Pitching the Value

2024 Economic Benefit Report: Holiday Parks and Campsites WALES

Report for the

UK Caravan & Camping Alliance

February 2024

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Executive Summary

The Welsh holiday park and campsite sector makes a substantial contribution to the Welsh tourism economy, generating £1.66bn in visitor expenditure, which is equivalent to £945.9m GVA and supports 30,726 FTE jobs.

Visitors to Welsh holiday parks and campsites stayed 107% longer and spent 14% more than the Welsh 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 Welsh holiday park and campsite sector generated **a gross direct visitor expenditure impact of £1.66bn in the economy**. This visitor expenditure **supports 30,726 FTE jobs and contributes £945.9m** (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 £92.8m of expenditure to the Welsh economy**.

Holiday Park and Campsite Operators

According to evidence provided by the UKCCA and the Frontline survey, **in 2023 there were 922 holiday parks and campsites operating in the Wales, accounting for 69,088 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 97 of these parks. Research found that **Welsh 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. **Welsh holiday parks and 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 65% in high season (August) and 45% in mid-season (September). Holiday park and campsite operators support their local communities through:

- **expenditure** – 31% from the total survey sample cumulatively spent £13.4m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local business and causes, and fundraising for charities
- **environmental activities** – including support for recycling and biodiversity, water and energy conservation initiatives, renewable energy adoption and participation in the Green Tourism award scheme
- **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 returning to pre COVID-19 levels, increased costs as well as a change in consumer behaviour
- **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

Holiday Park and Campsite Visitors

437 respondents to the survey had made a visit to a holiday park and campsite in the Wales in 2023. The majority of the survey respondents lived in England (71%). Just over half of the respondents (54%) stayed on a holiday park and campsite in the UK five times or more during the last 12 months. **85% stayed in a touring caravan, motorhome or tent over the course of the year**. 9% 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 **16% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 2. **30% of groups brought a pet.** Visitors spent, on average, 5.6 nights per trip. **This is higher than the average tourism number of nights per trip at 2.7[5].**

Visitors who stayed in rented accommodation spent, on average, £279 per day, including £159 on-site and £120 off-site. **Touring visitors spent, on average, £96 per day**, including £42 on-site and £54 off-site. **Visitors who owned their holiday caravan spent £106 per day**, including £57 on-site and £49 off-site. **This is higher than the average tourism spend per night by those taking a trip in Wales of £89[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 Wales[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 Welsh Tourism in Context

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

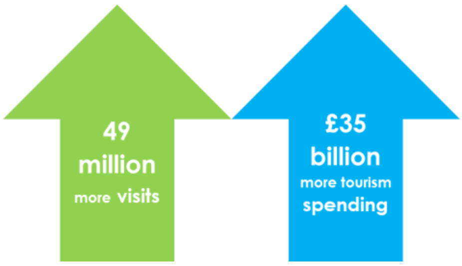
2.1 National tourism strategies

VisitBritain 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:

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

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.

In **Wales**, the tourism strategy is governed by Welcome to Wales: Priorities for the visitor economy 2020-2025 policy[14] which set its vision to 2025:

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

Its goals and ambitions are to ***"grow tourism in a way that also delivers benefits for people and places including environmental sustainability, social and cultural enrichment, and health benefits".***

The tourism strategy for Wales is aimed at driving higher tourism earnings to deliver maximum value for the Welsh economy and making a difference to people's lives, be they visitors, local stakeholders or business owners.

Some of the key priorities of this strategy include:

- **great products and places** – to maintain position in a competitive market, [Wales] will continue to invest in tourism products and events that deliver both local benefits to communities in Wales, and put Wales on the world stage
- **outstanding visitor experiences** – every visitor to Wales should also have a positive, memorable experience at individual attractions and throughout their stay

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

- **an innovative Cymru Wales brand** – will continue to deliver a bold and integrated brand for Wales, harnessing tourism's potential to act as a defining sector [Wales] on the world stage, presenting Wales to the world as a welcoming, vibrant destination
- **an engaged and vibrant sector** – recognise, coordinate and harness the contribution of a wide range of partners to growing Wales's visitor economy, and to realise tourism's own potential to underpin the economic, social, cultural and environmental wellbeing of all kinds of communities across Wales

2.2 National tourism statistics

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

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

40% increase in GDP from 2020 to 2023

GDP contribution of £214 billion in 2022

3% annual growth 2022 - 2032

Tourism-related industries in Wales accounted for 5% of GVA in 2019 (£3.4bn)[16]. The **spend per night by visitors to Wales was £89 (per adult equivalent). Visitors spent an average of 2.7 nights per trip[17].**

The Wales Visitor Economy profile (2021)[18] shows some further statistics around tourism in Wales:

- tourism is one of the country's fastest growing sectors[19]
- more than 11% (151,000) of the workforce in Wales was employed in tourism, which was a drop from 161,000 in 2019
- the majority of these jobs (76%) were in hospitality[20]
- South East Wales accounted for the largest volume of tourism industry employment with 43% (65,000)

A 2023 Mintel report looking at the UK camping and caravanning sector,[21] found that total volumes returned to pre-pandemic levels in 2022, with the overall number of camping and/or caravanning trips reaching an estimated 16.7m[22]. Other notable statistics 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[23]. Demand remains robust at the premium end of the spectrum. Some 69% of recent and potential future campers/caravanners say they would pay more to stay on a holiday park and campsite with private bathroom facilities, 55% would pay more to stay in a luxury caravan, and 54% would pay more to stay in unusual 'glamping' accommodation[24].

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[15] https://wttc.org/news-article/new-report-from-wttc-reveals-uk-travel-and-tourism-sector-is-expected-to-create-700000-jobs-over-the-next-decade
[16] *https://www.gov.wales/wales-visitor-economy-profile-2021-html#:~:text=Please%20see%20Definitions%20of%20Tourism,2015%20(%C2%A32.7%20billion)*
[17] *https://www.visitbritain.org/research-insights/great-britain-domestic-overnight-trips-latest-results*
[18] *https://www.gov.wales/wales-visitor-economy-profile-2021-html#:~:text=Tourism%20enterprises%20(12%2C110)%20accounted%20for,of%20enterprises%20registered%20in%20Wales*
[19] *https://www.gov.wales/wales-visitor-economy-profile-2021-html*
[20] *https://www.gov.wales/sites/default/files/publications/2020-02/welcome-to-wales-priorities-for-the-visitor-economy-2020-2025.pdf*
[21] *Camping and caravanning is defined as holidays that use tents, trailer tents, touring caravans, caravan holiday homes, park homes, and motorhomes or campervans as accommodation.*
[22] *Camping and Caravanning UK, Mintel, 2023.*
[23] https://www.easier.com/141247-carry-on-camping-4-5-million-brits-took-their-first-camping-holiday-during-the-pandemic.html
[24] *Camping and Caravanning UK, Mintel, 2023.*

3 Holiday Park and Campsite Operator Consultation

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

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

While this represents a comprehensive list of holiday parks and campsites in Wales 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 Wales holiday parks and campsites

According to evidence provided by the UKCCA and our survey, **in 2023 there were 922 holiday parks and campsites operating in Wales, accounting for 69,088 pitches[27].**

The majority of these pitches are either owner-occupied holiday caravans (41,174, 60%) or touring pitches[28] (16,892, 24%). 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.

North Wales contains both the highest number of holiday parks and campsites (508) and the highest number of pitches (44,952). Table 3.1 summarises the composition of Wales's holiday park and campsite sector and Appendix 1 provides a breakdown of areas included in each region.

Table 3.1: Composition of Wales'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
Mid Wales	53	1,042	15	4	527	18	79	5	**1,690**
North Wales	508	9,177	136	81	2,8193	3,698	3,011	656	**44,952**
South East Wales	54	1,403	22	6	2,979	426	101	8	**4,945**
South West Wales	307	5,270	64	7	9,476	1,393	796	495	**17,501**
Wales	**922**	**16,892**	**237**	**98**	**41,175**	**5,535**	**3,987**	**1,164**	**69,088**

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

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

3.2 Sampling methodology

Holiday parks and campsite operators across Wales 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.

97 out of 922 holiday parks and campsites across Wales participated giving us a 95% confidence +/– 9.5% margin of error. This means that there is a 95% probability that the sample accurately reflects the wider.

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 four regional areas, receiving a minimum response at least 7%.

Table 3.2: Locations of holiday parks and campsites

Location	Number responding	Estimated population	Percentage consulted
Mid Wales	19	53	36%
North Wales	36	508	7%
South East Wales	7	54	13%
South West Wales	34	307	11%
Unknown	1		
Total	**97**	**922**	**10%**

Source: Frontline Park and Campsite Operators Survey, 2023

3.4 Holiday parks and campsites size

The survey sample also included a diverse and representative mix of very small, small, medium, large and very large holiday parks and campsites, including 2 very large (251 pitches or more) and 44 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)	44	452	10%
Small (6-50 pitches)	11	133	8%
Medium sized (51-100 pitches)	19	148	13%
Large (101-250 pitches)	20	130	15%
Very large (251 pitches or more)	2	59	3%
Total	**96**	**922**	**10%**

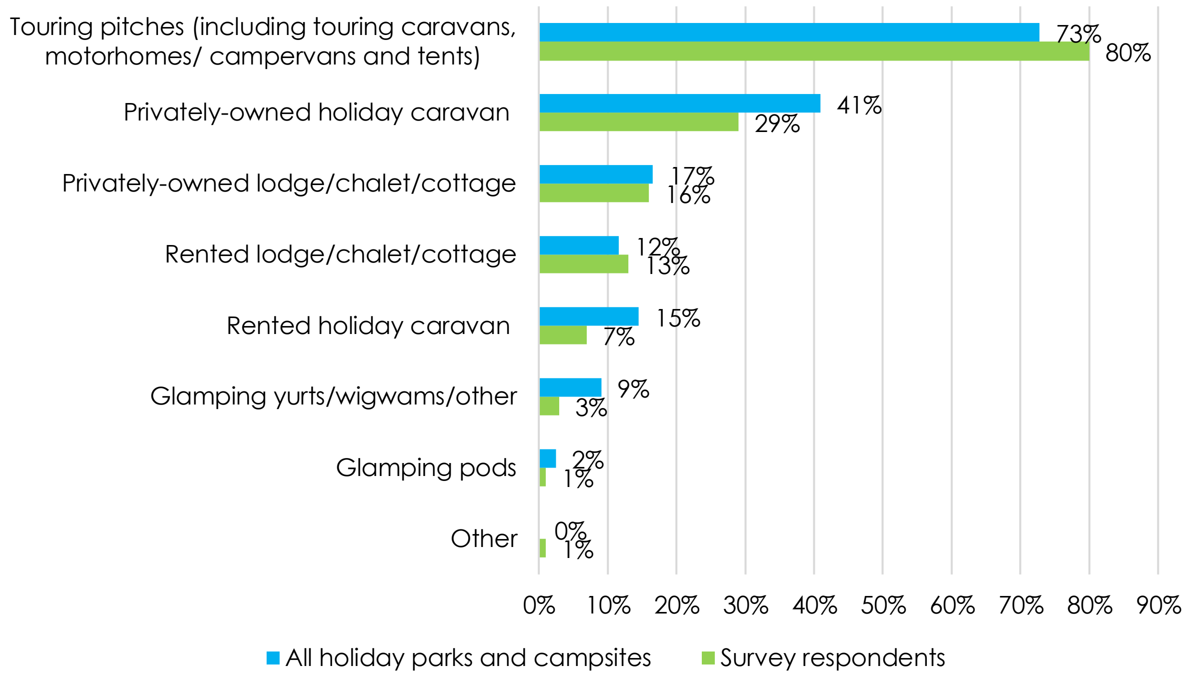
Source: UKCCA, 2023

3.5 Accommodation provided

The accommodation type was also broadly representative of the sector. 80% of those surveyed had touring pitches which includes touring caravans, motorhomes/campervans and tents.

32%[29] had owner-occupied accommodation (caravans or lodges), and 16% offered rented accommodation (19% 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 offer more than one type of accommodation)

N=96 (survey respondents)
N=922 (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 Wales's holiday parks and campsites.

In very small holiday parks and campsites, two thirds (66%) had toilet blocks 62% had showers, while slightly over a fifth (21%) 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 showers, toilet and Wi-Fi, the majority also had a laundry (70%), defibrillator (62%) and an outdoor play area (46%). A small number, including the very large have also increased their environmental facilities having installed electric vehicle charging, solar panels and heat pumps.

Other facilities included recreational facilities e.g. gym, leisure club, games rooms, undercover fire pit areas and camper fridge and freezer access.

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

Table 3.4: Facilities listed by holiday park and campsites surveyed

Facility	Very small holiday parks and campsites %	Small, medium and large holiday parks and campsites %	Very large holiday parks and campsites %
Toilet block	66%	66%	50%
Showers	62%	62%	50%
Laundry	7%	70%	100%
Retail/shop	-	10%	50%
Restaurant/bar/takeaway	-	10%	100%
Entertainment	-	2%	50%
Outdoor play area	-	46%	50%
Games/information room	-	30%	-
Wi-Fi	21%	72%	100%
Electric vehicle charging points	-	22%	50%
Dog washing facilities	-	10%	-
Bike cleaning stations	-	-	-
Locker and or back packing facilities	-	-	-
Defibrillators	-	62%	50%
Solar panels	-	14%	50%
Heat pumps		8%	-
Other	55%	12%	-
Total parks consulted	**29**	**50**	**2**

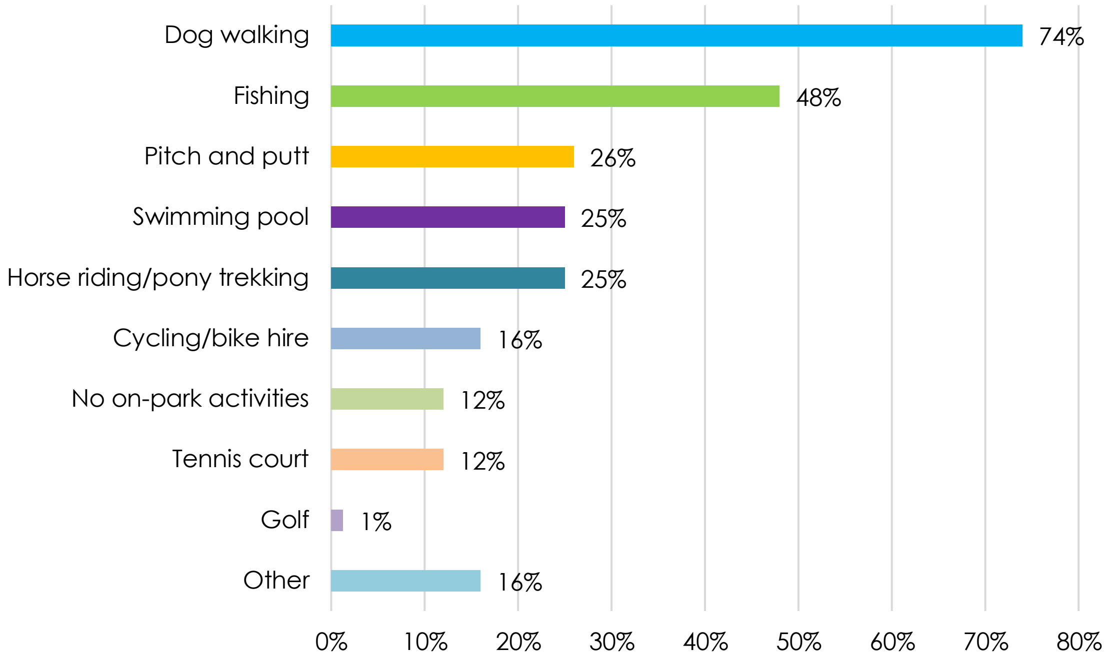
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 *N*= 81
(figures sum to over 100% as most parks offer more than one type of facility)

The most common **activities** provided on-site included dog-walking (74%), followed by fishing (48%), pitch and putt (26%) swimming pools (25%), and horse riding/pony trekking (25%).

'Other' activities included:

- local attractions e.g. castles, craft centres
- recreational activities e.g. bowling, llama walks
- natural attractions such as beaches and rivers

Figure 3.2: Activities listed by holiday park and campsites surveyed

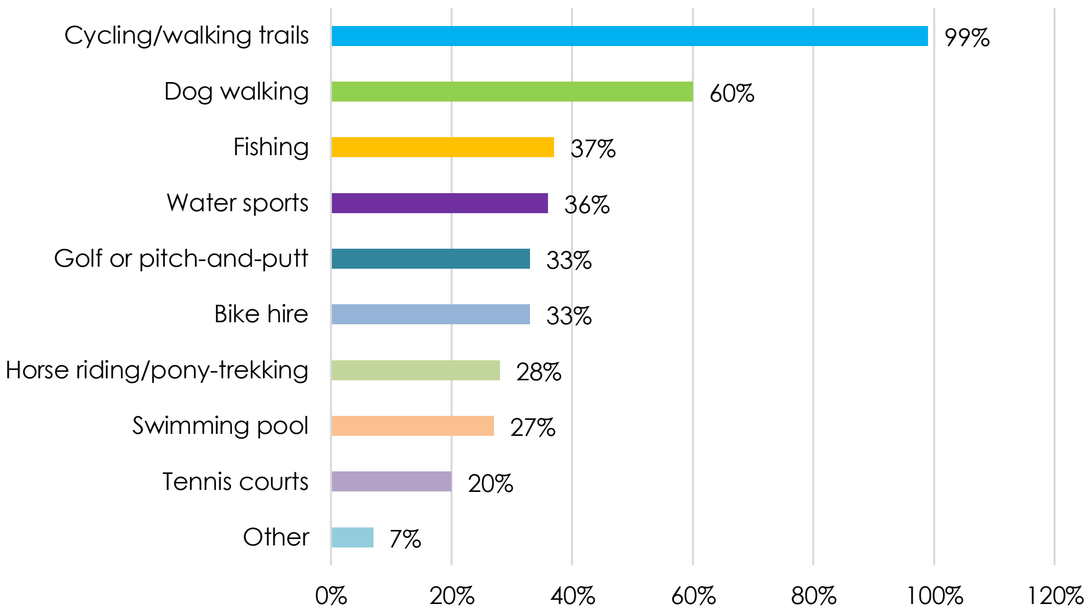


Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=73
(figures sum to over 100% as most offer more than one type of facility)

Holiday parks and campsites have access to a range of **activities in the local area**. 99% had cycling/walking trails in the areas as well as dog walking (60%). At least a third had fishing (37%), water sports (36%), golf or pitch-and-putt (33% and bike hire (33%).

'Other' includes mountain biking and climbing, activity centres and beaches.

Figure 3.3: Range of activities in the local area



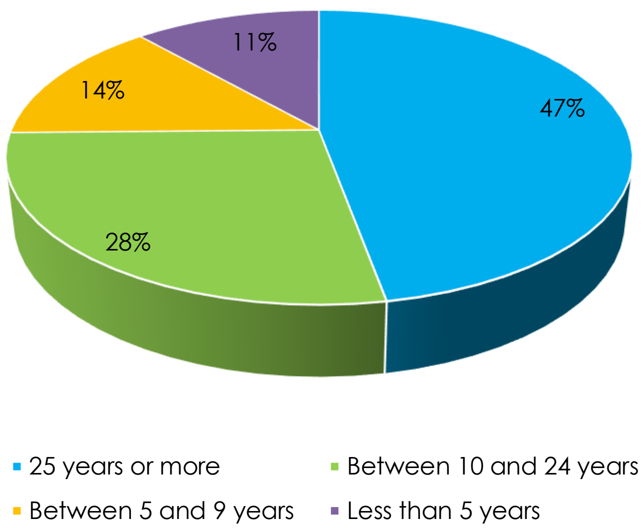
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=75
(figures sum to over 100% as most parks had more than one type of activity in the local area).

3.7 Holiday park and campsite ownership

In the majority of responses operators saw their holiday parks and campsites as long-term investments, with 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



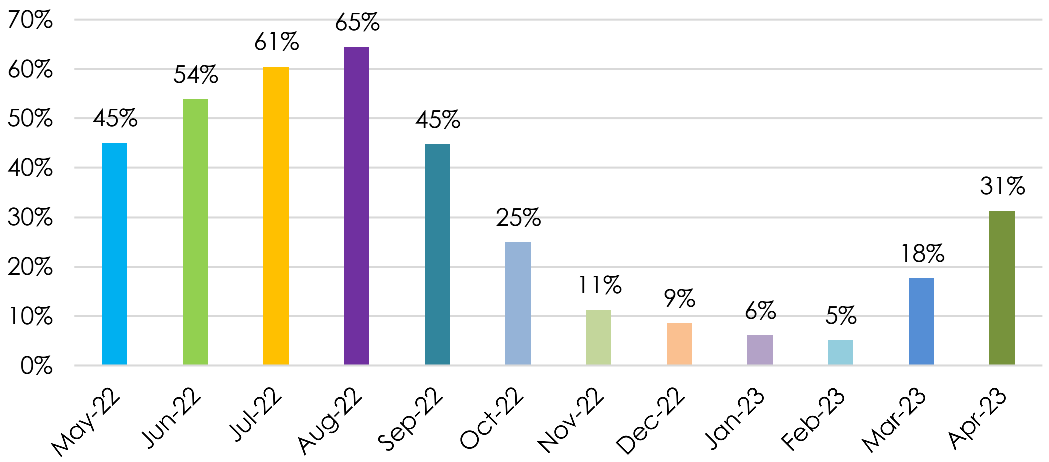
Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=87

3.8 Length of season and occupancy rates

Three quarters (75%) operated seasonally with the remainder (25%) open all year. Where holiday parks and campsites were seasonal, most were open from March-October/November.

Average occupancy rates peaked at 65% in high season (August 2022), falling to 45% in mid-season (September 2022). Low season average occupancy ranged from a low of 5% in February (2023) to a high of 18% in March (2023) as presented in Figure 3.5.

Figure 3.5: Average occupancy rates on holiday parks and campsites surveyed[30]



Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=60

[30] *Due to the higher number of seasonal parks responding to the survey, average UK occupancy figures have been used in the economic modelling for the out of season months.*

3.9 Visitor origin

When asked where their visitors came from, respondents said that, 68% came from England, 24% from Wales, 2% from Scotland, and <1% from Northern Ireland; 3% were from outside the UK. The most cited market for visitors from outside the UK were such as Germany, the Netherlands, France, the Republic of Ireland, and Switzerland.

When segmented by region (Table 3.5) there was a small amount of variance. The two northern regions had higher percentages of visitors from England and only the South East region had higher percentages of visitors from Wales than England.

Table 3.5: Visitor origin of holiday parks and campsites surveyed

Area	England	Wales	Scotland	Northern Ireland	Outside UK
Mid Wales	77%	15%	3%	<1%	5%
North Wales	80%	12%	3%	1%	3%
South East Wales	17%	45%	1%	<1%	2%
South West Wales	53%	44%	1%	<1%	3%
Total*	**68%**	**24%**	**2%**	<1%	**3%**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 *N=62 total*

***Total percentages may add up to under/over 100% due to rounding and recipient input*

3.10 Staff employed

Results show that on average, there were 4.6 full-time and 1.5 part-time staff all year round and 2.9 full-time and 1.1 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.

No respondents employed migrant workers.

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

Holiday Park and Campsite Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small (1-5 pitches)*	-	-	-	-
Small (6-50 pitches)	8.1	0.5	7.3	1.4
Medium sized (51-100 pitches)	1.2	0.6	2.8	0.4
Large (101-250 pitches)	1.6	1.9	3.4	0.7
Very large (251 pitches or more)	2.5	1.5	17.5	21.5
Average across all holiday parks and campsites**	**2.9**	**1.1**	**4.6**	**1.5**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=52

**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 0-70 full time and 0-42 part time all year staff, and 0-80 full time and 0-15 part time seasonal staff*

3.11 Expenditure by holiday park and campsite[31]

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	£4,639,722	£193,322
Operating expenditure	£4,699,145	£156,638
Wages and salaries	£4,015,772	£133,859
Total expenditure	**£13,354,639**	**£483,819**

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=24-30
** Ranges from £3,000-£2m (capital), £1,000-£350,000m (operating) and £0-£314,557m (wages and salaries)*

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

- **rising utility costs**
- **investments** – in new stock and accommodation, and facilities e.g. cafes, restaurants and shops
- **new developments or upgrades** – including new pitches and other improvements, repairs and upgrades

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

- **accommodation** – including new lodges, glamping pods, improving pitches and other developments
- **utility development** – including infrastructure upgrades and piped gas
- **facilities** – including new and refurbishment kitchens, IT equipment and pool refurbishment
- **infrastructure** – road resurfacing and improvements, wider landscaping and park maintenance
- **digital improvements** – such as broadband and Wi-Fi infrastructure, TVs, and IT booking software

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	£612,123	£18,975,825	£713,139	£20,681,041
Next three financial years	£1,319,252	£38,258,303	£1,276,900	£43,414,609

Source: Frontline Holiday Park and Campsite Operator Survey, 2023 N=29-34
**Ranges from: maintenance £ 4,338-£2.6m (next financial year) and, £30-£5.3m (next three financial years); improvements £0-£2.6m (next financial year) and £80-£5.3m (next three financial years)*

When asked how their income had changed over the last two years, over half (55%) of the 34% who responded said it had stayed the same, with 36% saying increased while 9% said it had decreased.

The main 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 price rises.

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

3.12 Community engagement

Over a quarter (26%) of operators provided information on how they **engage with the local community** responses included:

- **promoting local businesses** – 92% promoted local producers, suppliers, restaurants and shops
- **social media advertising** – 88% advertise and signpost local businesses and causes on social media
- **promoting local events** – 84% promoted and sponsored local events such as the National Eisteddfod
- **fundraising** – 68% fundraise for the community, particularly around sports and community groups and parish and community councils
- 20% work with **community groups and community councils**

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

"Supports local events, local tourist attractions, local cafes and restaurants."

Mid Wales

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

South West Wales

"Employing local subcontractors. Promoting National Eisteddfod in the area 2023. Notice board of local events, information etc."

North Wales

3.13 Environmental improvement

Slightly over a quarter of holiday park and campsite operators (26%) provided information on how they **supported environmental improvements**. Over half (53%) of respondents had a carbon reduction plan. The most frequently occurring environmental initiatives included:

- **recycling** – which was highlighted by 100% and included educating and encouraging visitors to follow recycling procedures
- **energy and water conservation** – 92% did this through water harvesting, solar panels, and biomass heating
- 84% showed **support for local wildlife** – including a range of conservation projects and tree planting
- **award participation** – 68% took part in award schemes including the Green Tourism award
- **using sustainable accommodation** – 60% had sustainable accommodation
- 12% had **restricted vehicle movement** – such as car-free zones

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

"Growing trees and hedging. Plans to put solar panels in place for electric. Making sure chemical waste is disposed of correctly."

Mid Wales

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

North Wales

"Only environmentally friendly cleaning and toilet fluids allowed. Recycling of all waste (collected by specialist company). No lights allowed at night (Dark Skies). No barbeques etc on the grass."

North Wales

3.14 Health and wellbeing

Almost two fifths (39%) provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **walking and cycling routes, waterways and beaches** – 61% provided access to and information about these
- 55% **encourage dog owners**
- 42% **provided local health and wellbeing facilities** – and granted access to the broader community e.g. school groups to these amenities
- **healthy food options** – 39% had on-site restaurants/cafes

'Other' responses (39%) included signposting to local cultural or nature activities and creating a relaxing environment on-site.

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

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

"I am a local person and am able to feed them all the information regarding the locality and the environment. I take pride in that and it is appreciated. I run the adjoining cultural centre. I take an interest in my campers and find out their requirements and interests."

Mid Wales

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

South West Wales

"Local activities promoted in our information shed."

North Wales

3.15 COVID-19 pandemic

Operators were asked how the COVID-19 pandemic had changed the sector; over a quarter (29%) 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
- **a reduction in bookings** – since overseas travel became possible again and rising costs
- **changing customer behaviour** – for example the type of accommodation booked, their expectations in regard to cancellations, and last minute bookings
- **an increase in competition** – that may arise now that overseas travel is possible again, as well as from unlicensed or pop-up parks
- **staffing issues** – in particular the recruitment of staff
- **no or little effects** – since restrictions were lifted

Operators were also asked what effect COVID-19 had on their operational expenditure over the last two years. Of the 34% who responded, 85% said it had risen while only 3% said it had reduced. The remainder stayed the same.

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

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

South West Wales

"We launched post 2020 lockdown so benefitted from boom in staycations. As people travel abroad again there will be a shakedown in the market and competition will be higher as a result of all the parks who added more stock now offering reduced prices to fill them. Staffing, particularly in housekeeping and hospitality has been affected by COVID-19, quantity and quality of staff is a struggle."

South West Wales

3.16 Consumer demographics

Operators were asked if the consumer demographics have changed over the years; 32% provided some insight. Examples included:

- **demographic shift** – both in terms of new younger couples, a general shift towards retired guests and a change in the number of 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:

" Younger couples taking shorter breaks rather than families staying for longer holidays."

South West Wales

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

Mid Wales

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

South West Wales

3.17 Cost of living implications

Operators were asked about the implications of the cost-of-living crisis; 35% responded. The most frequently occurring examples included:

- **impact of rising costs** – including gas, fuel and electricity and businesses may cease to be financially viable
- **changing customer behaviour** – in particular shorter visitor stays or generally spending less
- **pricing challenges** – decreased margins due to trying to limit price increases to offer competitive rates
- **increasing general uncertainty** – to remain financially viable while trying to navigate these challenges

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

"Everyone watching their pennies."

Mid Wales

"Water costs, petrol costs, electricity costs all increased."

South West Wales

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

North Wales

3.18 Brexit

A small proportion respondents (13%) provided feedback on the implications of Brexit on supplies; the majority (82%) had issues. The most frequently occurring examples included:

- **supply chain delays or disruptions** – for example getting or parts for new units
- **increased costs**

Operators were also asked if Brexit had produced more red tape for their business; of the 47% who responded, almost half (48%) said it had.

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

" Lost 80% of EU visitors. Many mower spares etc attract import duty."

South West Wales

" More on the attraction side of the business for sourcing animal medication/treatments, feed, and the movement of animals in and out of Europe."

South West Wales

"In relation to obtaining items to run the business."

North Wales

3.19 Overseas travel and overseas visitors

Operators were asked if they had seen a decrease in overseas visitors; 30% responded. The majority (79%) said they had, **seen a decrease during travel restrictions. Some estimated the reduction was up to 39%.**

3.20 Holiday park and campsite operator summary

This research found that Wales'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 65% in high season (August 2022) and 45% in mid-season (September 2022). The proportion of visitors outside Wales varied significantly, 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** – 31% from the total survey sample cumulatively spent £13.4m per year in capital and operating expenditure, wages and salaries
- **local community engagement** – including hosting community events, promoting local business and causes, and fundraising for charities
- **environmental activities** – including support for recycling and biodiversity, water and energy conservation initiatives, renewable energy adoption and participation in the Green Tourism award scheme
- **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 returning to pre COVID-19 levels, increased costs as well as a change in consumer behaviour
- **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

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.

437 respondents to the survey had made a visit to a holiday park and campsite in Wales in 2023. Table 4.1 shows the spread of visitors across the Welsh regions.

Table 4.1: Location of holiday parks and campsites visited

Location	Percentage
Mid Wales	18%
North Wales	43%
South East Wales	9%
South West Wales	29%
Unknown	1%
Total consulted	**437**

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

4.1 Visitor origin and number of trips

The majority of the respondents lived in England (71%), and just over a quarter (27%) lived in Wales. This aligns to Welsh holiday park and campsite operators who reported that the majority of their visitors come from England (Section 3).

Table 4.2: Visitor home country

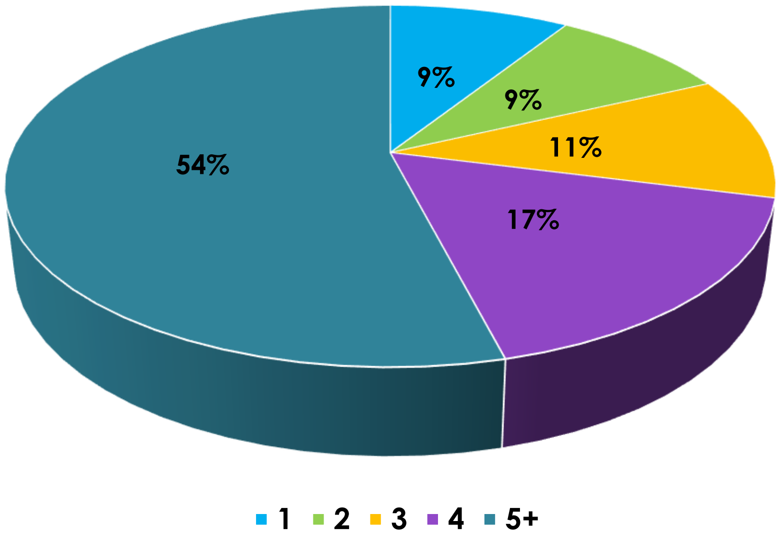
Location	Visitors
England	71%
Wales	27%
Scotland	1%
Northern Ireland	-
Outside the UK[32]	<1%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=437

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

Over half of respondents (54%) stayed on a holiday park and campsite five times or more during the last 12 months; a further 17% stayed four times. 14% of these were a rally 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=427

4.2 Visitor characteristics

85% of respondents had stayed in a touring caravan, motorhome or tent over the course of the year. 9% stayed in an owner-occupied holiday caravan or lodge; while 4% stayed in some form of rented accommodation including glamping and rented lodge/chalet/cottage.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	42%
Touring caravan	36%
Tent	7%
Static accommodation types	
Holiday caravan owned	8%
Holiday caravan rented	4%
Privately-owned lodge/chalet/cottage	1%
Glamping e.g. pods/yurts/wigwams/other	<1%
Rented lodge/chalet/cottage	<1%
Mixed types e.g. motorhome and glamping pods	
Multiple or mixed types of accommodation	1%

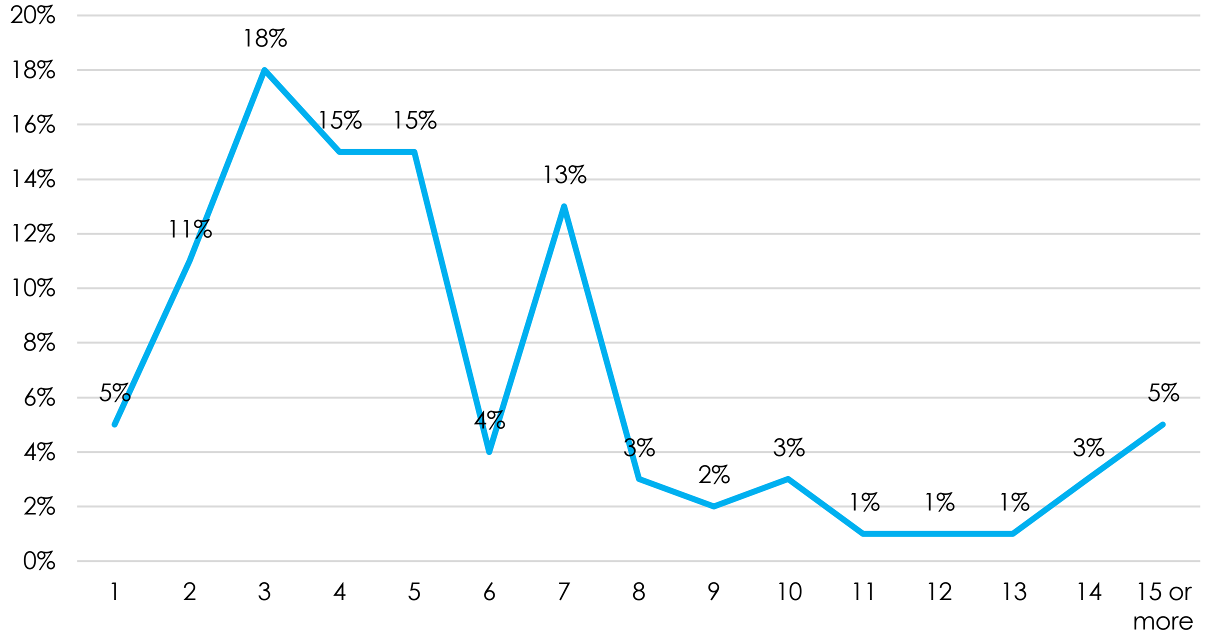
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

The high level of tourers is not surprising as the vast majority (84%) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club[33]. When broken down further:

- 28.2% were members of CCC
- 27.6% were members CAMC
- 27.6% were members of both

On average respondents spent **5.6 nights per trip.** The distribution of responses is shown in Figure 4.2.

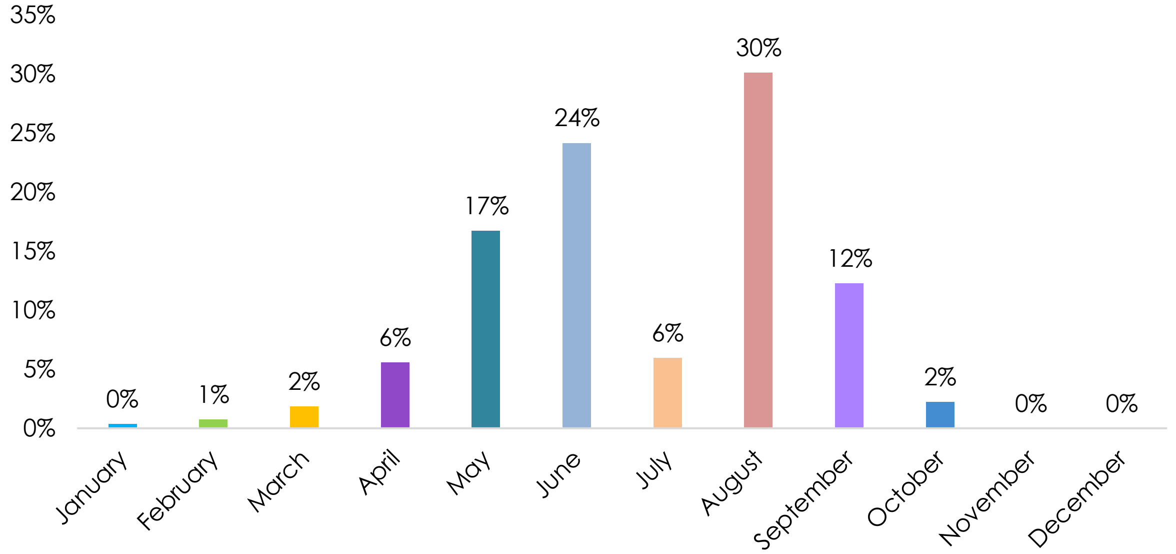
Figure 4.2: Number of nights stayed per visit



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=411

Figure 4.3 shows the month in which respondents began their trip. August (30%) was the most popular followed by June (24%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=269

[33] *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 2.0, and 16% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.8. 30% 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 (3.4 and 2.5 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	11%	37%	74%
2	78%	54%	18%
3	7%	7%	4%
4	3%	-	
5+	1%	2%	4%
Average	2.0	1.8	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, £1314 per visit, including £750 on-site and £564 off-site.

Touring visitors and their party spent, on average, £508 per visit, including £221 on-site and £287 off-site.

Visitors who owned their holiday caravan spent, on average, £877 per visit, including £469 on-site and £408 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	£138	£75	£69
Transport spent during trip	£36	£29	£33
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)[34]	£548	£192	£440
Holiday park and campsite facilities (e.g. Wi-Fi, laundrette etc)	£4	£5	£4
Eating/drinking on the holiday park and campsite	£129	£16	£15
Eating/drinking in the surrounding area	£159	£81	£104
Recreation/entertainment on the holiday park and campsite	£47	£3	£5
Recreation/entertainment in the surrounding area	£70	£21	£30
Shopping on the holiday park and campsite	£21	£5	£5
Shopping off the holiday park and campsite	£101	£61	£159
Visitor attractions off the holiday park and campsite	£60	£17	£12
Other	£0	£3	£2
Total – on-site	**£750**	**£221**	**£469**
Total – off-site	**£564**	**£287**	**£408**
Total – both on and off-site	**£1,314**	**£508**	**£877**

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

[34] *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, £279 per day, including £159 on-site and £120 off-site.

Touring visitors spent, on average, £96 per day, including £42 on-site and £54 off-site.

Visitors who owned their holiday caravan spent, on average, £106 per day, including £57 on-site and £49 off-site.

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters[35]	Tourers	Owners[36]
Transport to and from destination	£29	£14	£8
Transport spent during trip	£8	£5	£4
Total cost of holiday park and campsite accommodation (including pitch fees and any rental costs where relevant)	£116[37]	£36[38]	£53[39]
Holiday park and campsite facilities (e.g. Wi-Fi, laundrette etc)	£1	£1	<£1
Eating/drinking on the holiday park and campsite	£27	£3	£2
Eating/drinking in the surrounding area	£34	£15	£12
Recreation/entertainment on the holiday park and campsite	£10	£1	£1
Recreation/entertainment in the surrounding area	£15	£4	£4
Shopping on the holiday park and campsite	£4	£1	£1
Shopping off the holiday park and campsite	£21	£12	£19
Visitor attractions off the holiday park and campsite	£13	£3	£1
Other	<£1	£1	<£1
Total – on-site	**£159**	**£42**	**£57**
Total – off-site	**£120**	**£54**	**£49**
Total – both on and off-site	**£279**	**£96**	**£106**

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"* (46%); and *"I wanted to visit the area/country"* (41%).

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	46%
I wanted to visit the area/country	41%
Specific activities available in the area, such as golf, walking, cycling	17%
CAMC/CCC club member communication	16%
I had been to this country before and wanted to visit another area	14%
Family/friend connections in the area	13%
Other	13%
The holiday park and campsite was recommended to me by family/friends	12%
We/I saw advertising for the holiday park and campsite i.e. magazine/website/etc	10%
I was attending an event/festival	6%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=299
**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*

[35] *Due to the low level of renter responses, the UK average has been used in the economic modelling.*
[36] *Due to the low level of owner responses, the UK average has been used in the economic modelling.*
[37] *Rental accommodation spend ranged from £40 per night to £286 per night.*
[38] *This does not include the cost of buying the accommodation.*
[39] *This does not include the cost of buying the accommodation. Where total accommodations fees per trip were more than £2,000, an assumption was made that this was the annual site fees, and this was divided by 365 to give a per day figure.*

'Other' responses included:

- ownership (17%)
- for a specific hobby/event/place (14%)
- general getaway (14%)

Also included were trips with family or friends (5%), seasonal or regular trip (5%), convenient location or general convenience (3%), good value holiday (3%), following a recommendation (2%) and a special occasion (2%).

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 (94%), long walks (81%) and spending time with friends and family (74%). 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	59%	5%	35%	1%	322
Short walks (under 2 miles)	48%	5%	42%	6%	309
Long walks (over 2 miles)	41%	9%	31%	19%	311
Spent time with family and friends	37%	4%	33%	26%	314
Wildlife/nature activities	29%	4%	34%	33%	312
Other outdoor physical activities	29%	4%	13%	68%	305
Cycling	13%	6%	13%	80%	308

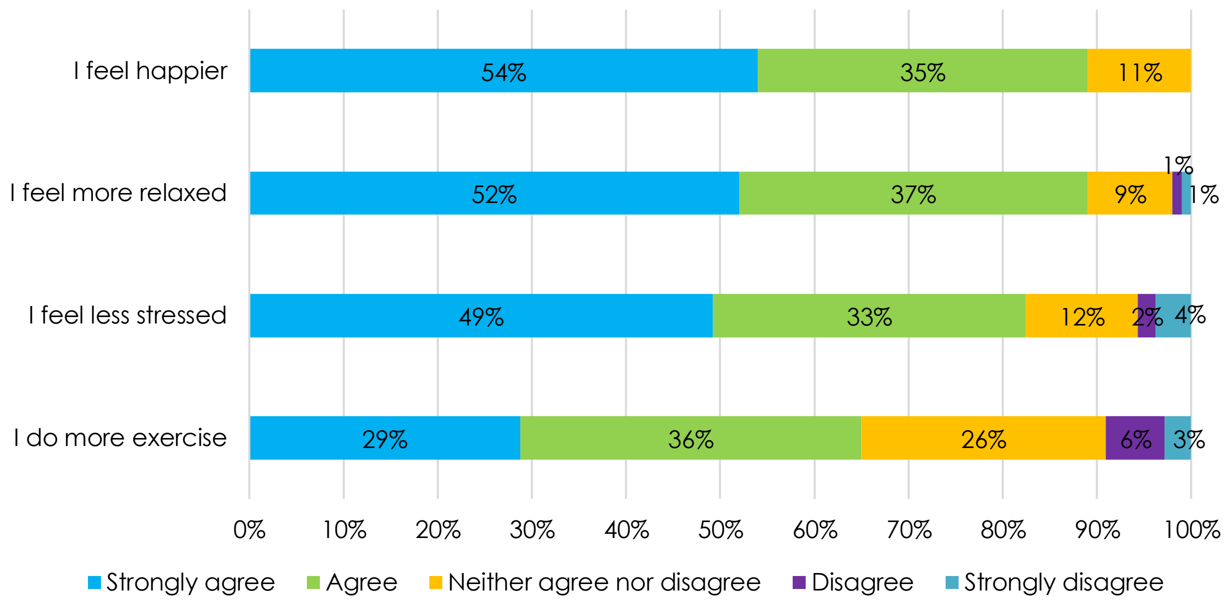
Source: Frontline Holiday Park and Campsite Visitor Survey, 2023

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

- 89% 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**
- 82% strongly agree or agreed that they **feel less stressed when visiting a holiday park and campsite**
- 65% strongly agree or agree that they **do more exercise when visiting a holiday park and campsite**

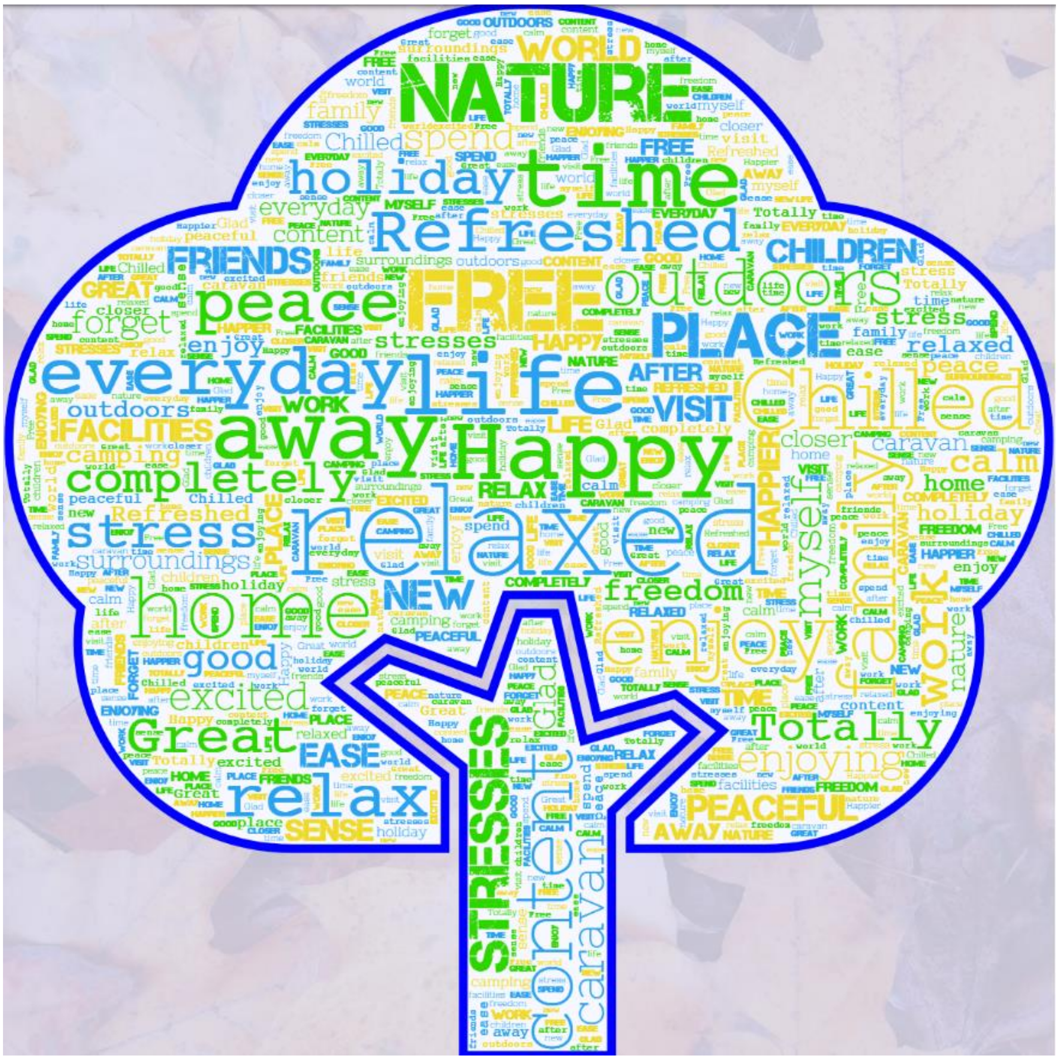
Figure 4.4 presents the detailed feedback.

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:

"Happy as I am away from everyday stresses and can relax with friends and family and enjoy the beautiful surroundings."

Touring Caravan Owner, Mid Wales

"Like the benefits of sitting around a campfire with my loved ones away from the TV is worth every penny."

Motorhome/Campervan Owner, North Wales

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

Tent Owner, Mid Wales

"Happy to be in peaceful surroundings, enjoying time away from everyday life and visiting other parts of the UK. Our caravan is our home from home."

Caravan Owner, South West Wales

4.5.1 Benefits and impacts of improved physical and mental health

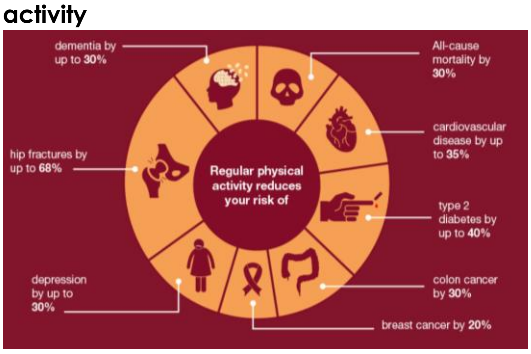
There are a **number of physical and mental health benefits** related to increased relaxation, spending time with family and exercise such as walking and cycling. Holiday parks and campsites occupy green spaces and often have sport and recreational facilities or access to nature and are therefore widely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

The Chief Medical Officer stated that [40]:

> *"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[41].

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)[42].

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[43].

New data and economic modelling from AXA UK and Centre for Business and Economic Research (CBER), indicated that burnout and stress cost the UK economy £28bn in sick days and lack of productivity (in 2022)[44]. Furthermore, in 2019, in-patient hospital admissions caused by stress-related illnesses in the UK cost over £8bn[45].

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

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

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

Visitors were:

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

Therefore, the holiday park and campsite sector in Wales is supporting the Welsh and wider UK policy agenda for health and wellbeing.

[40] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[41] https://assets.publishing.service.gov.uk/media/5bf41840e5274a2af47c464e/Cycling_and_walking_for_individual_and_population_health_benefits.pdf
[42] 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.
[43] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[44] https://www.hrgrapevine.com/content/article/2023-03-29-burnout-is-costing-the-uk-economy-28bn-a-year
[45] 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"* (48%)
- *"I holidayed more on holiday parks and campsites in the UK i.e. a staycation"* (39%).
- *"I already had a caravan/motorhome/tent/lodge/chalet and now do more touring/camping"* (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	46%
holidayed more on holiday parks and campsites in the UK i.e. a staycation	39%
already had a caravan/motorhome/tent/lodge/chalet/cottage and **now do more touring/camping**	38%
am looking to **combine overseas holidays with staycations**	36%
bought a caravan/motorhome/tent/lodge/chalet/cottage and have **continued to use it**	19%
resumed overseas holidays	17%
discovered (rediscovered) holiday parks and campsites as a holiday destination	13%
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	3%
none of the above	13%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=*321*
**Figures sum to more than 100% as multiple answers were allowed to this question*

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

- *"I view holiday parks and campsites as a good value for money holiday option" (53%)*
- *"I will holiday more in my caravan/motorhome/tent/lodge/chalet" (37%)*

When comparing holiday parks and campsites as either a good or poor value holiday choice, 86% of respondents see them as good value[46].

Table 4.10 presents the detailed feedback.

[46] *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 is 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	53%
will **holiday more** in my caravan/motorhome/tent/lodge/chalet/cottage on holiday parks and campsites	37%
will **travel shorter distances** to visit holiday parks and campsites	25%
view holidays **overseas to be a much more considered purchase**	22%
view holiday on **holiday parks and campsites to be a much more considered purchase**	17%
discovered (rediscovered) holiday parks and campsites as a **cost-effective** holiday destination	13%
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	9%
will take **fewer trips** to holiday parks and campsites	7%
have **reduced my use** of activities/facilities in the holiday parks and campsites area	7%
invested in a tent/caravan/motorhome during the pandemic and plan to **still go abroad** as I did before 2020 but also take holidays on campsites/parks due to that investment	7%
will tour less but stay the same length of time	5%
invested in a tent/caravan/motorhome during the pandemic and plan to **continue using it** rather than go abroad	5%
invested in a tent/caravan/motorhome during the pandemic but **now plan to go abroad as I did before**	1%
other	5%
none of the above	9%

Source: Frontline Holiday Park and Campsite Visitor Survey, 2023 N=321
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. 77% 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 (87%) than those who **had** been put off (55%).

Some **visitor** comments included:

"Using our campervan is just our way, of fulfilling our holiday enjoyment experience. From the moment we leave to the moment we arrive back, it's just fantastic."
Motorhome/Campervan Owner, Mid Wales

"I cannot afford any other type of holiday really, so camping is the best option for me. However, I am completely happy with this arrangement!"
Touring Caravan Owner, South East Wales

"We have started camping for short breaks as well as increasing use of our motor home. Getting out and about more is at least in part a reaction to the COVID-19 restrictions and an appreciation that life should be enjoyed to the full."
Tent User, North Wales

"Love our motorhome. Affordable and allows us to experience more of UK and Europe than we ever considered. Love the long trips we are able to do wherever we fancy going."
Motorhome/Campervan Owner, South West Wales

4.7 Visitor summary

The majority of the respondents lived in England (71%), of which over half (55%) stayed on a holiday park and campsite in Wales five times or more during the last 12 months.

85% stayed in a touring caravan, motorhome or tent over the course of the year. 9% 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 16% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2. 30% of groups brought a pet.

Visitors spent 5.6 nights per trip. **This is higher than the average tourism number of nights per trip at 2.7[47].**

Visitors who stayed in rented accommodation spent, on average, £279 per day, including £159 on-site and £120 off-site. Touring visitors spent, on average, £96 per day, including £42 on-site and £54 off-site. Visitors who owned their holiday caravan spent, on average, £106 per day, including £57 on-site and £49 off-site. **This is higher than the wider average tourism spend per night by those taking a trip Wales at £89[48].**

[47] *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*

[48] *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 Welsh holiday park and campsite sector from May 2022-April 2023.

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

- days of the year (365)
- accommodation type (7)
- Welsh regions (4)

In other words, the model includes 10,220 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 Mid Wales on Saturday 5th August 2023.

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Mid Wales	1,042
Multiplied by:	
Average occupancy rate on 5th August	65%[49]
Number of pitches occupied on 5th August	677
Multiplied by:	
Average on-site expenditure per day for touring holiday-makers	£41.70
= On-site expenditure of touring caravan visitors to Mid Wales on 5th August	**£28,243**

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 Mid Wales, 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 Mid Wales	1,042
Multiplied by:	
Average occupancy rate on 5th August	65%[50]
Number of pitches occupied on 5th August	677
Multiplied by:	
Average off-site expenditure per day for touring holiday-makers	£54.30
= Off-site expenditure of touring caravan visitors to Mid Wales on 5th August	**£36,777**

5.3 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted above, the Mid 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.

[49] Due to the higher number of seasonal parks responding to the survey, average UK occupancy figures have been used in the economic modelling for the out of season months.
[50] Due to the higher number of seasonal parks responding to the survey, average UK occupancy figures have been used in the economic modelling for the out of season months.

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 Wales.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£28,243
Plus	
Total off-site expenditure	£36,777
Total combined on and off-site expenditure	**£65,020**
Multiplied by:	0.64
= Indirect and induced effects	**£41,613**

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	£28,243
Plus	
Total off-site expenditure	£36,777
Indirect and induced effects	£41,613
Visitor impact	**£106,633**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[51], 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[52], indicate that every £100 of turnover generated by Wales's overnight accommodation sector translates to a GVA impact of £57.01[53].

This proxy was applied to the above turnover figures to produce an estimate of the holiday park and campsite sector's contribution to Welsh 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 35%, the remaining 65% 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 65% as shown in Table 5.5.

£8.03 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[54]
Divided by 365 days	
Remaining average daily pitch fees spend	£8.03

[51] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[52] *2021 Annual Business Survey, ONS.*
[53] *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).*
[54] *https://www.parkholidays.com/caravan-holiday-homes-for-sale/costs-to-consider*

6 Economic Impact of Holiday Parks and 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 and campsite sector in Wales, broken down by region and by accommodation type.

6.1 Impact by Welsh region

It is estimated that in 2022/23 visitors to Welsh holiday parks and campsites spent **a total of £1.66bn in the Welsh economy**, made up as follows:

- £493.8m on-site spend
- £517.9m off-site spend
- £647.5m of multiplier impacts

This visitor expenditure supports **30,726 FTE jobs** and contributes **£945.9m of GVA to the Welsh economy.**

Table 6.1: Economic impacts by Welsh region

Region	Visitor expenditure (£m)	Employment (FTE jobs)
Mid Wales	35.8	663
North Wales	1,085.5	20,102
South East Wales	117.3	2,172
South West Wales	420.6	7,789
Wales	**1,659**	**30,726**

Source: Frontline, 2023

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)
Touring Pitches*	327.6	6,066	186.7
Glamping yurts/wigwams/others	10.3	191	5.9
Pods	4.3	79	2.4
Privately-owned holiday caravans	935.5	17,324	533.3
Rented holiday caravans	240.8	4,459	137.3
Privately-owned lodge/chalet/cottage	90.6	1,677	51.6
Rented lodge/chalet/cottage	50.2	930	28.6
All accommodation	**1,659.2**	**30,726**	**945.9**

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 Wales, 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 expenditure on privately-owned holiday caravan and touring caravan/motorhome maintenance

Area of expenditure	Touring Caravan/Motorhome Owner*[55]	Privately-owned holiday caravans/lodge owner[56,57]
Servicing	£249	£908
Insurance	£302	£225
Road Tax	£179	N/A
General upkeep	£186	£155
Total	**£916**	**£1,288**

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 Wales (37,750 [58]) multiplied by average maintenance expenditure per touring caravan/motorhome (£916). This equals £34.6m.

Aligned to the approach presented above, the estimated gross expenditure figure for privately-owned holiday caravan/lodge owners is 45,161[59], multiplied by average maintenance expenditure per holiday caravan (£1,288). This equals £58.2m.

The total impact associated with expenditure on maintenance by tourers and privately owned holiday caravans **is estimated to be in the region of £92.8m.**

More detailed impact findings are shown in Appendix 2**.**

6.4 Economic impact summary

In 2022/23 it is estimated that holiday park and campsite sector in Wales generated **a gross direct, visitor expenditure impact of £1.66bn. This expenditure impact equates to a GVA impact of £945.9m** (including multipliers) and supported **30,726 FTE** jobs in the Welsh economy.

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

- **North Wales**: with visitor expenditure of £1.1bn, equivalent to a GVA impact of £618.8m, and 20,102 supported FTE jobs
- **South West Wales:** with visitor expenditure of £420.6m, equivalent to a GVA impact of £239.8m, and 7,789 supported FTE jobs

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

- **privately-owned holiday caravans**: with visitor expenditure of £439.5m, equivalent to a GVA impact of £533.1m, and 17,324 supported FTE jobs
- **touring pitches**: with visitor expenditure of £327.6m, equivalent to a GVA impact of £186.7m, and to 6,066 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and holiday caravan owners adds a **further £92.8m of expenditure to the Welsh economy**.

[55] *These figures were taken from visitors who lived in Scotland as it was assumed that's where they would spend their money.*
[56] *These figures were taken from visitors visiting Scotland as it was assumed that's where they would spend their money.*
[57] *Note this is based on 24 respondents.*
[58] *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.*
[59] *UKCCA, 2023.*

7 Conclusions

The Welsh holiday park and campsite sector makes a substantial contribution to the Welsh tourism economy, generating £1.66bn in visitor expenditure, equivalent to £945.9m GVA and supporting 30,726 FTE jobs.

Visitors to Welsh 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 £279 on-site and off-site by renters, £106 on-site and off-site by owners and £96 on-site and off-site by tourers. This is an increase on the average Welsh tourism visitor spend (per day) of £89[60].

Flexible accommodation and facilities provision, supporting local communities, protecting the environment and encouraging a healthier lifestyle: The 922 holiday parks and campsites in Wales account for 69,088 pitches[61]. 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 £92.8m 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 returning to pre COVID-19 levels, increased costs as well as a change in consumer behaviour
- **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

[60] 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)

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

Appendix 1 – 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

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
Mid Wales	5.2	0.2	0.1	3.4604	0.3	0.5	0.1	**9.8**
North Wales	45.7	2.2	1.3	185.1487	59.6	19.8	10.4	**324.1**
South East Wales	7.0	0.4	0.1	19.5636	6.9	0.7	0.1	**34.7**
South West Wales	26.2	1.0	0.1	62.2273	22.5	5.2	7.9	**125.2**
Total	**84.1**	**3.8**	**1.6**	**270.4**	**89.3**	**26.2**	**18.5**	**493.8**

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
Mid Wales	7.1	0.2	0.0	3.8	0.2	0.6	0.1	**12.0**
North Wales	62.8	1.4	0.8	205.4	38.5	21.9	6.8	**337.7**
South East Wales	9.6	0.2	0.1	21.7	4.4	0.7	0.1	**36.9**
South West Wales	36.1	0.7	0.1	69.0	14.5	5.8	5.1	**131.3**
Total	**115.7**	**2.5**	**1.0**	**300.0**	**57.6**	**29.0**	**12.1**	**517.9**

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
Mid Wales	7.9	0.3	0.1	4.7	0.3	0.7	0.1	**14.0**
North Wales	69.4	2.3	1.4	250.0	62.8	26.7	11.0	**423.6**
South East Wales	10.6	0.4	0.1	26.4	7.2	0.9	0.1	**45.8**
South West Wales	39.9	1.1	0.1	84.0	23.7	7.1	8.3	**164.1**
Total	**127.8**	**4.0**	**1.7**	**365.1**	**94.0**	**35.3**	**19.6**	**647.5**

Due to rounding there may be slight discrepancies when totalling

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	Glamping yurts/wigwams/ others	Pods	Privately-owned holiday caravans	Rented holiday caravans	Privately-owned lodge/chalet/ cottage	Rented lodge/chalet/ cottage	Total
Mid Wales	20.2	0.7	0.2	12.0	0.8	1.8	0.2	**35.8**
North Wales	178.0	5.9	3.5	640.5	160.8	68.4	28.3	**1085.5**
South East Wales	27.2	1.0	0.3	67.7	18.5	2.3	0.3	**117.3**
South West Wales	102.2	2.8	0.3	215.3	60.6	18.1	21.4	**420.6**
Total	**327.6**	**10.3**	**4.3**	**935.5**	**240.8**	**90.6**	**50.2**	**1,659.2**

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
Mid Wales	96	4	1	64	5	10	1	**182**
North Wales	846	41	24	3,429	1,104	366	193	**6,003**
South East Wales	129	7	2	362	127	12	2	**642**
South West Wales	486	19	2	1,152	416	97	146	**2,318**
Total	**1,557**	**71**	**29**	**5,007**	**1,653**	**485**	**343**	**9,145**

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
Mid Wales	132	3	1	71	3	11	1	**222**
North Wales	1,164	26	16	3,804	712	406	126	**6,254**
South East Wales	178	4	1	402	82	14	2	**682**
South West Wales	668	12	1	1,279	268	107	95	**2,432**
Total	**2,142**	**46**	**19**	**5,556**	**1,066**	**538**	**224**	**9,590**

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
Mid Wales	146	5	1	87	6	13	2	**259**
North Wales	1,286	43	25	4,629	1,162	494	204	**7,845**
South East Wales	197	7	2	489	134	17	2	**848**
South West Wales	738	20	2	1,556	438	131	154	**3,040**
Total	**2,367**	**75**	**31**	**6,760**	**1,740**	**655**	**363**	**11,991**

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
Mid Wales	374	12	3	222	15	33	4	**663**
North Wales	3,295	110	65	11,862	2,979	1,267	524	**20,102**
South East Wales	504	18	5	1,253	343	42	6	**2,172**
South West Wales	1,892	52	6	3,987	1,122	335	396	**7,789**
Total	**6,066**	**191**	**79**	**17,324**	**4,459**	**1,677**	**930**	**30,726**

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
Mid Wales	3.0	0.1	0.0	2.0	0.2	0.3	0.0	**5.6**
North Wales	26.0	1.3	0.7	105.6	34.0	11.3	5.9	**184.8**
South East Wales	4.0	0.2	0.1	11.2	3.9	0.4	0.1	**19.8**
South West Wales	15.0	0.6	0.1	35.5	12.8	3.0	4.5	**71.4**
Total	**47.9**	**2.2**	**0.9**	**154.2**	**50.9**	**14.9**	**10.5**	**281.5**

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
Mid Wales	4.1	0.1	0.0	2.2	0.1	0.3	0.0	**6.8**
North Wales	35.8	0.8	0.5	117.1	21.9	12.5	3.9	**192.5**
South East Wales	5.5	0.1	0.0	12.4	2.5	0.4	0.0	**21.0**
South West Wales	20.6	0.4	0.0	39.4	8.3	3.3	2.9	**74.9**
Total	**65.9**	**1.4**	**0.6**	**171.0**	**32.8**	**16.6**	**6.9**	**295.2**

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
Mid Wales	4.5	0.1	0.0	2.7	0.2	0.4	0.0	**8.0**
North Wales	39.6	1.3	0.8	142.5	35.8	15.2	6.3	**241.5**
South East Wales	6.1	0.2	0.1	15.1	4.1	0.5	0.1	**26.1**
South West Wales	22.7	0.6	0.1	47.9	13.5	4.0	4.8	**93.6**
Total	**72.9**	**2.3**	**1.0**	**208.1**	**53.6**	**20.2**	**11.2**	**369.1**

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
Mid Wales	11.5	0.4	0.1	6.8	0.4	1.0	0.1	**20.4**
North Wales	101.5	3.4	2.0	365.2	91.7	39.0	16.1	**618.8**
South East Wales	15.5	0.5	0.1	38.6	10.6	1.3	0.2	**66.9**
South West Wales	58.3	1.6	0.2	122.7	34.6	10.3	12.2	**239.8**
Total	**186.7**	**5.9**	**2.4**	**533.3**	**137.3**	**51.6**	**28.6**	**945.9**

Due to rounding there may be slight discrepancies when totalling