The **spend per night by visitors to England was £97 (per adult equivalent). Visitors spent an average of 2.8 nights per trip[15].**

The scale of the tourism sector in England is significant and the sector works hand in hand with a wide range of industry including farming, transport, retail, sport, museums and the arts. There are estimated to be anywhere between 5-6,000 visitor attractions in England[16].

Figure 2.1 outlines some of the key impacts of the tourism sector in 2019.

[14] 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
[15] *https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results*
[16] *https://www.visitbritain.org/research-insights/value-tourism-england*

Figure 2.1: The contribution of England's tourism sector to the economy



Source: VisitEngland: Tourism Key Facts and Trends, 2019

A 2023 Mintel report looking at the UK camping and caravanning sector,[17] 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[18]. Other notable statistics include:

- value of the domestic market has risen by 25% over the past five years
- 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 (across the UK); 37% of new campers have a household income above £50,000, compared with just 21% of those who camped/caravanned pre-pandemic[19].

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[20].

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

3 Holiday Park and Campsite Operator Consultation

This section provides evidence from consultations with holiday park and campsite operators across England. This was drawn from a database provided by the UKCCA[21] 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[22]

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

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

3.1 Composition of England's holiday parks and campsites

According to evidence provided by the UKCCA and our survey, **in 2023 there were 4,754 holiday parks and campsites operating in England, accounting for 320,901pitches[23].**

The majority of these pitches are either owner-occupied holiday caravans (151,163, 47%) or touring pitches[24] (108,200, 34%). 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.

South West England contains both the highest number of holiday parks and campsites (1,133) and the highest number of pitches (80,559); South East England also contains a high number of both parks and pitches. Table 3.1 summarises the composition of England's holiday park and campsite sector and Appendix 1 provides a breakdown of areas included in each region.

Table 3.1: Composition of England'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
East Midlands	571	10,103	136	85	19,094	2,530	1,143	791	**33,882**
East of England	639	11,495	326	121	24,066	5,274	1,998	1,146	**44,426**
North East England	181	3,445	101	49	10,675	1,908	565	113	**16,856**
North West England	545	9,611	342	223	20,942	2,244	2,654	852	**36,868**
South East England	580	14,987	385	102	19,995	6,003	2,812	1,201	**45,485**
South West England	1,133	36,787	882	313	24,529	10,500	3,764	3,783	**80,559**
West Midlands	482	7,591	157	55	6,661	613	799	193	**16,069**
Yorkshire	623	14,182	435	163	25,201	2,902	3,044	830	**46,756**
England	**4,754**	**108,200**	**2,764**	**1,112**	**151,163**	**31,974**	**16,778**	**8,910**	**320,901**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023
**Includes touring caravans, motorhomes/campervans and tents*
***Yurts/wigwams/other excluding pods*

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

3.2 Sampling methodology

Holiday parks and campsite operators across England were invited to participate in the research. This was done by the various sponsor members reaching out 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.

666 out of 4,754 holiday parks and campsites across England participated giving us a 95% confidence +/- 3.6% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population.

3.3 Geography locations

The geographic location of those completing the survey was broadly representative of the sector. For example, it included holiday parks and campsites from all eight regional areas, receiving a minimum response at least 10%.

Table 3.2: Locations of holiday parks and campsites surveyed

Location	Number responding	Estimated population	Percentage consulted
East Midlands	60	571	11%
East of England	92	639	14%
North East England	37	181	20%
North West England	72	545	13%
South East England	100	580	17%
South West England	182	1,133	16%
West Midlands	61	482	13%
Yorkshire	61	623	10%
Unknown	1		
Total	**666**	**4,754**	**14%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023

3.4 Holiday parks and campsites size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large holiday parks and campsites, including 36 very large (251 pitches or more); and 303 very small (5 pitches or fewer), these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 3.3: Sizes of the holiday parks and campsites surveyed

Number	Number responding	Estimated population	Percentage consulted
Very small (1-5 pitches)	303	2,821	11%
Small (6-50 pitches)	57	551	10%
Medium sized (51-100 pitches)	116	470	25%
Large (101-250 pitches)	127	591	21%
Very large (251 pitches or more)	37	321	12%
Total	**640**	**4,754**	**13%**

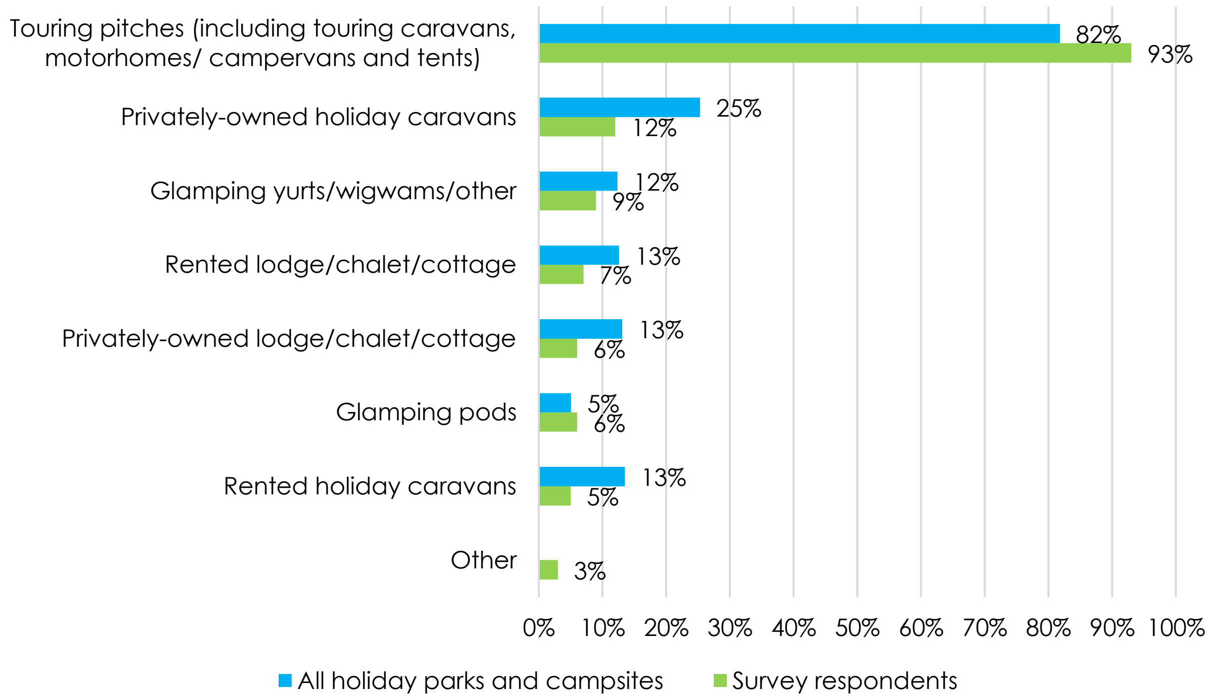
Source: UKCCA, 2023

3.5 Accommodation provided

The accommodation type was also broadly representative of the sector. 93% of those surveyed had touring pitches which includes touring caravans, motorhomes/campervans and tents.

14%[25] had owner-occupied accommodation (caravans or lodges) and 10% offered rented accommodation (20% including glamping pods and yurts/wigwams).

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



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

N=625 (survey respondents)
N=4,733 (all holiday parks and campsites)

3.6 Facilities and activities provided

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

In the very small holiday parks and campsites, 76% had toilet blocks, 63% had showers and over a third (35%) 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 (64%), defibrillators (58%) and an outdoor play area (51%).

Larger holiday parks and campsites, with more than 250 pitches, had a laundry (96%), outdoor plays area (93%), Wi-Fi (93%), defibrillators (78%), retail shops (59%), games/information rooms (59%) and restaurants/bar/takeaway (52%). Many have also increased their environmental facilities having installed electric vehicle charging (59%), solar panels (44%) and heat pumps (22%).

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

Other common facilities included:

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

Table 3.4: Facilities listed by holiday park and campsites surveyed

Facility	Very small holiday parks and campsites	Small, medium and large holiday parks and campsites	Very large holiday parks and campsites
Toilet block	76%	87%	85%
Showers	63%	85%	85%
Laundry	9%	64%	96%
Retail/shop	-	10%	59%
Restaurant/bar/takeaway	-	12%	52%
Entertainment	-	5%	44%
Outdoor play area	1%	51%	93%
Games/information room	-	28%	59%
Wi-Fi	35%	71%	93%
Electric vehicle charging points	-	10%	59%
Dog washing facilities	-	7%	22%
Bike cleaning stations	-	3%	4%
Locker and or back packing facilities	-	1%	-
Defibrillators	-	58%	78%
Solar panels	1%	10%	44%
Heat pumps	-	3%	19%
Other	31%	5%	4%
Total consulted	**182**	**280**	**27**

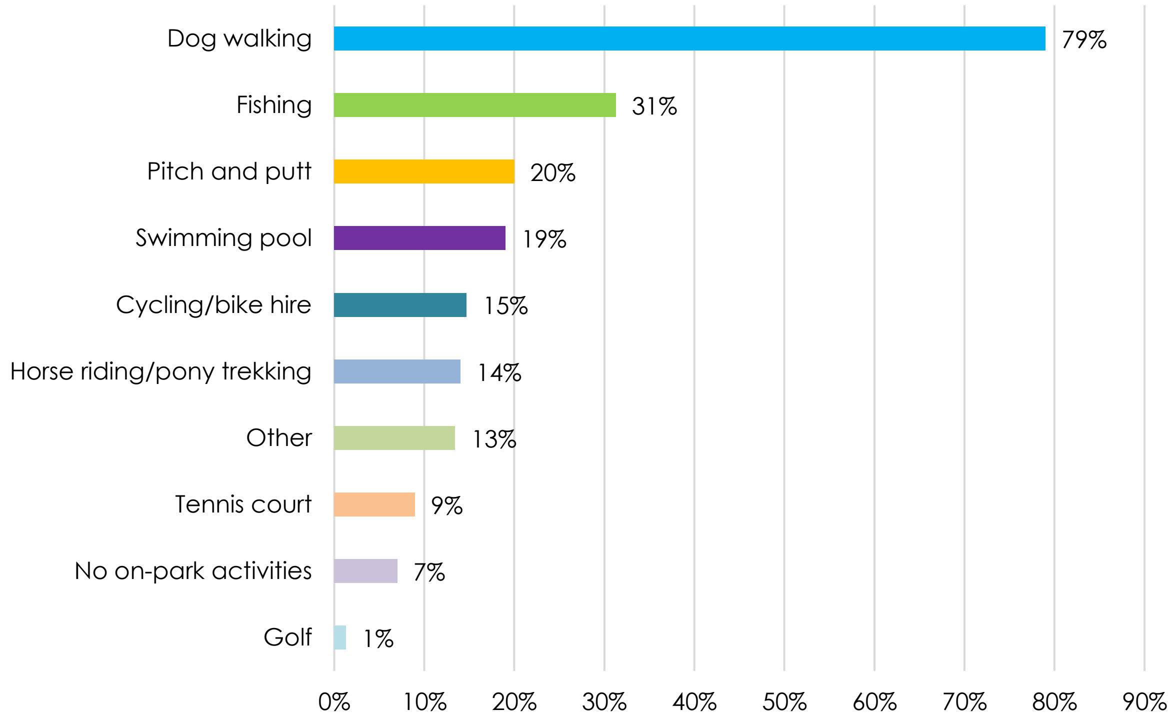
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N= 489
(figures sum to over 100% as most parks offer more than one type of facility)

Across all holiday parks and campsites the most common **activities** provided on-site included dog-walking (79%), fishing (31%), pitch and putt (20%), swimming pools (19%), and cycling or bike hire (15%).

'Other' activities included:

- local attractions e.g. National Trust houses, local markets, pubs and cafes
- recreational activities e.g. table tennis, archery and mini golf
- natural attractions e.g. beaches and wildlife parks

Figure 3.2: Activities listed by holiday park and campsites surveyed



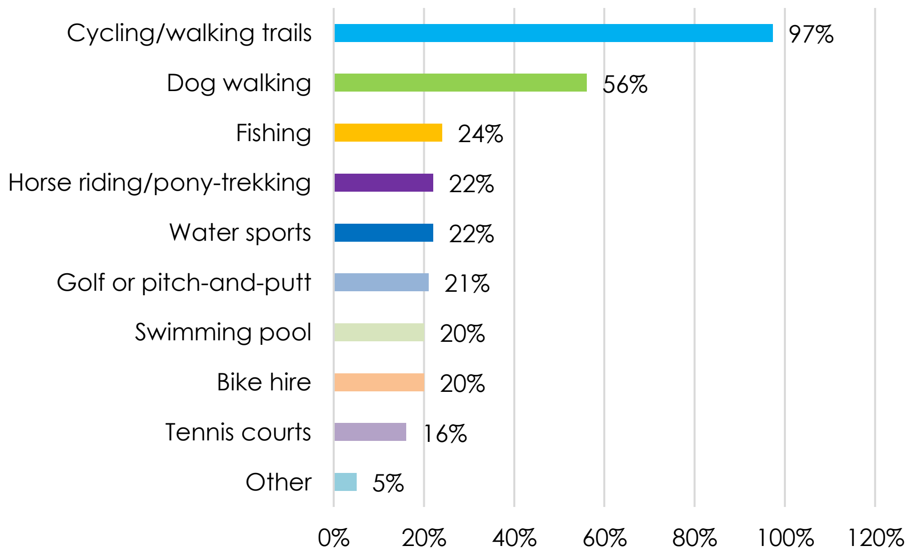
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=455
(figures sum to over 100% as most offer more than one type of facility)

Holiday parks and campsites have access to a range of **activities in the local area**. 97% had cycling/walking trails in the areas as well as dog walking (56%). A further 24% had fishing, 22% had horse riding and 22% had water sports.

'Other' includes:

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

Figure 3.3: Range of activities in the local area



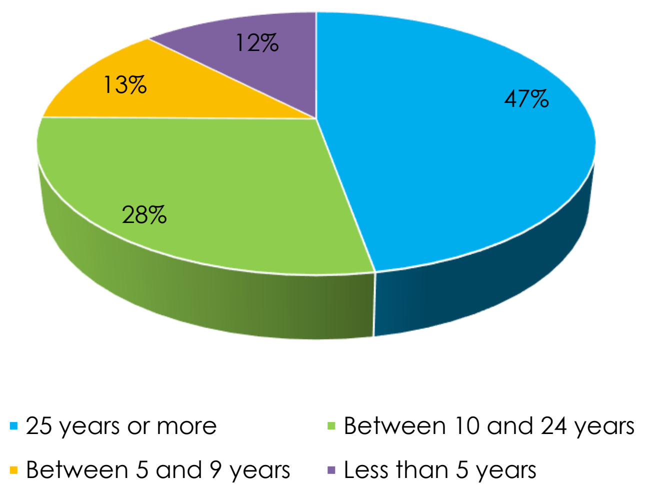
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=425
(figures sum to over 100% as most had more than one type of activity in the local area).

3.7 Holiday park and campsite ownership

In the majority of responses, operators saw their holiday parks and campsites as long-term investments, with over three quarters (75%) owned and operated for at least 10 years, and nearly half for over 25 years (47%).

Figure 3.4 summarises the feedback.

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



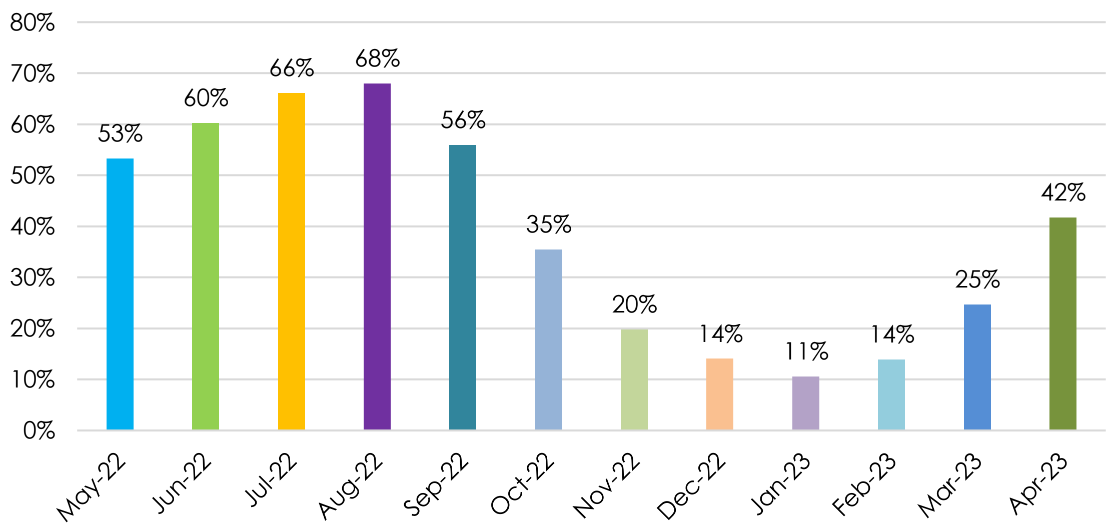
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=589

3.8 Length of season and occupancy rates

Over half (58%) operated seasonally with the remainder (42%) open all year. Where holiday parks and campsites were seasonal, most were open from March – October/November.

Average occupancy rates peaked at 68% in high season (August 2022), falling to 53% in mid-season (May 2022). Low season average occupancy ranged from a low of 11% in January (2023) to a high of 25% in March (2023) as presented in Figure 3.5.

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



Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=421

3.9 Visitor origin

When asked where their visitors came from, respondents said that, 87% came from England, 5% from Wales, 4% from Scotland, and 1% from Northern Ireland; 4% were from outside the UK. The most cited market for visitors from outside the UK were countries from Western Europe such as the Netherlands, Belgium, France and Germany.

When segmented by region (Table 3.5) there was a small amount of variance. The two northern regions had higher percentages of visitors from Scotland and the two western regions had higher percentages of visitors from Wales. The South East had the highest percentage of visitors from outside the UK.

Table 3.5: Visitor origin of holiday parks and campsites surveyed

Area	England	Wales	Scotland	NI	Outside UK
East Midlands	93%	2%	3%	<1%	2%
East of England	92%	1%	2%	<1%	3%
North East England	86%	4%	7%	1%	3%
North West England	85%	4%	8%	1%	2%
South East England	86%	5%	4%	2%	9%
South West England	84%	8%	3%	<1%	4%
West Midlands	84%	7%	3%	1%	4%
Yorkshire	86%	3%	5%	1%	3%
Total*	**87%**	**5%**	**4%**	**1%**	**4%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=333 total
**Total percentages don't all add up to 100% as some respondents didn't fill out all fields*

3.10 Staff employed

Results show that on average, there were 5.9 full-time and 1.8 part-time staff all year round and 4.5 full-time and 1.8 part-time seasonal staff.

As not all holiday 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 3.6: Average staff employed per holiday parks and campsite surveyed

Holiday Park and Campsite Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small (1-5 pitches)*	-	2.0	2.0	2.0
Small (6-50 pitches)	0.7	0.7	1.5	0.9
Medium sized (51-100 pitches)	1.9	0.5	3.0	0.5
Large (101-250 pitches)	4.0	0.9	4.9	1.2
Very large (251 pitches or more)	24.4	13.1	29.7	10.7
Average across all holiday parks and campsites**	**4.5**	**1.8**	**5.9**	**1.8**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=301
**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 1-440 full time and 1-51 part time seasonal staff*

3.11 Expenditure by holiday park and campsite[26]

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

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

Table 3.7: Total expenditure by holiday parks and campsites surveyed

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£46,777,648	£235,064
Operating expenditure	£100,965,569	£379,570
Wages and salaries	£71,010,115	£268,978
Total expenditure	**£218,753,332**	**£883,612**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=271-279
**Ranges from £12-£10m (capital), £2,000-£9m (operating) and £0-£6m (wages and salaries)*

86% of operators stated that their capital expenditure had increased over the last three years, with 10% saying it had stayed the same and just 4% saying it had decreased. Some of the reasons given for the increase 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 areas of capital expenditure over the last five years included:

- **accommodation** – including purchasing new land or lodges, glamping pods and pitches
- **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 facility blocks, play areas, and hard standings
- **infrastructure** – road resurfacing and improvements, wider landscaping and drainage systems
- **broadband** and Wi-Fi infrastructure

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

Table 3.8: Planned expenditure

	Expenditure			
	Average maintenance	Total maintenance	Average improvements	Total improvements
Next financial year	£384,725	£85,793,768	£519,125	£883,567
Next three financial years	£812,265	£176,261,496	£1,033,439	£224,426,060

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=217-255
**Ranges from: maintenance £0-£2.6m (next financial year) and, £1,000-£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, just over half (51%) of the 42% who responded said it had stayed the same, with 41% 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, an increase in occupancy due to COVID-19/staycation trend, expansion of their parks, and increased margins due to raising prices.

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

3.12 Community engagement

Over a quarter (29%) of operators provided information on how they **engage with the local community**; responses included:

- **promoting local events** – 90% promoted and sponsored local events, for example Macmillan coffee mornings and field trips for local schools
- **promoting local business** – 89% actively promote local producers, suppliers, restaurants and shops
- **social media advertising** – 89% advertise and signpost local businesses and causes on social media
- **fundraising** – 84% fundraise for the community, particularly around sports and community groups and parish and community councils
- 12% work with **community groups and community councils**

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

"Charity raffle prize of a free 2-night stay."

South West England

"Information with local restaurants/cafes/attractions on the website and in the information booklet in the lodge. Sponsor local charity events."

North West England

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

North East 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."

South West England

3.13 Environmental improvement

Just under a third of holiday park and campsite operators (31%) provided information on how they **supported environmental improvements**. Two thirds (67%) of respondents had a carbon reduction plan. The most frequently occurring environmental initiatives included:

- **recycling** – which was highlighted by 97% and included educating and encouraging visitors to support this
- **energy and water conservation** – 85% 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, some were engaged in sites of special scientific interest (SSSI)
- **award participation** – 78% took part in award schemes including the David Bellamy or Green Tourism award
- **using sustainable accommodation** – 67% had sustainable accommodation including the use of upcycled materials
- 13% had **restricted vehicle movement** – such as car-free zones

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

"We are heavily engaged in providing a sustainable business and have won awards for this."
South West England

"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."
South West England

"Informing guests about sustainability, recycling and trying to achieve zero carbon emissions in their lives and on our farm."
North West England

"Maintenance of hedges for birds (at relevant times of year), wildflower banks and meadows, feeding birds, no chemicals used on the grass, recycling waste, encourage campers to walk to local amenities on the footpaths rather than use cars."
East Midlands

3.14 Health and wellbeing

Almost half (45%) of respondents provided information on how they **encourage health and wellbeing**. The most frequently occurring examples included:

- **walking and cycling routes, waterways and beaches** – 67% provided these or information about these
- 66% **encourage dog owners**
- **healthy food options** – 53% had onsite restaurants/cafes
- 49% **provided local health and wellbeing facilities** – and granted access to the broader community e.g. school groups

'Other' responses (32%) included:

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

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

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

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

"Supply peace and space in a countryside setting."
North East England

"We promote the local activities i.e. walking routes together with promoting the local healthy food restaurants we also produce homegrown vegetables and fruit which is available for sale in our camp shop."
East Midlands

3.15 COVID-19 pandemic

Operators were asked how the COVID-19 pandemic had changed the sector; over a third (34%) provided some insight. These included:

- **initial surge in bookings** – due to travel restrictions, including new people taking up camping or glamping, and an increase in motorhome/caravan ownership
- **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. Some operators also noticed customers were using their own on-board facilities more than pre-COVID-19
- **reduction in bookings** – since overseas travel became possible again, reverting back to pre COVID-19 levels
- **economic impacts** – for example supply costs and labour costs
- **an increase in competition** – from more farm sites and temporary pop up sites
- **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 41% who responded, 84% said it had risen while 14% said it had stayed the same; only 3% said it had reduced.

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

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

"Boost to caravans and motorhome ownership as well as many new people taking up camping for the first time."
North West England

"Sales and membership have increased. Sales from mature segment have reduced where empty nesters and established families have increased."
East Midlands

"Supply and lead times have become at times unworkable and unsustainable."
West Midlands

"Customers are looking for a higher quality product."
South East England

"More contactless payments, online bookings, and people using their onboard facilities."
Yorkshire

3.16 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 who camped for the first time during the pandemic, and a general shift towards those who had retired, with some mentioning there were fewer families
- **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:

"New entrants post-COVID-19 due to international travel restrictions."

South West England

"More young couples are interested in static holiday homes in the UK."

East of England

"More last-minute bookings and a shift towards shorter stays."

South East England

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

South West England

3.17 Cost of living implications

Operators were asked about the implications of the cost-of-living crisis; 53% responded. The most frequently occurring examples included:

- **economic pressures** – both in terms of guests not spending as much, or site costs for the operator
- **changing customer behaviour** – shorter visitor stays or l booking last minute
- **pricing challenges** – decreased margins due to trying to limit price increases
- **decrease in new holiday caravan spend** – fewer purchases of new holiday caravans
- **increasing general uncertainty** – including unpredictable customer numbers from last minute bookings, and operating costs and interest rates rising unexpectedly leading to some operators considering the long-term viability of their business

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

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

East of England

"Margins falling, increased staff costs, less secondary spend."

North West England

"Bookings come in often a day or two before arrival, which makes planning very difficult."

South West England

"Downturn in holiday home purchases, holiday bookings and so on."

East Midlands

"Challenging times, with unpredictable customer numbers making future plans very uncertain."

South West England

3.18 Brexit

Over a quarter of respondents (27%) provided feedback on the implications of Brexit on supplies; the majority (86%) had issues. The most frequently occurring examples 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 service

Operators were also asked if Brexit had produced more red tape for their business; of the 47% who responded, almost half (45%) 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."
East of England

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

"Some minor short-term supply issues were blamed on Brexit, but I think COVID-19 more likely was the cause."
West Midlands

3.19 Overseas travel and overseas visitors

Operators were asked if they had seen a decrease in overseas visitors; 38% responded. The majority (82%) said they had **seen a decrease during travel restrictions. Some estimated the reduction was up to 50%.**

3.20 Holiday park and campsite operator summary

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

In addition to the diverse accommodation offered, 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 (75%) and many have done so for over 25 years (47%). Occupancy rates peaked at 68% in high season (August 2022) and 56% in mid-season (May 2022). The proportion of visitors outside England varied significantly from, depending on the geographic location.

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 their:

- **expenditure** – 41% from the total survey sample cumulatively spent £218.7m per year in capital and 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-parks

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

- **COVID-19** – leading to an initial spike in bookings which have now 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, leading to uncertainty for operators
- **Brexit** – leading to increased cost and supply chain disruptions, as well as a decrease in the quality of service

4 Visitor Survey

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

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

3,673 respondents to the survey had made a visit to a holiday park and campsite in England in 2023. Table 4.1 shows the spread of visitors across the English regions.

Table 4.1: Location of holiday parks and campsites visited

Location	Percentage
East Midlands	6%
East of England	12%
North East England	7%
North West England	11%
South East England	12%
South West England	24%
West Midlands	7%
Yorkshire	8%
Unknown	13%
Total consulted	**3,673**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

4.1 Visitor origin and number of trips

The vast majority of the respondents lived in England (93%). Less than 1% came from outside the UK. This aligns to English holiday park and campsite operators who reported that the majority of their visitors come from England (Section 3).

Table 4.2: Visitor home country

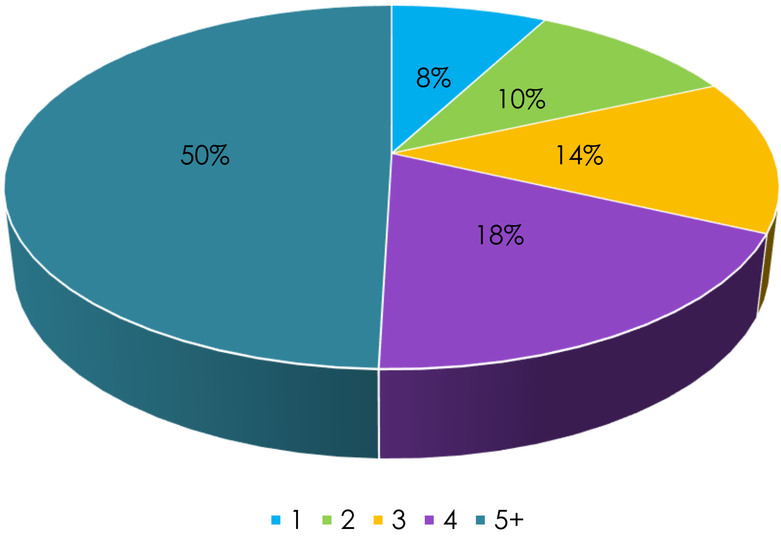
Location	Visitors
England	93%
Wales	4%
Scotland	3%
Northern Ireland	<1%
Outside the UK[27]	<1%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=3,668

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

Half of respondents (50%) stayed on a holiday park and campsite five times or more during the last 12 months; a further 18% stayed four times. 16% of these were a rally campsite or temporary campsite. Where respondents stayed more than five nights, the average was ten nights.

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



N=3,509

4.2 Visitor characteristics

90% of respondents had stayed in a touring caravan, motorhome or tent over the course of the year. 4% stayed in an owner-occupied holiday caravan or lodge; while 4% stayed in some form of rented accommodation.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	44%
Touring caravan	39%
Tent	7%
Static accommodation types	
Holiday caravan privately owned	3%
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. rented holiday caravan and motorhome	
Multiple or mixed types of accommodation	1%

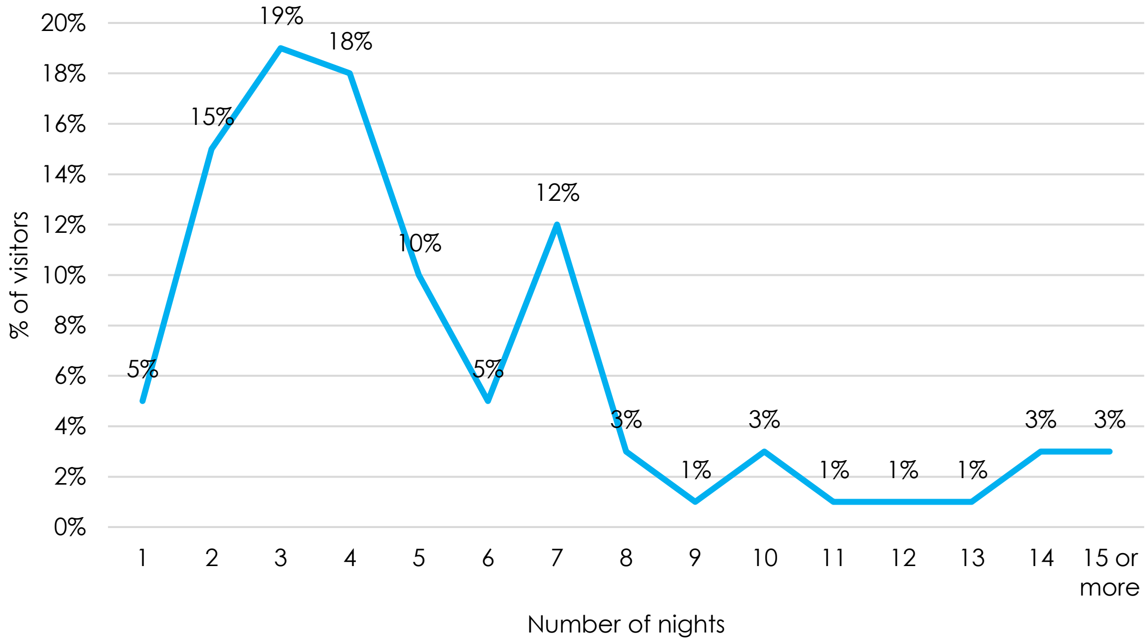
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

The high level of tourers is not surprising as the vast majority (91%) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club[28]. When broken down further:

- 26% were members of the CCC
- 26% were members of the CAMC
- 39% were members of both

On average respondents spent **5.1 nights per trip**. The distribution of responses is shown in Figure 4.2

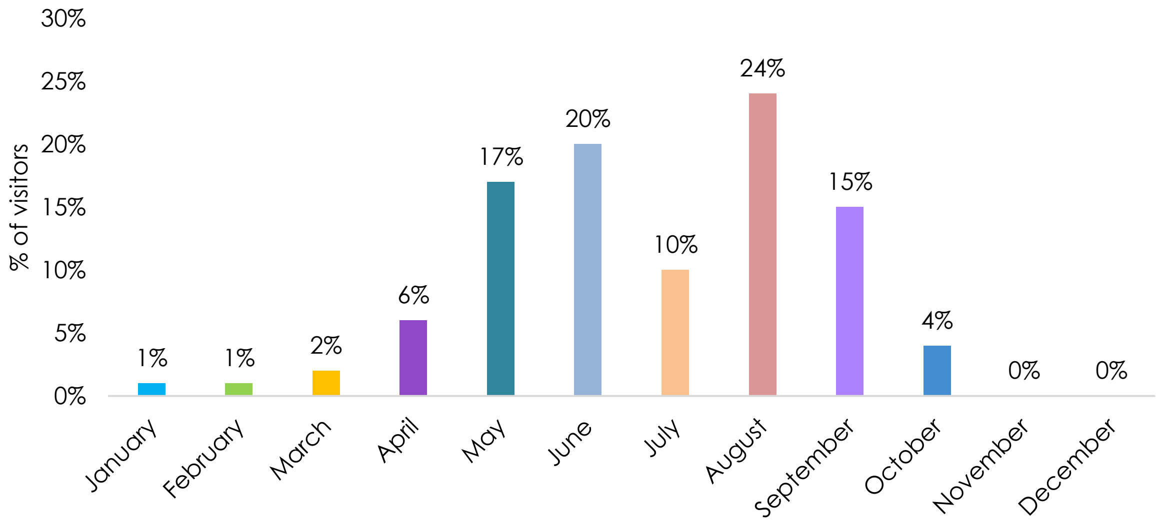
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=3,370

Figure 4.3 shows the month in which respondents began their trip. August (24%) was the most popular followed by June (20%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=2,206

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

Table 4.4 shows the number of adults, children and pets in each party. The average adult group size was 2.1, and 20% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.9. 31% of groups brought a pet.

The average total group size was 2.3. 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 (3.3 and 2.7 respectively) compared with tourers at 2.3.

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

Number	...of adults	... of children*	.....of pets**
1	9%	37%	67%
2	81%	45%	19%
3	5%	12%	4%
4	3%	4%	<1%
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*

4.3 Visitor expenditure

Visitors and their party who stayed in rented accommodation spent, on average, £1,098 per visit, including £694 on-site and £404 off-site.

Touring visitors and their party spent, on average, £504 per visit, including £211 on-site and £293 off-site.

Visitors who owned their holiday caravan and lodge spent, on average, £708 per visit, including £321 on-site and £387 off-site.

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

Table 4.5: Visitor spend per visit

Area of expenditure	Renters	Tourers	Owners
Transport to and from destination	£89	£79	£73
Transport spent during trip	£29	£26	£33
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)[29]	£551	£180	£184
Holiday park and campsite facilities (e.g. Wi-Fi, laundry etc)	£7	£6	£19
Eating/drinking on the holiday park and campsite	£92	£17	£63
Eating/drinking in the surrounding area	£124	£82	£105
Recreation/entertainment on the holiday park and campsite	£25	£3	£16
Recreation/entertainment in the surrounding area	£44	£23	£36
Shopping on the holiday park and campsite	£19	£6	£39
Shopping off the holiday park and campsite	£70	£57	£91
Visitor attractions off the holiday park and campsite	£31	£18	£27
Other	£18	£7	£22
Total – on-site	**£694**	**£211**	**£321**
Total – off-site	**£404**	**£293**	**£387**
Total – both on and off-site	**£1,098**	**£504**	**£708**

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

[29] *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, £203 per day, including £128 on-site and £75 off-site.

Touring visitors, on average, spent £100 per day, including £42 on-site and £58 off-site.

Visitors who owned their holiday home spent, on average, £115 per day, including £52 on-site and £62 off-site.

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters	Tourers	Owners
Transport to and from destination	£16	£16	£12
Transport spent during trip	£5	£5	£5
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)	£102[30]	£35[31]	£30[32]
Holiday park and campsite facilities (e.g. Wi-Fi, laundry etc)	£1	£1	£3
Eating/drinking on the holiday park and campsite	£17	£3	£10
Eating/drinking in the surrounding area	£23	£16	£17
Recreation/entertainment on the holiday park and campsite	£5	£1	£3
Recreation/entertainment in the surrounding area	£8	£5	£6
Shopping on the holiday park and campsite	£3	£1	£6
Shopping off the holiday park and campsite	£13	£11	£15
Visitor attractions off the holiday park and campsite	£6	£4	£4
Other	£3	£1	£4
Total – on-site	**£128**	**£42**	**£52**
Total – off-site	**£75**	**£58**	**£62**
Total – both on and off-site	**£203**	**£100**	**£115**

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

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

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

The most popular responses were *"It's an area I know well/been before"* (36%); and *"I wanted to visit the area/country"* (32%).

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

Factor	Number responding*
It's an area I know well/been before	36%
I wanted to visit the area/country	32%
CAMC/CCC club member communication	18%
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	5%
Other	17%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=2,944
**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*

[30] *Rental accommodation spend ranged from £3 per night to £428 per night.*
[31] *This does not include the cost of buying the accommodation.*
[32] *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:

- convenient location or general convenience (22%)
- for a specific hobby/event/place (17%)
- seasonal or regular trip (13%)
- general getaway (12%)
- trips with family or friends (11%)

Also included were ownership (8%), club events or membership (6%), good value holiday (4%), following a recommendation (4%), special occasion (2%) and for work (1%).

4.5 Health and wellbeing

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

This was followed by short walks (95%), long walks (85%) and spending time with friends and family (83%). Table 4.8 summarises the results.

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

	Level of activity done				
	More	**Less**	**Same**	**I did not undertake this activity**	**Total**
Spent time relaxing	54%	6%	38%	1%	2,738
Short walks (under 2 miles)	41%	7%	47%	5%	2,664
Long walks (over 2 miles)	41%	11%	32%	15%	2,703
Spent time with family and friends	39%	4%	31%	27%	2,691
Wildlife/nature activities	24%	5%	36%	35%	2,650
Other outdoor physical activities	9%	4%	8%	79%	2,650
Cycling	13%	6%	14%	67%	2,640

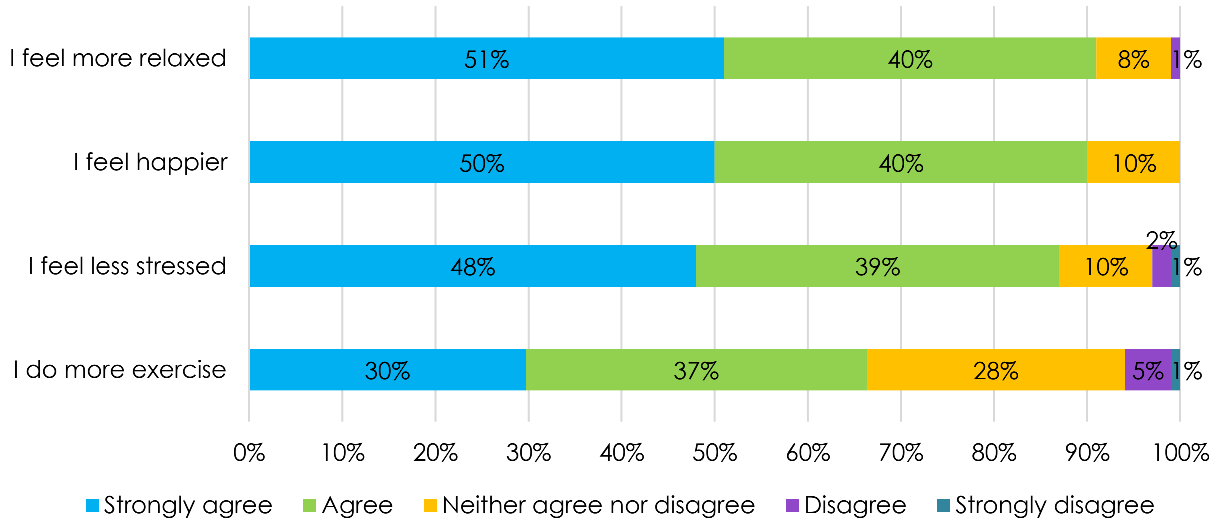
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

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**
- 86% strongly agree or agreed that they **feel less stressed when visiting a holiday park and campsite**
- 67% strongly agree or agree that they **do more exercise when visiting a holiday park and campsite**

Figure 4.4 presents the detailed feedback.

Figure 4.4: When visiting a holiday park and campsite …



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

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, North West England

"You feel less stressed, you exercise more, and you feel more connected to your family."

Motorhome/Campervan Owner, East of England

"At one with nature, relaxed, refreshed and batteries recharged."

Motorhome/Campervan Owner, South East England

"Relaxed, happy and pleased to be able to spend time with my family, friends and camping companions who make me smile every day! I feel like it's generally a great and relatively cheap way to spend a weekend away somewhere."

Tent Owner, South West England

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

Motorhome/Campervan Owner, North East England

"Relaxed and always enjoy the time switching off from busy work and enjoying natural surroundings."

Touring Caravan Owner, North East England

4.5.1 *Benefits and impacts of improved physical and mental health*

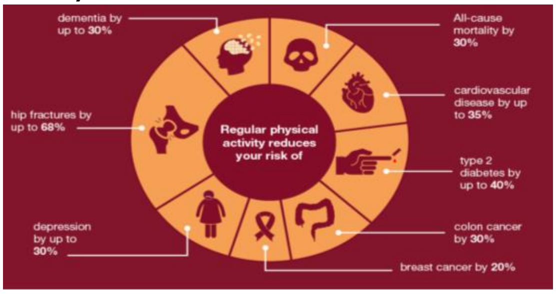
There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling. Holiday parks and campsites occupy green spaces and often have sport and recreational facilities or access to nature and are therefore widely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

The Chief Medical Officer stated that [33]:

> *"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[34].

Figure 4.5: The health benefits of physical activity



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

As well as health impacts, **there are significant socioeconomic implications**. Physical inactivity is estimated to cost the UK £7.4bn annually (including £0.9bn to the NHS alone)[35].

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[36].

New data and economic modelling from AXA UK and the 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)[37]. Furthermore, in 2019, in-patient hospital admissions caused by stress-related illnesses in the UK cost over £8bn[38].

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 England's 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, England's holiday park and campsite sector is supporting the English and wider UK policy agenda for health and wellbeing.

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

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

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

The most popular responses were:

- *"I 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"* (40%)
- *"I holidayed more on holiday parks and campsites in the UK i.e. a staycation"* (38%)

Table 4.9 presents the detailed feedback.

Table 4.9: 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**	40%
holidayed more on holiday parks and campsites in the UK i.e. a staycation	38%
am looking to **combine overseas holidays with staycations**	31%
bought a caravan/motorhome/tent/lodge/chalet/cottage and have **continued to use it**	20%
resumed overseas holidays	19%
discovered (rediscovered) holiday parks and campsites as a holiday destination	12%
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=2,751
**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:

- *"view holiday parks and campsites as a good value for money holiday option"* (54%)
- *"will holiday more in my caravan/motorhome/tent/lodge/chalet"* (37%)

When comparing holiday parks and campsites as either a good or poor value holiday choice, 86% of respondents see them as good value[39].

Table 4.10 presents the detailed feedback.

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

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

Response	Number responding*
view holiday parks and campsites as a **good value for money** holiday option	54%
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	24%
view holidays **overseas to be a much more considered purchase**	20%
view holiday 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	8%
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	6%
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=2,751
**Figures sum to more than 100% as multiple answers were allowed to this question*

Visitors were asked if they had been put off holidaying abroad as a result of Brexit and if so, is this likely to be short or long term decision/choice. 79% of respondents claimed they had not been put of holidaying abroad as a result of Brexit. Whether they had or had not been put off holidaying abroad, respondents felt this was a long-term decision, though this effect was larger in those who **had not** been put off holidaying abroad (83%) 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, South West 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, Yorkshire

"I will not be persuaded to change my habits by cost of living, Brexit or green issues as I believe using my Campervan is a very cost effective, environmentally friendly and satisfying pastime."

Motorhome/Campervan Owner, South East England

"These are fantastic places [to] visit and the weather has been very good. Nowhere like England when the sun shines."

Tent User, South East England

"All my favourite holidays include camping in the UK… I find it the best way to relieve the stress of work."

Rented Caravan User, South West England

"I LOVE my motorhome and all of the opportunities that it affords me. I could not afford the same number of overnight stays if paying for air b and b or B and B, hotels, etc."

Motorhome/Campervan Owner, West Midlands

4.7 Visitor summary

The majority of the respondents lived in England (93%), of which half (50%) stayed on a holiday park and campsite in England five times or more during the last 12 months.

90% stayed in a touring caravan, motorhome or tent over the course of the year. 4% 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 20% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. 37% of groups brought a pet.

Visitors spent 5.1 nights per trip. **This is higher than the average tourism number of nights per trip at 2.8[40].**

Visitors who stayed in rented accommodation spent, on average, £203 per day, including £128 on-site and £75 off-site. Touring visitors spent, on average, £100 per day, including £42 on-site and £58 off-site. Visitors who owned their holiday caravan spent, on average, £115 per day, including £52 on-site and £62 off-site. **This is higher than the wider average tourism spend per night by those taking a trip in England at £97[41].**

[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

[41] 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

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

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

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

- days of the year (365)
- accommodation type (7)
- English regions (8)

In other words, the model includes 20,440 separate economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures.

5.2 Measuring on-site and off-site expenditure

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

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in the North East	3,445
Multiplied by:	
Average occupancy rate on 5th August	68%
Number of pitches occupied on 5th August	2,343
Multiplied by:	
Average on-site expenditure per day for touring holiday-makers	£41.67
= On-site expenditure of touring caravan visitors to the North East on 5th August	**£97,633**

For accommodation spend (part of on-site spend), a 25% reduction has been applied to the low season months (October to April) to account for the fact that average daily spend by visitors was given primarily for the medium to high season months (April to October).

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

Table 5.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in the North East	3,445
Multiplied by:	
Average occupancy rate on 5th August	68%
Number of pitches occupied on 5th August	2,343
Multiplied by:	
Average off-site expenditure per day for touring holiday-makers	£57.73
= Off-site expenditure of touring caravan visitors to the North East on 5th August	**£135,261**

5.3 Measuring indirect and induced expenditure

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

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

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

The most up to date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (2019). This publication recommended that the 0.64 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation. Table 5.3 presents a worked example for England.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£97,633
Plus	
Total off-site expenditure	£135,261
Total combined on and off-site expenditure	**£232,894**
Multiplied by:	0.64
= Indirect and induced effects	**£149,052**

5.4 Measuring visitor impact

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

Table 5.4 presents a worked example.

Table 5.4: Visitor impact

Total on-site expenditure	£97,633
Plus	
Total off-site expenditure	£135,261
Indirect and induced effects	£149,052
Visitor impact	**£381,946**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[42], every £54,000 spent by tourists in a local economy sustains one full-time equivalent (FTE) job. This proxy was applied in the assessment of the FTE employment impacts associated with the holiday park and campsite visitor expenditure.

Figures from the most recent ONS publication[43], indicate that every £100 of turnover generated by England's overnight accommodation sector translates to a GVA impact of £59.27[44].

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

5.6 Capturing owner annual pitch fees

In our spend figures in Section 4.3, anything over £2,000 in the privately-owned holiday caravan and privately-owned lodge/chalet spend figures was assumed to be annual site fees, and this was divided by 365 to give a per day figure. As the yearly average occupancy was only 39%, the remaining 61% of 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 61% as shown in Table 5.5.

£7.54 per day was added to the privately-owned holiday caravan and privately-owned lodge/chalet on-site spend figures in our model.

Table 5.5: Owner annual pitch fees

Average annual pitch fees	£4,512[45]
Divided by 365 days	
Remaining average daily pitch fees spend	£7.54

[42] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*

[43] *2021 Annual Business Survey, ONS.*

[44] *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).*

[45] https://www.parkholidays.com/caravan-holiday-homes-for-sale/costs-to-consider

6 Economic Impact of Holiday Parks and Campsites in England

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 England, broken down by region and by accommodation type.

6.1 Impact by English region

It is estimated that in 2022/23 visitors to English holiday parks and campsites spent **a total of £9.2bn in the English economy**, made up as follows:

- £2.77bn on-site spend
- £2.84bn off-site spend
- £3.60bn of multiplier impacts

This visitor expenditure supports **170,429 FTE jobs** and contributes **£5.45bn of GVA to the English economy.**

Table 6.1: Economic impacts by English county

Region	Visitor Expenditure (£m)	Employment (FTE jobs)
East Midlands	960.4	17,786
East of England	1,301.0	24,093
North East England	493.9	9,146
North West England	1,049.5	19,435
South East England	1,332.6	24,679
South West England	2,335.0	43,240
West Midlands	416.5	7,713
Yorkshire	1,314.3	24,338
England	**9,203**	**170,429***

Source: Frontline, 2023

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

6.2 Impact by accommodation type

Table 6.2 summarises the impacts aligned to accommodation type.

Table 6.2: Economic impacts by accommodation type

England	Visitor Expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Touring Pitches*	2,441.3	45,210	1,447.0
Glamping yurts/wigwams/others	126.3	2,338	74.8
Pods	50.8	940	30.1
Privately-owned holiday caravans	4,250.9	78,720	2,519.5
Rented holiday caravans	1,460.8	27,051	865.8
Privately-owned lodge/chalet/cottage	473.1	8,762	280.4
Rented lodge/chalet/cottage	400.0	7,407	237.1
All accommodation	**9,203**	**170,429**	**5,454.6****

Source: Frontline, 2023

**Includes touring caravans, motorhomes/campervans and tents*

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

6.3 Assessing the economic impacts of maintenance expenditure

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

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

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

Area of expenditure	Touring Caravan/Motorhome Owner*[46]	Privately-owned holiday caravans/lodge owner[47]
Servicing	£282	£741
Insurance	£330	£283
Road Tax	£183	N/A
General upkeep	£204	£1,023[48]
Total	**£999**	**£2,047**

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 England (626,650 [49]) multiplied by average maintenance expenditure per touring caravan/motorhome (£999). This equals £626m.

Aligned to the approach presented above, the estimated gross expenditure figure for privately-owned caravan holiday home/lodge owners is 165,299[50], multiplied by average maintenance expenditure per holiday home (£2,047). This equals £338.4m.

The total impact associated with expenditure on maintenance by tourers and privately owned holiday caravans/lodges **is estimated to be in the region of £964.4m.**

More detailed impact findings are shown in Appendix 2.

6.4 Economic impact summary

In 2022/23 it is estimated that England's holiday park and campsite sector generated **a gross direct, visitor expenditure impact of £9.2bn. This expenditure supports 170,429 FTE** jobs and contributes **£5.45bn** (including multipliers) **GVA impact** to England's economy.

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

- **South West England:** with visitor expenditure of £2.33bn, equivalent to a GVA impact of £1.38bn, and 42,240 supported FTE jobs
- **South East England**: with visitor expenditure of £1.33bn, equivalent to a GVA impact of £790m, and 24,679 supported FTE jobs

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

- **privately-owned holiday caravans**: with visitor expenditure of £4.25bn, equivalent to a GVA impact of £2.52bn, and 78,720 supported FTE jobs
- **touring pitches**: with visitor expenditure of £2.44bn, equivalent to a GVA impact of £1.45bn, and to 45,210 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and caravan holiday home/lodge owners adds a **further £964.4m of expenditure to the English economy**.

[46] *These figures were taken from visitors who lived in England as it was assumed that's where they would spend their money.*
[47] *These figures were taken from visitors visiting England as it was assumed that's where they would spend their money.*
[48] *Note there were 6 respondents who spent £7,000 or more on general upkeep that year.*
[49] *https://www.caravantimes.co.uk/features/the-strange-and-wonderful-sights-of-caravanning/ and apportioned according the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[50] *UKCCA, 2023.*

7 Conclusions

The English holiday park and campsite sector makes a substantial contribution to the English tourism economy, generating £9.2bn in visitor expenditure, equivalent to £5.45bn GVA and supporting 170,429 FTE jobs.

Visitors to English holiday parks and campsites spend more money than the national tourism average: During each of these stays, visitors spend a considerable amount of money per day in the local economy, including £203 on-site and off-site by renters, £114 on-site and off-site by owners and £99 on-site and off-site by tourers. This is an increase on the average English tourism visitor spend (per day) of £97[51].

Flexible accommodation and facilities provision, supporting local communities, protecting the environment and encouraging a healthier lifestyle: England's 4,754 holiday parks and campsites account for 320,901 pitches[52]. 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 £964.4m of expenditure to the economy.

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

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

- **COVID-19** – leading to an initial spike in bookings which have now 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 both businesses with operating costs and pricing challenges as well as consumers becoming more frugal and changing how they book, 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

[51] *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)*
[52] *This includes Certificated Sites and Certificated Locations.*

Appendix 1 – Regional Breakdown

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

East of England – includes Bedfordshire, Cambridgeshire, Essex, 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

Appendix 2 – Detailed Impact Findings

Visitor Expenditure

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/cottage	Rented lodge/chalet/cottage	Total
East Midlands	56.4	2.3	1.5	159.8	43.7	9.6	13.7	**286.9**
East of England	64.1	5.6	2.1	201.5	91.0	16.7	15.5	**396.6**
North East England	19.2	1.7	0.8	89.4	32.9	4.7	2.0	**150.8**
North West England	53.6	5.9	3.8	175.3	38.7	22.2	14.7	**314.4**
South East England	83.6	6.6	1.8	167.4	103.6	23.5	20.7	**407.3**
South West England	205.3	15.2	5.4	205.3	181.3	31.5	65.3	**709.3**
West Midlands	42.4	2.7	0.9	48.6	10.6	6.7	3.3	**115.3**
Yorkshire	79.1	7.5	2.8	211.0	50.1	25.5	14.3	**390.3**
Total	**603.8**	**47.7**	**19.2**	**1,258.3**	**551.9**	**140.5**	**149.5**	**2,770.9**

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
East Midlands	82.6	1.4	0.9	168.5	26.8	10.1	8.4	**298.7**
East of England	94.0	3.5	1.3	212.3	55.9	17.6	12.1	**396.7**
North East England	28.2	1.1	0.5	94.2	20.2	5.0	1.2	**150.3**
North West England	78.6	3.6	2.4	184.8	23.8	23.4	9.0	**325.6**
South East England	122.6	4.1	1.1	176.4	63.6	23.4	9.0	**400.2**
South West England	300.8	9.3	3.3	216.4	111.3	33.2	40.1	**714.5**
West Midlands	62.1	1.7	0.6	58.8	6.5	7.0	2.0	**138.7**
Yorkshire	116.0	4.6	1.7	222.4	30.7	26.9	8.8	**411.1**
Total	**884.8**	**29.3**	**11.8**	**1,333.7**	**338.8**	**146.7**	**90.7**	**2,835.7**

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
East Midlands	89.0	2.4	1.5	210.1	45.1	12.6	14.1	**374.8**
East of England	101.2	5.8	2.2	264.8	94.0	22.0	17.7	**507.7**
North East England	30.3	1.8	0.9	117.5	34.0	6.2	2.0	**192.7**
North West England	84.6	6.1	4.0	230.5	40.0	29.2	15.2	**409.6**
South East England	132.0	6.9	1.8	220.0	107.0	32.3	25.1	**525.1**
South West England	323.9	15.7	5.6	269.9	187.2	41.4	67.4	**911.2**
West Midlands	66.8	2.8	1.0	68.7	10.9	8.8	3.4	**162.5**
Yorkshire	124.9	7.8	2.9	277.3	51.7	33.5	14.8	**512.9**
Total	**952.7**	**49.3**	**19.8**	**1,658.9**	**570.1**	**186.0**	**159.8**	**3,596.6**

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
East Midlands	228.0	6.2	3.9	538.4	115.6	32.2	36.1	**960.4**
East of England	259.4	14.9	5.5	678.6	240.9	56.3	45.3	**1301.0**
North East England	77.7	4.6	2.2	301.0	87.2	15.9	5.2	**493.9**
North West England	216.9	15.6	10.2	590.5	102.5	74.8	38.9	**1,049.5**
South East England	338.2	17.6	4.7	563.8	274.3	79.3	54.9	**1,332.6**
South West England	830.0	40.3	14.3	691.7	479.7	106.1	172.8	**2,335.0**
West Midlands	171.3	7.2	2.5	176.2	28.0	22.5	8.8	**416.5**
Yorkshire	320.0	19.9	7.4	710.6	132.6	85.8	37.9	**1,314.3**
Total	**2,441.3**	**126.3**	**50.8**	**4,250.9**	**1,460.8**	**473.1**	**400.0**	**9,203.2**

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
East Midlands	1,044	43	27	2,960	809	177	253	**5,313**
East of England	1,188	104	39	3,731	1,686	310	287	**7,344**
North East England	356	32	16	1,655	610	88	36	**2,792**
North West England	993	109	71	3,246	717	411	272	**5,821**
South East England	1,549	123	33	3,100	1,919	436	384	**7,543**
South West England	3,802	282	100	3,802	3,357	583	1,209	**13,135**
West Midlands	784	50	18	901	196	124	62	**2,135**
Yorkshire	1,466	139	52	3,907	928	472	265	**7,228**
Total	**11,181**	**884**	**355**	**23,301**	**10,221**	**2,601**	**2,769**	**51,312**

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
East Midlands	1,530	27	17	3,120	496	187	155	**5,532**
East of England	1,741	64	24	3,932	1,035	326	225	**7,347**
North East England	522	20	10	1,744	374	92	22	**2,784**
North West England	1,455	67	44	3,422	440	434	167	**6,029**
South East England	2,270	76	20	3,267	1,178	434	167	**7,411**
South West England	5,571	173	61	4,008	2,060	615	742	**13,231**
West Midlands	1,150	31	11	1,088	120	131	38	**2,568**
Yorkshire	2,148	85	32	4,118	569	497	163	**7,612**
Total	**16,386**	**542**	**218**	**24,699**	**6,274**	**2,716**	**1,680**	**52,514**

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
East Midlands	1,647	45	28	3,891	835	233	261	**6,941**
East of England	1,874	108	40	4,904	1,741	407	328	**9,402**
North East England	562	33	16	2,175	630	115	37	**3,569**
North West England	1,567	113	74	4,268	741	541	281	**7,584**
South East England	2,444	127	34	4,075	1,982	599	465	**9,725**
South West England	5,998	291	103	4,999	3,467	767	1,249	**16,874**
West Midlands	1,238	52	18	1,273	202	163	64	**3,010**
Yorkshire	2,312	144	54	5,136	958	620	274	**9,498**
Total	**17,643**	**913**	**367**	**30,720**	**10,557**	**3,445**	**2,959**	**66,603**

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
East Midlands	4,221	115	72	9,971	2,140	597	669	**17,786**
East of England	4,803	276	102	12,567	4,462	1,043	840	**24,093**
North East England	1,439	85	41	5,574	1,614	295	96	**9,146**
North West England	4,016	289	189	10,936	1,899	1,386	721	**19,435**
South East England	6,262	326	86	10,441	5,079	1,468	1,016	**24,679**
South West England	15,371	746	265	12,809	8,883	1,966	3,201	**43,240**
West Midlands	3,172	133	47	3,262	519	417	163	**7,713**
Yorkshire	5,926	368	138	13,160	2,455	1,590	702	**24,338**
Total	**45,210**	**2,338**	**940**	**78,720**	**27,051**	**8,762**	**7,407**	**170,429**

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
East Midlands	33.4	1.4	0.9	94.7	25.9	5.7	8.1	**170.1**
East of England	38.0	3.3	1.2	119.4	54.0	9.9	9.2	**235.1**
North East England	11.4	1.0	0.5	53.0	19.5	2.8	1.2	**89.4**
North West England	31.8	3.5	2.3	103.9	23.0	13.2	8.7	**186.3**
South East England	49.6	3.9	1.0	99.2	61.4	14.0	12.3	**241.4**
South West England	121.7	9.0	3.2	121.7	107.4	18.7	38.7	**420.4**
West Midlands	25.1	1.6	0.6	28.8	6.3	4.0	2.0	**68.3**
Yorkshire	46.9	4.5	1.7	125.0	29.7	15.1	8.5	**231.3**
Total	**357.9**	**28.3**	**11.4**	**745.8**	**327.1**	**83.2**	**88.6**	**1,642.3**

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
East Midlands	49.0	0.9	0.5	99.9	15.9	6.0	5.0	**177.0**
East of England	55.7	2.0	0.8	125.9	33.1	10.4	7.2	**235.1**
North East England	16.7	0.6	0.3	55.8	12.0	3.0	0.7	**89.1**
North West England	46.6	2.1	1.4	109.5	14.1	13.9	5.4	**193.0**
South East England	72.6	2.4	0.6	104.6	37.7	13.9	5.4	**237.2**
South West England	178.3	5.5	2.0	128.3	65.9	19.7	23.8	**423.5**
West Midlands	36.8	1.0	0.3	34.8	3.8	4.2	1.2	**82.2**
Yorkshire	68.7	2.7	1.0	131.8	18.2	15.9	5.2	**243.6**
Total	**524.4**	**17.4**	**7.0**	**790.5**	**200.8**	**86.9**	**53.8**	**1,680.7**

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
East Midlands	52.7	1.4	0.9	124.5	26.7	7.5	8.4	**222.1**
East of England	60.0	3.4	1.3	157.0	55.7	13.0	10.5	**300.9**
North East England	18.0	1.1	0.5	69.6	20.2	3.7	1.2	**114.2**
North West England	50.2	3.6	2.4	136.6	23.7	17.3	9.0	**242.7**
South East England	78.2	4.1	1.1	130.4	63.4	19.2	14.9	**311.3**
South West England	192.0	9.3	3.3	160.0	111.0	24.5	40.0	**540.1**
West Midlands	39.6	1.7	0.6	40.7	6.5	5.2	2.0	**96.3**
Yorkshire	74.0	4.6	1.7	164.4	30.7	19.9	8.8	**304.0**
Total	**564.7**	**29.2**	**11.7**	**983.2**	**337.9**	**110.3**	**94.7**	**2,131.7**

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
East Midlands	135.1	3.7	2.3	319.1	68.5	19.1	21.4	**569.2**
East of England	153.7	8.8	3.3	402.2	142.8	33.4	26.9	**771.1**
North East England	46.1	2.7	1.3	178.4	51.7	9.4	3.1	**292.7**
North West England	128.5	9.3	6.0	350.0	60.8	44.4	23.1	**622.0**
South East England	200.4	10.4	2.8	334.2	162.5	47.0	32.5	**789.8**
South West England	491.9	23.9	8.5	410.0	284.3	62.9	102.4	**1,383.9**
West Midlands	101.5	4.3	1.5	104.4	16.6	13.4	5.2	**246.8**
Yorkshire	189.7	11.8	4.4	421.2	78.6	50.9	22.5	**779.0**
Total	**1,447.0**	**74.8**	**30.1**	**2,519.5**	**865.8**	**280.4**	**237.1**	**5,454.6**

Due to rounding there may be slight discrepancies when totalling