Pitching the Value

2019 Economic Benefit Report: Holiday Parks and Campsites WALES

Report for the

UK Caravan & Camping Alliance

February 2019

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Executive Summary

The Welsh holiday park and campsite sector makes a substantial contribution to the Welsh tourism economy, generating £1.33bn in visitor expenditure, equivalent to £761.4m GVA and supporting 24,677 FTE jobs.

The Welsh holiday park and campsite sector accounted for 15% of the tourism sector's GVA.

Visitors to Welsh holiday parks and campsites stayed up to 82% longer and spent up to 83% more than the national tourism average.

Background

Tourism is one of Wales' key industries. The tourism strategy for Wales[1] states that **tourists and visitors spend over £13m a day and contribute around £2.8bn GVA annually in Wales**. During the first half of 2018, the Wales Tourism Performance Report highlighted the following[2]:

- **5.1 million overnight domestic GB trips to Wales generated expenditure of £907m**
- **46.7 million tourism day visits generated expenditure of £1.92bn**
- **430,000 trips taken by international visitors with an expenditure of £167m**

The most recent Tourism Barometer Wave (Autumn 2018) indicated that **84% of businesses had seen greater (40%) or equal (44%) levels of visitor numbers compared with the same period in 2017. 79% expressed confidence for the season ahead.**

Report Purpose

In November 2017, **the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd to undertake an independent economic impact and benefit assessment of the holiday park and campsite sector across the UK**. This included an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland.

Economic Impact

In 2018 it is estimated that the Welsh holiday park and campsite sector generated **a total visitor expenditure impact of £1.33bn**. **This expenditure equates to a GVA impact of £761.4m (including multipliers) and supported 24,677 FTE jobs in the Welsh economy.**

According to a report commissioned by VisitBritain[3] **the tourism sector in Wales had a direct GVA of £3.5bn[4], therefore the holiday park and campsite sector with a direct GVA of £520.2m (excluding multipliers)[5] makes a substantial contribution (15%) to the sector's GVA.**

In addition, tourers and caravan holiday home owners spend money on **maintenance which adds a further £127.1m of expenditure to the economy**.

[1] https://gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?lang=en
[2] https://gov.wales/docs/statistics/2018/181030-wales-tourism-performance-january-june-2018-en.pdf
[3] https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf
[4] Converted to 2018 prices.
[5] See appendix 3 for GVA excluding multipliers summary table.

Holiday Park/Campsite Operators

According to evidence provided by the UKCCA, **in the summer of 2018 there were 898 member holiday parks/campsites operating in Wales accounting for 62,586 pitches**[6]. This was drawn from a database of holiday parks/campsites provided by the UKCCA. Consultations were undertaken with 115 of these parks. Research found that **Welsh holiday parks/campsites offer a wide range of accommodation options to visitors**, which allows it to serve a diverse range of customers' tastes and budgets. These include touring pitches for caravans, campervans, motorhomes and tents; owner-occupied holiday homes; and rented holiday homes, lodges, apartments, chalets, wigwams, pods and yurts.

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

The majority of holiday park/campsite operators have owned their parks for over 10 years and many have done so for over 25 years. Park occupancy rates vary from an average of 69% in high season (August) to 54% in mid season (May and September). The proportion of visitors who live outside Wales was 69%. From this, 55% came from England, 7% from Scotland, 5% from outside of the UK and 2% from Northern Ireland.

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

- **expenditure** – 37% parks from the total survey sample cumulatively spent £22.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including promotion and sponsorship of local events, fundraising and utilising local suppliers
- **environmental activities** – including support for recycling and conservation and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycle paths, promotion of wider community health and fitness sessions and healthy food options provided in parks' restaurants.

Park Visitors

1,050 respondents to the survey had made 1,315 visits to a holiday park/campsite in Wales in 2018 across two trips. The remainder of this section is based on those visiting Wales in **Trip 1 only (677)** which had the most comprehensive data set as all respondents participated in at least one trip.

The majority of survey participants lived in England (66%) with 31% from Wales. Just under half of respondents (43%) had stayed on a holiday park or campsite in Wales 5 times or more during the last 12 months.

72% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 19% stayed in a rented or owner-occupied caravan holiday home; while 6% stayed in a rented or owner occupied lodge/ chalet/ cottage.

The average adult group size was 2.2, and **32% of all groups included children**. Where parties were travelling with children, the average **number of children in each group was 1.9**. **36% of groups brought a pet**.

Visitors and their party who stayed in rented or touring accommodation spent, on average, £448 per visit (£95 per day), spending, on average, 4.7 days on a holiday park/campsite on each **holiday. Visitors staying in owned accommodation spent, on average,** £513 per visit (£83 per day) and stayed, on average 6.2 days. This is higher than the average daily spend by visitors to Wales at £52[7] and 3.4 days per holiday[8].

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

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

1 Introduction

In November 2017, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants Ltd (Frontline) to undertake an independent economic impact and benefit assessment of the holiday park/campsite sector across the UK. This includes an overall UK-wide report, providing headline findings for the UK and its four countries; plus detailed individual country reports for England, Scotland, Wales and Northern Ireland. **This report is for Wales[9].**

The UKCCA comprises the following sponsor organisations:

1.1 Research objectives

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

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

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

The assessment method is presented in Appendix 1.

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

2 Welsh Tourism in Context

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

2.1 National tourism strategies

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

- Scotland – *'Tourism Scotland 2020'* initiative
- Northern Ireland – *'Economy 2030'* draft
- Wales – *'Partnership for Growth'*
- England – *'A Strategic Framework for Tourism 2010-2020'*

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

VisitBritain's strategy has the ambitions of:

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

This strategy aims to build from the past while taking advantage of the opportunities for Britain including:

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

In **Wales**, the tourism strategy is governed by the *'Partnership for Growth: strategy for tourism 2013-2020'*[11] which set its vision to 2020:

> *'Wales will provide the warmest of welcomes, outstanding quality, excellent value for money and memorable, authentic experiences to every visitor.'*

It's goal and ambition is for:

> *'Tourism to grow in a sustainable way and to make an increasing contribution to the economic, social and environmental well-being of Wales. This will support a growth in tourism earnings in Wales by 10% or more by 2020."*

The tourism strategy for Wales is aimed at driving higher tourism earnings to deliver maximum value for the Welsh economy. This strategy set out ambitious growth targets for tourism in Wales for the period 2013 – 2020.

The strategy supports the delivery of the following priorities as set out in the Programme for Government[12]. These are summarised as:

- develop tourism activity and niche markets and secure maximum benefit from major events
- promote Wales as a destination by making a high quality tourism offer
- work to extend the tourism season and associated benefits
- identify funding opportunities to improve the visitor infrastructure and product
- support investment in staff training and management
- use digital technologies to take Wales to the world and bring the world to Wales
- invest in quality tourism businesses and more effectively market Wales' quality visitor attractions, accommodation and food
- work with national, UK and international sports federations to ensure more major events are hosted in Wales
- deliver improvement in rights of way for cyclists and walkers, of the Wales Coast Path
- further develop St Fagans National Museum of History as a significant cultural attraction
- implement Cadw's Heritage Tourism Project
- maintain free admission to Amgueddfa Cymru (National Museum Wales) and National Library of Wales

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

[11] https://gov.wales/docs/drah/publications/130613-partnership-for-growth-en.pdf

[12] https://gov.wales/about/programme-for-government/?lang=en

2.2 National tourism statistics

The tourism strategy for Wales states that tourists and visitors spend over £13m a day and contribute around £2.8bn Gross Value Added (GVA) annually in Wales[13].

During the first half of 2018, the *Wales Tourism Performance Report* highlighted the following[14]:

- 5.1 million overnight domestic GB trips to Wales generating expenditure of £907m
- 46.7 million tourism day visits generated expenditure of £1.92bn
- 430,000 trips taken by international visitors with an expenditure of £167m
- average accommodation occupancy rates:
  - hotels: 64%
  - self-catering: 50%
  - hostel: 48%
  - guesthouse/B&B: 31%

The most recent Tourism Barometer Wave (September 2018)[15] indicated that 84% of businesses had seen greater (40%) or equal (44%) levels of visitors compared with the same period in 2017. 79% expressed confidence for the season ahead.

[13] https://gov.wales/topics/culture-tourism-sport/tourism/partnership-for-growth-strategy/?lang=en
[14] https://gov.wales/docs/statistics/2018/181030-wales-tourism-performance-january-june-2018-en.pdf
[15] https://gov.wales/docs/caecd/research/2018/181122-wales-tourism-business-barometer-wave-4-2018-summary-en.pdf

3 Holiday Park/Campsite Operator Consultation

This section provides evidence from consultations with holiday parks/campsites across Wales. This was drawn from a database of holiday parks/campsites provided by the UKCCA Working Group[16]. This database includes data from the:

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

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

3.1 Composition of the of the Welsh holiday park/campsite sector

Based on the information provided by the UKCCA, i**n the summer of 2018 there were 898 member holiday parks/campsites operating in Wales accounting for 62,586 pitches**[17]. The majority of these pitches are either owner-occupied caravan holiday homes or lodges (40,109 pitches, 64%) or touring pitches[18] (15,943 pitches, 25%). However, the holiday parks/campsites have a wide and growing mix of other accommodation options which cater for a broad range of tastes and budgets, including wigwams, yurts and pods.

North Wales contains both the highest number of holiday parks/campsites (59) and the highest number of pitches (40,893); South West Wales also contains a high number of both parks and pitches. Table 3.1 summarises the composition of the Welsh holiday parks/campsites sector.

Table 3.1: Composition of Wales holiday parks/campsites sector

	Number of parks	Touring Pitches	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Glamping	Lodge/ chalet/ cottage Owned	Lodge/ chalet/ cottage Rented	Total pitches
Mid Wales	72	1,229	557	15	9	77	0	1,887
North Wales	481	8,736	26,196	3,766	51	1,837	307	40,893
South East Wales	80	1,054	2,669	489	4	29	10	4,255
South West Wales	265	4,924	8,066	1,785	17	678	81	15,551
Total	**898**	**15,943**	**37,488**	**6,055**	**81**	**2,621**	**398**	**62,586**

Source: UKCCA, 2018

3.2 Sampling methodology

Holiday parks/campsites across Wales were invited to participate in the research. This was done by the various sponsor groups reaching out to holiday park/campsite operators and gaining consent. Telephone interviews and e-surveys were conducted with those agreeing to participate.

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

115 holiday parks/campsites out of a population of 898 across Wales participated giving us a 95% confidence +/- 9% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider population and is therefore representative of the holiday parks/campsites sector in Wales.

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

3.3 Geographic locations

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

Table 3.2: Locations of holiday parks/campsites

Location	Number of parks responding	Estimated number of parks	Percentage consulted
Mid Wales	4	72	6%
North Wales	59	481	12%
South East Wales	7	80	9%
South West Wales	45	265	17%
Total	**115**	**898**	**13%**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

3.4 Holiday parks/campsites size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large parks, including 10 very large parks (parks with 251 pitches or more); and 37 very small parks (parks with 5 pitches or fewer), these are typically certificated locations and certificated sites.

Table 3.3: Sizes of the holiday parks/campsites surveyed

Number	Number of parks responding	Number of parks	Percentage consulted
Very small parks (1-5 pitches)	37	473	8%
Small parks (6-50 pitches)	26	111	23%
Medium sized parks (51-100 pitches)	22	126	17%
Large parks (101-250 pitches)	20	132	15%
Very large parks (251 pitches or more)	10	56	18%
Total	**115**	**898**	**13%**

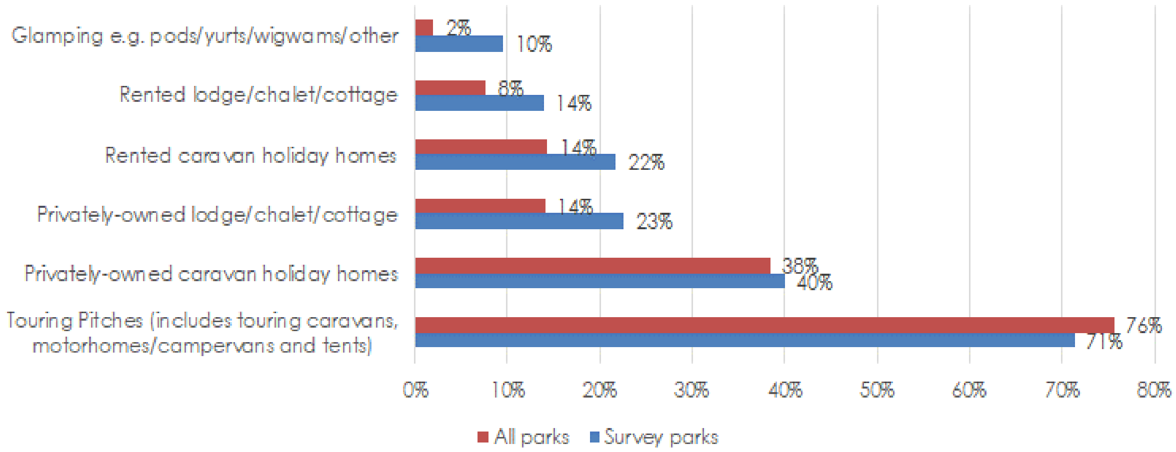
Source: UKCCA Group, 2018

3.5 Accommodation provided

The accommodation type of surveyed holiday parks/campsites was broadly representative of the sector as a whole. The majority of holiday parks/campsites (71%) had touring pitches which includes touring caravans, motorhomes/campervans and tents.

40% of the holiday parks/campsites had owner-occupied holiday homes on their parks, and 23% offered privately-owned lodge/chalet/cottages.

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



N=111

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

3.6 Facilities and activities provided

In addition to accommodation, many holiday parks/campsites offer a range of facilities. Surveyed holiday parks/campsites were asked to list what **other facilities they had on-site**. In the very small sites (1-5 pitches) 70% had toilet, 52% shower blocks and 48% had Wi-Fi facilities.

In the small to large parks (6-250+ pitches), facilities were more frequent with toilet blocks, Wi-Fi and laundry being most common.

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

'Other' facilities included:

- hardstandings
- electric hook ups
- motorhome service point
- fitness centre

Table 3.4: Facilities listed by holiday park/campsite operators

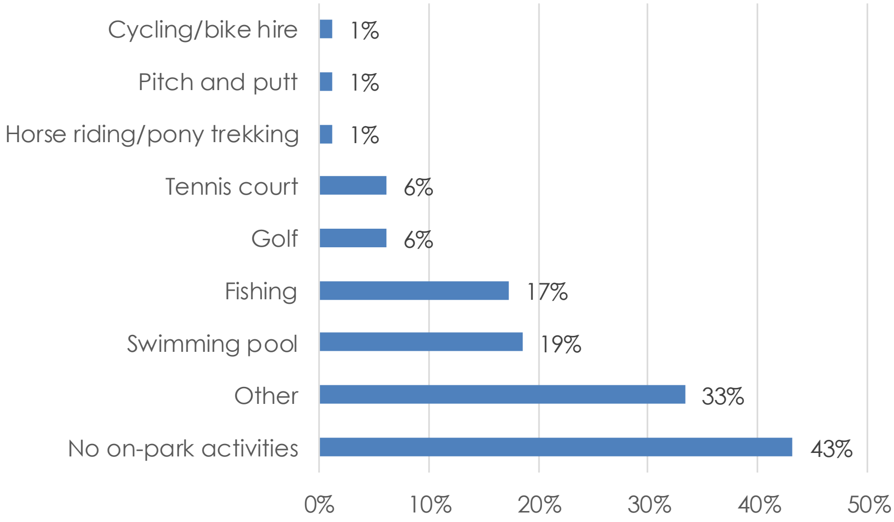
	Very small parks		Small to very large parks	
Facility	**Number of parks**	**% of parks**	**Number of parks**	**% of parks**
Toilet blocks	23	70%	60	79%
Shower blocks	17	52%	49	64%
Wi-Fi	16	48%	51	67%
Laundry	5	15%	57	75%
Outdoor play area	1	3%	39	51%
Restaurant/bar/takeaway	1	3%	10	13%
Retail/shop	-	-	15	20%
Games room	1	3%	14	18%
Entertainment	1	3%	11	14%
No on-park facilities	2	6%	2	3%
Others (please specify)	25	76%	24	32%
Total parks consulted	**33**	-	**76**	-

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

The figures in Table 3.4 capture only those holiday parks/campsites who listed each type of facility in their response; it is possible that some of the holiday parks/campsites may have some of these activities but did not answer this question in full. Therefore, the figures may underestimate the true mix of facilities on Welsh holiday parks/campsites.

Holiday parks/campsites were also asked about the activities provided on-site. Less than half (43%) provided no on-park activities while over 19% provided a swimming pool, 17% fishing and 6% tennis courts. Others included; farm, fitness centre and water sports. Only 51% of very small parks (1-5 pitches) had onsite activities.

Figure 3.2: Activities listed by holiday park/campsite operators



N=581

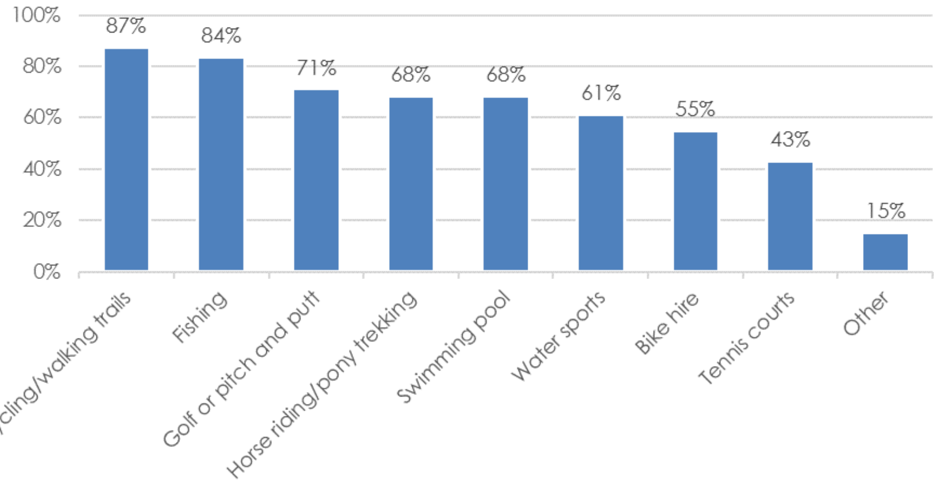
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites offer more than one type of facility)

Surveyed holiday parks/campsites were also asked about the **range of activities provided in the local area.** The vast majority of holiday parks/campsites had cycling/walking trails (87%) in the area, as well as fishing (84%). A further 71% had golf or pitch and putt, while 68% had horse riding/pony trekking and a swimming pool (respectively). Over half had water sports, bike hire, and just under half had a tennis court.

'Other' activities included:

- bird watching
- climbing
- zip lining

Figure 3.3: Range of activities in the local area



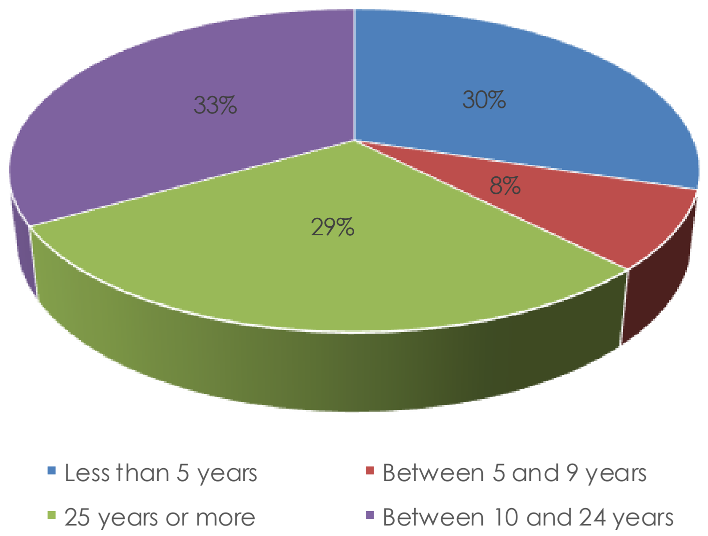
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites had more than one type of activity in the local area) N=111

3.7 Holiday park/campsite ownership

In the majority of cases holiday park/campsite operators, saw their holiday parks/campsites as long-term investments, with the holiday parks/campsites owned and operated for more than ten years (62%).

Figure 3.4 summarises the feedback.

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



N=114

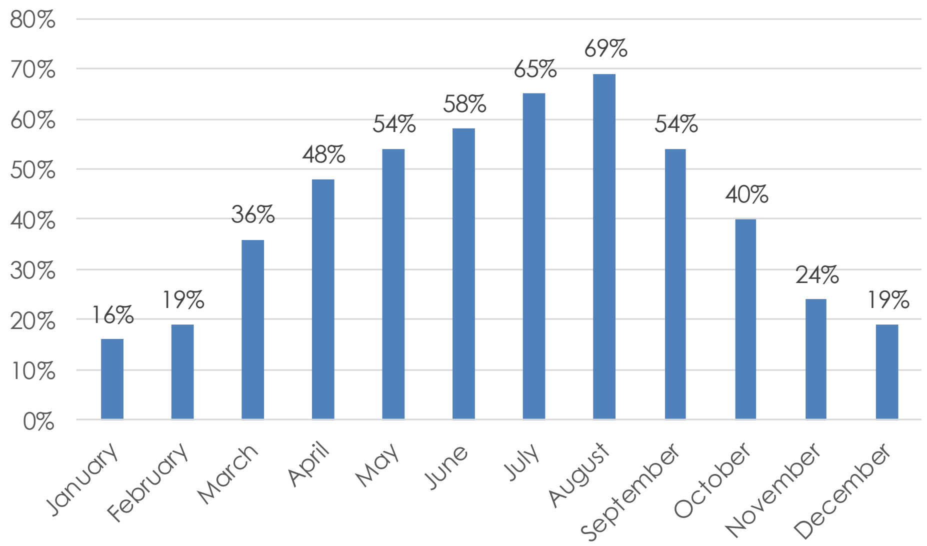
Source: Frontline Holiday Park/Campsite Operator Survey, 2018

3.8 Length of season and occupancy rates

The majority of surveyed holiday parks/campsites (65%) operated seasonally with under a third open all year round. The majority (84%) are open from late March to the end of October. Holiday park/campsite operators were asked to report their typical occupancy rates for each month opened.

Occupancy rates in Welsh holiday parks/campsites peaked at 69% in high season (August) to 54% in mid season (May and September). Low season average occupancy ranged from a low of 16% in January to a high of 36% in March as presented in Figure 3.5.

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



Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=80

3.9 Visitor origin

All survey participants were asked what percentage of their visitors came from Wales, from the rest of the UK and from the rest of the World. 55% were from England, 31% from Wales and 7% from Scotland; 6% were from outside the UK.

When segmented by region (Table 3.5) there was a significant degree of variance in responses by holiday parks/campsites.

Table 3.5: Visitor origin

Area	England	Wales	Scotland	NI	Outside UK
Mid Wales	53%	40%	2%	1%	4%
North Wales	78%	12%	4%	2%	4%
South East Wales	41%	38%	8%	4%	9%
South West Wales	48%	40%	4%	2%	6%
Total	**55%**	**31%**	**7%**	**2%**	**6%**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=107

3.10 Staff employed

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

Results show that on average, across all holiday parks/campsites, there were 4.8 full-time and 1.8 part-time staff all year round and 13.1 full-time and 8.9 part-time seasonal staff.

Numbers varied depending on the size of the holiday parks/campsites. **No respondent holiday parks/campsites reported employing migrant workers.**

Table 3.6: Average staff employed per holiday park/campsite

Park Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small parks (1-5 pitches)*	-	-	-	-
Small parks (1-50 pitches)	0.4	0.9	0.9	0.3
Medium sized parks (51-100 pitches)	1.0	2.5	2.3	2.3
Large parks (101-250 pitches)	3.8	2.6	3.8	3.2
Very large parks (251 pitches or more)	55.2	26.2	17.4	1.7
Average across all parks	**13.1**	**8.9**	**4.8**	**1.8**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=69

**No employee numbers were gathered on the very small parks, typically because these are CL/CS sites that have a small number of pitches and do not require employees directly related to this element of the business.*

3.11 Expenditure by holiday park/campsite[19]

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

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

Table 3.7: Total expenditure by holiday parks/campsites

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£7,667,776	£187,019
Operating expenditure	£2,392,661	£108,757
Wages and salaries	£12,447,863	£259,330
Total expenditure	**£22,508,300**	**£555,106**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=24-50

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

- **accommodation** – new and existing developments across caravans and other parks developments including glamping
- **pitch development** – adding new and improving existing across touring and owned
- **facilities** – new and refurbishment of washrooms, shower blocks, play areas, leisure facilities and restaurants
- **utility development** – electric hook up and connections
- **connectivity** – Wi-Fi and broadband
- **fleet development** – cars and wider transportation
- **materials and plant/equipment**

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

Table 3.8: Planned expenditure

	Expenditure	
	Maintenance	Improvements
Next financial year	£3,662,335	£3,351,611
Next three financial years	£9,957,757	£7,061,390
Total	**£13,620,092**	**£10,413,001**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=36-71

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

3.12 Community engagement

Almost half (48%) of holiday park/campsite operators provided information on how they **engage with the local community**, the most frequently occurring included:

- **promotion and sponsorship of local events** – including leaflet display and local information
- **fundraising** – including for historic landmarks, sports events and local charities
- **utilisation of local suppliers**
- **supporting local community groups**

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

"Getting involved in events such as The Great British Beach Clean with the Marine Conservation Society to ensure that the area is free from litter."

South East Wales

"Promote local events in the town and surrounding area."

Mid Wales

"Employ local staff. Promote and use Welsh language. Buy local wherever possible."

North Wales

"We support our local businesses and community shop."

South West Wales

"We look to source services and materials locally and are a major employer of local labour from within the community."

North Wales

"The Group is involved in sponsoring local community events such as flower shows, gardening clubs and athletics for children."

North Wales

3.13 Environmental improvement

Over half of holiday park/campsite operators (58%) provided information on how they supported environmental improvement at their park/site, the most frequently occurring included:

- **recycling** – which was highlighted by all respondents
- **sustainable accommodation** – including upcycling of materials
- **David Bellamy Award participation** – a quarter had participated in this
- **wildlife conservation** – across flora and fauna, including planting to encourage wildlife
- **energy and water conservation** – through water harvesting, solar panels, light sensors and low wattage solutions, compost toilets
- **restricted vehicle movement** – some have 'no car' policy

Of those that responded, all actively promoted recycling.

The word cloud below shows the importance of **recycling** and wildlife conservation, as well as encouraging guests to get involved.

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

"We have a David Bellamy award, 20 kw Solar system, solar preheat water system, air source pump for heating facilities, bore hole water supply, recycling."

South West Wales

"We have introduced water and energy saving initiatives deployed via the 'Save It' campaign and are considering negative emissions technologies in collaboration with buying specifications for new assets."

South East Wales

"Our lodge was made from upcycled scaffolding planks and poles, the shack was made from tree branches, we recycle around 90% of the guest waste and we have our own spring water."

North Wales

"The park has a lot of edible plants and herbs which we use in food dishes."

North Wales

"We are an eco-site producing very little waste. Guests coming by car are encouraged to take any residual waste home.

South East Wales

"We have a detailed environmental policy which includes recycling, compost loos, use of solar power, planting for wildlife."

North Wales

"Conservation work has been ongoing for the last 20 years to promote the biodiversity of the area and to maintain the natural environment."

South West Wales

3.14 Health and wellbeing

Almost half (52%) of holiday park/campsite operators provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **wide range of sports and outdoor facilities both on site and off site** – including swimming, fitness and fishing
- **positive effect of being** – and close to nature
- **cycling/walking routes and beaches** – some on holiday parks/campsites but mostly in the surrounding area
- **healthy food options** – in onsite restaurants

Only 3% stated they did not provide any health and wellbeing activities.

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

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

"Promote outdoor activities in the local area."

Mid Wales

"All visitors are given a welcome pack with walks, beaches and National Trust places. They are also told of local events and the menu of food done on site."

South West Wales

"We are adjacent to Sustrans Cycle Route 4 and as well as receiving lots of cyclists on their tours we encourage our visitors to use this route with cycles or walking to access the surrounding area and attractions. We hold the Visit Wales Cycling and Walking friendly awards."

South East Wales

"We seek to promote a healthier lifestyle in an environment of outdoor living, which encourages exercise and physical activity. We promote local events such as charity runs and other fun events to both visitors and staff."

North Wales

"We have a swimming pool and fitness suite on one of our parks. We advertise local walks and have a number of visitors using the Anglesey coastal path."

North Wales

3.15 External factors impacting the business

A small sample of Welsh holiday park/campsite operators (11%) provided some insight to the external factors affecting their business, the weather came out first with almost two thirds (62%) highlighting this. This was closely followed by uncertainty aligned to Brexit; although some view positive aspects aligned to exchange rates.

Others mentioned:

- negative impacts of planning
- decreasing disposal income impacting on caravan holiday home sales

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

"Weather - site full to capacity when the forecast is good! Planning - cumbersome process restricting growth."

South West Wales

"Planning rules and the strict planning departments of local authorities are currently also preventing me from upgrading my park further, the hassle of going through the bureaucratic system is putting me off developing/expanding further."

South West Wales

"The uncertainty surrounding Brexit is leading to people being more cautious in their spending."

North Wales

"Disposable income has dropped, more cautious about spending. People's wages have not risen with the retail prices of caravan holiday homes."

North Wales

"Weather affects bookings very much. Not sure how Brexit will affect us but fear it will be negative."

South East Wales

3.16 In summary

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

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

The majority of holiday park/campsite operators have run holiday parks/campsites for over 10 years and many have done so for over 25 years. Holiday park/campsite occupancy rates vary from an average of 69% in high season (August) to 54% in the mid season (May and September). The proportion of visitors to Welsh holiday parks/campsites who live outside Wales varied significantly from park to park, depending on geographic location.

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

- **expenditure** – 37% holiday parks/campsites from the total survey sample cumulatively spent £22.5m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including promotion and sponsorship of local events, fundraising and utilising local suppliers
- **environmental activities** – including support for recycling and conservation and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycling and footpaths, promotion of wider community health and fitness, and healthy food options provided on holiday parks/campsites

4 Visitors Survey

An online visitor survey was open from May to November 2018. The survey was disseminated electronically by the Caravan and Motorhome Club and The Camping and Caravanning Club to a sample of their members. The survey was also promoted by some holiday parks/campsites, in sector magazines and through social media.

1,050 respondents to the survey had made 1,315 visits to a holiday park/campsites in Wales in 2018 across two trips. Table 4.1 shows the spread of visitors across the Welsh regions.

Table 4.1: Location of holiday parks/campsites visited

Location	Visitors	
	Trip 1	**Trip 2**
Mid Wales	11%	14%
North Wales	45%	39%
South East Wales	10%	6%
South West Wales	28%	28%
Unknown	7%	6%
Total consulted	**677**	**638**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The remainder of this section is based on those visiting Wales in **Trip 1 only (677)** which had the most comprehensive data set as all respondents participated in at least one trip.

4.1 Visitor origin and number of trips

The majority of survey participants lived in England (66%) with 31% from Wales. This aligns to the Welsh holiday park/campsite operators who reported that the majority of their visitors come from England.

1% came from outside the UK.

Table 4.2: Visitor home country

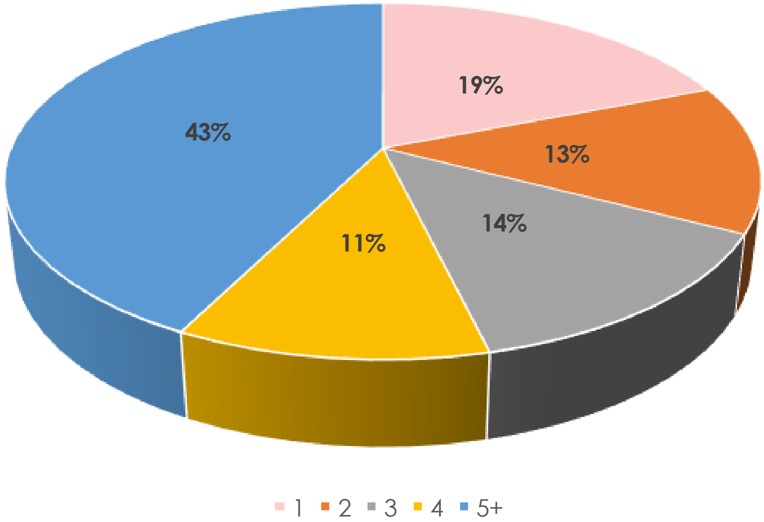
Location	Visitors
England	66%
Wales	31%
Scotland	1%
Northern Ireland	1%
Outside the UK[20]	1%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=673

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

Slightly under half of respondents (43%) stayed on a holiday park/campsite in Wales five times or more during the last 12 months; a further 11% stayed four times.

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



N=675

4.2 Visitor characteristics

72% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 19% stayed in a rented or owner-occupied caravan holiday home; while 6% stayed in a rented or owner occupied lodge/chalet/ cottage.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	33%
Touring caravan	27%
Tent	12%
Static accommodation types	
Caravan holiday home rented	10%
Caravan holiday home owned	9%
Rented lodge/chalet/cottage	5%
Glamping e.g. pods/yurts/wigwams/other	2%
Privately-owned lodge/chalet/cottage	1%

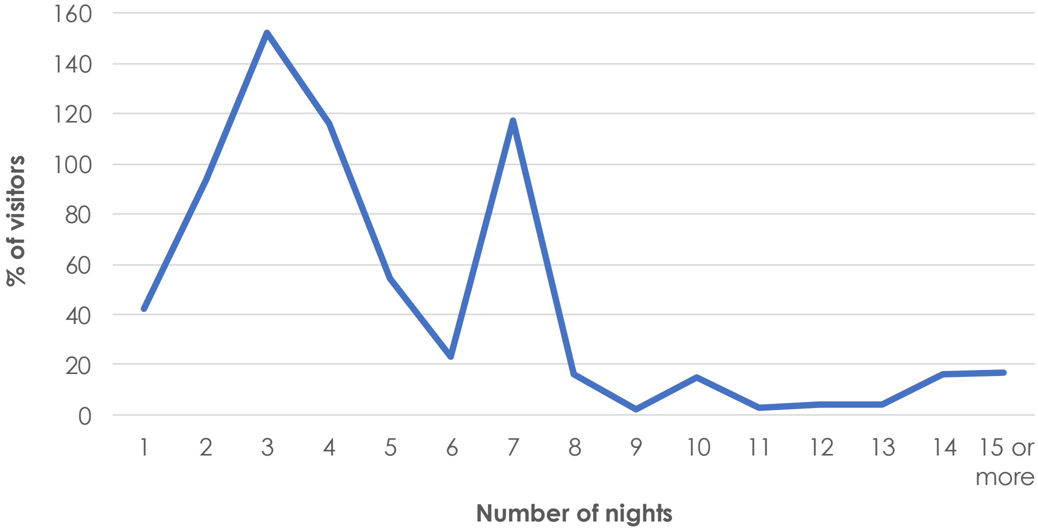
Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=664

The high level of tourers is not surprising as **over half (57%) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club**[21]. When broken down further:

- 52% were members of the Camping and Caravanning Club
- 78% were members of the Caravan and Motorhome Club
- 29% were members of both

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

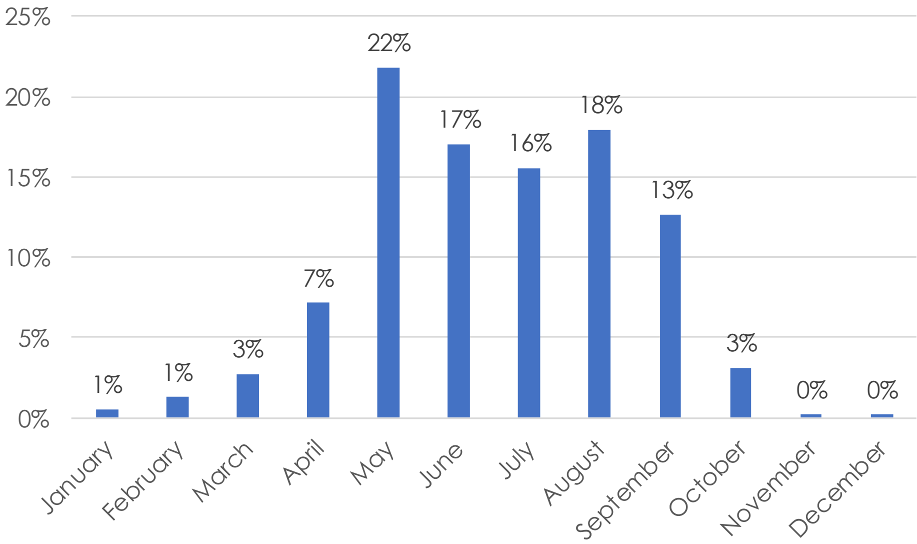
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=675

Figure 4.3 shows the month in which respondent visitors began their trip. May (22%) was the most popular month followed by August (18%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=547

[21] *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 4.3 shows the number of adults, children and pets in each party. The average adult group size was 2.2, and 32% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.9. 36% of groups brought a pet.

The average total group size was 2.6. When broken down by tourers and owners, tourers had an average group size of 2.6 and owners 2.4.

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

	Number of adults	Number of children	Number of pets
1	6%	40%	71%
2	79%	42%	24%
3	5%	12%	3%
4	6%	3%	2%
5+	4%	5%	0%
Average	2.2	1.9	1.3

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

4.3 Visitor expenditure

Visitors who stayed in rented or touring accommodation spent, on average, £448 per visit (per group), including £253 on-site and £195 off-site. Visitors who owned their holiday home spent, on average, £513 (per group) per visit, including £316 on-site and £197 off-site.

Accommodation hire cost, touring and pitch fees, transport and food and drink were the biggest expenditure items.

Table 4.5 summarises the areas of expenditure.

Table 4.5: Visitor spend per visit

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£66	£55
Transport spent during trip	£27	£24
Total cost of holiday accommodation	£126	£167
Touring-pitch/fees paid to park	£100	£125
Park facilities (e.g. Wi-Fi, laundry etc)	£2	£1
Eating/drinking on the park	£21	£19
Eating/drinking/takeaways in the surrounding area	£72	£81
Recreation/entertainment on the park	£3	£4
Recreation/entertainment in the surrounding area	£17	£24
Visitor attractions	£13	£12
Other	£1	£0
Total – on-site	**£253**	**£316**
Total – off-site	**£195**	**£197**
Total – both on and off-site	**£448**	**£513**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors who stayed in rented and touring accommodation spent, on average, £95 per day, including £54 on-site and £41 off-site. Visitors who owned their holiday home spent, on average, £83 per day, including £51 on-site and £32 off-site.

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£14	£9
Transport spent during trip	£6	£4
Total cost of holiday accommodation	£27	£27
Touring-pitch/fees paid to park	£21	£20
Park facilities (e.g. Wi-Fi, laundry etc)	£1	£0
Eating/drinking on the park	£4	£3
Eating/drinking/takeaways in the surrounding area	£15	£13
Recreation/entertainment on the park	£1	£1
Recreation/entertainment in the surrounding area	£4	£4
Visitor attractions	£3	£2
Other	£0	£0
Total – on-site	**£54**	**£51**
Total – off-site	**£41**	**£32**
Total – both on and off-site	**£95**	**£83**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

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

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

The most popular responses were *"I wanted to visit the area"* (36%); and *"wanted to revisit the area"* (27%).

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

Factor	Number responding*
Wanted to visit the area	36%
Wanted to revisit the area	27%
Had been to this region/country before and wanted to visit another area	16%
Family/friends in the area	14%
Saw advertisement for the park(s) in a magazine, newspaper or website	14%
Park/site recommended by family/friends	12%
Club member communication	11%
Specific activities available in the area	7%
Attending an event/festival	5%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=565

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

4.5 Health and wellbeing

Time spent relaxing (67%) was the most commonly undertaken activity by visitors followed by short walks (53%) and time spent with family and friends (53%).

Table 4.8 summarises the results.

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

	More	Less	Same	I did not undertake this activity	Total
Spent time relaxing	67%	6%	26%	1%	**534**
Short walks (under 2 miles)	53%	4%	38%	5%	**534**
Spent time with family and friends	53%	5%	27%	14%	**502**
Long walks (over 2 miles)	50%	7%	29%	14%	**528**
Wildlife/nature activities	39%	5%	30%	26%	**502**
Other outdoor physical activities	33%	5%	23%	40%	**477**
Cycling	18%	4%	12%	67%	**502**

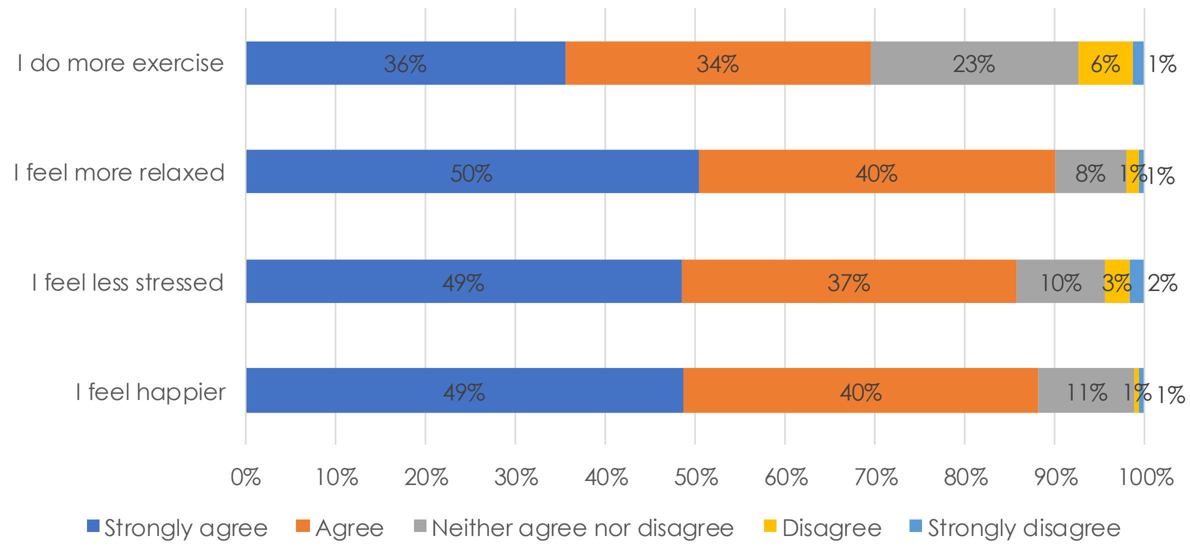
Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

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

- 90% strongly agree or agree that they **feel more relaxed when visiting a holiday park/campsite**
- 89% strongly agree or agree that they **feel happier when visiting a holiday park/campsite**
- 86% strongly agree or agree that they **feel less stressed when visiting a holiday park/campsite**
- 70% strongly agree or agree that they **do more exercise when visiting a holiday park/campsite**

Figure 4.4 presents the detailed feedback.

Figure 4.4: When visiting a holiday park/campsite…

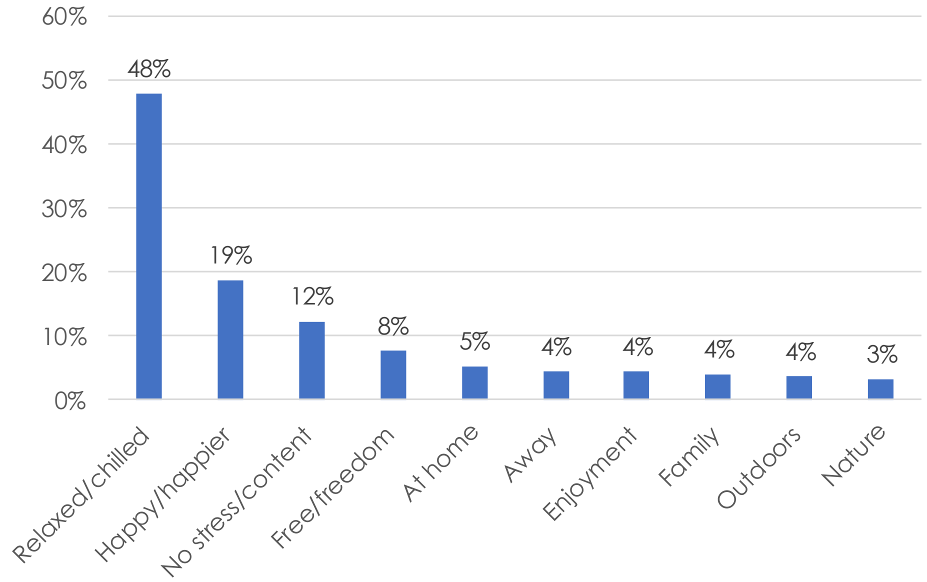


Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors felt more relaxed (48%), happier (19%) and less stressed (12%) as a result of visiting a holiday park/campsite. This is summarised in Figure 4.5 and the word cloud below.

Overall visitors were extremely positive about their experience of holiday parks/campsite in Wales with only three negative comments.

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



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=498

Some **visitor** comments included:

"Very relaxed and happy while the whole family has fun."

Motorhome/campervan Owner, North Wales

"Relaxed. It's nice to switch off from work and just spend quality time as a family, because in a few years' time the kids probably won't want to come on holidays with us."

Rented Caravan Owner, Mid Wales

"Confident and secure in the knowledge that the site is well maintained and most of all pet friendly!"

Tent Owner, North Wales

"Safe as a single woman traveller and value independent travelling. Okay with basic sites and then enjoy ones with full facilities."

Motorhome/Campervan Owner, South West Wales

"Relaxed. Like adventure is out there. Being with nature and away from technology. And focusing on the important things, friends, nature, and inner peace."

Tent Owner, North Wales

"Relaxed and at one with nature, having unwound over our weekends away and feel refreshed when we go back to work every Monday."

Motorhome/Campervan Owner, South West Wales

"I should have bought my motorhome much sooner."

Motorhome/Campervan Owner, South East Wales

4.5.1 Benefits and impacts of improved physical and mental health

There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling.

According to the Chief Medical Officer[22]:

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

Data shows that walking regularly at any speed will[23]:

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

As well as health impacts, there are significant **socio-economic implications**. Physical inactivity currently costs the NHS between £1bn and £1.8bn a year. Costs to the wider economy are conservatively estimated at £5.5bn in sickness absence and £1bn in premature deaths – a total of £8.3bn[24].

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.

A study by the New Economics Foundation[25] found there were 17,500 episodes where stress or anxiety was the primary cause for hospital admissions in 2016/17, which led to 165,800 days when beds were occupied. According to the think tank, the average cost of a bed day to the NHS is around £429, which means the total cost to the taxpayer of these episodes is £71.1m[26].

The Welsh government recently published their plan for Health and Social Care, '*Healthier Wales: our plan for Health and Social* Care' in the summer 2018. The new plan sets out the Welsh Government's long-term vision for achieving a 'whole system approach to health and social care' by[27]:

- improving population health and wellbeing through a focus on prevention
- improving the experience and quality of care for individuals and families
- enriching the wellbeing, capability and engagement of the health and social care workforce
- increasing the value achieved from funding of health and care through improvement, innovation, use of best practice, and eliminating waste

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

Visitors were:

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

Therefore the Welsh holiday park/campsite sector is supporting the Welsh policy agenda for health and wellbeing.

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[22] https://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[23] http://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[24] https://www.thebmc.co.uk/briefingpaper
[25] https://neweconomics.org/2018/05/stressed-economy-stressed-society-stressed-nhs
[26] https://www.shponline.co.uk/stress/stress-and-anxiety-costing-the-nhs-71m-a-year/
[27] https://www.basw.co.uk/media/news/2018/jun/healthier-wales-welsh-governments-plan-health-and-social-care

Some **visitor** comments included:

"Fairly new convert to caravanning and absolutely love it. We get lots of exercise, we can take the puppy and find it much less stressful than flying abroad."

Touring Caravan Owner, North Wales

"Life becomes uncomplicated resulting in ease of mind in a relaxing and safe environment."

Touring Caravan Owner, South West Wales

"We feel a lot a lot healthier, with more walking and plenty of fresh air."

Owner of Caravan Holiday Home, South East Wales

"Any site I have visited has generally exceeded expectations."

Rented lodge/chalet/cottage /apartment User, North Wales

"Words are not enough to say how much we both enjoy our many weekends away on Club Sites, they are immaculate with friendly staff and all in fantastic locations. Well done."

Touring Caravan Owner, South West Wales

"Been camping all my life just getting my wife into it she's disabled and can't do much activities but loves the relaxing scenery."

Tent Owner, Mid Wales

4.6 In summary

The majority of the survey participants lived in Wales (66%) and just under half of respondents (43%) stayed on a holiday park/campsite in Wales five times or more during the last 12 months.

72% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 19% stayed in a rented or owner-occupied caravan holiday home; while 6% stayed in a rented or owner occupied lodge/ chalet/ cottage.

The average adult group size was 2.2, and 32% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.9. 36% of groups brought a pet.

Visitors who stayed in rented or touring accommodation spent, on average, £448 per visit (per group), including £253 on-site and £195 off-site. Visitors who owned their holiday home spent, on average, £513 (per group) per visit, including £316 on-site and £197 off-site. This is compared to on the average Welsh tourism visitor spend (per trip) in 2017 of £175[28].

[28] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

The main objective of this research was to assess the total value of visitor spend attributable to the Welsh holiday park/campsite sector in the twelve months to December 2018.

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

- days of the year (365)
- accommodation type (6)
- Welsh region (4)

In other words, the model includes 8,760 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 on-site expenditure figures were estimated for touring caravans in North Wales on Saturday 4th August.

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in North Wales	8,736
Multiplied by:	
Average occupancy rate on 4th August	70%
Number of pitches occupied on 4th August	6,115
Multiplied by:	
Ave. on-site expenditure per day for renting holiday-makers	£53.71
= On-site expenditure of touring caravan visitors to North Wales on 4th August	**£328,437**

The off-site expenditure was measured in exactly the same way. Following the same worked example as above, it was calculated that in North Wales, on Saturday 4th August, total off-site expenditure by touring caravan visitors is presented in Table 5.2.

Table 5.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in North Wales	8,736
Multiplied by:	
Average occupancy rate on 4th August	70%
Number of pitches occupied on 4th August	6,115
Multiplied by:	
Ave. off-site expenditure per day for renting holiday-makers	£41.48
= Off-site expenditure of touring caravan visitors to North Wales on 4th August	**£253,650**

5.3 Measuring indirect and induced expenditure

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

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

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

The most up-to-date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (March 2018). This publication recommended that the 0.47 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation.

Table 5.3 presents a worked example for Wales.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£328,437
Plus	
Total off-site expenditure	£253,650
Total combined on and off-site expenditure	**£582,087**
Multiplied by:	0.47
= Indirect and induced effects:	**£273,581**

5.4 Measuring visitor impact

The 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	£328,437
Plus	
Total off-site expenditure	£253,650
Indirect and induced effects	£273,581
Visitor impact	**£855,668**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[29], 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/campsite visitor expenditure.

According to figures from the most recent ONS's publication[30], every £100 of turnover generated by Wales's tourism industry translates to a GVA impact of £57.14[31]. This proxy was applied to the above turnover figures to produce an estimate of the holiday park/campsite sector's contribution to Welsh GVA.

[29] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[30] *2018 Annual Business Survey, ONS, 2018.*
[31] *Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks).*

6 Economic Impact of Holiday Parks/Campsites in Wales

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

6.1 Impact by Welsh region

It is estimated that in 2018 visitors to Welsh holiday parks/campsites spent **a total of £1.33bn in the Welsh economy**, made up as follows:

- £540.2m on-site spend
- £366.3m off-site spend
- £426m of multiplier impacts

This visitor expenditure **supports 24,677 FTE jobs and contributes £761.4m of GVA to the Welsh economy**.

Table 6.1: Economic impacts by Welsh Region

Region	Visitor expenditure (£m)	Employment (FTE jobs)
North Wales	865.1	16,021
South West Wales	334.8	6,200
South East Wales	90.6	1,680
Mid Wales	42.0	776
Wales	**1,332.5**	**24,677**

Source: Frontline, 2019

6.2 Impact by accommodation type

Table 6.2 summarises the impacts aligned to accommodation type.

Table 6.2: Economic impacts by accommodation type

Wales	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Caravan Holiday Home (owned)	757.0	14,017	432.8
Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	370.7	6,866	211.8
Caravan Holiday Home (rented)	140.8	2,608	80.4
Lodge/chalet/cottage (owned)	52.9	980	30.3
Lodge/chalet/cottage (rented)	9.2	171	5.1
Glamping e.g. pods/yurts/wigwams/other	1.9	35	1.0
All accommodation	**1,332.5**	**24,677**	**761.4**

Source: Frontline, 2019

6.3 Assessing the economic impacts of maintenance with expenditure

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

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

Table 6.3: Average Welsh annual maintenance expenditure on visitor owned accommodation

Area of expenditure	Touring Caravan/ Motorhome Owner*[32]	Caravan/Holiday Home Owner[33]
Servicing	£234	£310
Insurance	£240	£214
Road Tax	£157	N/A
General Upkeep	£288	£953
Total	**£919**	**£1,477**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018
**includes touring caravans, motorhomes/campervans and tents*

The predicted expenditure figure for touring caravan owners is equal to the estimated number of touring caravans/owned motorhomes in Wales (78,000[34]) multiplied by average maintenance expenditure per touring caravan/motorhome (£919). This equals £71.7m.

Aligned to the approach presented above, the estimated expenditure figure for caravan holiday home/lodge owners is equal to the number of owner caravan holiday homes (37,488[35]), multiplied by average maintenance expenditure per holiday home (£1,477). This equals £55.4m.

The total impact associated with expenditure on caravan and holiday home maintenance is estimated to be in the region of £127.1m.

[32] *Note these figures were taken from visitors who lived in Wales as it was assumed that's where they would spend their money.*
[33] *Note these figures were taken from visitors visiting Wales as it was assumed that's where they would spend their money.*
[34] *NCC https://www.thencc.org.uk/Our_Industry/statistics.aspx and apportioned according the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[35] *UKCCA, 2018.*

6.4 In summary

In 2018 it is estimated that the holiday park/campsite sector in Wales generated **a total visitor expenditure impact of £1,331m**. **This expenditure impact equates to a GVA impact of £761.4m (including multipliers) and supported 24,677 FTE jobs.**

According to a report commissioned by VisitBritain[36] the tourism sector in Wales had a direct GVA of £3.5bn[37], therefore the holiday park/campsite sector with a direct GVA of £520.2m (excluding multipliers)[38] makes a substantial contribution (15%) to the sector's GVA.

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

- **North Wales**: with visitor expenditure of £865.1m, equivalent to a GVA impact of £494.3m, and to 16,020 supported FTE jobs
- **South West Wales:** with visitor expenditure of £334.8m, equivalent to a GVA impact of £191.3m, and to 6,201 supported FTE jobs

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

- **owner-occupied caravan holiday homes**: with visitor expenditure of £757.0m, equivalent to a GVA impact of £432.5m, and to 14,018 supported FTE jobs
- **touring pitches**: with visitor expenditure of £370.7m, equivalent to a GVA impact of £211.8m, and to 6,865 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and caravan holiday home owners adds a **further £127.1m of expenditure to the Welsh economy.**

[36] https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf

[37] *Converted to 2018 prices.*

[38] *See appendix 3 for GVA excluding multipliers summary table.*

7 Conclusions

The Welsh holiday park/campsite sector makes a substantial contribution to the Welsh tourism economy, generating £1.33bn in visitor expenditure, equivalent to £761.4m GVA and supporting 24,677 FTE jobs.

High proportion of non-Welsh visitors: The sector brings in a large number of non-Welsh tourists to Wales, with 69% of all visitors to Welsh holiday parks/campsites resident outside Wales.

Visitors stay longer on Welsh holiday parks/campsites than the national tourism average: Visitors take a holiday or short break on a holiday park/campsite on several occasions over the course of a year, with 43% of respondents taking five or more trips a year. They also tend to take lengthy stays, with renters and tourers spending, on average, 4.7 days on a holiday park/campsite on each holiday, and owners staying 6.2 days. This is longer than the average trip length of visitors to Wales of 3.4 days[39].

Visitors to Welsh holiday parks/campsite spend more money than the national average: During each of these stays, visitors spend a considerable amount of money per day in the local economy, including £95 on-site and off-site by renters and tourers, and £83 on-site and off-site by owners. This is higher than the average daily spend by visitors to Wales at £52[40].

Flexible accommodation and facilities provision, support local communities, protects the environment and encourages a healthier lifestyle: Wales' 898 member holiday parks/campsites account for 62,586 pitches[41]. These holiday parks/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 home owners adds a further £127.1m of expenditure to the economy.

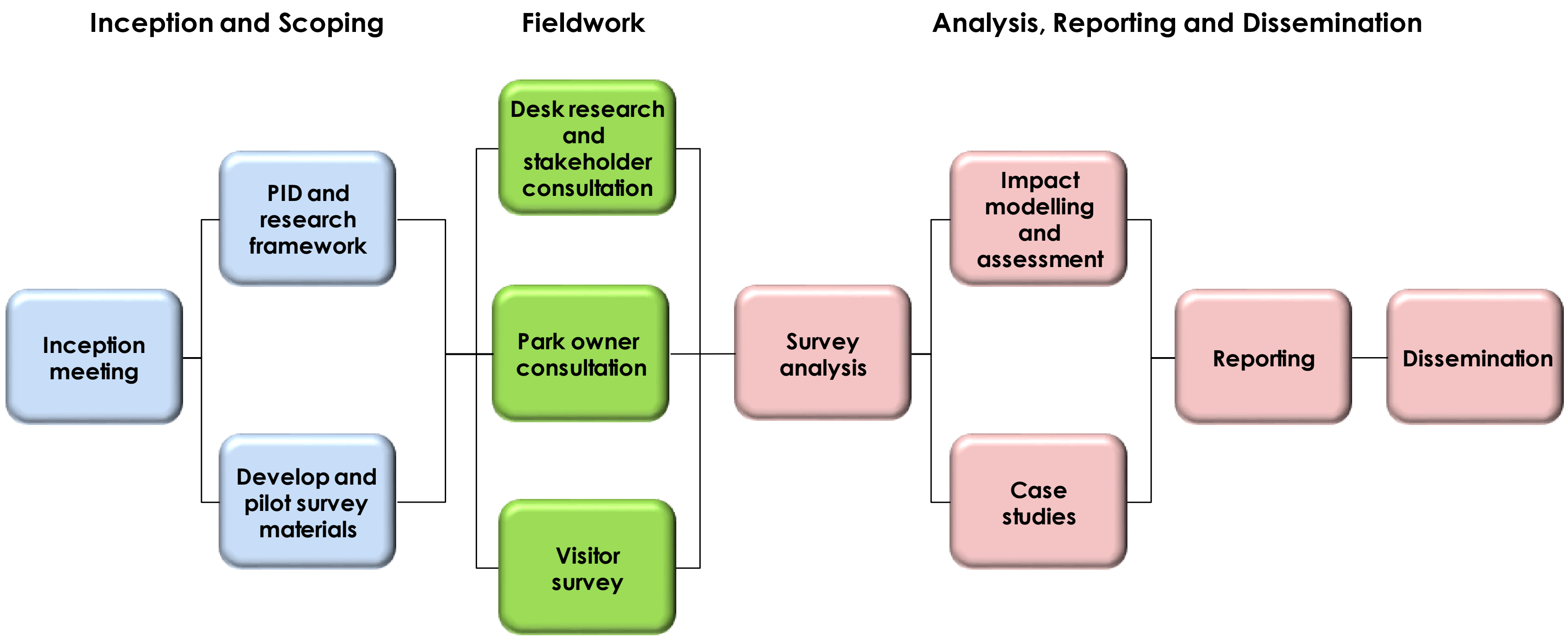
Migrant worker levels are very low: The potential impact of Brexit on migrant workforce is likely to be low, with no holiday park/campsite operators reporting using migrant labour[42].

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

[39] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf
[40] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf
[41] *This includes Certificated Sites and Certificated Locations.*
[42] *While respondents did not have migrant workers, we cannot assume that the overall population is the same.*

Appendix 1 – Method

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



Appendix 2 – Regional Breakdown

Mid Wales – includes Aberystwyth, Cardigan, Newtown

North Wales – includes Llandudno, Rhyl, Colwyn Bay and Prestatyn

South East Wales – includes Vale of Glamorgan, Rhondda Cynon Taff, Merthyr Tydfil, Caerphilly, Cardiff, Newport, Blaenau Gwent, Torfaen, Monmouthshire and Bridgend

South West Wales – includes Swansea, Neath Port Talbot, Pembrokeshire and Carmarthenshire

On-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	11.0	4.7	0.1	0.1	0.7	0.0	16.6
North Wales	78.0	221.8	33.6	0.4	15.6	2.7	352.1
South East Wales	9.4	22.6	4.4	0.0	0.2	0.1	36.7
South West Wales	43.9	68.3	15.9	0.2	5.7	0.8	134.8
Total	**142.3**	**317.4**	**54.0**	**0.7**	**22.2**	**3.6**	**540.2**

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet / cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	8.5	2.9	0.1	0.1	0.4	0.0	12.0
North Wales	60.2	138.0	26.0	0.4	9.7	2.1	236.4
South East Wales	7.3	14.2	3.3	0.0	0.1	0.1	25.0
South West Wales	33.9	42.5	12.3	0.1	3.6	0.5	92.9
Total	**109.9**	**197.6**	**41.7**	**0.6**	**13.8**	**2.7**	**366.3**

Indirect and induced multiplier impacts (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	9.1	3.6	0.1	0.1	0.5	0.0	13.4
North Wales	64.9	169.1	28.0	0.4	11.9	2.3	276.6
South East Wales	7.9	17.2	3.6	0.0	0.1	0.1	28.9
South West Wales	36.6	52.1	13.3	0.1	4.4	0.6	107.1
Total	**118.5**	**242.0**	**45.0**	**0.6**	**16.9**	**3.0**	**426.0**

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	28.6	11.2	0.3	0.3	1.6	0.0	42.0
North Wales	203.1	528.9	87.6	1.2	37.2	7.1	865.1
South East Wales	24.6	54	11.4	0.0	0.4	0.2	90.6
South West Wales	114.4	162.9	41.5	0.4	13.7	1.9	334.8
Total	**370.7**	**757.0**	**140.8**	**1.9**	**52.9**	**9.2**	**1,332.5**

FTE Employment

Employment associated with on-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	203	87	2	1	12	0	306
North Wales	1,444	4,108	622	8	288	51	6,521
South East Wales	174	418	81	1	5	2	681
South West Wales	814	1,265	295	3	106	13	2,496
Total	**2,635**	**5,878**	**1,001**	**13**	**411**	**66**	**10,004**

Employment associated with off-site expenditure (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	157	54	2	1	8	0	222
North Wales	1,115	2,556	481	7	179	39	4,377
South East Wales	135	260	62	1	3	2	463
South West Wales	629	787	228	2	66	10	1,722
Total	**2,036**	**3,657**	**773**	**11**	**256**	**51**	**6,784**

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

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	169	67	2	1	9	0	248
North Wales	1,203	3,132	519	7	220	42	5,123
South East Wales	145	319	67	1	3	1	536
South West Wales	678	964	246	2	81	11	1,982
Total	**2,195**	**4,482**	**834**	**11**	**313**	**54**	**7,889**

Employment associated with visitor expenditure impact (FTE jobs)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	529	208	6	3	29	0	776
North Wales	3,762	9,796	1,622	22	687	132	16,021
South East Wales	454	997	210	3	11	5	1,680
South West Wales	2,121	3,016	769	7	253	34	6,200
Total	**6,866**	**14,017**	**2,608**	**35**	**980**	**171**	**24,677**

Gross Value Added

GVA associated with on-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	6.3	2.7	0.1	0.0	0.4	0.0	9.5
North Wales	44.7	126.8	19.3	0.3	9.0	1.5	201.6
South East Wales	5.4	12.9	2.5	0.0	0.1	0.1	21.0
South West Wales	25.2	39.1	9.1	0.1	3.3	0.4	77.2
Total	**81.6**	**181.5**	**31.0**	**0.4**	**12.8**	**2.0**	**309.3**

GVA associated with off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	4.8	1.7	0.1	0.0	0.2	0.0	6.8
North Wales	34.5	80.0	14.8	0.2	5.5	1.2	136.2
South East Wales	4.2	8.0	1.9	0.0	0.1	0.0	14.2
South West Wales	19.5	24.4	7.0	0.1	2.1	0.3	53.4
Total	**63.0**	**114.1**	**23.8**	**0.3**	**7.9**	**1.5**	**210.6**

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

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	5.2	2.0	0.1	0.0	0.3	0.0	7.6
North Wales	36.8	95.9	15.9	0.2	6.7	1.3	156.8
South East Wales	4.4	9.8	2.1	0.0	0.1	0.0	16.4
South West Wales	20.8	29.5	7.5	0.1	2.5	0.3	60.7
Total	**67.2**	**137.2**	**25.6**	**0.3**	**9.6**	**1.6**	**241.5**

GVA associated with visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Mid Wales	16.3	6.4	0.3	0.0	0.9	0.0	23.9
North Wales	116.0	302.7	50.0	0.7	21.2	4.0	494.6
South East Wales	14.0	30.7	6.5	0.0	0.3	0.1	51.6
South West Wales	65.5	93.0	23.6	0.3	7.9	1.0	191.3
Total	**211.8**	**432.8**	**80.4**	**1.0**	**30.3**	**5.1**	**761.4**