

Pitching the Value

2024 Economic Benefit Report:
Holiday Parks and Campsites

IMPACT REPORT





Introduction

The UK Caravan and Camping Alliance (UKCCA) first published its ground-breaking economic benefit report in 2019 demonstrating the sector's significant value to the nation's economy. Since then, the UK has been through a period of considerable challenges and change with Brexit, the Covid pandemic, and more recently the cost-of-living crisis.

One factor that has remained a constant is the importance and resilience of the holiday park and campsite sector, as evidenced in the Pitching the Value 2024 report conducted by independent research consultants Frontline, which assessed data and insight from 2022 and 2023.

Despite the challenges businesses have faced in the past few years, the latest UKCCA report demonstrates holiday parks and campsites generated £12.2bn in visitor expenditure, equating to £7.2bn Gross Value Added (GVA) to the UK economy. Employment levels are high with the sector supporting 226,745 full-time jobs across the UK.

Meanwhile, the sector's expenditure accounts for 5% of the tourism sector's overall GDP of £214bn. Ultimately, each pound spent on a domestic holiday means visitors are supporting local economies the length and breadth of the nation.

The report also highlights the value the consumers themselves receive from this type of holiday. The survey of visitors was completed by more than 5,200 people, and UK holiday parks and campsites continue to be viewed as good value for money with a wide range of affordable accommodation options for all types of family groups.

In addition, Pitching the Value highlights the wider health and wellbeing benefits of spending time in the great outdoors on campsites and holiday parks through getting closer to nature and being active outdoors through a variety of pastimes.

Sustainability is an important theme and the report highlights work being undertaken by the sector including carbon reduction plans, putting a focus on recycling facilities, energy and water conservation, and introducing measures that support and enhance biodiversity.

Holiday parks and campsites also have strong ties to the local communities in which they are based, whether that's through employment, supporting local marketing or fundraising initiatives or even, in some cases, because they have been run as multi-generational businesses for many years.

So despite the challenges of the past, and those still to be faced in the future, the holiday park and campsite sector is optimistic. It continues to invest in its sites, services and accommodation types, which demonstrates a commitment and strong confidence in the sector.

• Frontline carried out the research on behalf of the UKCCA, which is made up of the National Caravan Council, the Camping and Caravanning Club, the Caravan and Motorhome Club, and the British Holiday & Home Parks Association. This impact report illustrates a snapshot of the full findings, which can be read at www.ukcca.org.uk.

Did you know...?



£12.2bn

Visitor expenditure generated by holiday parks and campsites in the UK, equating to £7.2bn Gross Value Added (GVA) to the UK economy



226,745

Full time jobs in the UK supported by the holiday park and campsite sector



5%

Contribution of holiday parks and campsites to the UK's tourism sector's overall GDP of £214bn



82%

Visitors to UK holiday parks and campsites stayed up to 82% longer and spent up to 12% more than the national tourism average

WHAT SOME OPERATORS SAID:

"Investors saw value and opportunity in UK parks - this enhanced as a result of the pandemic - genuine attractive sector for private equity."

"We provide business for local pubs, restaurants, local petrol station, local farm shop (all within one mile of site). We also host youth activities such as local Scout group."

"[We have] wildflowers, solar powered lights, native trees, recycling, encourage low energy modes of travel - bicycles and foot."

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

The campsite and holiday park sector

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

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

In November 2022, the UK Caravan & Camping Alliance

(UKCCA) commissioned Frontline Consultants to undertake an independent reassessment of the economic impact and benefit of the holiday park and campsite sector in the UK. This included an overall UK-wide report, providing headline findings for the UK and its four nations plus detailed individual country reports for England, Scotland, Wales and Northern Ireland.

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. Full report is available at www.ukcca.org.uk.

VISITORS TO UK HOLIDAY PARKS AND CAMPSITES

A total of 5,224 respondents to the survey had made a visit to a holiday park and campsite in the UK in 2023. The majority of the survey participants lived in England (77%). Just over half of the respondents (53%) stayed on a holiday park and campsite in the UK five times or more during the last 12 months. Eighty-four per cent stayed in a touring caravan, motorhome or tent over the course of the year while 10% stayed in an owner-occupied holiday caravan or lodge. A further 4% stayed in some form of rented, stationary accommodation, while 1% stayed in other accommodation.

Type of accommodation

Ninety per cent of those operators surveyed offered touring pitches, which included touring caravans, motorhomes/campervans and tents. Nineteen per cent had owner-occupied accommodation (holiday caravans or lodges), and 10% offered rented accommodation (19% including glamping pods and yurts/tipis).

Average group size

The average adult group size was two, and 15% of all groups included children. Where parties were travelling with children, the average number of children in each group was two. Nearly a third of groups brought a pet.

Spending power

Visitors who stayed in rented accommodation spent on average £217 per day, including £134 on-site and £82 off-site. Touring visitors on average spent £101 per day including £42 on-site and £59 off-site. Visitors who owned their holiday caravan spent £102 per day, including £44 on-site and £58 off-site. This is higher than the average spend per night by UK visitors at £96.

Health benefits

Forty-four per cent of operators provided information on how they encourage health and wellbeing. The most frequently occurring examples included:

- walking and cycling routes, waterways and beaches – 68% provided access and information about these.
- 67% encouraged dog owners.
- 51% had on site restaurants/cafes offering healthy food options.
- 49% provided local health and wellbeing facilities, allowing access to – and promoting to – the wider community.

'Other' responses (31%) included undertaking:

- outdoor activities such as walking, cycling and swimming.
- community events and local promotion of cultural or nature trails.
- providing a relaxing environment and access to green spaces.

The time spent relaxing (99%) was the most undertaken activity by visitors followed by short (95%) and long walks (85%) and spending time with friends and family (75%).



UNITED KINGDOM

THE UK'S HOLIDAY PARK AND CAMPSITE SECTOR...

Generated
£12.2bn
in visitor
expenditure,
equivalent to
£7.2bn GVA

Supported
226,745
jobs

Accounted for
5%
of the tourism
sector's GDP

Visitors to UK
holiday parks and
campsites stayed up to
82% longer and spent up
to 12% more than
the national tourism
average



In the summer of 2023, there were 6,169 member holiday parks and campsites operating in the UK, accounting for 439,828 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to tipis, pods, yurts, lodges, apartments and owner-occupied and rented holiday caravans.

Campsite and holiday park occupancy rates vary from an average of 68% in high season (August) to 54% in mid season (May).


PARK OPERATORS SUPPORT THEIR LOCAL COMMUNITIES THROUGH:

- **Expenditures:** 41% cumulatively spent £263.5m per year in capital and operating expenditure, wages and salaries.
- **Local community engagement:** including hosting community events, promoting local business, causes and fundraising, particularly around sports, parish and community groups.
- **Environmental activities:** supporting and implementing environmental improvements through carbon reduction plans, recycling plus promotional activities to explain to visitors how to follow on-site procedures, energy and water conservation, supporting local wildlife care, award participation and car-free zones.
- **Health and wellbeing:** providing access and information about walking and cycling routes, encouraging dog owners, site restaurants/cafes offering healthy food options, promoting local health and wellbeing facilities, nature trails and providing relaxing environments and access to green spaces.

ENGLAND

ENGLAND'S HOLIDAY PARK AND CAMPSITE SECTOR...

- **Generated £9.2bn in visitor expenditure, equivalent to £5.45bn GVA**
- **Supported 170,429 jobs**
- **Visitors stayed up to 82% longer and spent 8% more than the English tourism average**



In the summer of 2023 there were 4,754 holiday parks and campsites operating in England, accounting for 320,901 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to tipis, pods, yurts, lodges, apartments and owner-occupied and rented holiday caravans.

Campsite and holiday park occupancy rates peaked at 68% in high season (August), falling to 53% in mid-season (May). The proportion of visitors who live outside England was 14%, with 4% coming from Scotland, 5% from Wales, 1% from Northern Ireland, and 4% from outside the UK.

SCOTLAND

SCOTLAND'S HOLIDAY PARK AND CAMPSITE SECTOR...

- **Generated £991.1m in visitor expenditure, equivalent to £565m GVA**
- **Supported 18,354 FTE jobs**
- **Visitors stayed up to 89% longer and spent 34% more than the Scottish tourism average**



In the summer of 2023 there were 401 member holiday parks and campsites operating in Scotland, accounting for 35,093 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to tipis, pods, yurts, lodges, apartments and owner-occupied and rented holiday caravans.

Campsite and holiday park occupancy rates vary from an average of 67% in high season (August) to 57% in mid-season (September). The proportion of visitors who live outside Scotland varies significantly depending on the park's geographic location.

WALES

WALES' HOLIDAY PARK AND CAMPSITE SECTOR...

- **Generated £1.66bn in visitor expenditure, equivalent to £945.9m GVA**
- **Supported 30,726 FTE jobs**
- **Visitors stayed up to 107% longer and spent 14% more than the Welsh tourism average**



In the summer of 2023 there were 922 member holiday parks and campsites operating in Wales, accounting for 69,088 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to tipis, pods, yurts, lodges, apartments and owner-occupied and rented holiday caravans.

Campsite and holiday park occupancy rates vary from an average of 65% in high season (August) to 45% in mid-season (September). The proportion of visitors who live outside Wales was 76%, with 68% coming from England, 2% from Scotland, less than 1% from Northern Ireland, and 3% from outside the UK.

NORTHERN IRELAND

NORTHERN IRELAND'S HOLIDAY PARK AND CAMPSITE SECTOR...

- **Generated £390.7m in visitor expenditure, equivalent to £205.7m GVA**
- **Supported 7,236 FTE jobs**
- **Visitors stayed up to 133% longer and spent 24% more than the Northern Irish tourism average**



In the summer of 2023 there were 92 member holiday parks and campsites operating in Northern Ireland, accounting for 14,746 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to tipis, pods, yurts, lodges, apartments and owner-occupied and rented holiday caravans.

Campsite and holiday park occupancy rates vary from an average of 81% in high season (August) to 66% in mid-season (September). The proportion of visitors who live outside Northern Ireland was 11%, with 4% coming from England, 1% from Scotland, less than 1% from Wales, and 5% from outside the UK.

Meet the UKCCA

ncc leisure vehicles
holiday & park homes
holiday & residential parks
leading & promoting the industry

NATIONAL CARAVAN COUNCIL

The National Caravan Council (the NCC) is the UK trade association for the caravan industry, representing the touring caravan, motorhome, holiday caravan/holiday lodge and residential park home sectors. Founded in 1939, the NCC works with more than 700 member organisations, and is the only UK trade association that represents the entire supply chain including holiday and residential park operators, dealerships, manufacturers, workshops, and suppliers of specialist services and products. For more information visit www.thencc.org.uk



THE CAMPING AND CARAVANNING CLUB

The Camping and Caravanning Club was founded in 1901 and is the largest and oldest Club in the world for all forms of camping. Today it has almost 750,000 members and a campsite network that includes nearly 100 Club Sites throughout the UK, plus a network of more than 1,100 privately-owned small Certificated Sites. To learn more about the Club visit www.campingandcaravanningclub.co.uk or call 024 7647 5442.



CARAVAN AND MOTORHOME CLUB

Championing and helping its members get more from the great outdoors, whether glamping or touring, the Caravan and Motorhome Club represents the interests of over 1.1 million caravan, motorhome, campervan and trailer tent owners across the UK. With over 117 years of knowledge and expertise, the Club has a wealth of experience and prides itself on offering great value and high quality campsites for tourers and glampers. The Club offers members over 2,700 campsites in the UK and overseas as well as glamping pods, yurts, camping pods, tent camping plus motorhome hire scheme available to non-members through its Experience Freedom operation. For further information please visit www.camc.com or call 01342 318813.



BRITISH HOLIDAY & HOME PARKS ASSOCIATION

The British Holiday & Home Parks Association (BH&HPA) is the only organisation established exclusively to serve and represent the interests of the parks industry in the UK. BH&HPA members own and manage 3,009 parks with a total of 388,699 pitches throughout the UK. For more details on BH&HPA visit www.bhpa.org.uk or, for a searchable directory of member holiday parks in the UK, visit www.ukparks.com.

UK Caravan & Camping Alliance



www.UKCCA.org.uk