Pitching the Value

2019 Economic Benefit Report: Holiday Parks and Campsites UK

Report for the

UK Caravan & Camping Alliance

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Executive Summary

The UK holiday park and campsite sector makes a substantial contribution to the UK tourism economy, generating £9.3bn in visitor expenditure, equivalent to £5.3bn GVA and supporting 171,448 FTE jobs.

The UK holiday park and campsite sector accounted for 8% of the tourism sector's GVA.

Visitors to UK holiday parks and campsites stayed up to 74% longer and spent up to 60% more than the national tourism average.

Background

Tourism is one of the UK's key industries. The UK aims to have a tourism industry worth over £257bn by 2025. This is slightly under 10% of UK GDP and supports almost 3.8 million jobs, i.e. around 11% of the total UK jobs[1].

The Deloitte Tourism: Jobs and Growth Report[2] found that the marginal revenue required to create a job in UK tourism is estimated to be around £54,000. For every 1% increase in total expenditure in UK tourism, it might be expected that full-time equivalent employment will increase by 0.9%. **The sector is predicted to grow at an annual rate of 3.8% through to 2025 – faster than the overall UK economy** (with a predicted annual rate of 3% per annum) and much faster than sectors such as manufacturing, construction and retail[3].

Spend by international visitors is forecast to grow by over 6% per year in comparison with domestic spending by UK residents at just over 3%. The value of inbound tourism is forecast to grow from over £21bn in 2013 to £57bn by 2025, with the UK seeing an international tourism balance of payments surplus in 2023, almost forty years since the UK last reported a surplus[4].

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.

Stakeholder feedback

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

STRENGTHS	**WEAKNESSES**
• resilience and adaptability • attractive natural environment across the UK – great outdoors, freedom • multi-generational, family-oriented nature of the offering • quality and variation of offering – on-site and off-site facilities • welcoming and trusted – loyal customer base, family and pet friendly • good value for money	• demographics – public perception, ageing tourism cohort • towing ability – electric vehicles and driver licence restrictions • digital connectivity variation • variation in quality of accommodation • difficulties in accessing finance/ lack of investment • planning issues – reducing ability to expand to align to growth in visitor numbers
OPPORTUNITES	**THREATS**
• innovation – electric cars, co-operative branding, short breaks, experience holidays • wellbeing tourism – meeting people, connecting to outdoors, mental and physical benefits • attracting younger generation through product offering e.g. glamping and quality accommodation • working collaboratively with local communities	• Brexit and uncertainty around this • tourers – lack of product development • connectivity and lack of broadband infrastructure • restrictive legislation • competitor sectors growing e.g. Airbnb and hotels • weather and impact of seasonality

[1] https://www.visitbritain.org/visitor-economy-facts
[2] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf
[3] https://www.visitbritain.org/visitor-economy-facts
[4] *While VisitBritain now excludes Northern Ireland's statistics as these are reported separately by NISRA, VB statistics are generally quoted at a UK level.*

Economic Impact

In 2018 it was estimated that the holiday park and campsite sector in the UK generated **a total visitor expenditure impact of £9.3bn. This expenditure impact equates to a GVA impact of £5.3bn, and to 171,448 supported FTE jobs in the UK economy.**

According to a report commissioned by VisitBritain[5] **the tourism sector across the four countries had a direct GVA of £64.7bn[6], therefore the holiday park and campsite sector with a direct GVA of £5.3bn (8%) makes a substantial contribution to the sector's GVA.** In addition, tourers and caravan holiday home owners spend money on **maintenance which adds a further £877.7m of expenditure to the economy**.

Holiday Park/Campsite Operators

According to evidence provided by the UKCCA, **in the summer of 2018 there were 6,243 member holiday parks/campsites operating in the UK accounting for 438,076 pitches**[7]. This was drawn from a database of holiday parks/campsites provided by the UKCCA. Consultations were undertaken with 790 of these parks. Research found that **UK 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, **UK 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/operated their parks for over 10 years and many have done so for over 25 years. Park occupancy rates vary from an average of 70% in high season (August) and 54% in mid season (September).

Holiday park/campsite operators support their local communities through:

- **expenditure** – almost half (48%) of respondent parks cumulatively spent £302.8m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events and fund raising particularly around sports and community groups
- **environmental activities** – including support for recycling and conservation, and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycle paths, promotion of wider community health and fitness and healthy food option provided in parks' restaurants.

Park Visitors

7,501 respondents made at least one visit to a holiday park/campsites in the UK in 2018. The majority of survey participants lived in England (80%) with 9% from Scotland, 6% from Wales and 4% from Northern Ireland. 1% came from outside the UK.

Slightly under half of respondents (44%) stayed on a holiday or touring/camping park/site in the UK 5 times or more during the last 12 months. **76% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year.** 16% stayed in a rented or owner-occupied caravan holiday home; while 5% stayed in a rented or owner occupied lodge/ chalet/ cottage. **The average adult group size was 2.4**, and **25% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 1.8. **35% of groups brought a pet**.

Visitors and their party who stayed in rented or touring accommodation spent, on average, £557 per visit (£101 per day), spending, on average, 4.5 days on a holiday park/campsite on each **holiday. Visitors staying in owned accommodation spent, on average, £480 per visit** (£89 per day) and stayed, on average 5.4 days. This is higher than the average daily spend by visitors to the UK at £63[8] and 3.1 days per holiday[9].

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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[5] *https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf*
[6] *Converted to 2018 prices.*
[7] *This includes Certificated Sites and Certificated Locations.*
[8] *https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf*
[9] *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 the UK[10].**

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/camping sector in the UK
- provide the economic impact/contribution from all forms of holiday parks/campsites accommodation including:
  - touring caravan/motorhome/ campervan (owned and hired)
  - caravan holiday homes/lodges (park or privately owned/rented)
  - camping
  - glamping
  - self-catering (apartments, chalets, permanent lodges/cabins)
- understand the type of spend by the sector and each subset and estimate how much tourism spend, both direct and indirect, is made, and how much income remains in the UK/regional economies
- determine the number of full-time equivalent (FTE) jobs supported by the sector and each subset, both those employed directly and indirectly as well as seasonal and part-time jobs
- report and provide robust data at the UK level as well as the four countries (England, Scotland, Wales and Northern Ireland); include to a 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 perspective.

The assessment method is presented in Appendix 1.

[10] *This report and the four supporting country reports can be found at www.ukcca.org.uk*

2 UK Tourism in Context

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

2.1 National tourism strategies

VisitBritain has developed the *"Delivering a Golden Legacy"*[11] strategy covering 2012 to 2020. Each country also has their own tourism strategies:

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

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

VisitBritain's strategy has the ambitions of:

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

This strategy aims 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

The **Great Britain** campaign[12] has resulted in VisitBritain working much more strategically with other public diplomacy partners (including the Foreign and Commonwealth Office (FCO), Department for International Trade and British Council).

This strategy sets out an ambitious goal for Britain. It requires a greater level of cooperation across Government, the UK and overseas tourism bodies and the national tourist boards in order to ensure that Britain and the UK is competitive and able to succeed in the global race for tourism.

2.2 National tourism statistics

Since 2010 tourism has been the fastest growing sector in the UK in employment terms[13].

Britain aims to have a tourism industry worth over £257bn by 2025. This is just under 10% of UK GDP and supports almost 3.8 million jobs, i.e. around 11% of the total UK jobs[14].

The Deloitte *Tourism: Jobs and Growth Report*[15] found that the marginal revenue required to create a job in UK tourism is estimated to be around £54,000. For every 1% increase in total expenditure in UK tourism, it might be expected that full-time equivalent employment will increase by 0.9%.

The sector is predicted to grow at an annual rate of 3.8% through to 2025 – faster than the overall UK economy (with a predicted annual rate of 3% per annum) and much faster than sectors such as manufacturing, construction and retail [16].

Spend by international visitors is forecasted to grow by over 6% per year in comparison with domestic spending by UK residents at just over 3%. The value of inbound tourism is forecast to grow from over £21bn in 2013 to £57bn by 2025, with the UK seeing an international tourism balance of payments surplus in 2023[17].

[11] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Britain_Growth_%20Strategy%20_inbound_Golden_Legacy_2012_to_2020.pdf
[12] https://www.visitbritain.org/introducing-great-tourism-campaign
[13] https://www.visitbritain.org/visitor-economy-facts
[14] https://www.visitbritain.org/visitor-economy-facts
[15] https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/Tourism_Jobs_and_Growth_2013.pdf
[16] https://www.visitbritain.org/visitor-economy-facts
[17] *While VisitBritain now excludes Northern Ireland's statistics are reported separately by NISRA and Tourism NI; VB statistics are generally quoted and compared at a UK level.*

In 2017, 39.2 million overseas visitors spent £24.5bn. These figures represent a 4% increase in volume and 9% increase in value compared with 2016.

In 2016, the UK ranked 6th in the United Nations World Tourism Organisation (UNWTO) International Awards League, (2.9%) climbing two places from 2015. However, the UK was down one place to 7th for international tourism earnings. The UK accounted for 3.6% of international tourism receipts in 2016.

In 2017 France, the USA and Germany were the top three markets in terms of number of visits to the UK accounting for 29% of visits[18]. The top three markets measured in terms of visitor spend were the same although in a different order (USA, Germany and France) accounting for 27% of all overseas visitor spend in the UK.

London accounts for 55% of all inbound visitor spend, the rest of England 32%, Scotland 9% and Wales 2%.

Repeat visitors are very important to the UK economy. In 2015, 77% of inbound visits were repeat, spending £15.1bn. Certain markets are also more likely to return such as 92% Irish Republic and Norway, 83% Iceland and 80% Belgium. Repeat visitors also stay longer and spending more per night[19].

[18] https://www.visitbritain.org/visitor-economy-facts

[19] https://www.visitbritain.org/visitor-economy-facts

3 Stakeholder Feedback

As part of the research, Frontline conducted interviews with senior stakeholders across the industry and facilitated a workshop with members of the UKCCA[20]. A list of contributors is presented in Appendix 2.

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

3.1 Drivers for change

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

- **Brexit and specifically the economic uncertainty around this** – this was seen as both a threat and an opportunity
- **migrant workforce and labour pool** – what happens to this group of workers post Brexit, what will the legislation look like, where will the labour pool come from
- **regulatory and legislative changes** – linked to environment e.g. diesel engines and electric cars, wild camping, licencing laws, car towing laws
- **need for skilled workforce, particularly at a senior level** – the sector lacks senior staff and leaders which has the potential to hamper sector growth
- **health and wellbeing** – the ability for holiday parks/campsites to support health, fitness and the overall wellness agenda
- **increasing appetite for shorter breaks** – requires holiday park/campsite operators to be more flexible around provision to compete with other forms of accommodation

3.2 SWOT analysis

The **strengths** of the sector were:

- **welcoming and trusted** – loyal customer base, extensive repeat business
- **resilient and adaptable to change** – evolved over time, flexible and diverse
- **attractive natural environment** across the UK – ability to offer greater proximity to the outdoors
- **family-oriented** – which is multi-generational and pet friendly
- **good value for money**
- **contributing to rural economies** – throughout the UK, extensive local connections
- **quality and variety** – of the holiday parks/campsites on and off-site facilities
- **environmentally friendly** – reputation
- **strong domestic market** – staycation and safe environment
- **social camping** – festivals and outdoor events

The **weaknesses** of the sector were:

- **variation in quality** – of accommodation
- **demographics** – public perception, ageing tourism cohort
- **digital connectivity variation** – high usage and high cost; dead zones in rural and coastal areas
- **towing ability** – electric vehicles and driver licence restrictions on younger people's ability to tow (impacting on younger people taking up caravanning)
- **difficulties in accessing finance/lack of investment** – particularly in the small businesses
- **seasonality** – limiting the availability of holiday park/campsite facilities and impacting labour
- **planning** – reducing ability to expand
- **skills gaps and shortages** – working for the sector not seen as a career choice
- **fragmentation** – lot of small players

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

"The cost of doing business has risen as a result of Brexit; many products we procure are imported."

"Getting visitors more active outdoors and outdoor recreation is important to our club. We started Britain on Foot campaign to help support this."

"Heading towards a time where cars or the younger generation can't tow a caravan."

"Skills shortage is an issue – working in the sector not seen as a career of choice."

[20] *Including Chris Greenwood from VisitScotland.*

The **opportunities** for the sector were:

- **opportunity for innovation** – electric cars and onsite access, co-operative branding, market/product gaps; shorter breaks, experience holidays
- **increasing the number of the younger generation** – utilising innovation, high end products and glamping as attractors
- **extending the season** – weather proofing – manufacturing of product – extends usage all year
- **wellbeing tourism** – meeting people, connecting to outdoors, mental and physical benefits
- **diversification** – including the growth of 'glamping', agricultural diversification for new income streams; digital detox
- **improving facilities/activities**, including greater use of technology and accessibility improvements
- **combatting negative perceptions** – promotion caravanning lifestyle and wellness advantages
- **post-Brexit staycation** – affordability and weakness of pound/low interest rates
- **utilising collaborative platforms** – opening up new opportunities
- **collaboration** – growing the size of the cake through working with community partners

The **threats** for the sector were:

- **uncertainty around Brexit** – and impact on e.g. migrant workforce, European visitors
- **towing** – including licensing requirements, unsuitability for small cars and electric cars; lack of manufacturers looking at this
- **weather** – reducing the season
- **growth in competing sectors** – hotels, cruise market, low cost airlines
- **loss of migrant workers** – aligned to Brexit
- **easy access to Europe and overseas perception** – UK closed post-Brexit
- **connectivity** – lack of broadband infrastructure
- **regulation/legislation/policy changes** – unknown; potential impact of tourism tax in Scotland
- **changes in power sources** – renewables, electric cars, linked to caravan towing, legislation; removal of diesel
- **lack of innovation** – static product development, lack of investment making the sector unattractive to younger ages

Some comments included:

"Weather has a huge impact on the UK economy. Although the latent impact from a 'good year' can provide positive benefits the next year."

"Very fragmented, lots of small operators and competition is huge."

"Opportunity for 'digital detox' – using the lack of Wi-Fi to our advantage."

"Glamping is on the rise, giving something unique and different – can show off on social media."

"Wellbeing is a big area for the future – wellbeing tourism and connecting people to the local communities."

3.3 Summary SWOT

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

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

STRENGTHS	**WEAKNESSES**
• resilience and adaptability • attractive natural environment across the UK – great outdoors, freedom • multi-generational, family-oriented nature of the offering • quality and variation of offering – on-site and off-site facilities • welcoming and trusted – loyal customer base, family and pet friendly • good value for money	• demographics – public perception, ageing tourism cohort • towing ability – electric vehicles and driver licence restrictions • digital connectivity variation • variation in quality of accommodation • difficulties in accessing finance/lack of investment • planning issues – reducing ability to expand to align to growth in visitor numbers
OPPORTUNITES	**THREATS**
• innovation – electric cars, co-operative branding, short breaks, experience holidays • wellbeing tourism – meeting people, connecting to outdoors, mental and physical benefits • attracting younger generation through product offering e.g. glamping and quality accommodation • working collaboratively with local communities	• Brexit and uncertainty around this • tourers – lack of product development • connectivity and lack of broadband infrastructure • restrictive legislation • competitor sectors growing e.g. Airbnb and hotels • weather and impact of seasonality

Some comments include:

"We have a loyal family friendly customer base which is brilliant for children and pets, suitable for all ages and abilities."

"We need to be more innovative in our product and service offering learning from other areas ensuring connectivity."

"The holiday park sector is very resilient. It is flexible and has over time, aligned to changing markets, with staycation being an important part of the model."

"The desire to escape the stresses and strains of modern life and focus on health and wellbeing is not going away. The holiday park sector is ideally positioned to capitalise on this."

4 Holiday Park/Campsite Operator Consultation

This section provides evidence from consultations with holiday parks/campsites across the UK. This was drawn from a database of holiday parks/campsites provided by the UKCCA[21]. This database included data from the:

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

While this represents a comprehensive list of the UKCCA member holiday parks/campsites in the UK it does not include all holiday parks/campsites. 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.

4.1 Composition of the UK holiday parks/campsites

Based on the information provided by the UKCCA, in **the summer of 2018 there were 6,243 member holiday parks/campsites operating in the UK accounting for 438,076 pitches**[22]. The majority of these pitches are either owner-occupied caravan holiday homes or lodges (223,537 pitches, 51%) or touring pitches[23] (151,921 pitches, 35%).

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. England contains both the highest number of holiday parks/campsites (4,845) and the highest number of pitches (320,005).

According to the UKCCA there are an estimated 110 holiday parks/campsites across Northern Ireland of which the UKCCA has details for 36% (40) member sites. In order to give a more representative population we have taken an average of the 40 holiday parks/campsites (i.e. pitch numbers and accommodation (type) and grossed this up to the 110.

Table 4.1 summarises the composition of the UK's holiday park/campsite sector.

Table 4.1: Composition of UK holiday park/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
England	4,845	120,363	138,966	40,340	1,354	11,765	7,217	320,005
Wales	898	15,943	37,488	6,055	81	2,621	398	62,586
Scotland	390	1,3048	16,287	3,280	250	1,058	739	34,662
Northern Ireland	110	2,567	15,303	2,854	0	49	49	20,823
Total	**6,243**	**151,921**	**208,044**	**52,529**	**1,685**	**15,493**	**8,403**	**438,076**

Source: UKCCA, 2018

[21] *This includes Certificated Sites and Certificated Locations*
[22] *This includes Certificated Sites and Certificated Locations*
[23] *This includes touring caravans, motorhomes/campervans and tents.*

4.2 Sampling methodology

Holiday parks/campsites across the UK 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.

790 holiday parks/campsites out of a population of 6,243 across the UK participated giving us a 99% confidence +/- 5% margin of error. This means that there is a 99% probability that the sample accurately reflects the wider population and is therefore representative of the holiday park/campsite sector in the UK.

4.3 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 countries, receiving a minimum response of at least 11%.

Table 4.2: Locations of holiday parks/campsites

Location	Number of parks responding	Estimated number of parks	Percentage consulted
England	529	4,845	11%
Wales	115	898	13%
Scotland	98	390	25%
Northern Ireland	46	110	42%
Unknown	2	-	-
Total	**790**	**6,243**	**13%**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

4.4 Holiday parks/campsites size

The survey sample included a diverse and representative mix of very small, small, medium, large and very large parks, including 97 very large parks (parks with 251 pitches or more); and 265 very small parks (parks with 5 pitches or fewer), these are typically Certificated Locations (CL) and Certificated Sites (CS).

Table 4.3: Sizes of the holiday parks/campsites surveyed

Number	Number of parks responding	Number of parks[24]	Percentage consulted
Very small parks (1-5)	265	3,716	7%
Small parks (6-50 pitches)	162	609	27%
Medium sized parks (51-100 pitches)	121	669	18%
Large parks (101-250 pitches)	142	774	18%
Very large parks (251 pitches or more)	97	405	24%
Total	**787**	**6,173**	**13%**

Source: UKCCA, 2018

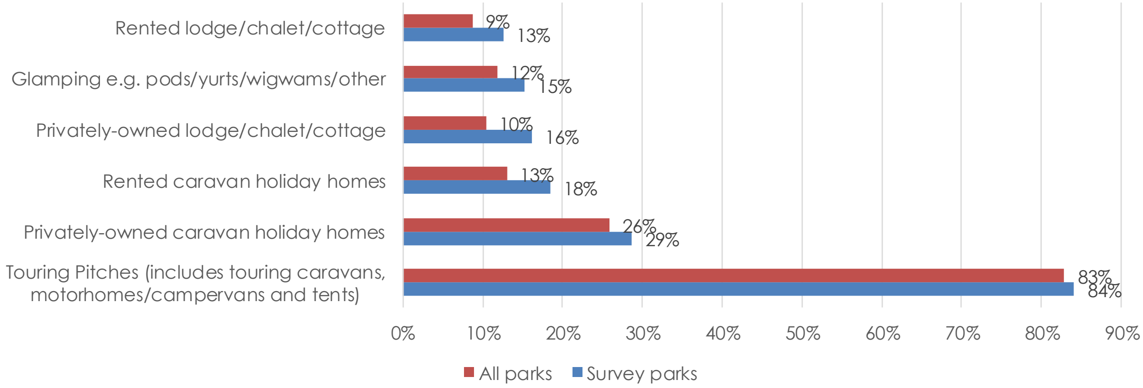
[24] *Note this only includes a subset of the Northern Ireland holiday parks/campsites population i.e. the 40 UKCCA member holiday parks/campsites instead of the estimated population of 110.*

4.5 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 (84%) had touring pitches which includes touring caravans, motorhomes/campervans and tents.

29% of the holiday parks/campsites had owner-occupied holiday homes on their holiday parks/campsites, 18% offered rented holiday homes, 16% privately owned lodge/chalet/cottages, 15% glamping and 13% rented lodge/chalet/cottages.

Figure 4.1: Types of accommodation on the holiday parks/campsites surveyed[25]



N=780

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

4.6 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) just over half (53%) had toilet blocks, 41% had shower blocks and 38% had Wi-Fi. In the small to large holiday parks/campsites (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 those offering touring pitches provided toilet and shower blocks, compared to those that only had static accommodation.

'Other' facilities included:

- hardstandings
- electric hook ups
- caravan and/or motorhome service point
- dishwashing facilities

Table 4.4: 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	122	53%	366	75%
Shower blocks	94	41%	352	72%
Wi-Fi	88	38%	383	78%
Laundry	25	11%	393	80%
Outdoor play area	-	-	295	60%
Restaurant/bar/takeaway	-	-	143	29%
Retail/shop	-	-	159	32%
Games room	1	-	128	26%
Entertainment	-	-	101	21%
No on-park facilities	2	1%	8	2%
Others (please specify)	215	93%	121	25%
Total parks consulted	**230**	-	**490**	-

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

[25] *Note 'all holiday parks/campsites only includes a subset of the Northern Ireland holiday parks/campsites population i.e. the 40 UKCCA member holiday parks/campsites instead of the estimated population of 110.*

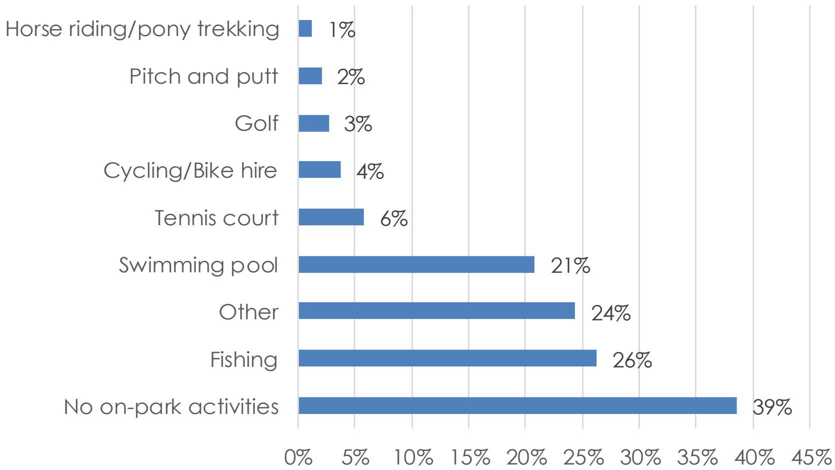
The figures in Table 4.4 capture only those holiday parks/campsites who listed each type of facility in their response; it is possible that some of the holiday parks/campsites may have some of these activities but did not answer this question in full. Therefore, the figures may under-estimate the true mix of facilities on UK holiday parks/campsites.

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

Just over a third (39%) provided no on-park activities while 26% provided fishing and 21% a swimming pool. 'Other' includes: spa, petting zoo, nature walks, kayaking, canoe hire, farm tours and quad biking.

Only 51% of very small parks (1-5 pitches) had onsite activities.

Figure 4.2: Activities listed by holiday park/campsite operators



N=480

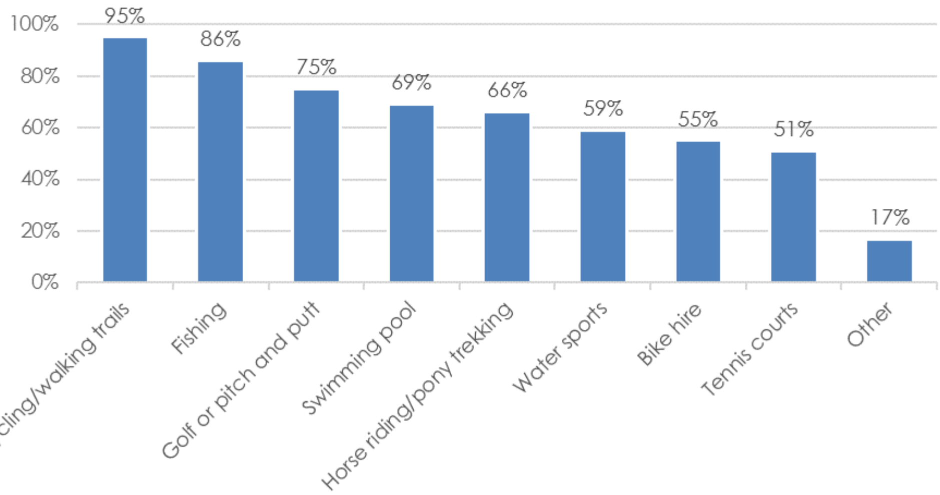
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most parks offer more than one type of facility)

Surveyed holiday parks/campsites were also asked about the **range of activities provided in the local area.** The vast majority of holiday parks/campsites had cycling/walking trails (95%) in the areas as well as fishing (86%). A further 75% had golf or pitch and putt, while 69% had a swimming pool and 66% had horse riding/pony trekking. Over half had water sports, bike hire and tennis courts.

'Other' activities included:

- bird watching
- climbing
- zip lining
- clay pigeon shooting
- kayaking
- sailing

Figure 4.3: Range of activities in the local area



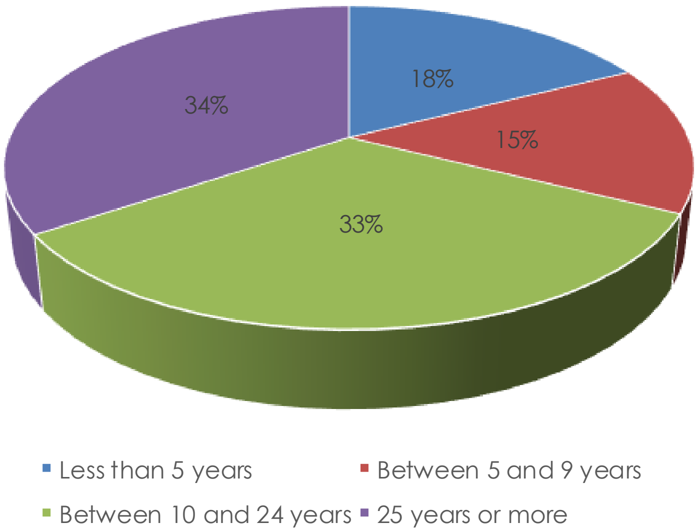
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites had more than one type of activity in the local area) N=627

4.7 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 (67%).

Figure 4.4 summarises the feedback.

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



N=787

Source: Frontline Holiday Park/Campsite Operator Survey, 2018

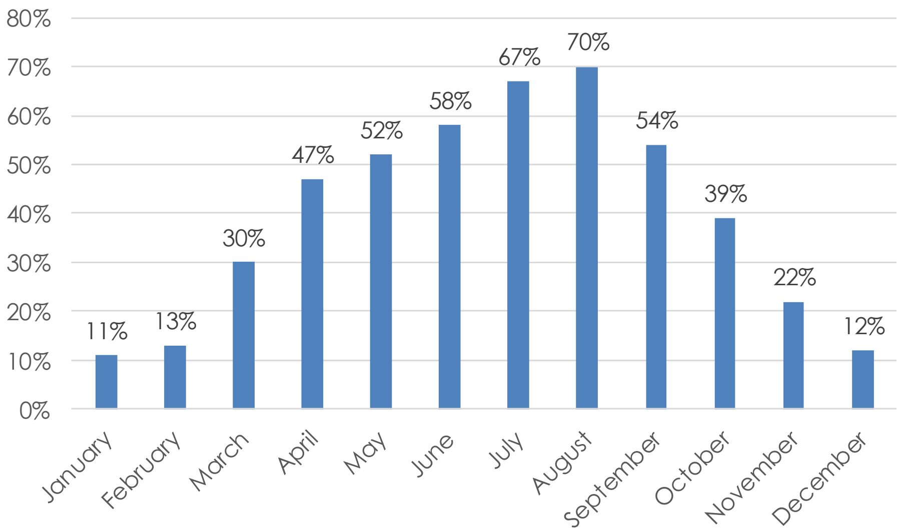
4.8 Length of season and occupancy rates

The majority of holiday parks/campsites (58%) operated seasonally with 42% open all year round. The majority (69%) 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 UK holiday parks/campsites peaked at 70% in high season (August) and 54% in mid season (September). Low season average occupancy ranged from a low of 12% in December to a high of 30% in March as presented in Figure 4.5.

Figure 4.5: Average occupancy rates on participants' holiday parks/campsites



Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=595

4.9 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 14.2 full-time and 15 part-time seasonal staff and 7.7 full-time and 2.4 part-time all year round staff.

Numbers varied depending on the size of the holiday parks/campsites. **4% of respondent holiday parks/campsites employed migrant workers, these accounted for, on average, 15% of their total workforce**.

Table 4.5: Average staff employed per holiday parks/campsites

Park Size	Seasonal		All year	
	Full-time	Part-time	Full-time	Part-time
Very small parks (1-5 pitches)*	-	-	-	-
Small parks (1-50 pitches)	0.8	2.1	2.1	2.2
Medium sized parks (51-100 pitches)	1.5	4.3	3.3	2.1
Large parks (101-250 pitches)	5.8	6.8	5.1	1.7
Very large parks (251 pitches or more)	31.7	31.7	20.0	3.6
Average across all parks	**14.2**	**15.0**	**7.7**	**2.4**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=399

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

4.10 Expenditure by holiday park/campsite[26]

Surveyed holiday parks/campsites 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 4.6.

Table 4.6: Total expenditure by holiday parks/campsites

Area of expenditure	Total expenditure	Average park expenditure
Capital expenditure	£92,417,429	£263,298
Operating expenditure	£95,958,618	£382,305
Wages and salaries	£114,438,011	£301,947
Total expenditure	**£302,814,058**	**£947,550**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=253-383

Holiday park/campsite operators were asked to comment on the top three areas of capital expenditure over the last five years. 54% provided at least one area and the following were most frequently highlighted:

- **accommodation** – new and existing renovation across all types of accommodation; purchase of new types of accommodation e.g. glamping pods, yurts
- **utility development** – electric hook up and connections; power upgrades and water supplies
- **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
- **park infrastructure** – such as roads and wider landscaping
- **park maintenance equipment** – plant and machinery
- **connectivity** – IT and fibre networking
- **fleet development** – cars and wider transportation, covering new and refurbishment

Looking to the future, parks 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 4.7.

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

Table 4.7: Planned expenditure

	Expenditure	
	Maintenance	Improvements
Next financial year (2018/19)	£39,735,096	£38,251,612
Next three financial years	£119,354,599	£101,346,553
Total	**£159,089,695**	**£139,598,165**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=232-634

4.11 Community engagement

Of the 790 holiday parks/campsites, almost half (47%) 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 historic landmarks, sports events and local charities
- **actively promoting local producers**, suppliers restaurants and shops
- **working with community groups** and community councils
- **social media advertising** and signposting

A small proportion (4%) stated that they did nothing or minimal for community engagement: some believed they could be doing more for their local communities, but staff resource was hampering them.

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

"We have an arrangement with Respitality to offer free holidays to carers to give them a break from looking after a member of the family."

Scotland

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

England

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

Wales

"We attend and contribute to local community meetings. Host a Foundation providing access to sea water sports for disabled children."

Northern Ireland

"For the past 5 years we have hosted the Cowal Primary School's annual orienteering competition – 8 - 10 schools participate in an all-day event at the park."

Scotland

4.12 Environmental improvement

Over half of holiday park/campsite operators (54%) provided information on how they **supported environmental improvement** at their holiday park/campsite, the most frequently occurring included:

- **recycling** – which was highlighted by the majority and included the education of guests and some started phasing out plastics
- **energy and water conservation** – through water harvesting, solar panels, light sensors and low wattage solutions, compost toilets
- **David Bellamy Award participation** – some have now achieved gold
- **support for local wildlife** – including a range of conservation projects, some were engaged in sites of special scientific interest (SSSI)
- **sustainable accommodation** – including upcycling of materials
- **restricted vehicle movement** – some have no car policy

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

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

"All our huts are made from recycled materials, we do not allow cars to the door so conserving the woodland they are in. All service points have separate bins for recycling. Bird and insect boxes around the site."

Scotland

"We have areas of undisturbed wild growth to encourage wildlife. We also run events of insect/animal identification and habitat."

Northern Ireland

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

Wales

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

England

"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."

Wales

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

England

4.13 Health and wellbeing

Almost half (44%) of holiday park/campsite operators provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **direct access to waterways/beaches, cycle paths and walks provision and information** – some on-park but mostly linked to surrounding area
- **provision of local health and wellbeing facilities and promotion within the wider community** – includes on-site fitness sessions and park runs
- **positive effect of being outdoors** – and close to nature
- **healthy food options** – in holiday park/campsite restaurants/cafes
- **activities across all ages** – and abilities
- **dog owners encouraged** – dog friendly areas

Less than 4% of respondents did not provide any facilities on their holiday parks/campsites – we expect the majority of these were CL/CS sites.

More detail on the health and wellbeing benefits for visitors is presented in Section 5.6.

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

"The park has direct access to the beach, and this encourages visitors to walk, run, swim, fish, bird-watch and boat-watch. Encourage all types of activities, mainly walking and cycling. Taking part in events in the wider community."

Northern Ireland

"Healthy option in Bistro. Cycle paths advertised and walks. Great area for sporting activities. Adjacent tennis court. Walking and cycling routes. Fishing on local river as well as golf course and bowling green. Two day spas in the town as well as a chiropractor"

Scotland

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

England

"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."

Wales

4.14 External factors impacting the business

A small sample of UK holiday park/campsite operators (7%) provided some insight to the external factors affecting their business, not surprisingly the weather came out first with the majority highlighting this. This was closely followed by uncertainty aligned to Brexit; although many saw positive aspects due to current positive exchange rates. Others mentioned:

- tourism tax and business rates relief changes
- lack of locally available skilled/trained staff and less overseas staff
- cost of materials
- poor broadband, Wi-Fi and mobile infrastructure
- lower caravan holiday home sales due to dropping disposal income
- negative impact of planning restricting park expansion
- cost of ferry travel to Northern Ireland being prohibitive to overseas visitors

Some holiday park/campsite operator feedback included:

"Weather. EU policies and the time, money and effort to implement them for not much visible benefit. Lack of coordination between mainland companies and their NI subsidiary. Cost of ferry travel across Irish sea."

Northern Ireland

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

England

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

Wales

"Worry over Business Rates relief which may choke investment/growth in the market/EU employees and uncertainty over whether they will be able to stay post Brexit."

Scotland

4.15 In summary

This research found that the UK's holiday parks/campsites offer a wide range of accommodation options to visitors, which allow it to serve a diverse range of customers. The UK's holiday parks/campsites offer a wide range of leisure facilities and amenities, with access to a broad mix of facilities on and off-site.

The majority of holiday park/campsite operators have run their holiday parks/campsites for over 10 years and many have done so for over 25 years. Holiday parks/campsites occupancy rates vary from an average of 70% in high season (August) to 54% in mid season (September).

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

- **expenditure** – almost half (48%) of respondent parks cumulatively spent £302.8m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including hosting community events and fund raising particularly around sports and community groups
- **environmental activities** – including support for recycling and conservation, and participation in the David Bellamy Conservation Award Scheme
- **health and wellbeing** – including providing cycling paths, promotion of wider community health and fitness and healthy food option provided on many holiday parks/campsites

5 Visitor 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.

Over ten thousand respondents started the survey, of which over 20% were removed due to incompleteness i.e. provided an answer to only the first few questions.

This gave a completed response from 7,501 visitors. These respondents made at least one visit to a holiday park/campsites in the UK in 2018.

Table 5.1 shows the spread of visitors across the four countries.

Table 5.1: Location of holiday parks/campsites visited

Location	Visitors	
	Trip 1	Trip 2
England	5,752	4,923
Scotland	798	755
Wales	677	638
Northern Ireland	213	191
Unknown	61	101
Total consulted	**7,501**	**6,608**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The remainder of this section is based on those visiting the UK in **Trip 1 only (7,501).** This was the most comprehensive data set as all respondents had participated in at least one trip.

5.1 Visitor origin and number of trips

The majority of survey participants lived in England 80% with 9% from Scotland, 6% from Wales and 4% from Northern Ireland. 1% came from outside the UK.

Table 5.2: Visitor home country

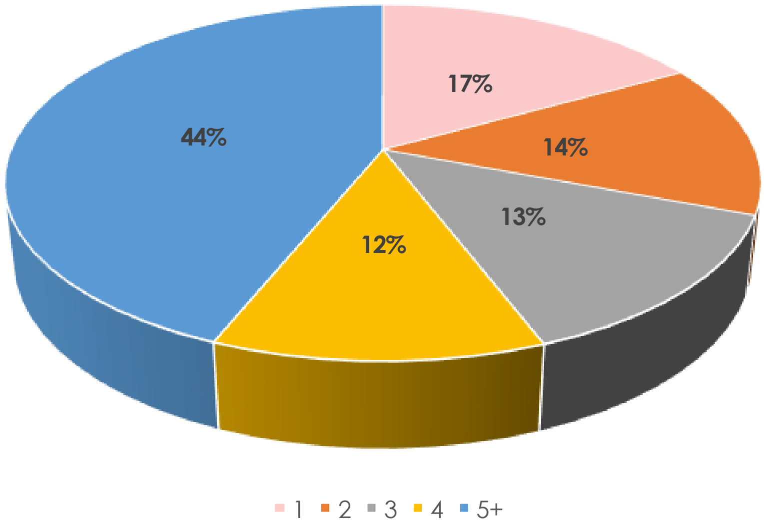
Location	Visitors
England	80%
Scotland	9%
Wales	6%
Northern Ireland	4%
Outside the UK[27]	1%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=7,472

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

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

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



N=7,462

5.2 Visitor characteristics

76% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 16% stayed in a rented or owner-occupied caravan holiday home; while 5% stayed in a rented or owner-occupied lodge/chalet/cottage.

Table 5.3 provides a full breakdown.

Table 5.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Motorhome/campervan	35%
Touring caravan	31%
Tent	10%
Static accommodation types	
Caravan holiday home owned	9%
Caravan holiday home rented	7%
Rented lodge/chalet/cottage	4%
Glamping e.g. pods/yurts/wigwams/other	2%
Privately-owned lodge/chalet/cottage	1%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=7,250

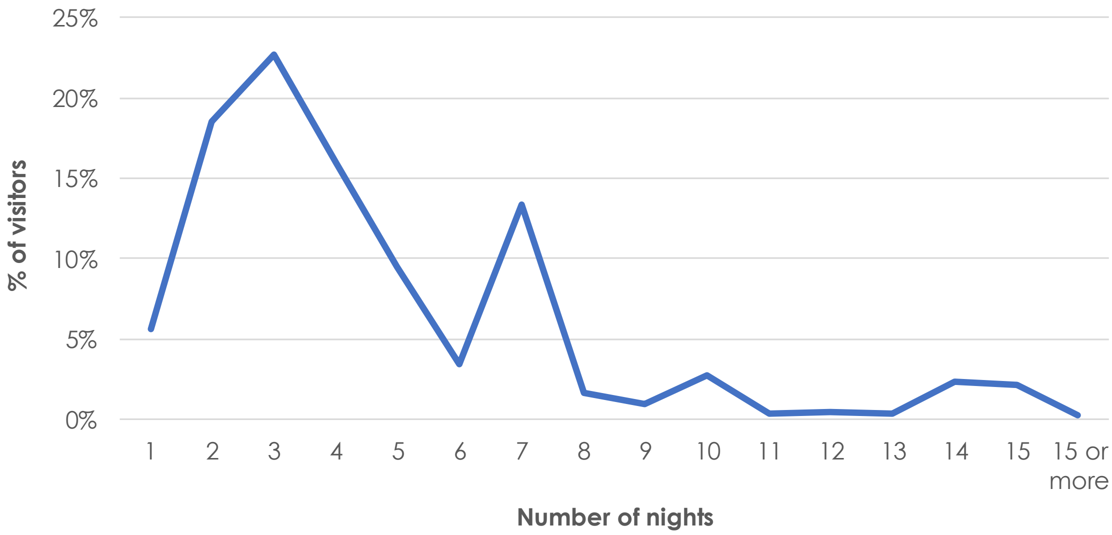
The high level of tourers is not surprising as **two thirds (66%) of visitors responding were a member of either the Camping and Caravanning Club and or Caravan and Motorhome Club[28].**

When broken down further:

- 37% were members of the Camping and Caravanning Club
- 51% were members of the Caravan and Motorhome Club
- 23% were members of both

On average visitors spent 4.6 nights per trip. The distribution of responses is shown in Figure 5.2.

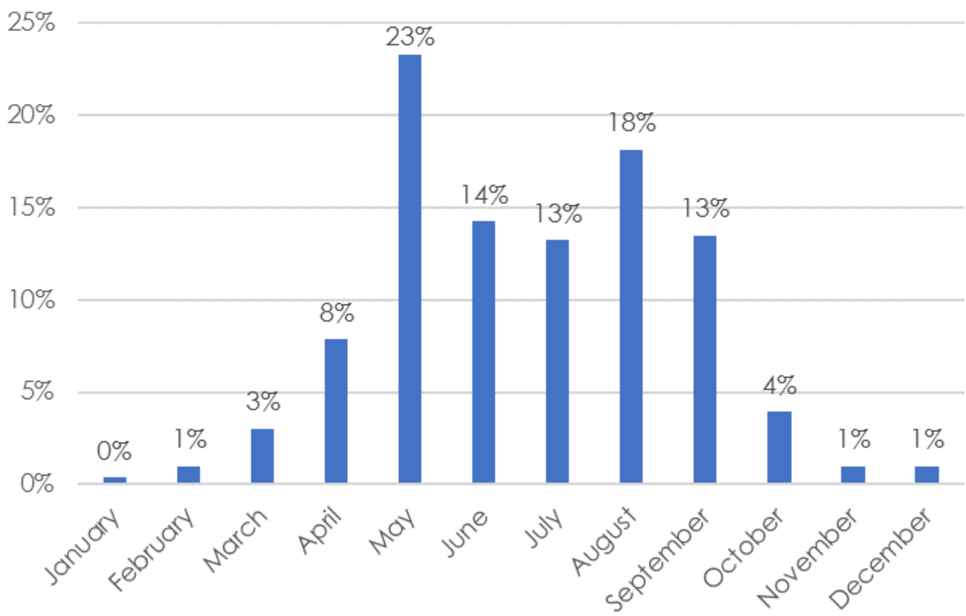
Figure 5.2: Number of nights stayed per visit



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=7,455

Figure 5.3 shows the month in which respondent visitors began their trip. May (23%) and August (18%) were the most popular for visitors with the highest proportion of trips occurring in these months.

Figure 5.3: Month during which visitors began their trip[29]



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=6,152

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

Table 5.4 shows the number of adults, children and pets in each party. The average adult group size was 2.4, and 25% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.8. 35% of groups brought a pet.

The average total group size was 2.7. When broken down by tourers and owners there was no difference in the average group size.

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

	Number of adults	Number of children	Number of pets
1	6%	35%	68%
2	82%	44%	27%
3	5%	13%	4%
4	5%	4%	1%
5+	0%	0%	1%
Average	2.2	1.8	1.4

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

5.3 Visitor expenditure

Visitors who stayed in rented or touring accommodation spent, on average, £557 per visit (per group), including £250 on-site and £207 off-site. Visitors who owned their holiday home spent, on average, £480 (per group) per visit, including £286 on-site and £194 off-site.

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

Table 5.5: Visitor spend per visit

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£74	£67
Transport spent during trip	£30	£30
Total cost of holiday accommodation	£117	£138
Touring-pitch/fees paid to park	£101	£115
Park facilities (e.g. Wi-Fi, laundry etc)	£3	£3
Eating/drinking on the park	£24	£24
Eating/drinking/takeaways in the surrounding area	£68	£62
Recreation/entertainment on the park	£5	£6
Recreation/entertainment in the surrounding area	£18	£16
Visitor attractions	£16	£15
Other	£1	£4
Total – on-site	**£250**	**£286**
Total – off-site	**£207**	**£194**
Total – both on and off-site	**£557**	**£480**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors who stayed in rented and touring accommodation spent, on average, £101 per day, including £55 on-site and £46 off-site.

Visitors who owned their holiday home spent, on average, £89 per day, including £53 on-site and £36 off-site. This is higher than the average UK tourism visitor spend in 2017 of £63 per day[30]. Table 5.6 summarises the daily expenditure.

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

Table 5.6: Visitor spend per day

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£16	£12
Transport spent during trip	£7	£6
Total cost of holiday accommodation	£26	£26
Touring-pitch/fees paid to park	£22	£21
Park facilities (e.g. Wi-Fi, laundry etc)	£1	£1
Eating/drinking on the park	£5	£4
Eating/drinking/takeaways in the surrounding area	£15	£12
Recreation/entertainment on the park	£1	£1
Recreation/entertainment in the surrounding area	£4	£3
Visitor attractions	£4	£3
Other	£0	£1
Total – on-site	**£55**	**£53**
Total – off-site	**£46**	**£36**
Total – both on and off-site	**£101**	**£89**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

5.4 International visitors

International visitors stayed longer and spent more money than UK visitors. International visitors responding to the survey spent on average 6.5 nights compared to 4.6 nights by UK visitors[31].

International visitors who stayed in rented or touring accommodation spent, on average, £1,050 (per trip) compared to the UK visitor average of £557 (per trip). For international visitors who owned their own holiday home, they spent, on average, £841 (per trip) compared to £480 (per trip) by UK visitors.

When trip spend was calculated per day international visitors spend was still higher than that of UK visitors. It was calculated that international visitors who stayed in rented and touring accommodation spent, on average, £175 per day, compared to £101 by UK visitors. Similarly, international visitors who owned their holiday home spent, on average, £101 per day, compared to £89 by UK visitors.

5.5 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"*; and *"I wanted to revisit the area"*.

Table 5.7 provides a full breakdown of influences.

[31] *This is based on a small sample – 101 international visitors responding to the survey.*

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

Factor	Number responding
Wanted to visit the area	30%
Wanted to revisit the area	27%
Had been to this region/country before and wanted to visit another area	13%
Family/friends in the area	11%
Saw advertisement for the park(s) in a magazine, newspaper or website	11%
Park/site recommended by family/friends	11%
Club member communication	13%
Specific activities available in the area	7%
Attending an event/festival	6%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=6,174
(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).

5.6 Health and wellbeing

Time spent relaxing (64%) was the most commonly undertaken 'activity' by visitors followed by short walks (55%) and time spent with family and friends (50%). Table 5.8 summarises the results.

Table 5.8: Activities undertaken whilst visiting a holiday park/campsite

	More	Less	Same	I did not undertake this activity
Spent time relaxing	64%	6%	29%	1%
Short walks (under 2 miles)	55%	4%	38%	4%
Spent time with family and friends	50%	6%	28%	15%
Wildlife/nature activities	36%	4%	31%	29%
Long walks (over 2 miles)	29%	7%	29%	14%
Other outdoor physical activities	28%	4%	24%	43%
Cycling	19%	4%	13%	64%

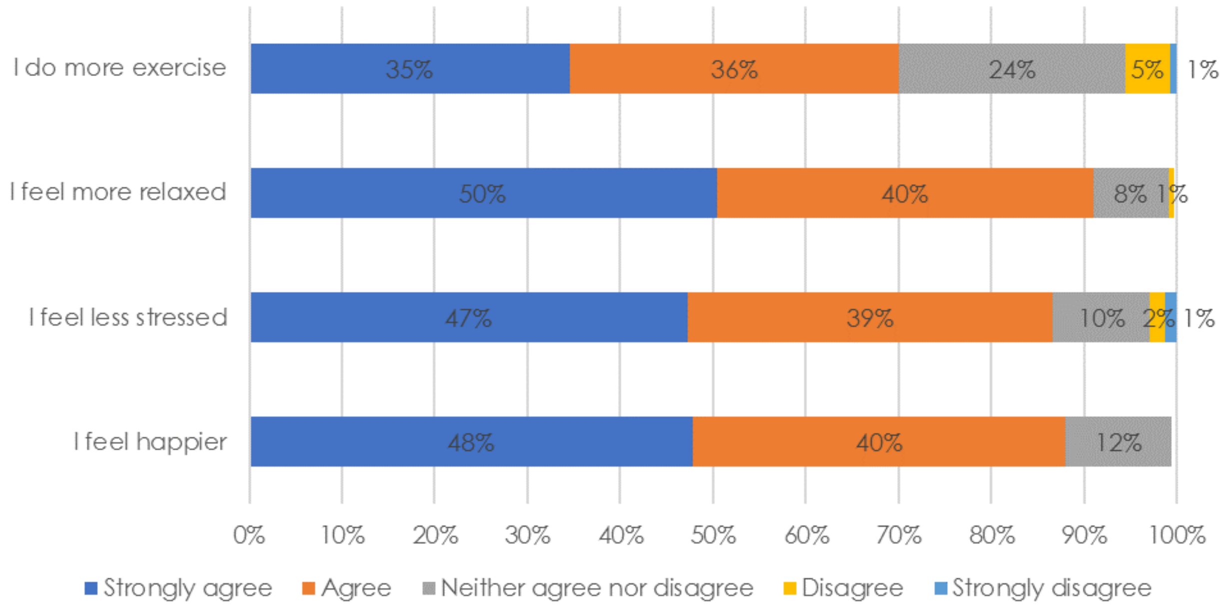
Frontline Holiday Park/Campsite Visitors Survey, 2018 N=5,198-5,778

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

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

Figure 5.4 presents the detailed feedback.

Figure 5.4: When visiting a holiday park/campsite…



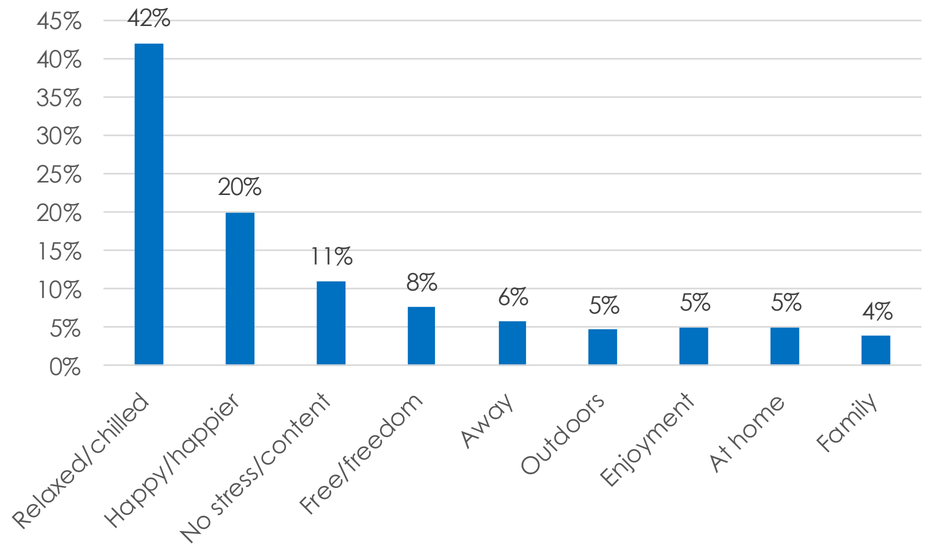
Frontline Holiday Park/Campsite Visitors Survey, 2018

Visitors felt more relaxed(44%), happier (20%) and less stress/content (11%) as a result of visiting a holiday park/campsites.

This is summarised in Figure 5.5 and the word cloud below.

Less than 1% negative comments were received, which generally focussed on stress levels aligned to getting to the destination and setting up.

Figure 5.5: During my time visiting a holiday park/campsite I feel……



Frontline Holiday Park/Campsite Visitors Survey, 2018 N=5,440

Some visitor comments included:

"I feel alive and not hemmed in by the stresses and strains of daily life and appreciate every moment with my family away from modern technology enjoying nature and life."

Rented Caravan User, Scotland

"I want to explore the great outdoors, play more outdoor activities, get away from the electronic world, play more game/activities like I did as a kid. Visit local arts craft type shops."

Glamping User, Scotland

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

Motorhome/Campervan Owner, England

"Happy in our little camping bubble!"

Motorhome/Campervan Owner, England

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

Tent Owner, England

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

Rented Caravan User, Wales

"More contented being in the outdoors as a lifestyle choice and getting better value for money. Comfortable and able to manage my time as I wish, with no pressures. I love the easy access to the countryside around."

Touring Caravan Owner, Northern Ireland

"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, Wales

5.6.1 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[32]:

> *"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[33]:

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

As well as health impacts, there are significant **socioeconomic implications**. Physical inactivity currently costs the NHS between £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.

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[34] 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.

In 2010 the UK Government launched the National Wellbeing Programme[35] to:

> *"Start measuring our progress as a country, not just by how our economy is growing, but by how our lives are improving; not just by our standard of living, but by our quality of life".*

In response the Office for National Statistics (ONS) established a national programme to develop and publish an accepted and trusted set of statistics for wellbeing, to complement traditional economic measures such as GDP. A national debate on *'what matters to you?'* resulted in the development of a wellbeing measurement framework. Examples of indicators on this framework include:

- healthy life expectancy
- sports participation
- accessed natural environment
- satisfaction with leisure time
- mental wellbeing
- satisfaction with overall lives
- overall happiness
- satisfaction with health

The evidence gathered from visitors during this study demonstrates that the UK holiday park/campsites 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 UK holiday park/campsite sector is supporting the UK policy agenda for health and wellbeing.

[32] https://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx

[33] http://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx

[34] https://www.shponline.co.uk/stress/stress-and-anxiety-costing-the-nhs-71m-a-year

[35] https://www.gov.uk/government/collections/national-wellbeing

Some **visitor** comments included:

"We use our camper van as a base for outdoor activities, mountain climbing, cycling, hiking. It makes it so easy to stay where we want to go. Sitting in the awning having a cup of tea listening to wildlife is so peaceful. So much different from my day to day life in the city."

Campervan Owner, Scotland

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

Glamping User, England

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

Rented Caravan User, England

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

Tent Owner, England

"With having disabilities caravanning is the only break I can have without the stress of travelling too far and still feel I've had a great holiday."

Caravan Owner, Northern Ireland

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

Rented Caravan User, Wales

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

Tent Owner, Wales

"Caravan holidays should be prescribed by doctors on the NHS as they would cure all but the most serious ailments!"

Touring Caravan owner, Northern Ireland

5.7 In summary

The majority of the survey participants lived in England (80%) and just under half of respondents (44%) stayed on a holiday or touring/camping park/site in the UK five times or more during the last 12 months.

76% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 16% stayed in a rented or owner-occupied caravan holiday home; while 5% stayed in a rented or owner-occupied lodge/chalet/ cottage. 2% stayed in 'glamping' accommodation.

The average adult group size was 2.2, and 25% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1.8. 35% of groups brought a pet.

Visitors who stayed in rented or touring accommodation spent, on average, £557 per visit (per group), including £250 on-site and £207 off-site. Visitors who owned their holiday home spent, on average, £480 (per group) per visit, including £286 on-site and £194 off-site. This is a substantial increase on the average UK tourism visitor spend (per trip) in 2017 of £196 i.e. £64 per day[36].

Visitors also tend to take lengthy stays, on average 4.6 days. This is longer than the average stay figures of 3.1 days reported by the GB Annual Tourist Report[37].

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

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

6 Economic Impact Assessment – Methodological Approach

6.1 General approach

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

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

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

In other words, the model includes a range of economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures. In total there were 48,180 separate calculations, including the following country level:

- Scotland: 19,710
- England: 17,520
- Northern Ireland: 2,190
- Wales: 8,760

6.2 Measuring on-site and off-site expenditure

Table 6.1 illustrates how the on-site expenditure figures were estimated for touring caravans in a particular UK region on Saturday 4th August.

Table 6.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in a region	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 a region on 4th August	**£328,437**

The off-site expenditure was measured in exactly the same. Following the same worked example as above, it was calculated that in a particular UK region, on Saturday 4th August, total off-site expenditure by touring caravan visitors is presented in Table 6.2.

Table 6.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in a region	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 a region on 4th August	**£253,650**

6.3 Measuring indirect and induced expenditure

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

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

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

The most up-to-date multipliers for the tourism accommodation sector in the UK are derived from the UK Input-Output Analytical Tables (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 6.3 presents a worked example for the UK.

Table 6.3: 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**

6.4 Measuring visitor impact

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

Table 6.4 presents a worked example.

Table 6.4: Visitor impact

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

6.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[38], 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[39], turnover generated by the tourism industry translates to a Gross Value Added (GVA) impact. Figures are presented in each country report as to the turnover: GVA ratio[40].

6.6 Measuring the overall impact across visitor expenditure, employment and GVA at the UK level

Based on the results of the individual country level impacts, the UK level impact has been calculated by adding each country level impact (across expenditure, FTE and GVA).

These are presented in Section 7.

[38] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[39] *2018 Annual Business Survey, ONS, 2018.*
[40] *Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks).*

7 Economic Impact of Holiday Parks/Campsites in the UK

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

The impact by region and the method for assessing impact for each country is presented in a separate report.

7.1 Impact by UK country

It is estimated that in 2018 visitors to UK holiday parks/campsites spent **a total of £9.3bn in the UK economy**. This visitor expenditure **supports 171,448 FTE jobs and contributes £5.3bn of GVA to the UK economy**.

Table 7.1 summarises the impact at a country level.

Table 7.1: Economic impacts by UK Country

Region	Visitor expenditure (£m)	Employment (FTE jobs)
Wales	1,332.5	24,677
England	6,809.3	126,098
Scotland	772.3	14,301
Northern Ireland	344.1	6,372
UK	**9,258.2**	**171,448**

Source: Frontline, 2019

7.2 Impact by accommodation type

Table 7.2 summarises the impacts aligned to accommodation type.

Table 7.2: Economic impacts by accommodation type

UK	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Caravan Holiday Home (owned)	4,136.9	76,607	2,359.7
Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	3,406.4	63,074	1,952.9
Caravan Holiday Home (rented)	1,175.0	21,761	669.5
Lodge/chalet/cottage (owned)	314.3	5,822	179.8
Lodge/chalet/cottage (rented)	188.1	3,480	107.7
Glamping e.g. pods/yurts/wigwams/other	37.5	704	22.0
All accommodation	**9,258.2**	**171,448**	**5,291.6**

Source: Frontline, 2019

7.3 Assessing the economic impacts of maintenance expenditure

The impacts presented to date are based on visitor expenditure in 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 7.3 estimates the average maintenance expenditure across the UK.

Table 7.3: Average UK annual maintenance expenditure on visitor owned accommodation

Area of expenditure	Touring Caravan/ Motorhome Owner*[41]	Caravan/Holiday Home Owner[42]
Servicing	£248	£232
Insurance	£245	£207
Road Tax	£167	N/A
General Upkeep	£204	£541
Total	**£864**	**£980**

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 the UK (780,000[43]) multiplied by average maintenance expenditure per touring caravan/motorhome (£864). This equals £673.9m.

Aligned to the approach presented above, the estimated expenditure figure for caravan holiday home/lodge owners is equal to the number of owned caravan holiday homes (208,000[44]), multiplied by average maintenance expenditure per holiday home (£980). This equals £203.8m. **The total impact associated with expenditure on caravan and holiday home maintenance in the UK is estimated to be in the region of £877.7m.**

7.4 In summary

In 2018 it was estimated that the holiday park/campsites sector in the UK generated **a total visitor expenditure impact of £9.3bn. This expenditure impact equates to a GVA impact of £5.3bn, and to 171,448 supported FTE jobs in the UK economy.**

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

- **owner-occupied caravan holiday homes**: with visitor expenditure of £4.1bn supporting 76,605 FTE jobs
- **touring pitches**: with visitor expenditure of £3.4bn supporting 63,194 FTE jobs

In addition to the figures above, money spent on maintenance by tourers and caravan holiday home owners adds a **further £877.7m of expenditure to the UK economy.**

According to a report commissioned by VisitBritain[45] the tourism sector across the four countries had a direct GVA of £64.7bn[46], therefore the holiday park/campsite sector with a direct GVA of £5.3bn (8%) makes a substantial contribution to the sector's GVA.

[41] *These figures were taken from visitors who lived in the UK as it was assumed that's where they would spend their money.*
[42] *These figures were taken from visitors visiting the UK as it was assumed that's where they would spend their money.*
[43] *NCC https://www.thencc.org.uk/Our_Industry/statistics.aspx and apportioned according to the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[44] *UKCCA, 2018.*
[45] *https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf*
[46] *Converted to 2018 prices.*

8 Conclusions

The UK holiday park and campsite sector makes a substantial contribution to the tourism economy, generating £9.3bn in visitor expenditure, equivalent to £5.3bn GVA and supporting 171,448 FTE jobs.

Visitors stay longer on UK holiday parks/campsites than the national tourism average: Visitors take a holiday or short break on a holiday park/campsites on several occasions over the course of a year, with 44% of respondents taking five or more trips a year. They also tend to take lengthy stays, on average 4.6 days. This is longer than the average stay figures of 3.1 days reported by the GB Annual Tourist Report[47].

Visitors to UK holiday parks/campsites spend more money than the national tourism average: During each of these stays, visitors spend a considerable amount of money per trip in the local economy, including £250 on-site and off-site by renters and tourers, and £207 on-site and off-site by owners. This is an increase on the average UK tourism visitor spend (per trip) in 2017 of £196 i.e. £63 per day[48].

Flexible accommodation and facilities provision, support local communities, protect the environment and encourages a healthier lifestyle: The UK's 6,243 member holiday parks/campsites account for 438,076 pitches[49]. 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 £877.7m of expenditure to the economy.

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

Usage of migrant workforce may negatively impact a small proportion of holiday parks/campsites following Brexit – While only 4% of respondent holiday parks/campsites reported using migrant workers, this equated to an average of almost one-fifth (15%) of their workforce. Brexit could therefore result in staff shortages for a small proportion of holiday parks/campsites.

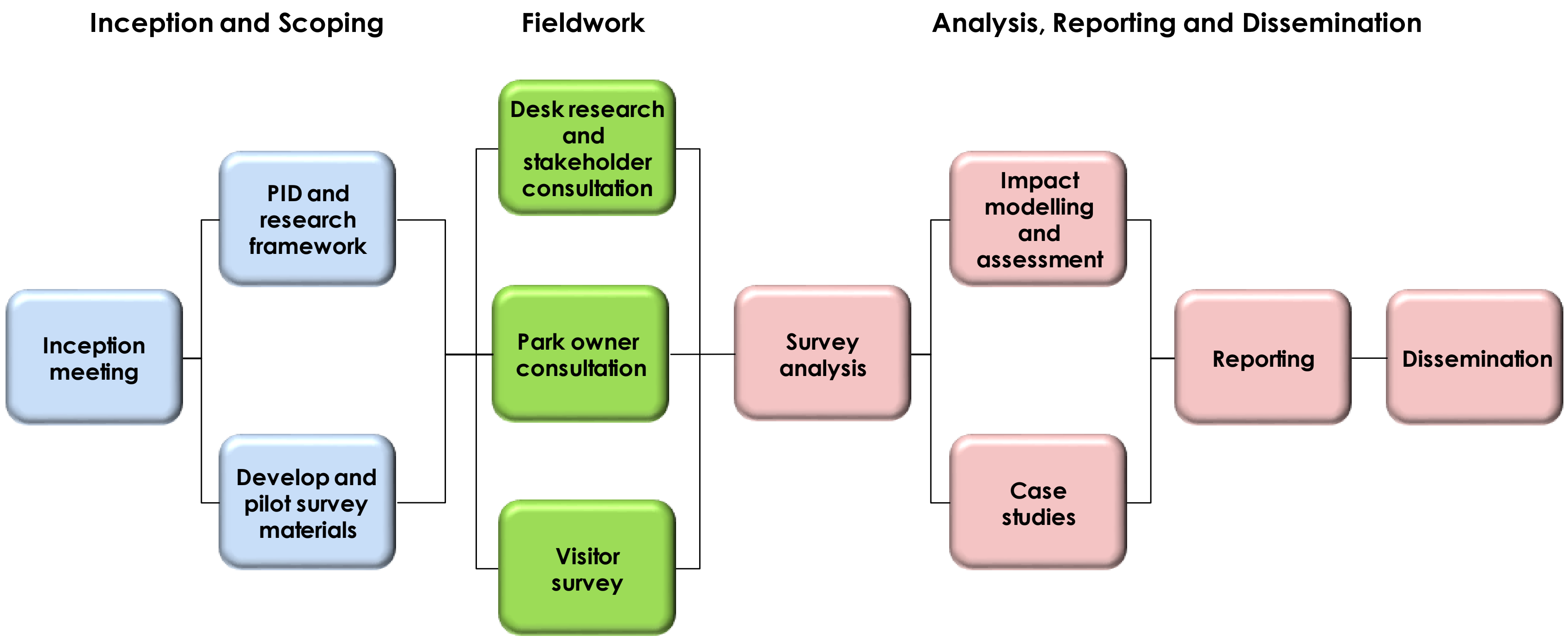
[47] https://gov.wales/docs/statistics/2018/180823-gb-tourist-statistics-2017-en.pdf

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

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

Appendix 1 – Method

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



Appendix 2 – Stakeholder Consultees

UKCCA Group:

Bob Hill	Camping and Caravanning Club
Brian Clark	National Caravan Council
Fiona Bewers	Caravan and Motorhome Club
Jeanette Wilson	British Holiday & Holiday Parks Association
Judith Sleigh	Thistle Holiday Parks
Viv Harrison	Caravan and Motorhome Club

Other:

Andrew Campbell	Welsh Tourism Alliance
Caroline Boyd	Tourism Northern Ireland
Chris Greenwood	VisitScotland
Humphrey Walwin	VisitBritain
John Waterworth	Parkdean Resorts
Kurt Jansen	English Tourism Alliance
Marc Crothall	Scottish Tourism Alliance
Nick Lomas	Caravan & Motorhome Club
Richard Moss	Colliers International
Robert Louden	Camping and Caravanning Club
Ros Pritchard	British Holiday & Home Parks Association

Appendix 3 – Regional Breakdown

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

England
East Midlands – includes Derbyshire, Leicestershire, Lincolnshire (except North and North East Lincolnshire), Northamptonshire, Nottinghamshire and Rutland
East of England – includes Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk and Suffolk
North East England – includes County Durham, Darlington, Hartlepool, Middlesbrough, Northumberland, Redcar and Cleveland, Stockton-on-Tees and Tyne and Wear
North West England – includes Cheshire, Cumbria, Greater Manchester, Lancashire and Merseyside
South East England – includes Berkshire, Buckinghamshire, East Sussex, Hampshire, the Isle of Wight, Kent, Oxfordshire, Surrey and West Sussex
South West England – includes Gloucestershire, Bristol, Wiltshire, Somerset, Dorset, Devon and Cornwall, as well as the Isles of Scilly
West Midlands – includes Birmingham and the larger West Midlands conurbation, which includes the city of Wolverhampton and large towns of Dudley, Solihull, Walsall and West Bromwich
Yorkshire – includes South Yorkshire, West Yorkshire, East Riding of Yorkshire, Hull, North Yorkshire and the City of York, as well as North Lincolnshire and North East Lincolnshire

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

Appendix 4 – Detailed Impact Findings

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
England	991.8	1,130.0	332.5	11.0	95.7	59.6	2,620.6
Wales	142.3	317.4	54.0	0.7	22.2	3.6	540.2
Scotland	114.9	120.3	28.9	2.1	7.7	6.6	280.5
Northern Ireland	23.2	116.4	25.8	0.0	0.4	0.4	166.2
Total	**1,272.2**	**1,684.1**	**441.2**	**13.8**	**126.0**	**70.2**	**3,607.5**

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
England	815.7	797.1	273.3	9.1	67.5	38.6	2,001.3
Wales	109.9	197.6	41.7	0.6	13.8	2.7	366.3
Scotland	104.3	100.1	26.2	1.9	6.4	6.0	244.9
Northern Ireland	15.2	35.4	16.9	0.0	0.1	0.3	67.9
Total	**1,045.1**	**1,130.2**	**358.1**	**11.6**	**87.8**	**47.6**	**2,680.4**

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
England	849.5	905.8	284.6	9.6	76.8	61.1	2,187.4
Wales	118.5	242.0	45.0	0.6	16.9	3.0	426.0
Scotland	103.0	103.6	26.0	1.9	6.6	5.8	246.9
Northern Ireland	18.1	71.2	20.1	0.0	0.2	0.4	110.0
Total	**1,089.1**	**1,322.6**	**375.7**	**12.1**	**100.5**	**70.3**	**2,970.3**

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
England	2,657.0	2,832.9	890.4	29.7	240.0	159.3	6,809.3
Wales	370.7	757.0	140.7	1.9	52.9	9.3	1,332.5
Scotland	322.2	324.0	81.1	5.9	20.7	18.4	772.3
Northern Ireland	56.5	223.0	62.8	0.0	0.7	1.1	344.1
Total	**3,406.4**	**4,136.9**	**1,175.0**	**37.5**	**314.3**	**188.1**	**9,258.2**

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
England	18,369	20,926	6,156	207	1,771	1,101	48,530
Wales	2,635	5,878	1,001	13	411	66	10,004
Scotland	2,126	2,226	535	40	145	119	5,191
Northern Ireland	430	2,155	477	0	7	8	3,077
Total	**23,560**	**31,185**	**8,169**	**260**	**2,334**	**1,294**	**66,802**

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
England	15,101	14,761	5,061	170	1,249	717	37,059
Wales	2,036	3,657	773	11	256	51	6,784
Scotland	1,930	1,856	485	38	121	110	4,540
Northern Ireland	282	655	314	0	2	5	1,258
Total	**19,349**	**20,929**	**6,633**	**219**	**1,628**	**883**	**49,641**

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
England	15,732	16,775	5,273	177	1,419	1,133	40,509
Wales	2,195	4,482	834	11	313	54	7,889
Scotland	1,904	1,916	480	37	124	109	4,570
Northern Ireland	334	1,320	372	0	4	7	2,037
Total	**20,165**	**24,493**	**6,959**	**225**	**1,860**	**1,303**	**55,005**

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
England	49,202	52,462	16,490	554	4,439	2,951	126,098
Wales	6,866	14,017	2,608	35	980	171	24,677
Scotland	5,960	5,998	1,500	115	390	338	14,301
Northern Ireland	1,046	4,130	1,163	0	13	20	6,372
Total	**63,074**	**76,607**	**21,761**	**704**	**5,822**	**3,480**	**171,448**

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
England	564.7	643.1	189.3	6.4	54.4	33.9	1,491.8
Wales	81.6	181.5	31.0	0.4	12.8	2.0	309.3
Scotland	71.2	74.5	17.8	1.4	4.8	4.0	173.7
Northern Ireland	11.9	59.6	13.2	0.0	0.2	0.2	85.1
Total	**729.4**	**958.7**	**251.3**	**8.2**	**72.2**	**40.1**	**2,059.9**

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
England	464.3	453.7	155.5	5.3	38.3	22.5	1,139.6
Wales	63.0	114.1	23.8	0.3	7.9	1.5	210.6
Scotland	64.6	62.0	16.3	1.3	4.0	3.7	151.9
Northern Ireland	7.8	18.1	8.7	0.0	0.1	0.2	34.9
Total	**599.7**	**647.9**	**204.3**	**6.9**	**50.3**	**27.9**	**1,537.0**

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
England	483.6	515.5	162.0	5.4	43.6	34.3	1,244.4
Wales	67.2	137.2	25.6	0.3	9.6	1.6	241.5
Scotland	63.8	64.0	16.0	1.2	4.0	3.6	152.6
Northern Ireland	9.2	36.4	10.3	0.0	0.1	0.2	56.2
Total	**623.8**	**753.1**	**213.9**	**6.9**	**57.3**	**39.7**	**1,694.7**

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
England	1,512.6	1,612.3	506.8	17.1	136.3	90.7	3,875.8
Wales	211.8	432.8	80.4	1.0	30.3	5.1	761.4
Scotland	199.6	200.5	50.1	3.9	12.8	11.3	478.2
Northern Ireland	28.9	114.1	32.2	0.0	0.4	0.6	176.2
Total	**1,952.9**	**2,359.7**	**669.5**	**22.0**	**179.8**	**107.7**	**5,291.6**