

Pitching the **Value**

2019 Economic Benefit Report:
Holiday Parks and Campsites

IMPACT REPORT





Introduction

The independent report 'Pitching the Value' is the first time holiday parks and campsites across the UK have been analysed to show the value of the sector to the nation's economy.

And that value shouldn't be underestimated. The report reveals that holiday parks and campsites around the UK generated a staggering £9.3bn in visitor expenditure and supported 171,448 full-time employees in 2018.

These headline figures only tell part of the story though, and the report - which was carried out by Frontline Consultants on behalf of the UK Caravan and Camping Alliance (UKCCA) - has a far-reaching impact, not only in terms of the economic value of the sector but also the health and wellbeing benefits of such holidays.

Bob Hill, who led the UKCCA joint working group, said: "This is a groundbreaking report that clearly demonstrates the important benefits to the economy brought by the UK's many holiday parks and campsites.

"Pitching the Value will help the industry attract more investment and ultimately improve opportunities for it to grow, develop and create new jobs. Our findings reinforce the importance of holiday parks and campsites to the country's tourism economy. That will help us to improve holidaymakers' on-site experiences and choice, which in turn will also attract more overseas visitors to these shores."

Holiday park and campsite operators also support local communities through capital and operating expenditure, and wages. Nearly half of those companies and organisations that took part in the report cumulatively spend nearly £303 million per year in this way. The research also found they engage with local communities through support for events such as fundraising activities, participate in recycling and environmental initiatives, and promote healthy active lifestyles in the great outdoors through pastimes such as walking and cycling.

The UKCCA is an umbrella group comprising The National Caravan Council, The Camping and Caravanning Club, the Caravan and Motorhome Club, and the British Holiday & Home Parks Association.

These four sponsoring organisations own or are affiliated to 6,243 holiday parks and campsites across the UK with a combined total of 438,076 pitches.

Those sites offer holidaymakers a diverse range of accommodation such as touring pitches for tents, caravans and motorhomes, rented holiday homes, lodges, and chalets, plus glamping units like tipis and yurts, together with a wide selection of on-site facilities.

Bob added: "We want to use this compelling evidence to ensure key influencers and decision-makers support the development and growth of our industry at a national, regional and individual business level for the benefit of our economy and for holidaymakers themselves."

This impact report provides a snapshot of the findings of the overall report. If you'd like to find out more, please visit www.ukcca.org.uk where you can also download a copy of the complete Pitching the Value report.

Did you know...?



£9.3bn

Visitor expenditure generated by holiday parks and campsites in the UK - equating to £5.3bn Gross Added Value (GVA) to the UK economy



8%

Contribution by holiday parks and campsites to the UK tourism sector's overall GVA of £64.7bn



171,448

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



£101 PER DAY

Average spending by visitors staying in rented or touring accommodation - which is more than a typical tourist



UK tourism and the holiday park and campsite sector

Tourism is one of the UK's key industries. The UK aims to have a tourism industry worth over £257 billion by 2025, which is slightly under 10% of UK GDP. The industry supports almost 3.8 million jobs, which is about 11% of total UK jobs.

The Deloitte Tourism: Jobs and Growth Report 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.

Spend by international visitors is forecast to grow by more

than 6% per year in comparison with domestic spending by UK residents at just more than 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 40 years since it last reported a surplus.

In November 2017, the UK Caravan and Camping Alliance (UKCCA) commissioned Frontline Consultants 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. You can read the highlights on the following pages, and download the full reports from www.ukcca.org.uk



UK HOLIDAY PARK VISITORS

7,501 respondents made at least one visit to a holiday park 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. One per cent came from outside the UK. Slightly 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.

• Type of accommodation

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

• Average group size

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. Thirty-five per cent of groups brought a pet.

• Spending power

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 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 and 3.1 days per holiday.

• Health benefits

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



UNITED KINGDOM

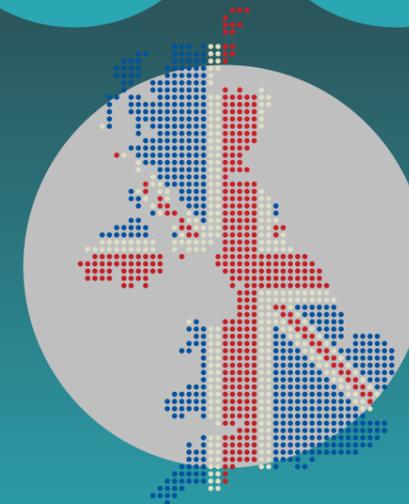
THE UK'S HOLIDAY PARK AND CAMPSITE SECTOR...

Generated
£9.3bn
in visitor
expenditure,
equivalent to
£5.3bn GVA

Supported
171,448
jobs

Accounted for
8%
of the tourism
sector's GVA

Visitors stayed
up to 74% longer
and spent up to
60% more than
the national
tourism average



In the summer of 2018 there were 6,243 member holiday parks operating in the UK, accounting for 438,076 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to lodges, apartments and owner-occupied and rented holiday homes.

Park occupancy rates vary from an average of 70% in high season (August) to 55% in mid-season (September).

PARK OPERATORS SUPPORT THEIR LOCAL COMMUNITIES THROUGH:

- **Expenditure** – almost half (48%) of respondent parks cumulatively spent £302.8m per year on 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 options provided in parks' restaurants

ENGLAND

ENGLAND'S HOLIDAY PARK AND CAMPSITE SECTOR...

- Generated £6.81bn in visitor expenditure, equivalent to £3.88bn GVA
- Supported 126,089 jobs
- Accounted 5% of the tourism sector's GVA
- Visitors stayed up to 73% longer and spend up to 59% more than the national tourism average



In the summer of 2018 there were 4,845 member holiday parks operating in England, accounting for 320,005 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to lodges, apartments and owner-occupied and rented holiday homes.

Park occupancy rates vary from an average of 70% in high season (August) to 55% in mid-season (September). The proportion of visitors who live outside England was 17%, with 6% coming from Scotland, 5% from Wales, 2% from Northern Ireland, and 4% from outside the UK.

SCOTLAND

SCOTLAND'S HOLIDAY PARK AND CAMPSITE SECTOR...

- Generated £772.3m in visitor expenditure, equivalent to £478.2m GVA
- Supported 14,301 jobs
- Accounted for 8.4% of Scottish GVA in 2018, compared to 7.8% in 2014
- Visitors stayed up to 41% longer and spent up to 39% more than the national tourism average



In the summer of 2018 there were 390 member holiday parks operating in Scotland, accounting for 34,662 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to lodges, apartments and owner-occupied and rented holiday homes.

Park occupancy rates vary from an average of 74% in high season (August) to 59% in mid-season (May and 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 £1.33bn in visitor expenditure, equivalent to £761.4m GVA
- Supported 24,677 jobs
- Accounted 15% of the tourism sector's GVA
- Visitors stayed up to 82% longer and spent up to 83% more than the national tourism average



In the summer of 2018 there were 898 member holiday parks operating in Wales, accounting for 62,586 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to lodges, apartments and owner-occupied and rented holiday homes.

Park occupancy rates vary from an average of 69% in high season (August) to 54% in mid-season (September). The proportion of visitors who live outside Wales was 69%, with 55% coming from England, 7% from Scotland, 2% from Northern Ireland, and 5% from outside the UK.

NORTHERN IRELAND

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

- Generated £344.1m in visitor expenditure, equivalent to £176.2m GVA
- Supported 6,372 jobs
- Accounted 15% of the tourism sector's GVA
- Visitors stayed up to 132% longer and spent up to 134% more than the national tourism average



In the summer of 2018 there were 110 member holiday parks operating in Northern Ireland, accounting for 20,823 pitches, and offering a wide range of accommodation options to visitors, from touring pitches for caravans, campervans, motorhomes and tents to lodges, apartments and owner-occupied and rented holiday homes.

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%, with 9% coming from England, 2% from Scotland, 1% from Wales, and 10% 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 representing the touring caravan, motorhome, caravan holiday home and residential park home industries. The NCC represents more than 550 companies across 850 different UK outlets, and is the only UK trade association that represents the entire supply chain including holiday/residential parks, dealerships, manufacturers, workshops, and suppliers of specialist services and products. For more information visit www.thencc.org.uk



**The
Camping and
Caravanning
Club**
The Friendly Club

THE CAMPING AND CARAVANNING CLUB

The Camping and Caravanning Club is 118-years-old and is the largest and oldest Club in the world for all forms of camping. It has 104 award-winning sites throughout the UK, a network of 1,400 privately-owned small Certificated Sites and, through a partnership with the Forestry Commission, runs and manages a further 15 Camping in the Forest touring sites. To learn more about the benefits of joining the Club visit www.campingandcaravanningclub.co.uk/jointheclub or call 024 7647 5442.



**CARAVAN AND
MOTORHOME CLUB**

CARAVAN AND MOTORHOME CLUB

The Caravan and Motorhome Club represents the interests of about one million caravan, motorhome, campervan and trailer tent owners across the UK. Founded in 1907, the Caravan and Motorhome Club has a wealth of experience and prides itself on offering great value and high quality sites for tourers. The Club offers members over 2,700 sites in the UK and overseas as well as glamping pods, yurts, camping pods, tent camping plus a motorhome and Airstream 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 2,951 parks with a total of 392,245 pitches throughout the UK. For more details on BH&HPA visit www.bhpha.org.uk or, for a searchable directory of member holiday parks in the UK, visit www.ukparks.com

UK Caravan & Camping Alliance



ncc
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holiday & park homes
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www.UKCCA.org.uk