Pitching the Value

2019 Economic Benefit Report: Holiday Parks and Campsites NORTHERN IRELAND

Report for the

UK Caravan & Camping Alliance

February 2019

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Executive Summary

The Northern Irish holiday park and campsite sector makes a substantial contribution to Northern Ireland's tourism economy, generating £344.1m in visitor expenditure, equivalent to £176.2m GVA and supporting 6,372 jobs.

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

Visitors to Northern Irish holiday parks and campsites stayed up to 132% longer and spent up to 134% more than the national tourism average.

Background

Tourism is one of Northern Ireland's key industries. The latest Northern Ireland Statistics and Research Agency (NISRA) tourism statistics for the year ended March 2018 show that **local tourism continues to show positive growth, with increases in overall visitor numbers and spend over the past year**.

In 2017, there were an estimated 4.9 million overnight trips in Northern Ireland, an increase of 6% in 2016. This includes trips by inbound visitors to Northern Ireland and domestic trips taken by local residents. **Estimated expenditure associated with these trips was £926m an increase of 9% from £850m over the same period**. The statistics point towards an upward trend in overall tourism activity in Northern Ireland between 2011 and 2017.

The most recent NI Census of Employment figures estimate **61,300 employee jobs in tourism related industries in 2015. This equates to one in ten of all jobs.**

Report Purpose

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

Economic Impact

In 2018 it was estimated that Northern Ireland's holiday park and campsite sector generated **a total visitor expenditure impact of £344.1m. This expenditure impact equates to a GVA impact (including multipliers) of £176.2m and supported 6,372 FTE jobs in the Northern Irish economy.**

According to a report commissioned by VisitBritain[1] **the tourism sector in Northern Ireland had a direct GVA of £0.8bn[2], therefore the holiday park and campsite sector with a direct GVA of £119.8m (excluding multipliers)[3] makes a significant contribution (15%) to the sector's GVA.**

In addition, tourers and caravan holiday home owners spend money on **maintenance which adds a further £21.2m of expenditure to the economy**.

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

[2] *Converted to 2018 prices and excluding multipliers.*

[3] *See appendix 2 for GVA excluding multipliers summary table.*

Holiday Park/Campsite Operators

According to evidence provided by the UKCCA, **in the summer of 2018 there were an estimated 110 holiday parks/campsites operating in Northern Ireland accounting for 20,823 pitches**[4]. This was drawn from a database of holiday parks/campsites provided by the UKCCA. Consultations were undertaken with 46 of these parks. Research found that **Northern Irish 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, **Northern Irish holiday parks/campsites also offer a wide range of facilities and amenities**, including restaurants, swimming pools, cafés and games rooms.

The majority of holiday park/campsite operators have owned their parks for over 10 years and many have done so for over 25 years. Park occupancy rates vary from an average of 68% in high season (July) to 49% in mid season (April). The proportion of visitors who live outside Northern Ireland was 22%. From this, 10% came from outside the UK, 9% from England, 2% from Scotland, and 1% from Wales.

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

- **expenditure** – 74% of parks from the total survey sample cumulatively spent £11.3m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including local sponsorship, hosting events, supporting community groups, local charities and children's outreach activities
- **environmental activities** – including support for recycling, wildlife, water and energy conservation, biomass boilers and electric vehicles
- **health and wellbeing** – including providing sports and outdoor activities, access to waterways and beaches, walk and cycle paths and a range of family fun activities

Park Visitors

243 respondents to the survey had made 404 visits to a holiday park/campsites in Northern Ireland in 2018 across two trips. The remainder of this section is based on those visiting Northern Ireland in **Trip 1 only (213)** which had the most comprehensive data set as all respondents participated in at least one trip.

The majority of survey participants lived in Northern Ireland (94%). Over two thirds (67%) had stayed on a holiday park or campsite in Northern Ireland 5 times or more during the last 12 months.

68% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 28% stayed in an owner-occupied caravan holiday home.

The average adult group size was 2.1, and **36% of all groups included children**. Where parties were travelling with children, the average number of children in each group was 0.9. **33% of groups brought a pet.**

Visitors and their party who stayed in rented or touring accommodation spent, on average, £532 per visit (£136 per day), spending, on average, 3.9 days on a holiday park/campsite on each **holiday. Visitors staying in owned accommodation spent, on average,** £488 per visit (£67 per day) and stayed, on average 7.2 days. This is higher than the average daily spend by visitors to Northern Ireland at £58[5] and 3.1 days per holiday[6].

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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[4] *This includes Certificated Sites and Certificated Locations*
[5] *https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/*
[6] *https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/*

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 Northern Ireland[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/campsite 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 regional level within each of the four countries
- consider expenditure by the holiday park/campsites owners/operators, e.g. ongoing maintenance, capital investment to extend, improve and/or provide new facilities
- consider spend by visitors to the holiday parks/campsites, both on and off-site, for all types of accommodation; identify spend by overseas visitors
- consider how the study can link to aspects of health and social wellbeing

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

The assessment method is presented in Appendix 1.

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

2 Northern Ireland Tourism in Context

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

2.1 National tourism strategies

VisitBritain has developed the *"Delivering a Golden Legacy"*[8] 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.

As the VisitBritain strategy does not cover Northern Ireland it is important to focus on their country specific statistics.

Northern Ireland is aiming to capitalise on the predicted 20 years of sustained global tourism growth[9]. To date tourism has exceeded the expectations set out in the previous "*Programme for Government*", it is widely accepted that in order for Northern Ireland to capitalise on its growth potential a new tourism strategy is required.

A scoping document released by the Department of Enterprise, Trade and Investment (DETI) and Tourism NI set out the key vision and aspiration for the future of tourism[10]. A consultation and engagement process across the industry formed an action plan, setting out specific targets and a vision.

The paper identified **main priorities for tourism in Northern Ireland**:

1. The need to expand outlook to a more global focus. Expansion of non-Northern Irish markets to drive up the interest and awareness of Northern Ireland as a visitor destination by maximising natural assets, culture and heritage and promoting iconic attractions.
2. Developing the 'experience' for visitors, ensuring that the experience matches the expectations and standards of international visitors and provides an authentic experience.
3. Using the Belfast Waterfront Conference and Exhibition Centre to be the catalyst for developing the business tourism sector in Northern Ireland.
4. The importance of events in driving up visitor numbers and generating increased spend has also been identified.

In order to achieve the priorities the paper details nine areas that will enable the vision to be implemented. This included improved connectivity, access and infrastructure to other markets, while promoting the ease of access through Dublin. This is of course dependent on the outcome of current Brexit negotiations. While Northern Ireland relies heavily on its ports and airports to access key markets, it lacks direct services to inbound tourism markets such as Canada, Germany, Scandinavia and the Middle East. Also noted is an investment in transport infrastructure to upgrade gateways between Northern Ireland and Republic of Ireland and the creation of innovative ways to encourage visitor exploration between both. Improved and increased accommodation to meet the demands, needs and expectations of visitors was also highlighted.

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

[9] https://www.economy-ni.gov.uk/topics/tourism

[10] https://www.northernireland.gov.uk/consultations/programme-government-consultation

2.2 National tourism statistics

The latest Northern Ireland Statistics and Research Agency (NISRA) tourism statistics for the year ended March 2018 show that local tourism continues to show positive growth, with increases in overall visitor numbers and spend over the past year[11].

In 2017, there were an estimated 4.9 million overnight trips in Northern Ireland, an increase of 6% in 2016. This includes trips by inbound visitors to Northern Ireland and domestic trips taken by local residents. Estimated expenditure associated with these trips was £926m an increase of 9% from £850m over the same period. Some of the main results included:

- overnight trips to Northern Ireland by inbound visitors were estimated to be 2.7 million – expenditure associated with these trips was £657m
- an estimated 2.1 million hotel room nights were sold in Northern Ireland – hotel room occupancy was estimated to be 73% in 2017
- a total of 112 cruise ships docked at Northern Ireland ports in 2017 – this was an increase compared to 93 cruise ships in 2016 and 33 in 2011

When all sources are considered together, the statistics point towards an upward trend in overall tourism activity in Northern Ireland between 2011 and 2017.

The most recent NI Census of Employment figures estimate 61,300 employee jobs in tourism related industries in 2015. This equates to one in ten of all jobs.

[11] https://www.nisra.gov.uk/statistics/tourism

3 Holiday Park/Campsite Operator Consultation

The following section provides evidence from the consultation with holiday parks/campsites across Northern Ireland. This was drawn from a database of holiday parks/campsites provided by the UKCCA[12]. This database includes data from the:

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

While this represents a comprehensive list of the UKCCA member holiday parks/campsites in Northern Ireland it does not include them all. For this reason, we have factored up the holiday parks/campsites numbers and pitch details to be more representative of the area overall.

3.1 Database of Northern Irish holiday parks/campsites

According to the information evidence provided by the UKCCA, **in the summer of 2018 there were an estimated 110 holiday parks/campsites operating in Northern Ireland accounting for 20,823 pitches**[13].

The majority of these pitches are either owner-occupied caravan holiday homes (15,303 pitches, 73%), rented caravan holiday homes (2,854 pitches, 14%), or touring pitches[14] (2,567 pitches, 12%). 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 chalets and lodges. *From the population data provided, no holiday parks/campsites had wigwams, yurts and pods.*[15]

Table 3.1 summarises the composition of Northern Ireland's holiday park/campsites sector.

Table 3.1: Composition of Northern Ireland's holiday park/campsites sector

Touring Pitches	Number of parks	Caravan Holiday Home Owned	Caravan Holiday Home Rented	Glamping	Lodge/ chalet/ cottage Owned	Lodge/ chalet/ cottage Rented	Total pitches
2,567	110	15,303	2,854	0	49	49	20,823

Source: UKCCA, 2018

3.2 Sampling methodology

Holiday parks/campsites across Northern Ireland were invited to participate in the research. This was done by the various sponsor groups reaching out to holiday park/campsites 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.

46 holiday parks/campsites out of a population of 110 across Northern Ireland participated giving us a 90% confidence +/- 10% margin of error. This means that there is a 90% probability that the sample accurately reflects the wider population and is therefore representative of the holiday park/campsite sector in Northern Ireland.

Due to the smaller sample size from Northern Ireland a regional breakdown has not been possible.

[12] *This includes Certificated Sites and Certificated Locations.*
[13] *This includes Certificated Sites and Certificated Locations.*
[14] *This includes touring caravans, motorhomes/campervans and tents.*
[15] *This information is based on the grossed sample of 40 UKCCA member holiday parks/campsites.*

3.3 Holiday park/campsite size

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

Table 3.2: Sizes of the holiday parks/campsites surveyed

Number	Number of parks responding
Very small parks (1-5 pitches)	4
Small parks (6-50 pitches)	14
Medium sized parks (51-100 pitches)	8
Large parks (101-250 pitches)	14
Very large parks (251 pitches or more)	6
Total	**46**

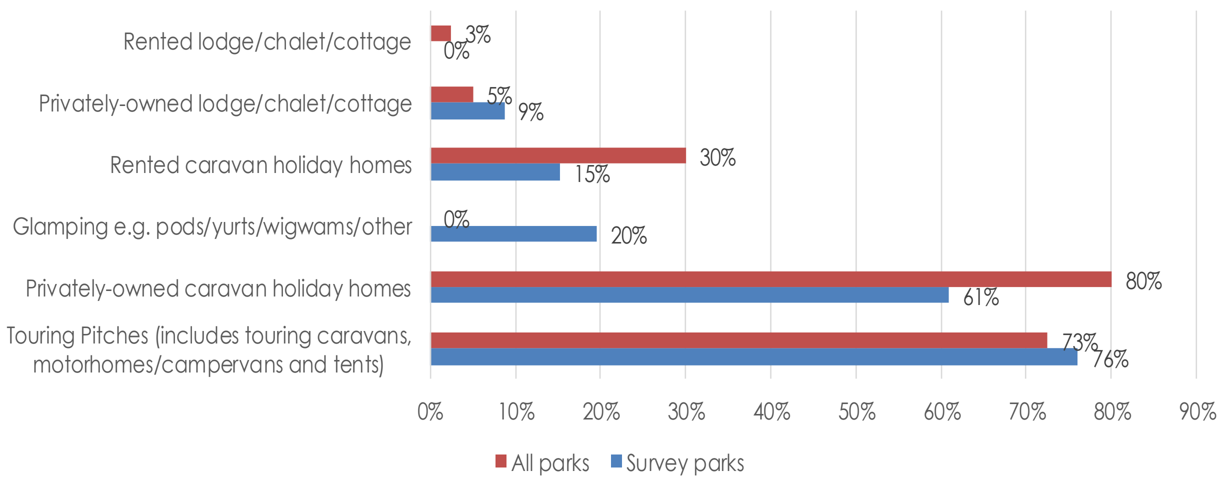
Source: Frontline Holiday Park/Campsite Operator Survey, 2018

3.4 Accommodation provided

The accommodation type of the surveyed holiday parks/campsites was reasonably representative of the sector as a whole. The majority of holiday parks/campsites (76%) had touring pitches which includes touring caravans, motorhomes/campervans and tents. 61% had privately-owned holiday homes and 20% had glamping

The substantial proportion of glamping is at odds with the population database[16] provided by the UKCCA, who had no record of this type of accommodation.

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



N=46

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

[16] *The UKCCA database contained 40 member holiday parks/campsites against as estimated population of 110.*

3.5 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 **facilities they had on-site.** Over three quarters had toilet blocks (78%), laundry facilities (78%) and an outdoor play area (78%). Over three quarters provided shower blocks (74%) and almost two thirds had Wi-Fi access (61%), a third had a shop.

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

'Other' facilities included:

- wildlife areas
- hardstandings
- electric hook-ups
- boat marina

Table 3.3: Facilities listed by holiday park/campsite sector operators

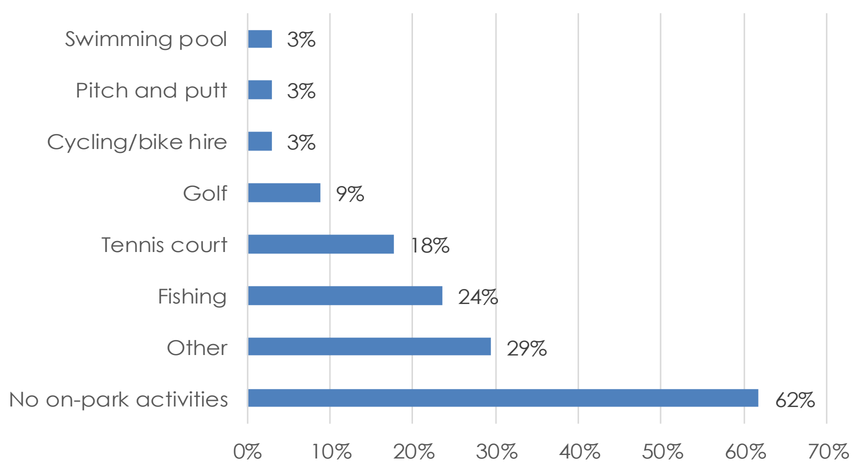
Facility	Number of parks	% of parks
Toilet blocks	36	78%
Laundry	36	78%
Outdoor play area	36	78%
Shower blocks	34	74%
Wi-Fi	28	61%
Retail/shop	15	33%
Games room	12	26%
Restaurant/bar/takeaway	10	22%
Entertainment	2	4%
No on-park facilities	2	4%
Others	12	26%
Total parks consulted	**46**	

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

The figures in Table 3.3 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 facilities but did not answer the question in full. Therefore, the figures may under-estimate the true mix of facilities on Northern Ireland's holiday parks/campsites.

Holiday parks/campsites were also asked about the activities provided on-site. Less than two thirds (62%) provided no on-park activities while just under a quarter provided fishing (24%), 18% provided tennis courts and 12% provided golf and pitch and putt. Others included: children's summer programme, animal farm and family zones.

Figure 3.2: Activities listed by holiday park/campsite operators



N=34

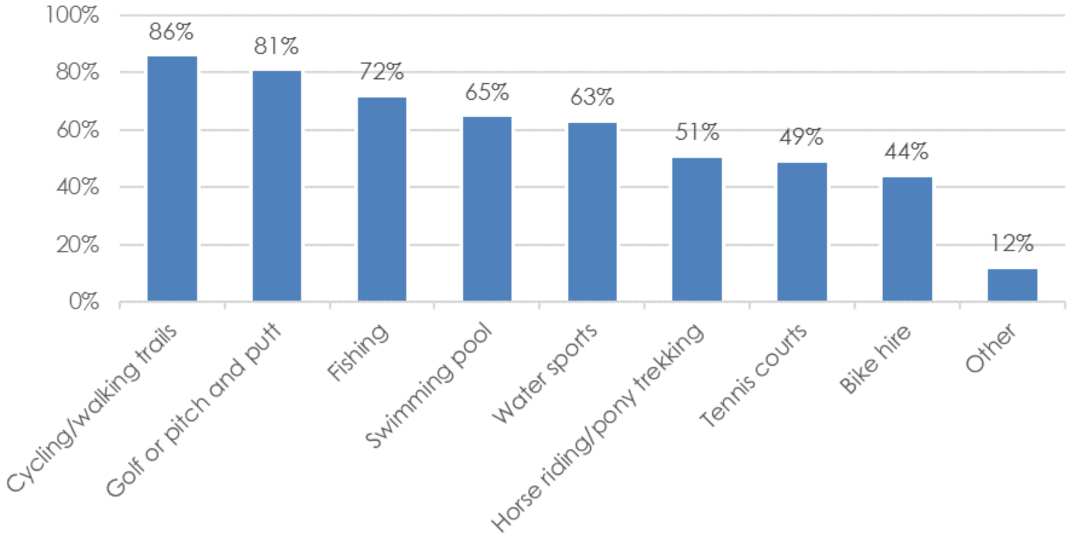
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites offer more than one type of facility)

Holiday park/campsite operators were asked about the **range of activities provided in the local area.** The vast majority of holiday parks/campsites had cycling/walking trails (86%) in the areas as well as golf or pitch and putt (81%). A further 72% had fishing, while 65% had a swimming pool and 63% had water sports. Around half had horse riding/pony trekking, and tennis courts, and just under half had bike hire.

'Other' included:

- bowling green
- go karting
- National Trust property

Figure 3.3: Range of activities in the local area



N=43

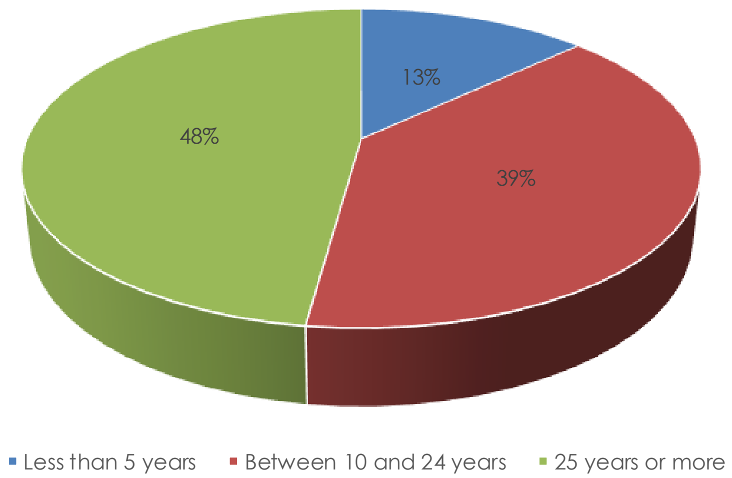
Source: Frontline Holiday Park/Campsite Operator Survey, 2018 (figures sum to over 100% as most holiday parks/campsites had more than one type of activity in the local area)

3.6 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 (87%).

Figure 3.4 summarises the feedback.

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



N=46

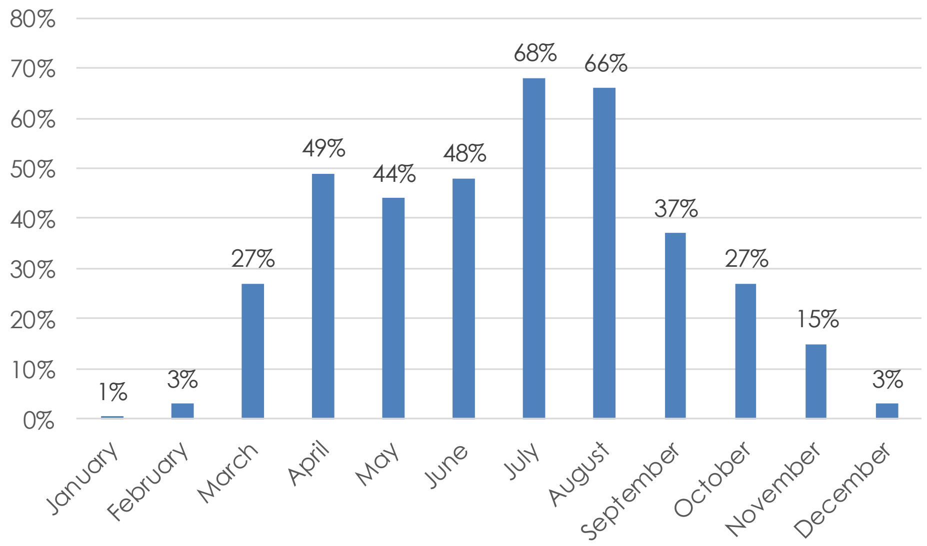
Source: Frontline Holiday Park/Campsite Operator Survey, 2018

3.7 Length of season and occupancy rates

The majority of holiday parks/campsites (85%) operated seasonally with 15% opened all year round. The majority (80%) are open from late March to the end of October.

Occupancy rates in Northern Ireland's holiday parks/campsites peaked at 68% in high season (July) to 49% in mid season (April). Low season average occupancy ranged from a low of 1% in January[17] to a high of 27% in March as presented in Figure 3.5.

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



Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=43

3.8 Visitor origin

Holiday park/campsite operators were asked what percentage of their visitors came from Northern Ireland, from the rest of the UK and from the rest of the world. Over three quarters came from Northern Ireland (78%), with a further 10% from outside the UK. This is likely due to a high number of visitors coming from the Republic of Ireland. Table 3.4 provides the full breakdown.

Table 3.4: Visitor origin

Northern Ireland	England	Wales	Scotland	Outside UK
78%	**9%**	**1%**	**2%**	**10%**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=44

3.9 Staff employed

Holiday park/campsite operators 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 2.9 full-time and 1.6 part-time staff all year round and 1 full-time and 3.2 part-time seasonal staff. Numbers varied depending on the size of the holiday park/campsite. **No respondent holiday park/campsite employed migrant workers**.

[17] *The majority of respondent holiday parks/campsites were not opened in January hence the average 1% occupancy.*

Table 3.5: 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)	1.2	6.3	1.2	0.4
Medium sized parks (51-100 pitches)	1.0	1.4	1.4	0.6
Large parks (101-250 pitches)	0.8	0.9	2.6	0.6
Very large parks (251 pitches or more)	1.0	5.0	9.2	5.8
Average across all parks	**1.0**	**3.2**	**2.9**	**1.6**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=40

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

3.10 Expenditure by holiday park/campsite[18]

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 3.6.

Table 3.6: Total expenditure by holiday parks/campsites

Area of expenditure	Total expenditure	Average expenditure
Capital expenditure	£4,949,506	£164,984
Operating expenditure	£3,834,695	£159,778
Wages and salaries	£2,518,476	£83,949
Total expenditure	**£11,302,677**	**£408,711**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=26-34

Holiday park/campsite operators were asked to comment on the top three areas of capital expenditure over the last five years. Over half (52%) provided feedback, with the following expenditure most frequently cited:

- **accommodation** – new and existing across all types of accommodation
- **pitch development** – adding new and improving existing – including resurfacing and hardstandings
- **facilities** – new and refurbishment of washrooms, shower blocks, play areas, facilities block
- **park expansion** – including café and shops
- **utility development** – hook-up, lighting, water and waste
- **park maintenance equipment** – plant and machinery
- **connectivity** – IT and fibre networking

Looking to the future, holiday parks/campsites were then asked to provide their planned expenditure for maintenance and/or expansion/improvement of their holiday park/campsite and on-site facilities. The total expenditure is presented in Table 3.7.

Table 3.7: Planned expenditure

	Expenditure	
	Maintenance	Improvements
Next financial year	£1,846,504	£1,183,500
Next three financial years	£4,681,748	£5,871,000
Total	**£6,528,252**	**£7,054,500**

Source: Frontline Holiday Park/Campsite Operator Survey, 2018 N=28-34

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

3.11 Community engagement

Over half (57%) of holiday park/campsite operators provided information on how they **engage with the local community**, the most frequently occurring included:

- **promotion and sponsorship of local events** – cross a range of areas including rugby and football, young farmers, walking and food tours, beach clean up
- **hosting events and fundraising**
- **supporting local community groups** – across schools, local charities and children's outreach
- **social media advertising** – and signposting
- **actively promoting local producers** – restaurants and shops

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

"Posters and social media advertising of local events. Access to local farm shops to sell produce on the park."

"The park works with the local community in a number of ways, a town centre campaign is promoted for visitors to use the local facilities regarding restaurants, bars."

"Charity functions such as dessert afternoons, BBQ, Action Cancer fundraising."

"We accommodate local school groups who wish to undertake beach cleans. We promote local activities and events in the local town."

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

"Host special events, international/local students, wildlife open days as we are a Site of Special Scientific Interest (SSSI)."

3.12 Environmental improvement

Over half of holiday park/campsite operators (57%) provided information on how they **supported environmental improvement** at their park/site, the most frequently occurring included:

- **recycling** – which was highlighted by the all respondents
- **wildlife conservation** – across flora and fauna
- **energy and water conservation** – through water harvesting, solar panels, low wattage solutions

A small number had also started using electric vehicles on-site and had installed a biomass boiler. The David Bellamy scheme was highlighted, but only by two holiday parks/campsites. This is not surprising as no UKCCA member holiday parks/campsites in Northern Ireland currently have an award.

The word cloud below shows the importance of **recycling** and providing **energy saving** solutions.

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

"Recycling bins, wildlife areas, tree, hedge and shrub planting scheme, holders of David Bellamy Gold Award, Honey Bee Award."

"The park encourages recycling offering glass recycling facilities. All cleaning products must adhere to COSHH and health and safety regulations, only listed cleaning products can be used on-site."

"Recycling bins, information on council facility, solar panels, LED lighting on new installs or upgrades, biomass boilers, mains gas throughout Park, some electric vehicles."

"We recycle as much as possible. Do not use pesticide sprays. We have enabled our local water company NI Water to initiate the installation of a sewerage treatment plant that will service the surrounding area."

"We keep a close watch on and encourage all to respect wildlife. Badgers, foxes and bird life are prolific on the site and in the area around. Recycling is a must. We have begun and will continue wild flower planting."

3.13 Health and wellbeing

Almost half (41%) of holiday park/campsite operators provided information on how they **encourage health and wellbeing**, the most frequently occurring examples included:

- **wide range of sports and outdoor facilities both on-site and off-site** – including play areas, games room
- **direct access to waterways/beaches, walking/cycling routes** – some on-park but mostly in the surrounding area
- **positive effect of being outdoors** – close to nature
- **programmes of activities for all ages** – including on-site fun days, children's summer schools, wider community events

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

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

"We provide lots of green open space to enjoy in the fresh coastal air. We promote local activities. It is extremely hard to gauge this as the variety of our visitors necessitates different types of support for their health and wellbeing."

"With our ageing client base we have provided a community spirit which helps to prevent loneliness. Our visitors feel protected by our company."

"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."

"The park is located beside the lough and has both jet ski launch and boat slip. The park is also used for the local park runners 5k route. "

"On-site fun days, children's summer programme, play parks, children's trail, games room."

3.14 External factors impacting the business

Only three Northern Irish holiday park/campsite operators provided some insight to the external factors affecting their business. These covered:

- weather
- policy implementation
- cost of ferry travel across the Irish Sea being prohibitive to visitors
- wild camping
- staff shortages and lack of applicants

3.15 In summary

This research found that Northern Ireland's holiday parks/campsite offer a wide range of accommodation options to visitors, which allow it to serve a diverse range of customers' tastes and budgets. These included touring pitches and owner-occupied and rented holiday homes as well as wider accommodation types.

In addition to this diverse accommodation offered, Northern Ireland's holiday parks/ campsites also offer a wide range of leisure facilities and amenities, including restaurants, swimming pools, outdoor play areas and fishing.

The majority of holiday park/campsite operators have had their parks for over 10 years and many have done so for over 25 years.

Holiday park/campsite occupancy rates vary from a peak of 68% in high season (July) to 49% in mid season (April). The proportion of visitors to Northern Ireland's holiday parks/campsites who live outside the country was estimated at 10% and varied from park to park.

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

- **expenditure** – 74% of holiday parks/campsites from the total survey sample cumulatively spent £11.3m per year in capital expenditure, operating expenditure, wages and salaries
- **local community engagement** – including local sponsorship, hosting events, supporting community groups, local charities and children's outreach activities
- **environmental activities** – including support for recycling, wildlife, water and energy conservation, biomass boilers and electric vehicles
- **health and wellbeing** – including providing sports and outdoor activities, access to waterways and beaches, walks and cycle paths and a range of family fun activities

4 Visitors Survey

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

243 respondents to the survey had made 404 visits to a holiday park/campsite in Northern Ireland in 2018 across two trips.

Table 4.1 shows the number of visitors to Northern Ireland. The lower response rate in Northern Ireland resulted from less holiday park/campsite operator engagement.

Table 4.1: Number of holiday parks/campsites visited

	Visitors	
	Trip 1	**Trip 2**
Total consulted	213	191

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

The remainder of this section is based on those **visiting Northern Ireland in Trip 1 only (213)** as this had the most comprehensive data set as all respondents had participated in at least one trip.

4.1 Visitor origin and number of trips

The majority of survey participants lived in Northern Ireland (94%). This aligns to the Northern Ireland holiday park/campsite operators who reported that the majority of their visitors come from Northern Ireland predominately to avoid the cost of ferry transport (Section 3).

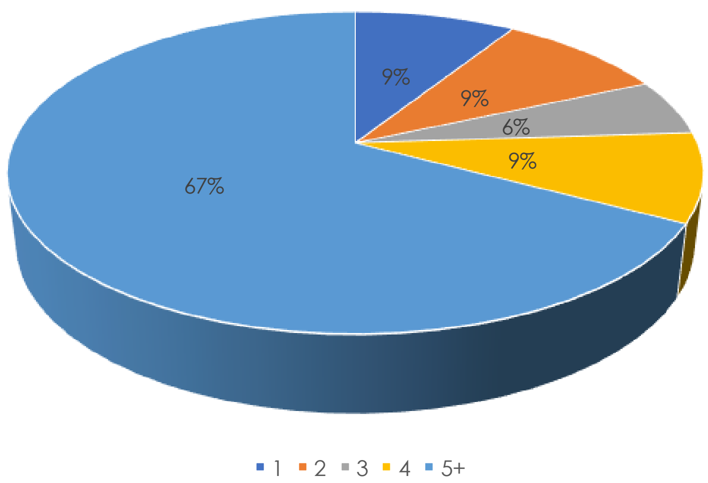
Table 4.2: Visitor home country

Location	Visitors
Northern Ireland	94%
England	5%
Scotland	1%
Wales	0%
Outside the UK[19]	0%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=213

Over two thirds (67%) of respondents stayed on a holiday park/campsite in Northern Ireland five times or more during the last 12 months; a further 9% stayed four times.

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



N=213

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

4.2 Visitor characteristics

68% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 28% stayed in an owner-occupied caravan holiday home.

Table 4.3 provides a full breakdown.

Table 4.3: Type of accommodation stayed in

	Visitors
Mobile accommodation types	
Touring caravan	43%
Motorhome/campervan	20%
Tent	5%
Static accommodation types	
Caravan holiday home owned	28%
Caravan holiday home rented	2%
Glamping e.g. pods/yurts/wigwams/other	0%
Privately-owned lodge/chalet/cottage	1%
Rented lodge/chalet/cottage	1%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

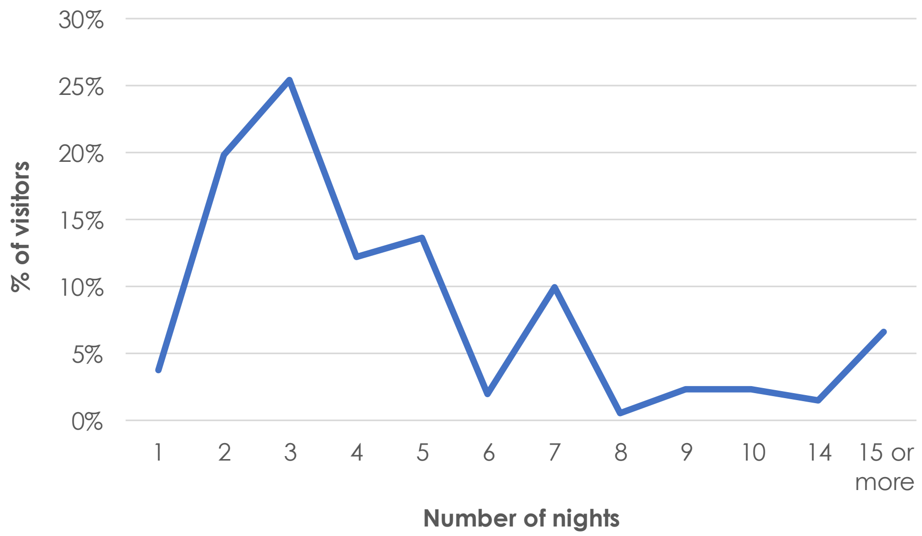
The high level of tourers is not surprising as **almost two thirds (61%) of visitors responding were a member of either the Camping and Caravanning Club or Caravan and Motorhome Club**[20].

When broken down further:

- 86% were members of the Camping and Caravanning Club
- 40% were members of the Caravan and Motorhome Club
- 26% were members of both

On average visitors spent 4.8 nights per trip. The distribution of responses is shown in Figure 4.2.

Figure 4.2: Number of nights stayed per visit

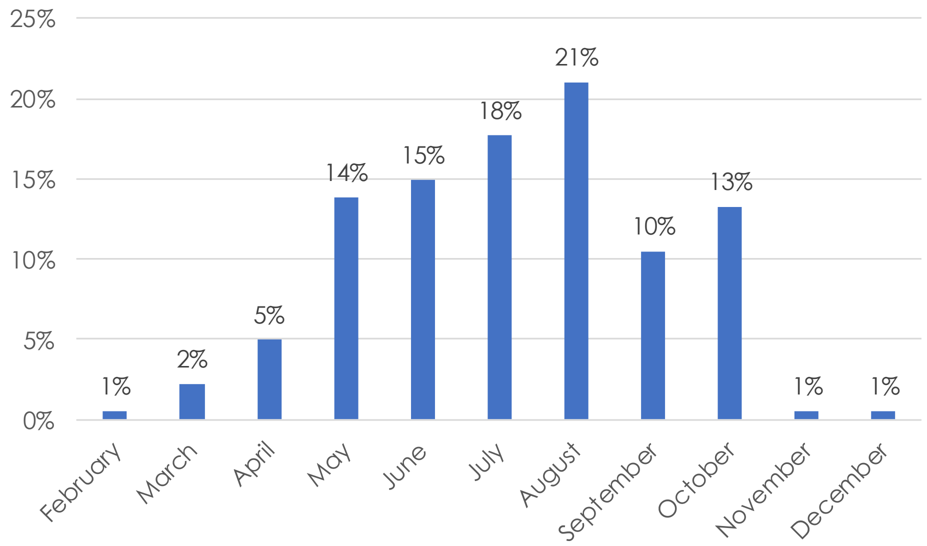


Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=212

[20] *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.*

Figure 4.3 shows the month in which respondent visitors began their trip. August (21%) was the most popular month, closely followed by July (18%).

Figure 4.3: Month during which visitors began their trip



Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=181

Table 4.4 shows the number of adults, children and pets in each party. The average adult group size was 2.1, and 36% of all groups included children. Where parties were travelling with children, the average number of children in each group was 2.2. 33% of groups brought a pet.

The average total group size was 2.5. When broken down by tourers and owners, tourers had an average group size of 2.4 and owners 2.9.

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

	Number of adults	Number of children	Number of pets
1	5%	10%	31%
2	86%	18%	8%
3	5%	11%	1%
4	3%	3%	0%
5+	1%	0%	1%
Average	2.1	2.2	1.2

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

4.3 Visitor expenditure

Visitors who stayed in rented or touring accommodation spent, on average, £532 per visit (per group), including £289 on-site and £243 off-site. Visitors who owned their holiday home spent, on average, £488 (per group) per visit, including £351 on-site and £137 off-site. This is compared to the average Northern Irish tourism visitor spend (per trip) in the first half of 2018 of £180[21].

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

Table 4.5 summarises the areas of expenditure.

[21] https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/

Table 4.5: Visitor spend per visit

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£109	£36
Transport spent during trip	£55	£15
Total cost of holiday accommodation	£180	£156
Touring-pitch/fees paid to park	£78	£186
Park facilities (e.g. Wi-Fi, laundry etc)	£4	£4
Eating/drinking on the park	£19	£5
Eating/drinking/takeaways in the surrounding area	£49	£55
Recreation/entertainment on the park	£8	£0
Recreation/entertainment in the surrounding area	£11	£21
Visitor attractions	£19	£8
Other	£0	£2
Total – on-site	**£289**	**£351**
Total – off-site	**£243**	**£137**
Total – both on and off-site	**£532**	**£488**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors who stayed in rented and touring accommodation spent, on average, £136 per day, including £74 on-site and £62 off-site. Visitors who owned their holiday home spent, on average, £67 per day, including £48 on-site and £19 off-site.

This is an increase on the average Northern Irish tourism visitor spend (per day) in the first half of 2018 of £58[22].

Table 4.6 summarises the daily expenditure.

Table 4.6: Visitor spend per day

Area of expenditure	Renters and tourers	Owners
Transport to and from destination	£28	£5
Transport spent during trip	£14	£2
Total cost of holiday accommodation	£46	£20
Touring-pitch/fees paid to park	£20	£26
Park facilities (e.g. Wi-Fi, laundry etc)	£1	£1
Eating/drinking on the park	£5	£1
Eating/drinking/takeaways in the surrounding area	£12	£8
Recreation/entertainment on the park	£2	£0
Recreation/entertainment in the surrounding area	£3	£3
Visitor attractions	£5	£1
Other	£0	£0
Total – on-site	**£74**	**£48**
Total – off-site	**£62**	**£19**
Total – both on and off-site	**£136**	**£67**

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018

[22] https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/

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

Visitors were asked *"what influenced you in making these visits?"* The most popular responses were *"I wanted to revisit or visit the area (65%)"*.

Table 4.7 provides a full breakdown of influences.

Table 4.7: Influences on visitor decisions on which holiday park/campsite to visit

Factor	Number responding*
Wanted to revisit the area	44%
Wanted to visit the area	21%
Park/site recommended by family/friends	16%
Family/friends in the area	16%
Club member communication	14%
Had been to this region/country before and wanted to visit another area	11%
Specific activities available in the area	11%
Saw advertisement for the park(s) in a magazine, newspaper or website	8%
Attending an event/festival	9%

Source: Frontline Holiday Park/Campsite Visitor Survey, 2018 N=190

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

4.5 Health and wellbeing

Time spent relaxing (69%) was the most commonly undertaken activity by visitors followed by short walks (63%) and time spent with family and friends (55%).

Table 4.8 summarises the results.

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

	More	Less	Same	I did not undertake this activity	Total
Spent time relaxing	69%	4%	26%	1%	**173**
Short walks (under 2 miles)	63%	4%	30%	63%	**164**
Spent time with family and friends	55%	10%	29%	7%	**213**
Long walks (over 2 miles)	53%	6%	27%	14%	**165**
Wildlife/nature activities	40%	5%	22%	34%	**213**
Other outdoor physical activities	31%	6%	19%	44%	**213**
Cycling	24%	4%	15%	57%	**157**

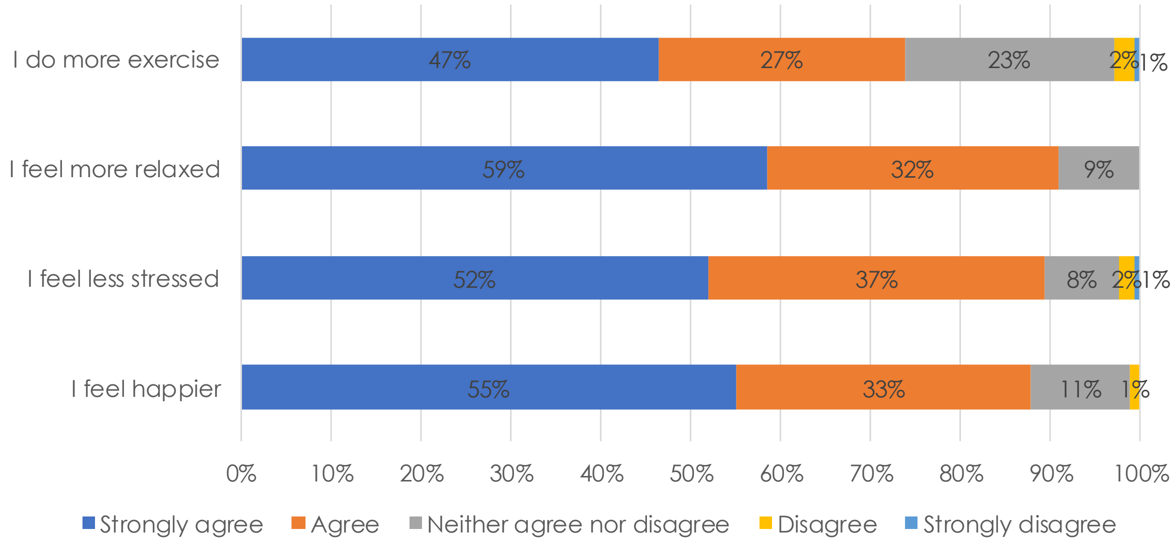
Frontline Holiday Park/Campsite Visitor Survey, 2018

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

- 91% strongly agree or agree that they **feel more relaxed when visiting a holiday park/campsite**
- 89% strongly agree or agree that they **feel less stressed when visiting a holiday park/campsite**
- 88% strongly agree or agreed that they **feel happier when visiting a holiday park/campsite**
- 74% strongly agree or agree that they **do more exercise when visiting a holiday park/campsite**

Figure 4.4 presents the detailed feedback.

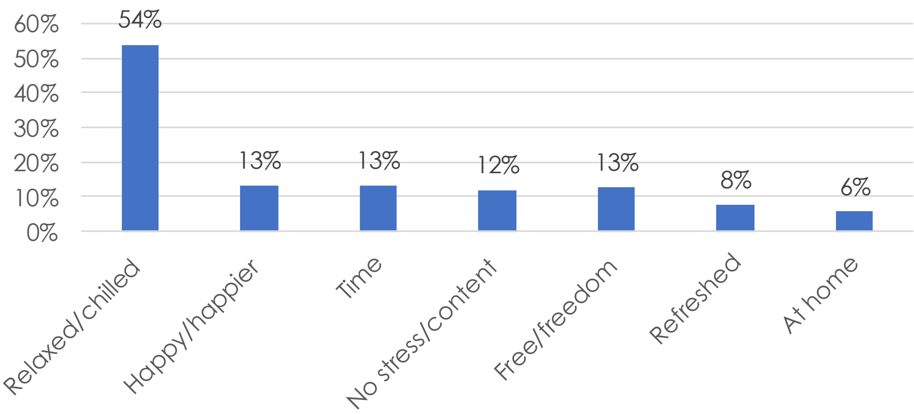
Figure 4.4: When visiting a holiday park/campsite…



Frontline Holiday Park/Campsite Visitor Survey, 2018

Visitors felt more relaxed (54%), happier (13%) and having more time (13%) as a result of visiting a holiday park/campsite in Northern Ireland. This is summarised in Figure 4.5 and the word cloud below.

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



Frontline Holiday Park/Campsite Visitor Survey, 2018 N=158

Some **visitor** comments included:

"I feel more relaxed more at home when spending quality time with family and friends, takes my mind off work and other things."

Touring Caravan Owner

"So relaxed and chilled, my wife and I love being out in the fresh country air. The staff at the caravan park are so friendly and helpful it adds to the whole caravan experience. I would recommend caravanning to anyone who hasn't yet experienced it, it's just amazing!"

Touring Caravan Owner

"Wonderful spending quality time with the kids, we are normally so busy it's great to relax."

Caravan Owner

"Relaxed and more time to walk and cycle and also catch up on some reading."

Touring Caravan Owner

"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

"I can never be away long enough, time spent with my family is very important to me."

Caravan Owner

"I feel relaxed and a million miles away from the real world."

Touring Caravan Owner

4.5.1 Benefits and impacts of improved physical and mental health

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

According to the Chief Medical Officer[23]:

> *"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[24]:

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

As well as health impacts, **there are significant socio-economic implications**. In 2009 the total financial cost of obesity to the Northern Ireland economy came to £370m; 25% of which were direct healthcare costs and 75% indirect costs (such as lost productivity)[25].

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[26].

A study by the New Economics[27] Foundation 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[28].

Increased focus on health and wellbeing is something at the forefront of the Northern Irish Government's agenda. In October 2016, a 10 year approach to transforming health and social care was launched, *'Health and Wellbeing 2026: Delivering Together'*. This ambitious plan was the response to the report produced by an Expert tasked with considering the best configuration of Health and Social Care Services in Northern Ireland.

A key objective of the plan is 'people are supported to keep well in the first place with the information, education and support to make informed choices and take control of their own health and wellbeing'[29].

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

Visitors were:

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

Therefore, Northern Ireland's holiday park/campsite sector is supporting the country's policy agenda for health and wellbeing.

[23] https://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[24] http://www.ramblers.org.uk/advice/facts-and-stats-about-walking/health-benefits-of-walking.aspx
[25] https://www.health-ni.gov.uk/articles/obesity-applying-all-our-health-nurses-midwives-and-allied-health-professionals
[26] https://www.mindbodygreen.com/0-2557/Why-Stress-Management-Is-So-Important-for-Your-Health.html
[27] https://neweconomics.org/2018/05/stressed-economy-stressed-society-stressed-nhs
[28] https://www.shponline.co.uk/stress/stress-and-anxiety-costing-the-nhs-71m-a-year/
[29] https://www.health-ni.gov.uk/sitesdefault/files/publications/health/health-and-welbeing-2026-delivering-together.pdf

Some **visitor** comments included:

"A change of scenery and the peace and quiet even for a very short time can be a tonic. It revives you and you feel hopeful for a little while."

Tent Owner

"Touring caravan is probably the best thing we have ever bought."

Touring Caravan Owner

"I am a full-time carer and really need these breaks away to be able to cope with everyday life. I can get out on my bike or go for long walks with my husband and the dog which is something I am not able to do when at home."

Motorhome and Campervan Owner

"My investment at Ballyleese Caravan Park Portstewart has helped to improve the quality of life for all family members - adults and children alike. We return home energised and refreshed to meet the demands of family/working life with renewed vigour. We would not swap this experience for any other."

Caravan Owner

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

Caravan Owner

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

Touring Caravan Owner

4.6 In summary

An online survey was undertaken of 243 holiday-makers who made 404 visits to holiday parks/campsites in Northern Ireland. The majority of survey participants lived in Northern Ireland (94%) and over two thirds (67%) had stayed on a holiday park or campsite in Northern Ireland five times or more during the last 12 months.

68% of visitors had stayed in a touring caravan, motorhome or tent over the course of the year. 28% stayed in an owner-occupied caravan holiday home; while 3% stayed in some form of rented, stationary accommodation.

The average adult group size was 2, and 36% of all groups included children. Where parties were travelling with children, the average number of children in each group was 1. 33% of groups brought a pet.

Visitors who stayed in rented or touring accommodation spent, on average, £532 per visit (per group), including £289 on-site and £243 off-site. Visitors who owned their holiday home spent, on average, £488 (per group) per visit, including £351 on-site and £137 off-site. **This is a substantial increase on the average Northern Irish tourism visitor spend (per trip) in 2018 of £180[30].**

[30] https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/

5 Economic Impact Assessment – Methodological Approach

5.1 General approach

The main objectives of this research were to assess the total value of visitor spend attributable to Northern Ireland's 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 (365)
- accommodation type (6)

In other words, the model includes 2,190 separate economic impact calculations. For clarity of presentation, this report only contains the aggregated, year-round, economic impact figures.

5.2 Measuring on-site and off-site expenditure

Table 5.1 provides an illustrative example of how the on-site expenditure figures were estimated for touring caravans in Northern Ireland on Saturday 4th August:

Table 5.1: On-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Northern Ireland	2,567
Multiplied by:	
Average occupancy rate on 4th August	66%
Number of pitches occupied on 4th August	1,694
Multiplied by:	
Ave. on-site expenditure per day for renting holiday-makers	£73.79
= On-site expenditure of touring caravan visitors to Northern Ireland on 4th August	**£125,000**

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

Table 5.2: Off-site expenditure of touring caravan visitors

Total number of touring caravan pitches in Northern Ireland	2,567
Multiplied by:	
Average occupancy rate on 4th August	66%
Number of pitches occupied on 4th August	1,694
Multiplied by:	
Ave. off-site expenditure per day for renting holiday-makers	£48.54
= Off-site expenditure of touring caravan visitors to Northern Ireland on 4th August	**£82,227**

5.3 Measuring indirect and induced expenditure

In addition to the types of impacts highlighted above, the Northern Ireland 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 following 0.47 multiplier be used as a proxy for the combined indirect and induced multipliers associated with tourist accommodation.

Table 5.3 presents a worked example for Northern Ireland.

Table 5.3: Indirect and induced effects

Total on-site expenditure	£125,000
Plus	
Total off-site expenditure	£82,227
Total combined on and off-site expenditure	**£207,227**
Multiplied by:	0.47
= Indirect and induced effects:	**£97,397**

5.4 Measuring visitor impact

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

Table 5.4 presents a worked example.

Table 5.4: Visitor impact

Total on-site expenditure	£125,000
Plus	
Total off-site expenditure	£82,227
Indirect and induced effects	£97,397
Visitor impact	**£304,624**

5.5 Measuring employment impacts and GVA associated with visitor spend

According to research by VisitBritain[31], 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[32], every £100 of turnover generated by Northern Ireland's tourism industry translates to a gross value added (GVA) impact of £56.92[33]. This proxy was applied to the above turnover figures to produce an estimate of the holiday park/campsite sector's contribution to Northern Ireland's GVA.

[31] *Tourism: Jobs and Growth - The economic contribution of the tourism economy, 2013.*
[32] *2018 Annual Business Survey, ONS, 2018.*
[33] *Based on SIC Code 55.2 (Holiday and other short stay accommodation) and SIC Code 55.3 (Camping grounds, recreational vehicles parks and trailer parks).*

6 Economic Impact of Holiday Parks/Campsites in Northern Ireland

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

6.1 Impact for Northern Ireland

It is estimated that in 2018 visitors to Northern Ireland's holiday parks/campsites spent **a total of £344.1m in the Northern Irish economy**, made up as follows:

- £166.2m on-site spend
- £67.9m off-site spend
- £110m of multiplier impacts

This visitor expenditure **supports 6,372 FTE jobs and contributes £176.2m of GVA to the Northern Ireland economy.**

Table 6.1: Economic impacts

	Visitor expenditure (£m)	Employment (FTE jobs)
Northern Ireland	**344.1**	**6,372**

Source: Frontline, 2019

6.2 Impact by accommodation type

Table 6.2 summarises the impacts aligned to accommodation type.

Table 6.2: Economic impacts by accommodation type

Northern Ireland	Visitor expenditure (£m)	Employment (FTE jobs)	Gross Value Added (£m)
Caravan Holiday Home (owned)	223.0	4,130	114.1
Caravan Holiday Home (rented)	62.8	1,163	32.2
Touring Pitches (includes touring caravans, motorhomes/campervans and tents)	56.5	1,046	28.9
Lodge/chalet/cottage (rented)	1.1	20	0.6
Lodge/chalet/cottage (owned)	0.7	13	0.4
Glamping e.g. pods/yurts/wigwams/other[34]	0.0	0.0	0.0
All accommodation	**344.1**	**6,372**	**176.2**

Source: Frontline, 2019

6.3 Assessing the economic impacts of maintenance expenditure

The impacts presented to date are based on visitor expenditure to holiday parks/campsites 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 Northern Ireland.

[34] *No holiday parks/campsites from the population data reported having glamping pitches so spend could not be aligned.*

Table 6.3: Average Northern Ireland annual maintenance expenditure on visitor owned accommodation

Area of expenditure	Touring Caravan/ Motorhome Owner*[35]	Caravan/Holiday Home Owner[36]
Servicing	£216	£167
Insurance	£243	£190
Road Tax	£160	N/A
Other	£74	£675
Total	**£693**	**£1,032**

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 Northern Ireland (7,800[37]) multiplied by average maintenance expenditure per touring caravan/motorhome (£693). This equals £5.4m.

Aligned to the approach presented above, the estimated expenditure figure for caravan holiday home/lodge owners is equal to the number of owner caravan holiday homes (15,303)[38], multiplied by average maintenance expenditure per holiday home (£1,032). This equals £15.8m. **The total impact associated with expenditure on caravan and holiday home maintenance is estimated to be in the region of £21.2m.**

6.4 In summary

In 2018 it was estimated that Northern Ireland's holiday park/campsites sector generated **a total visitor expenditure impact of £344.1m. This expenditure impact equates to a GVA impact (including multipliers) of £176.2m and supported 6,372 FTE jobs.**

According to a report commissioned by VisitBritain[39] the tourism sector in Northern Ireland had a direct GVA of £0.8bn[40], therefore the holiday park/campsites sector with a direct GVA of £119.8m (excluding multipliers)[41] makes a significant contribution (15%) to the sector's GVA.

The accommodation types which recorded the highest visitor impacts were:

- **owner-occupied caravan holiday homes**: with visitor expenditure of £223m, equivalent to a GVA impact of £114.5m, and to 4,130 supported FTE jobs
- **rented caravan holiday homes**: with visitor expenditure of £62.8m, equivalent to a GVA impact of £32.2m, and to 1,163 supported FTE jobs

In addition to the figures above, money spent on maintenance by tourers and caravan holiday home owners adds a **further £21.2m of expenditure to the economy.**

[35] *Note these figures were taken from visitors who lived in Northern Ireland as it was assumed that's where they would spend their money.*
[36] *Note these figures were taken from visitors visiting Northern Ireland as it was assumed that's where they would spend their money.*
[37] *NCC https://www.thencc.org.uk/Our_Industry/statistics.aspx and apportioned according the ONS Annual Business Survey on country level turnover for SIC Codes 55.2 and 55.3.*
[38] *UKCCA, 2018.*
[39] *https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/economic-impact-of-tourism/economic-impact---deloitte--tourism---jobs--growth.pdf*
[40] *Converted to 2018 prices and excluding multipliers.*
[41] *See appendix 2 for GVA excluding multipliers summary table.*

7 Conclusions

Northern Ireland's holiday park and campsite sector makes a substantial contribution to the Northern Irish tourism economy, generating £344.1m in visitor expenditure, equivalent to £176.2m GVA and supporting 6,372 jobs.

Visitors stay longer on Northern Irish 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 67% of respondents taking five or more trips a year. They also tend to take lengthy stays, on average 4.8 days. This is longer than the average stay figures of around 3.1 days reported by Tourism Northern Ireland in 2018[42].

Visitors to Northern Irish holiday parks/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 £136 on-site and off-site by renters and tourers, and £67 on-site and off-site by owners. This is higher than the average daily spend by visitors to Northern Ireland at £58[43].

Flexible accommodation and facilities provision, support local communities, protect the environment and encourage a healthier lifestyle: Northern Ireland's 110 holiday parks/campsites account for 20,823 pitches[44]. 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 £21.2m of expenditure to the economy.

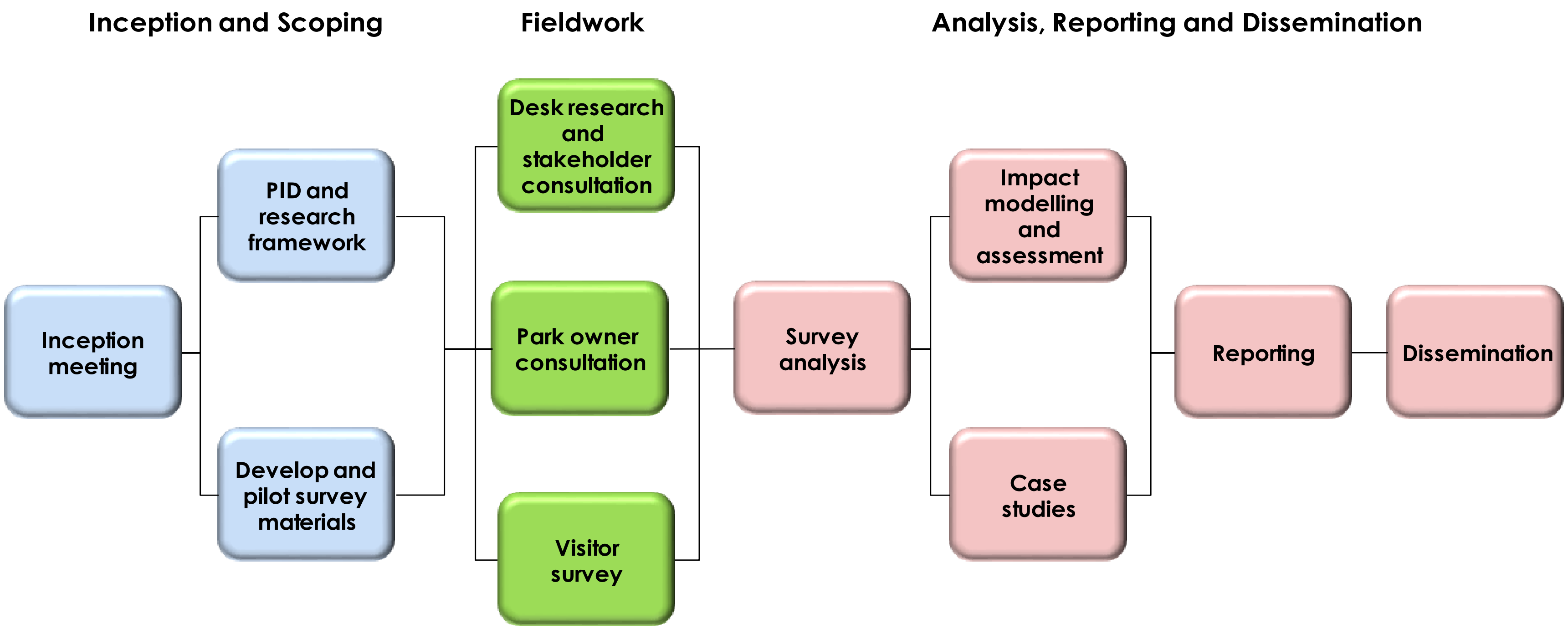
Migrant worker levels are very low: The potential impact of Brexit on migrant workforce is likely to be low, with no respondent holiday park/campsite operators reporting using migrant labour[45].

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

[42] https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/
[43] https://tourismni.com/facts-and-figures/tourism-performance-statistics/ni-annual-and-quarterly-tourism-performance/
[44] *Includes Certificated Sites and Certificated Locations and is grossed up from the UKCCA member database.*
[45] *While respondents did not have migrant workers, we cannot assume that the overall population is the same particularly as the population was grossed up.*

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 – 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
Total	23.2	116.4	25.8	0.0	0.4	0.4	166.2

Off-site expenditure (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet /cottage (Owned)	Lodge/chalet/ cottage (Rented)	Total
Total	15.2	35.4	16.9	0.0	0.1	0.3	67.9

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
Total	18.1	71.2	20.1	0.0	0.2	0.4	110.0

Visitor expenditure impact (£m)

	Touring Pitches (includes touring caravans, motorhomes/ campervans & tents)	Caravan Holiday Home (Owned)	Caravan Holiday Home (Rented)	Glamping e.g. pods/yurts/ wigwams/ other	Lodge/chalet/ cottage (Owned)	Lodge/chalet /cottage (Rented)	Total
Total	56.5	223.0	62.8	0.0	0.7	1.1	344.1

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
Total	430	2,155	477	0	7	8	3,077

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
Total	282	655	314	0	2	5	1,258

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
Total	334	1,320	372	0	4	7	2,037

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
Total	1,046	4,130	1,163	0	13	20	6,372

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
Total	**11.9**	**59.6**	**13.2**	**0.0**	**0.2**	**0.2**	**85.1**

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
Total	**7.8**	**18.1**	**8.7**	**0.0**	**0.1**	**0.2**	**34.9**

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
Total	**9.2**	**36.4**	**10.3**	**0.0**	**0.1**	**0.2**	**56.2**

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
Total	**28.9**	**114.1**	**32.2**	**0.0**	**0.4**	**0.6**	**176.2**